

# User Management.

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Sage

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## Introduction

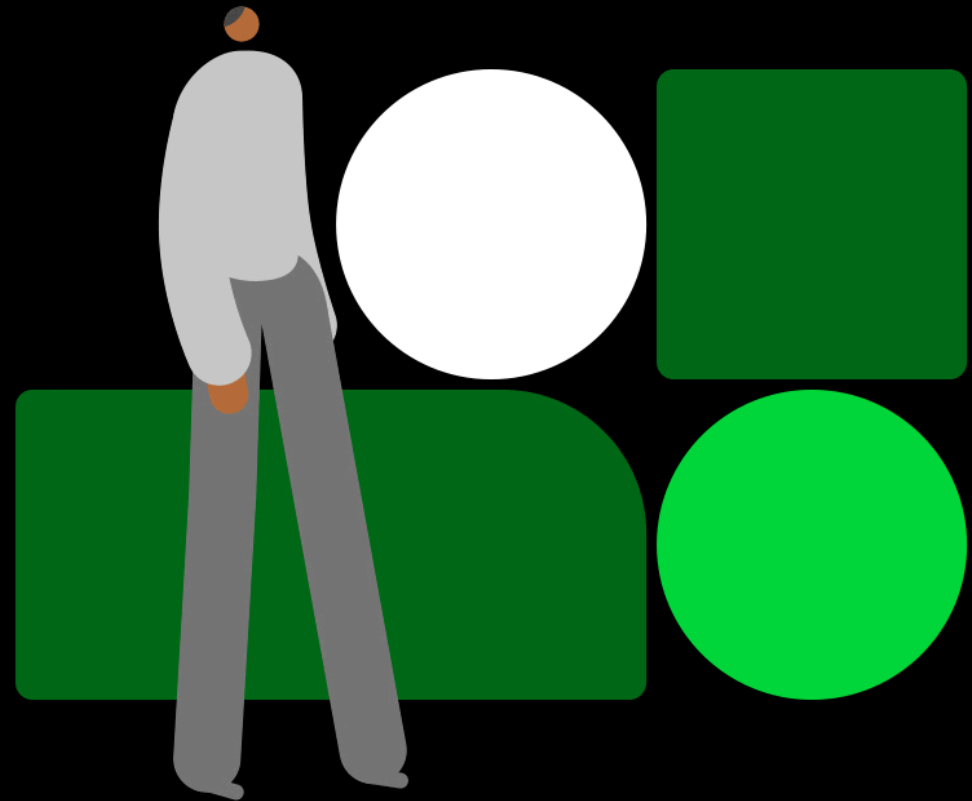
## Set up a new user

- User types
- Level of Access

## Remove active user

## Summary

## Extra Support



# Introduction



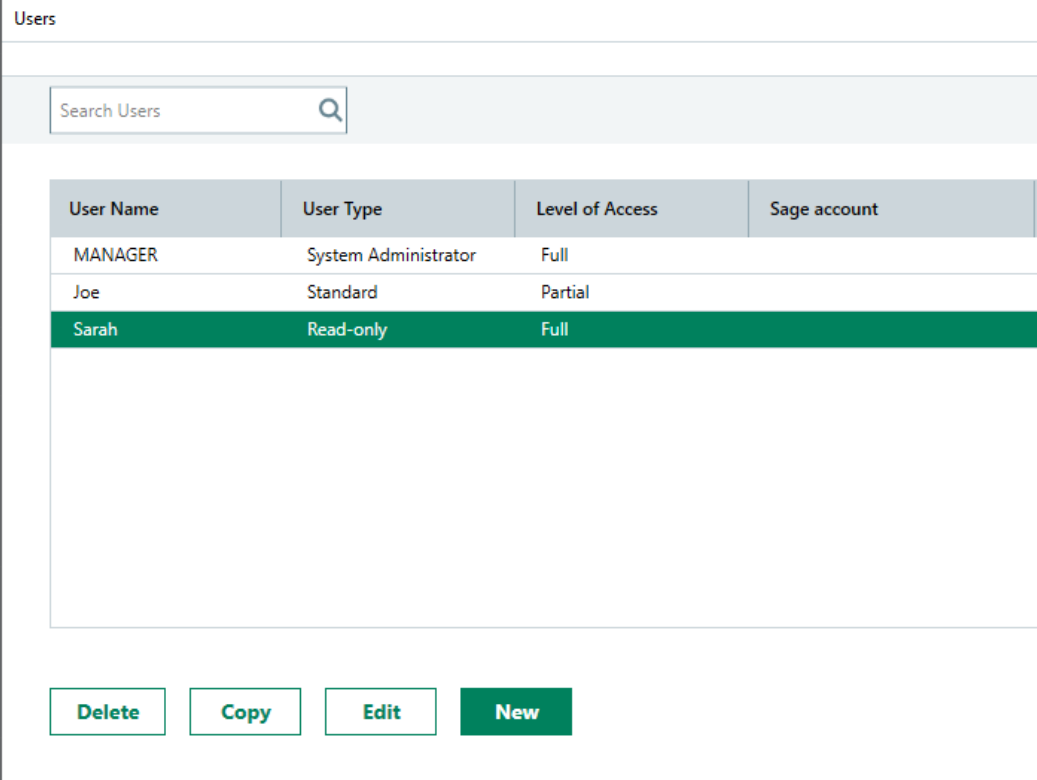
# Introduction.

If you have more than one person processing in Sage 50 Accounts, you can set up individual users for each person to log in with.

**Set up access rights for V26**

## Settings > User management > Users

- Control which areas users have access to and keep track of users activity.
- Have more than one user logged at a time with a multi user licence.
  - To upgrade to a multi user licence contact our support team
- No limit to how many users can be created.
  - Limited to how many can log in at one time
- Remove if a user if they are currently active.
  - Use with caution



User Name	User Type	Level of Access	Sage account
MANAGER	System Administrator	Full	
Joe	Standard	Partial	
Sarah	Read-only	Full	

Buttons: Delete, Copy, Edit, New

# Setup a new user.



# Setup a new user.

- User Type.
- Profile – Add in username and password.
- Level of access – Choose what areas they have access to.
- Remote Data Access – Not going to be covered in this session.
- Confirmation.

**Remote Data  
Access  
recording**

Create New User

Help

**Create New User**

User Type | Profile | Level of Access | Remote Data Access | Confirmation

**Select a user type**

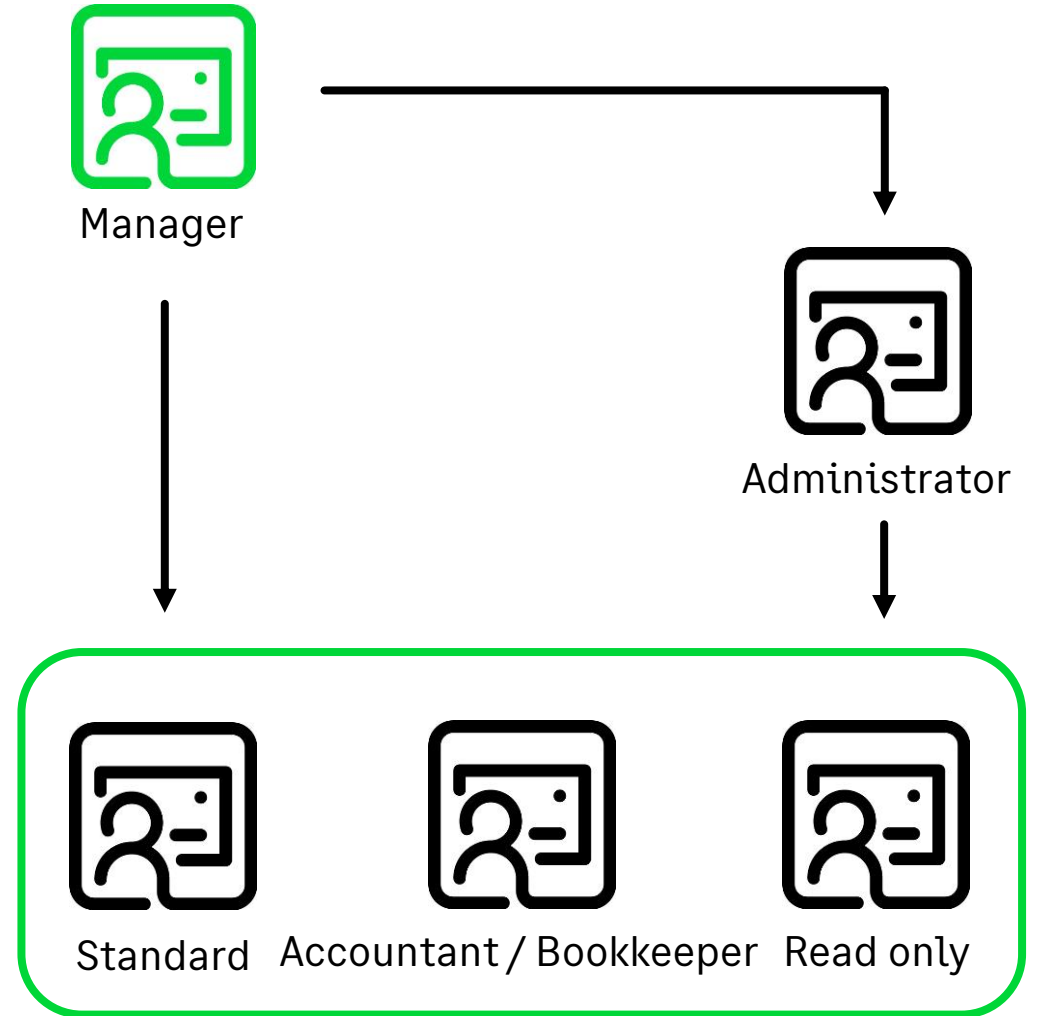
- Standard**  
You can grant access for a standard user according to their role.
- Accountant or Bookkeeper**  
Grant access to company data, allow them to create and manage other Accountant or Bookkeeper user types.
- Administrator**  
This user has full access to company data and can perform all functions.
- Read-only**  
You can grant access for a user to view data according to their role.

**Continue** **Cancel**

# User types.

- Manager – Access all areas and functions.
- Administrator – Access to all company data and perform most user management functions.
- Standard – Level of access can be limited.
- Accountant/Bookkeeper – Level of access can be restricted, can create other Accountant or Bookkeeper user profiles.
- Read only – Enables a user to view the company & run reports but unable to make any changes.

**Note** – Only Manager or Administrator can amend users.



# Remove Active User.

## When?

- User might have left their machine on and logged in on the software.
- Did not log out correctly.

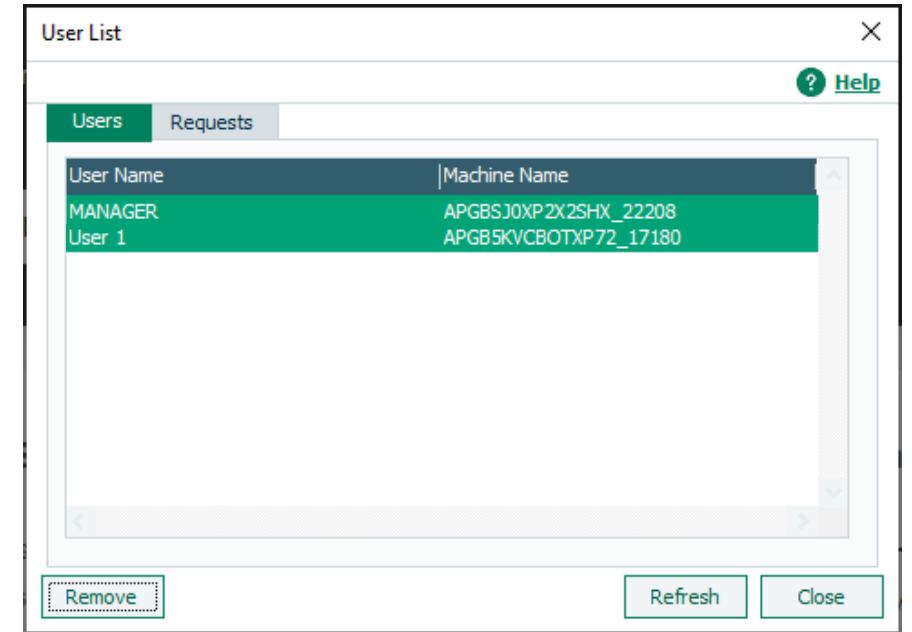
## Who?

Only the manager user can remove users active sessions from the program.

## Where?

Settings > User management > Active Sessions.

**Note** – Use with caution and do not remove if they are in the middle of processing.

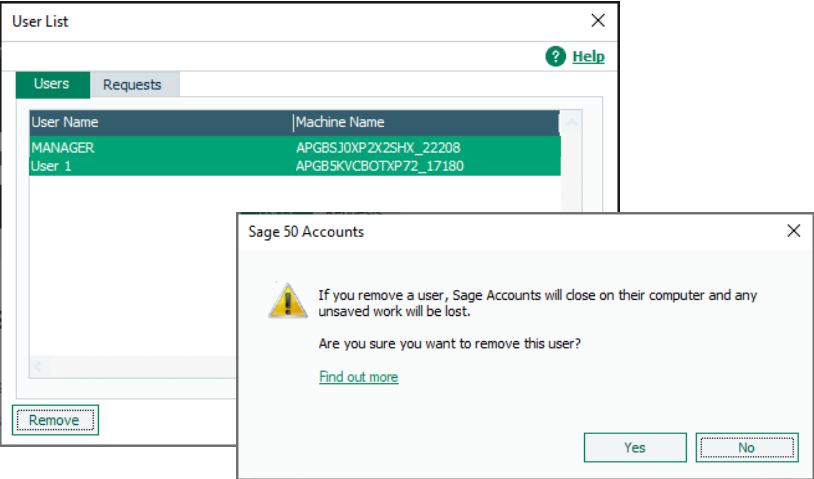


**If you remove an active user**

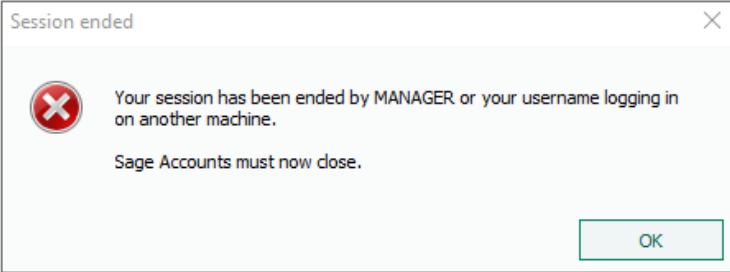


# Remove Active User.

Manager user.



User that has been removed.



**If you remove an active user**

**Note** – Use with caution and do not remove if they are in the middle of processing.

# Summary.

- Manager and Administrator can add and edit and delete users.
  - Manager **cannot be** amended by any other user.
- Manager user is default with the software, the name cannot be amended and the user cannot be deleted.
- You can restrict user access to certain areas of the program.
- You can copy existing users to create new users and replicate level of access.
- Active users can be removed if they are currently logged in but not processing.
  - Only Manager can remove users active sessions.

**Create, edit &  
delete Users  
V27 & above**

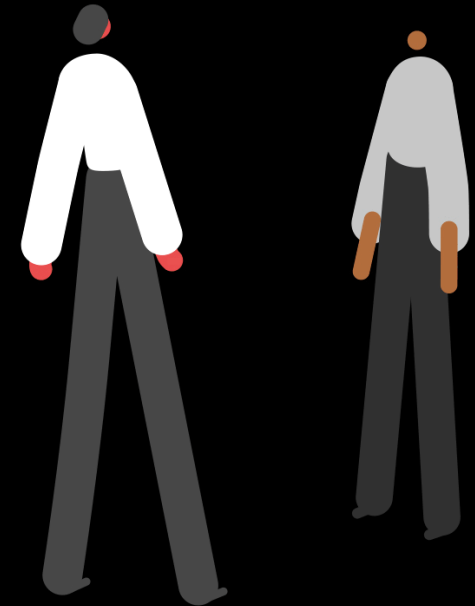
# Extra Support

**Useful tips &  
Resources**

**Time saving  
tools**

**Help Centre**

**Regular tasks  
50 Accounts**



# Upcoming Webinars.



# Upcoming Webinars.

## Key Topics

### **Nominal Records** **Wednesday 22 March 2pm**

In this webinar you'll learn about the Nominal codes ledger, structure and how to set up new Nominal records. We'll also cover the options available within a record.

### **Company credit cards and employee expenses** **Thursday 23 March 2pm**

Recording company credit card transactions in your accounts and making a payment. This can also be used to track and record employee expenses.

## Upcoming

Running your Year End

VAT return

Customer/Supplier Defaults

Company Archives



**Webinar Registration**

# What's included as a Sage member?



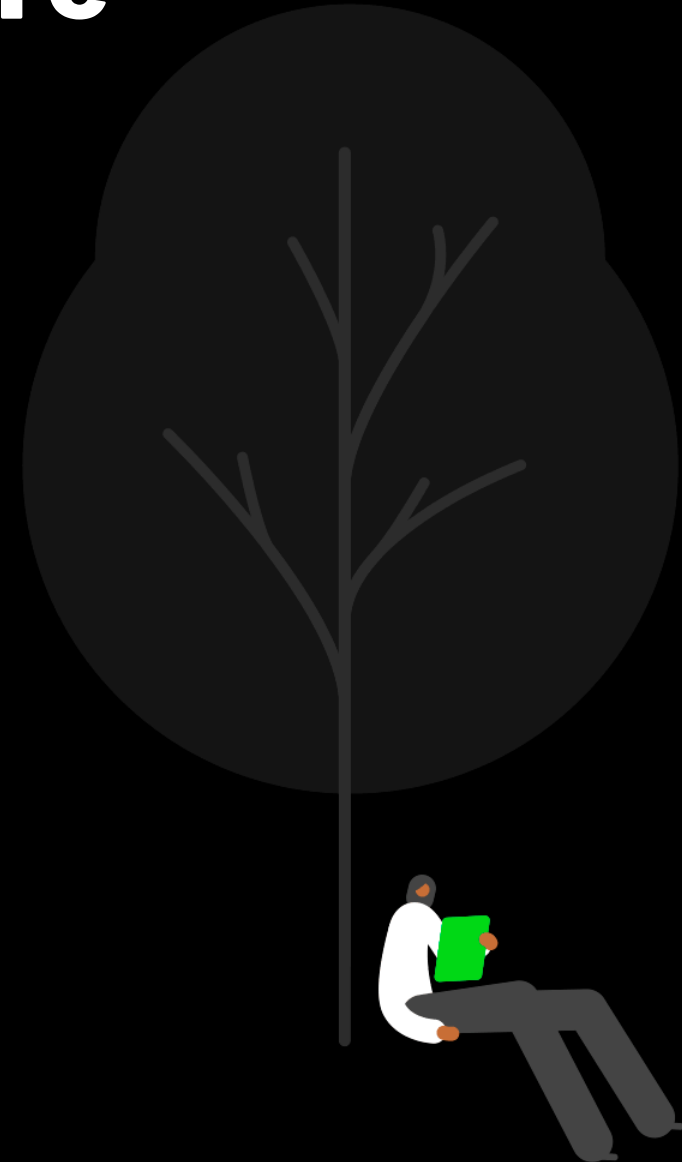
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## That's why Sage goes beyond great software solutions

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**Sage is here to help you grow and your business flow.**



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Member  
Masterclass

Learning

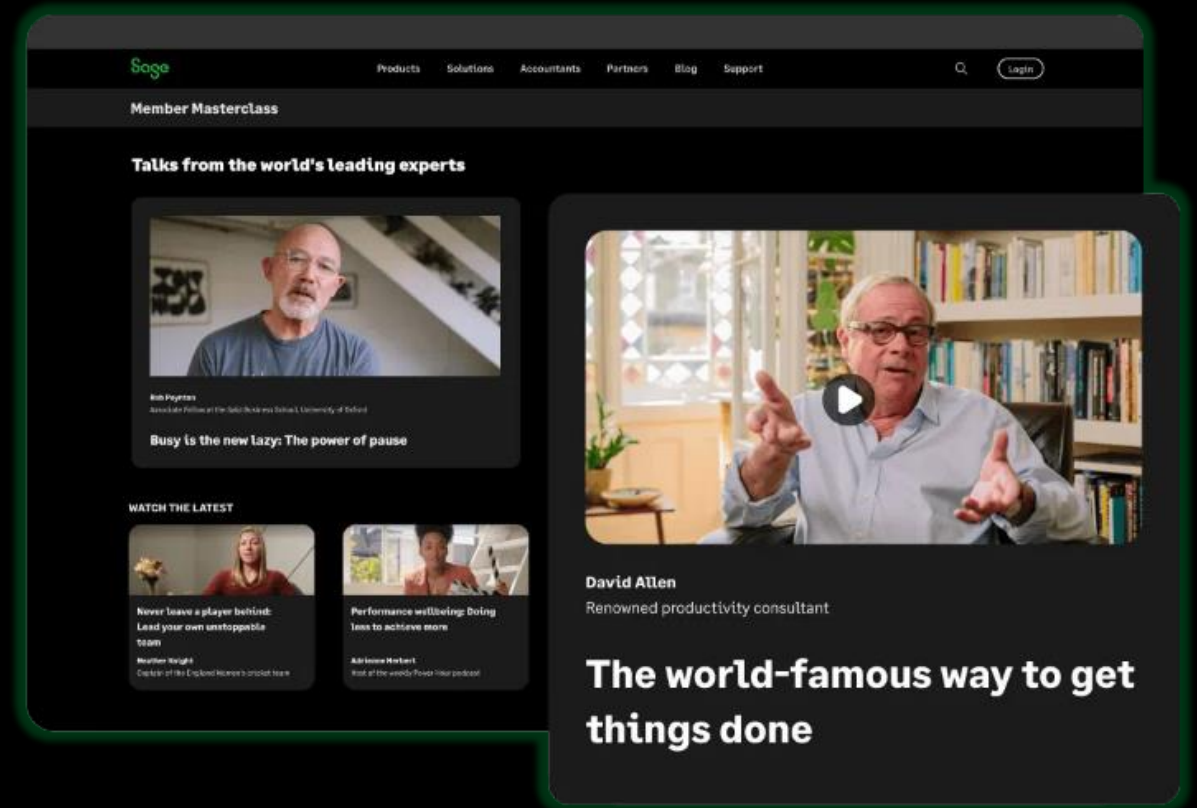
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Forums

Award winning  
support

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Software  
Certification

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