







# Sage Business Cloud Accounting: User Setup / Management

# User Setup / Management

## Learning Objectives

In this chapter, you will learn the following:

- How to invite/authorize users to access your company files in Accounting
- Understand different levels of access/roles
- Customize access levels
- Edit/manage user permissions
- Add a system manager

	<b>Important Information / Important Note / Additional Information</b>	Item where caution and attention is required or additional insight and information is provided.
	<b>Exercise</b>	Your opportunity to practice a concept.
	<b>End of Exercise</b>	Indicates the end of an exercise.
	<b>Check Your Knowledge</b>	Review questions at the end of a lesson to check your understanding and ability to implement concepts.
	<b>Summary</b>	Overview of the most important items covered in a section or lesson.
	<b>End of Lesson</b>	The end of the lesson.

# Setup Users

If you have other people working for your company, you can authorize and invite unlimited users to access your companies and their data/files within **Accounting**. The **User Management** feature allows businesses to customize the level of access based on user role/security and define different access levels for employees to perform job-related tasks. For example, sales employees may enter quotes and invoices but cannot view financial information. Conversely, a bookkeeper may have access to all transactions and financial information and reports.

The account/business owner that signed up for **Accounting** is the only person that can invite others to use **Accounting** and has full access with **System Manager** privileges. A **System Manager** can:

- Access **User Management**
- Set up new users
- Change the access roles of existing users.

A security role for each person is chosen and then an invitation is sent via email.



**NOTE:** Instructors, you can tailor the access roles for individual students/companies to create different learning scenarios throughout the course. To maximize the use of **Accounting** in the classroom, students should have **Full Access** to all areas throughout **Accounting** for their companies. There are two places to add/invite a new user. Let's look at the first way.

## Lesson

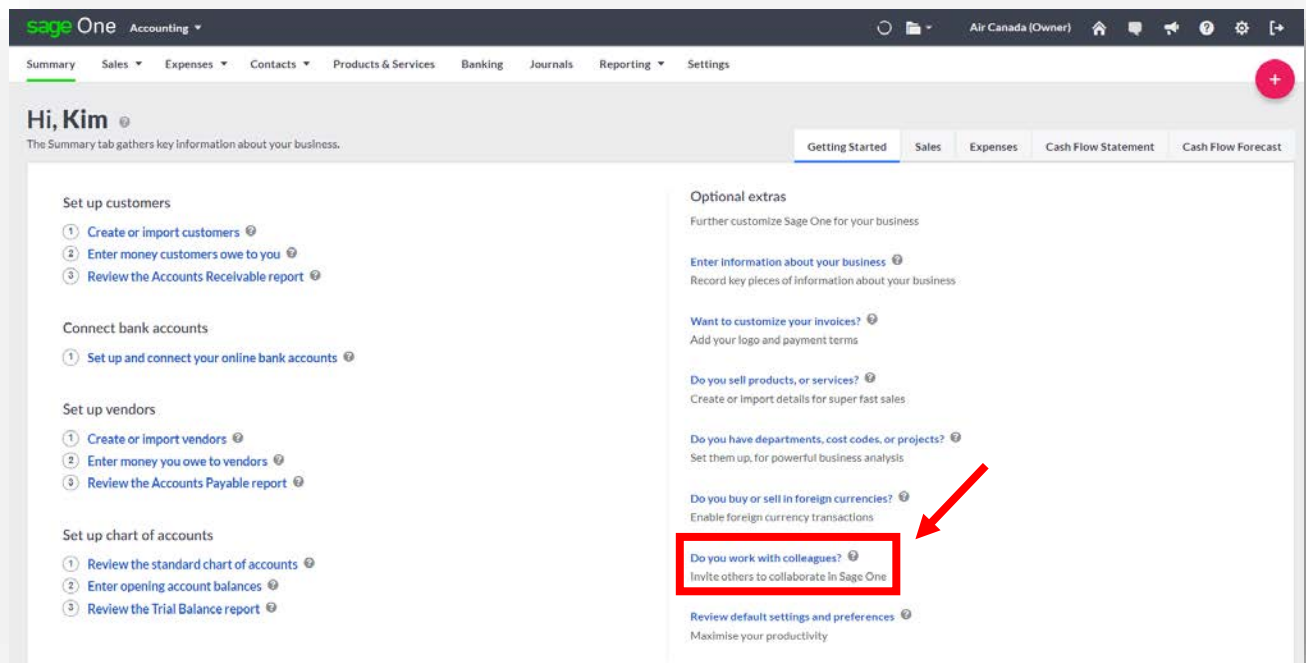


Divine Chocolates has hired two full time employees to work as full-time candy makers in the kitchen. They've also hired employees to run the catering for the wedding and corporate events as well as someone to sell chocolates at a kiosk at the local mall. Christina will need to set each of the employee's access level based on their roles within **Accounting**. Her first employee, Lori Thompson will be Christina's other 'right-hand'. Christina will need Lori to assist with invoices, taking and receiving payments, running reports, generating payroll and many other tasks. Therefore, she'll have *full access* to **Accounting** with *System Manager* privileges. This will enable Lori to assist Christina with invoices, taking and receiving payments, running reports and many other tasks throughout Accounting. Her second employee Sal, will operate the kiosk at the local mall. Although Sal will have limited responsibilities outside of sales, he'll need custom access to the Sales and Contacts areas within **Accounting** so he can take payments and input future candy orders.

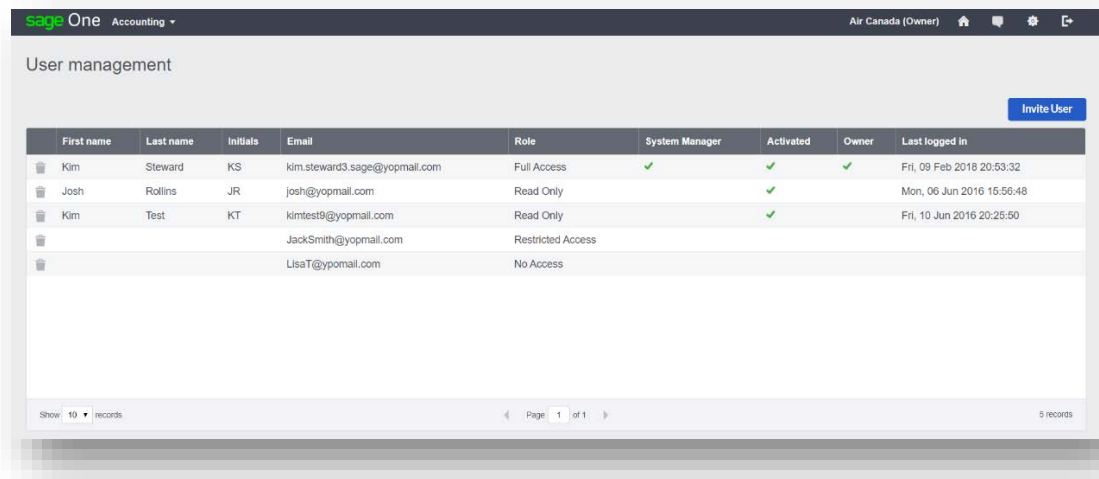
# User Management

## Inviting Users

1. Let's start by adding Divine Chocolates newest employee, Lori Thompson. To add/invite a new user, from the home screen/main dashboard, navigate down to **Do you work with colleagues?**



2. To invite a new user, click **Invite User**. (This is not the same as inviting a student to collaborate with instructors in **Accounting**. This feature is only for defining access levels to determine what level of access students will have whilst working within **Accounting**.)



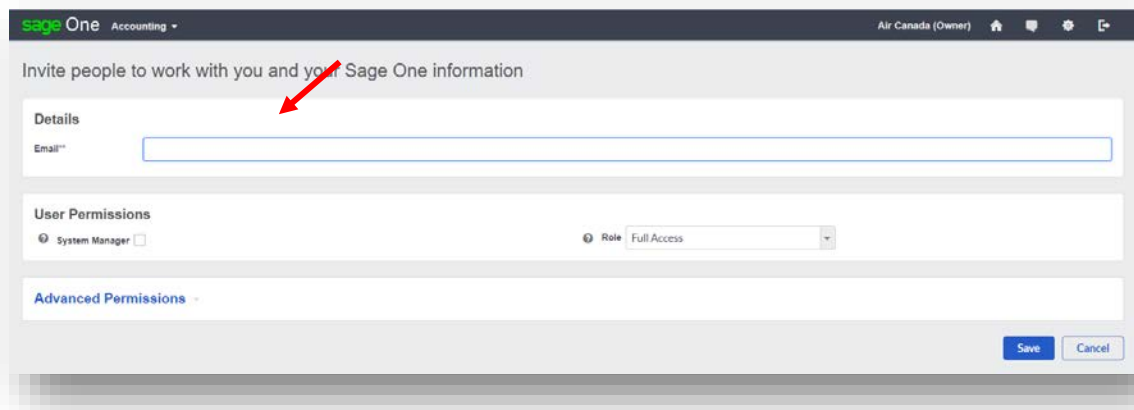
The screenshot shows the Sage One Accounting User Management interface. At the top, it says "sage One Accounting" and "Air Canada (Owner)". Below the header is a table with columns: First name, Last name, Initials, Email, Role, System Manager, Activated, Owner, and Last logged in. There are five rows of user data. A blue "Invite User" button is in the top right corner. At the bottom, there is a pagination control showing "Page 1 of 1" and "5 records".

First name	Last name	Initials	Email	Role	System Manager	Activated	Owner	Last logged in
Kim	Steward	KS	kim.steward3.sage@yopmail.com	Full Access	✓	✓	✓	Fri, 09 Feb 2016 20:53:32
Josh	Rollins	JR	josh@yopmail.com	Read Only		✓		Mon, 06 Jun 2016 16:56:48
Kim	Test	KT	kimtest9@yopmail.com	Read Only		✓		Fri, 10 Jun 2016 20:25:50
			JackSmith@yopmail.com	Restricted Access				
			LisaT@yopmail.com	No Access				

3. In the invitation box, fill in Lori's **email address** to send the invitation.  
 Enter: [Lori.Thompson@yopmail.com](mailto:Lori.Thompson@yopmail.com)



**NOTE:** Students, add a number at the end of Thompson in the email address. Each student will need to receive their own personal invitation. For example [lori.thompson25@yopmail.com](mailto:lori.thompson25@yopmail.com). If that's already been taken by another student, simply select another number so no two students have the same email address/invitation.



The screenshot shows the Sage One Accounting "Invite people to work with you and your Sage One information" form. A red arrow points to the "Email" input field in the "Details" section. Below the email field is the "User Permissions" section, which includes a checkbox for "System Manager" and a dropdown menu for "Role" set to "Full Access". At the bottom right, there are "Save" and "Cancel" buttons.

# System Managers

As a business Christina will need to determine who will have system manager privileges throughout **Accounting**. This enables users the ability to:

- Invite and setup new users
- Edit existing users
- Edit company information
- Access **Business Information, Third Party Access** and **User Management** from within **Accounting** Settings

Only the account owner of **Accounting** should be the System Manager; however, **Accounting** allows more than one **System Manager**. In this case Christina needs another individual to help her out so she'll grant Lori Thompson **System Manager** privileges.

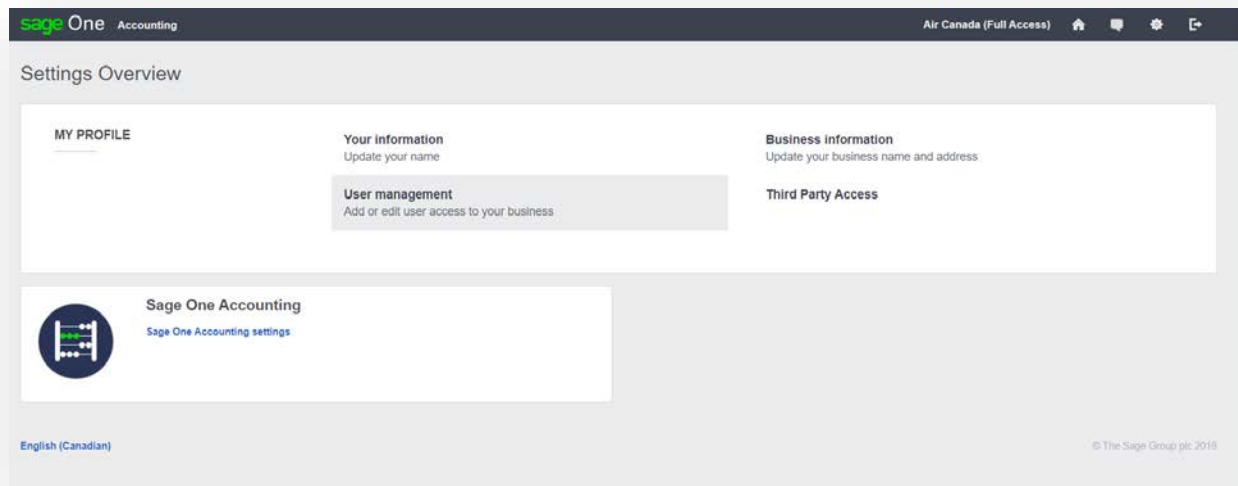


**NOTE:** Users with Full Access level do *not* automatically have **System Manager** permissions to invite other users to **Accounting**. You must indicate as such when setting up the account

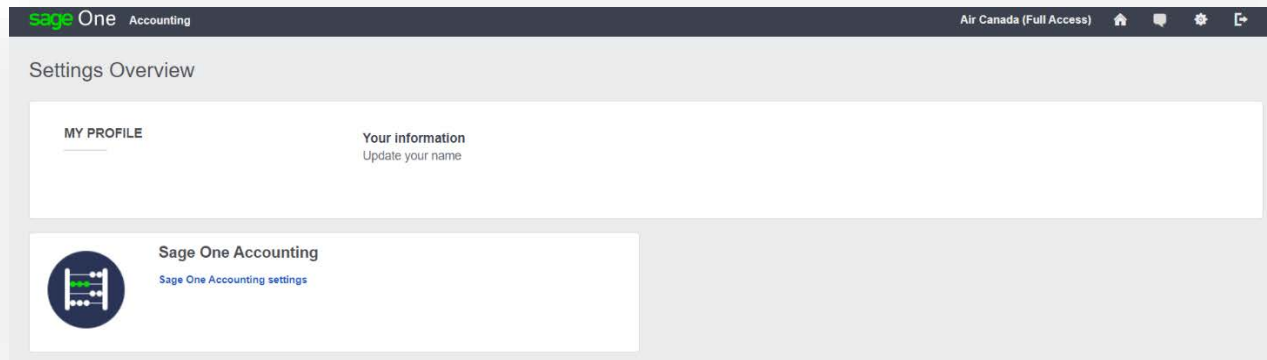
4. To enable Lori to have system manager privileges, check the **System Manager** box.

The screenshot shows the Sage One Accounting interface for inviting a user. The 'User Permissions' section is highlighted with a red box, and a red arrow points to the 'System Manager' checkbox, which is currently unchecked. The 'Role' dropdown is set to 'Full Access'.

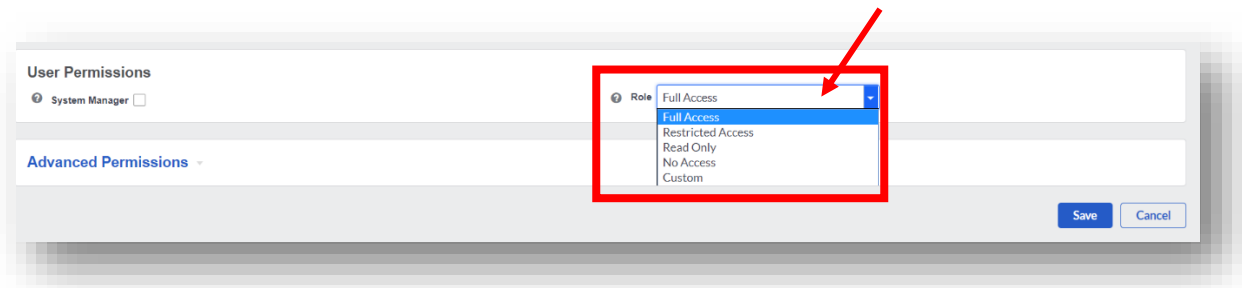
This is how user privileges will appear within **Settings** to an invited user **with Full Access and System Manager** privileges:



This is how user privileges will appear to an invited user with **Full Access** *without System Manager* privileges:



5. Next, navigate to **User Permissions** and select the **Role** or level of access to determine which permissions Lori Thompson should have with Divine Chocolates. *Select: Full Access.*
  - **Full Access**
  - **Restricted Access**
  - **Read Only**
  - **No Access**
  - **Custom**



<b>Full Access</b>	The user has access to all options within <b>Accounting</b> . They can enter any type of transaction, change business and financial settings, enter journals, reconcile a bank account, view management reports, access bank records, view bank balances and run any kind of report. They also have access to financial information and can create other users.
<b>Read Only</b>	The user can view data but not enter or change any details. They cannot enter any transactions and cannot access company account information.
<b>Restricted Access</b>	The user can enter quotes, estimates, invoices, credit notes, payments, receipts and record refunds from within Sales Invoices. By default, a restricted user cannot edit, delete, or void transactions and cannot access the Journals or Settings areas. No access to Getting Started Tab, Cash Flow Statement or Cash Flow Forecast. Within banking users are able take payments, make payments and transfer funds but not access bank accounts. They are unable to access journals or tax returns. Reports are accessible but not all. Users do not have access to <b>Accounting</b> settings.
<b>No Access</b>	The user cannot access any features within <b>Accounting</b> .
<b>Custom</b>	These users have varying access levels throughout <b>Accounting</b> to perform specific tasks in relation to their job role. For example, you might grant a custom user full access to Sales but no access to Banking.

The employee that will be running the kiosk at the mall will need to create invoices for sales and chocolate orders. Sal Jones, a personable individual has been hired for the job. Although Sal will need access to certain areas of **Accounting** Christina doesn't want him to have access to many other areas including **Banking** or **Settings**. Therefore, she'll want to set Sal up with customized access.



# Custom Settings

- To set customized access levels and permissions click **Custom** and navigate down to **Advanced Permissions**. In the **Sales and Contacts** area, set Sal's role to *Full Access*. All other areas should be set to *No Access*. Click **Save**.

The screenshot shows the Sage Accounting user management interface. At the top, it indicates the user is currently assuming the role of Christina Lopez. Below this, there are sections for 'Details' (First name: Christina, Last name: Lopez, Initials: CL, Email: Christina.Lopez88209@sageone.com) and 'User Permissions' (System Manager checked, Role: Full Access). The 'Advanced Permissions' section is highlighted with a red border and contains the following settings:

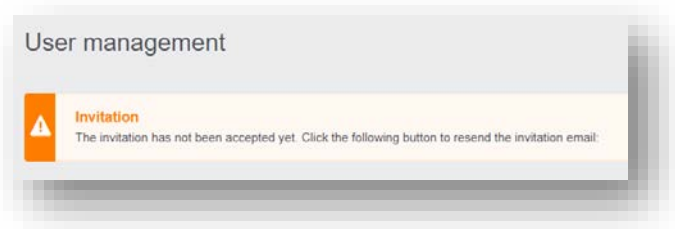
Area	Access Level
Sales*	Full Access
Purchases*	Full Access
Bank*	Full Access
Catalogs*	Full Access
Contacts*	Full Access
Reporting*	Full Access
Journals*	Full Access
Financial statements*	Full Access
Settings*	Full Access

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form.



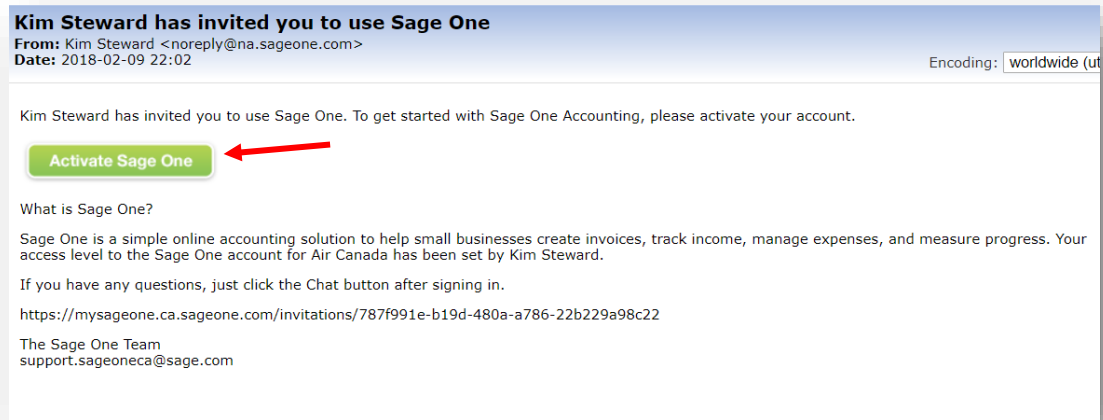
**NOTE:** Catalogs within **Advanced Permissions** are Products and Services/Inventory.

Until the user signs in and accepts the invitation, a notification will appear on the dashboard that the invitation has been sent to the user, but has not been accepted yet. To resend the invitation, simply click on the User Name and click **Resend Invitation**.

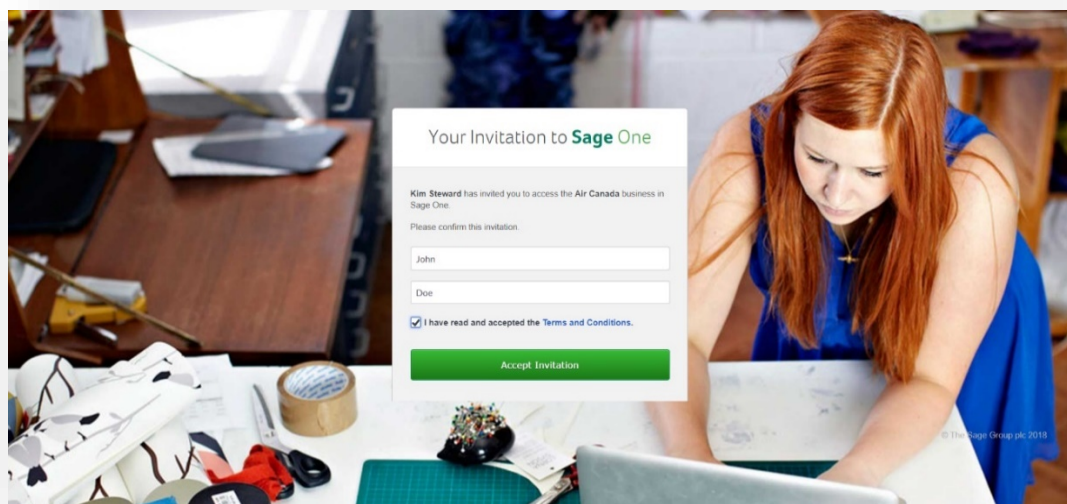


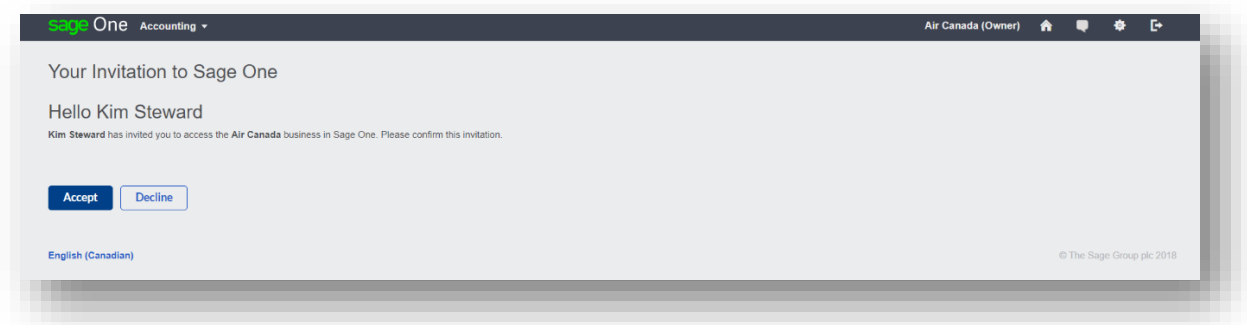
# Accepting an Invitation

1. Lori and Sal will receive an invitation via email inviting them to use **Accounting**. Click **Activate Sage One** to begin working with company files within **Accounting**.



2. After accepting the invitation, users are asked to confirm the invitation within **Accounting**. The company you're being given access to will appear in the box. In this scenario Lori and Sal are being granted access to Divine Chocolates.
3. Input your first and last name and accept the terms and conditions. Enter: *Lori Thompson*. Click **Accept Invitation**.

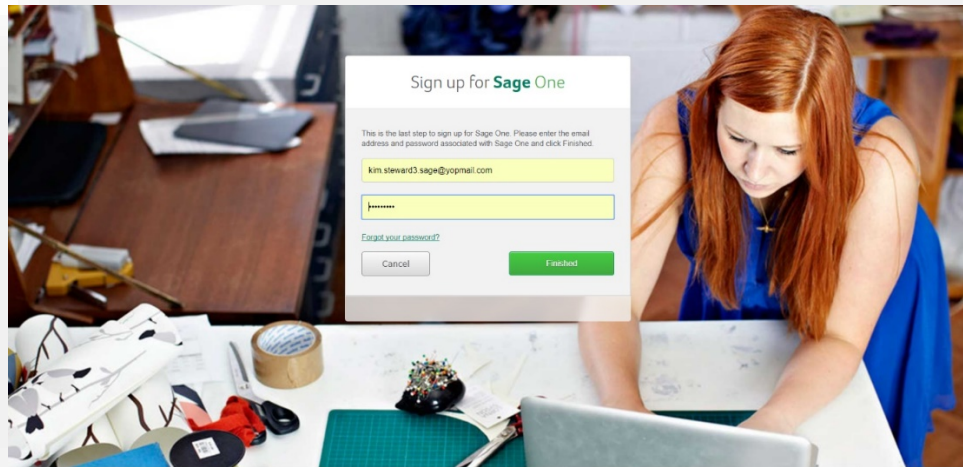




4. Upon doing so, Lori and Sal will be asked to confirm their email address. Click **Continue**

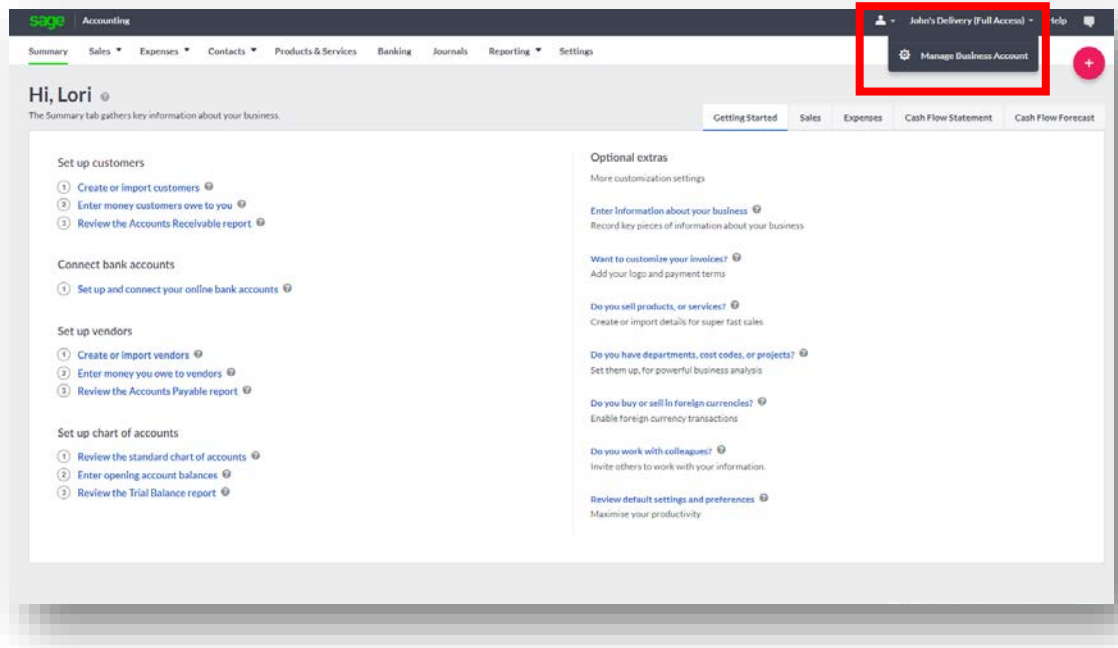
The screenshot shows the 'Your Invitation to Sage One' page. It includes the Sage One logo and the text 'Kim Steward has invited you to access the Air Canada business in Sage One. Please confirm this invitation.' There are two input fields for 'John' and 'Doe'. A checkbox is checked with the text 'I have read and accepted the Terms and Conditions.' Below this, there is a section titled 'Accept Invitation' which contains an email address input field with the text 'johndoe@yopmail.com' and a green 'Continue' button. A red box highlights the email address field and the 'Continue' button.

5. Once the invitation is accepted, Lori and Sal will be prompted to sign into **Accounting**. Enter the email address and password associated with the account.



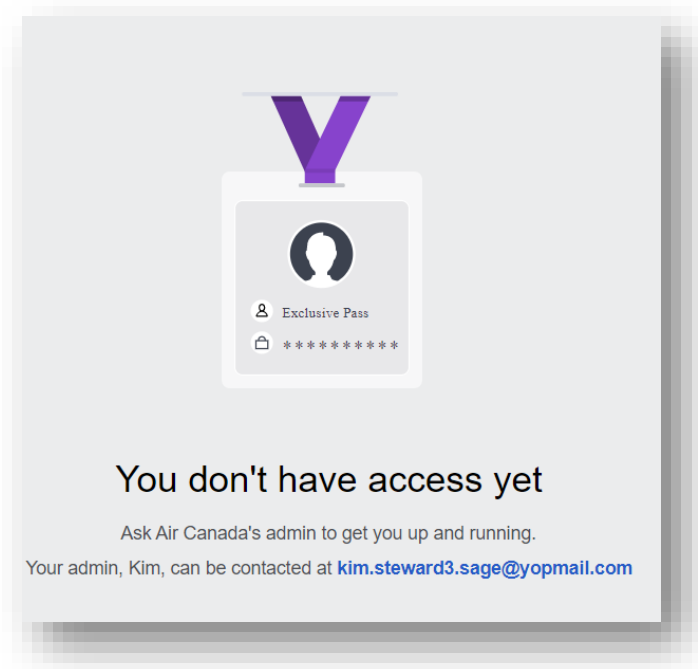
6. If a user (student) does not have an account setup in **Accounting** yet, they'll be prompted to create one. Enter name, email and password. Click **Get Started**.

7. The invited user (Lori and Sal) is navigated to the **Getting Started** dashboard where they'll have access to Divine Chocolates (the assigned company). The company file you're working within is notated at the top of the screen to the right. In this example Lori has been granted full access to all areas throughout **Accounting** for Divine Chocolates.



From that point, users can log into **Accounting** and access the company file using their email address and password, at any time.

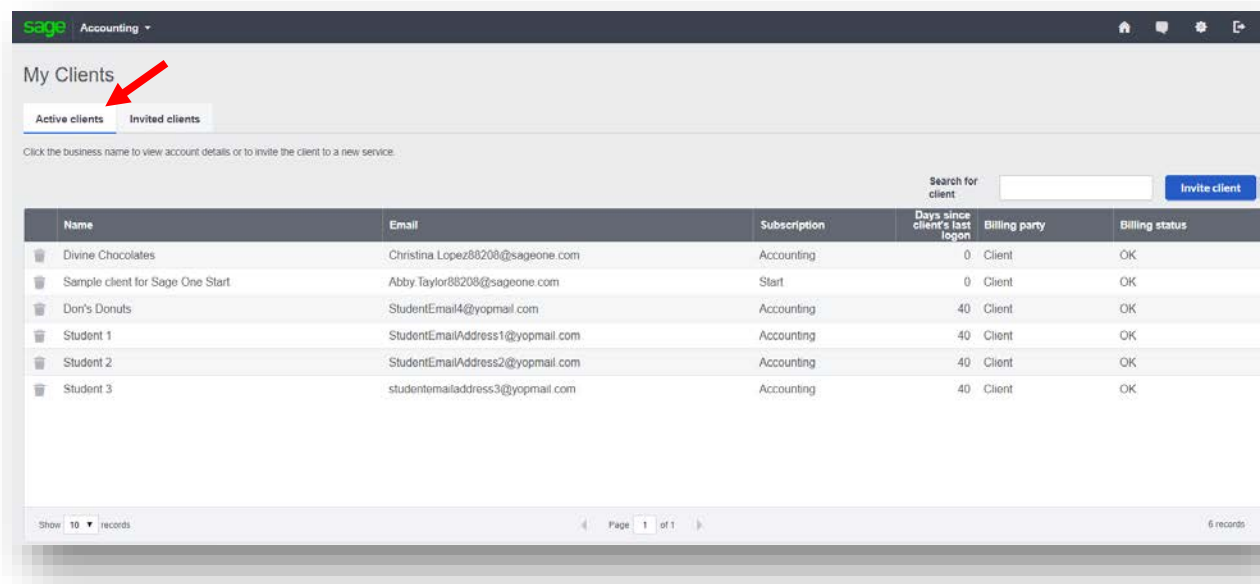
8. If a student/user attempts to access an area they don't have assigned privileges to, a notification will appear notifying them they don't currently have access, similar to the one below:



**Instructors:** The section below explains how to access and edit student accounts.

## Accessing User Management

1. From the **Accountants Dashboard**, select the student invited to access **Accounting** and open the file within the **Active** tab, in the list below:



My Clients

Active clients | Invited clients

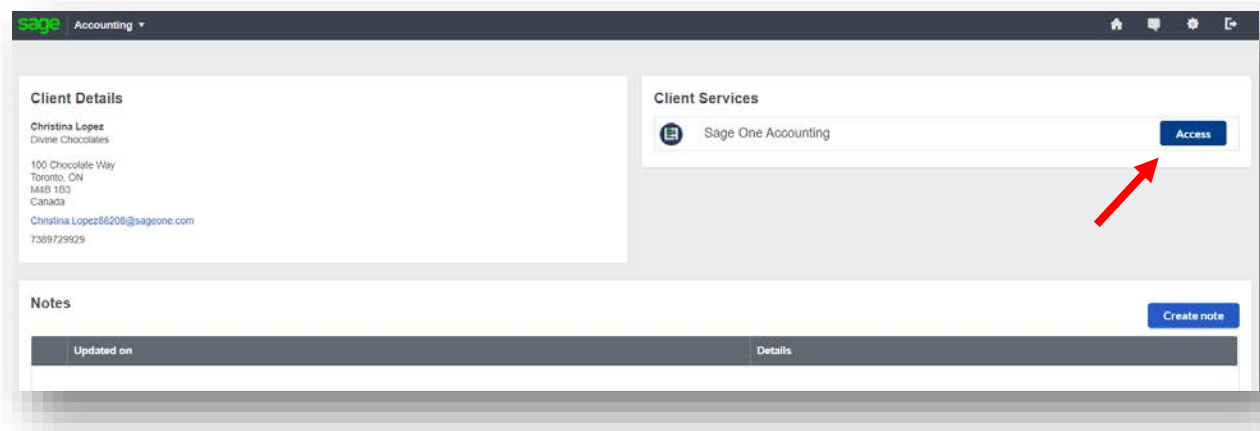
Click the business name to view account details or to invite the client to a new service.

Search for client:  [Invite client](#)

Name	Email	Subscription	Days since client's last logon	Billing party	Billing status
Divine Chocolates	Christina.Lopez86208@sageone.com	Accounting	0	Client	OK
Sample client for Sage One Start	Abby.Taylor88208@sageone.com	Start	0	Client	OK
Don's Donuts	StudentEmail4@yopmail.com	Accounting	40	Client	OK
Student 1	StudentEmailAddress1@yopmail.com	Accounting	40	Client	OK
Student 2	StudentEmailAddress2@yopmail.com	Accounting	40	Client	OK
Student 3	studentemailaddress3@yopmail.com	Accounting	40	Client	OK

Show 10 records | Page 1 of 1 | 6 records

2. Navigate **Client Services** and click on **Access**:



Client Details

Christina Lopez  
Divine Chocolates  
100 Chocolate Way  
Toronto, ON  
M4B 1B3  
Canada  
Christina.Lopez86208@sageone.com  
7399729929

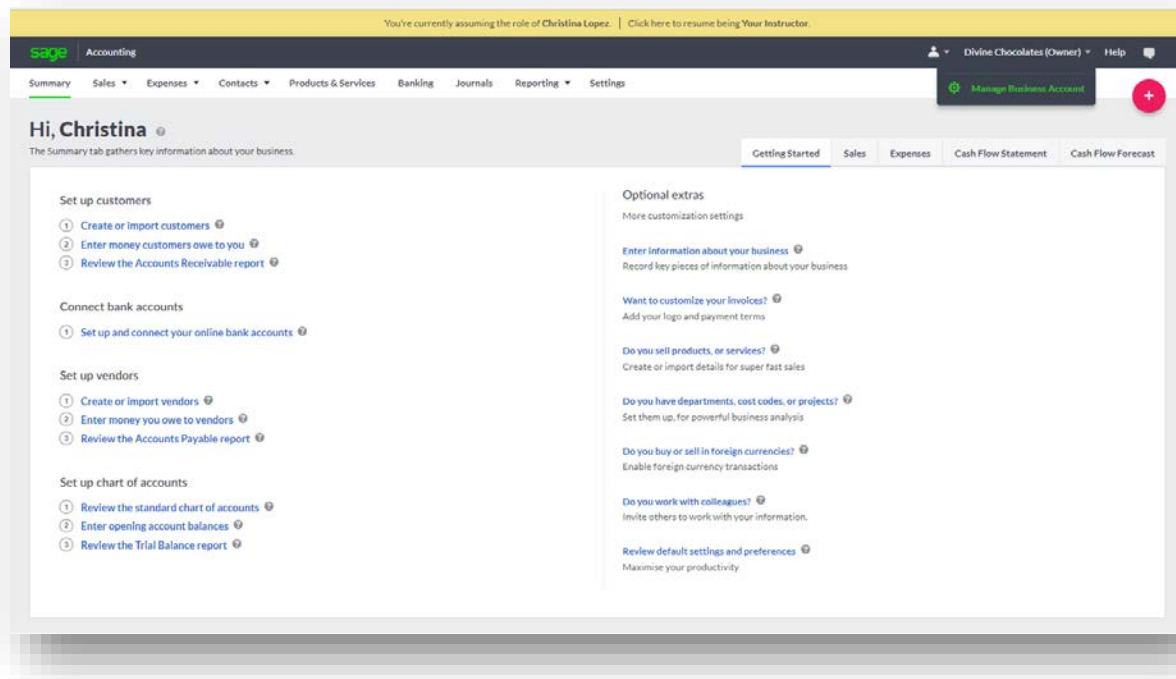
Client Services

Sage One Accounting [Access](#)

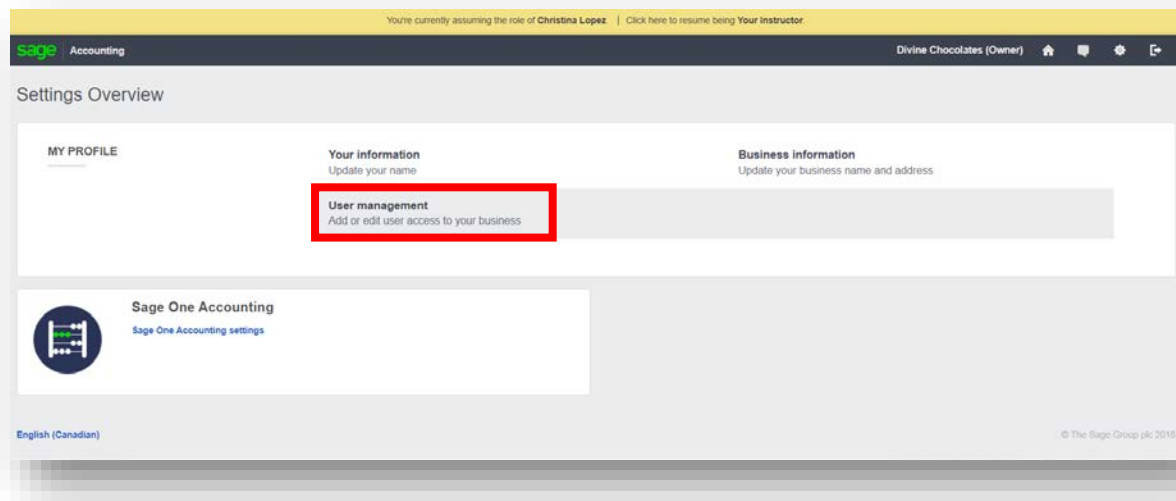
Notes [Create note](#)

Updated on | Details

3. From within the home screen, navigate to the client menu in the top right above and select **Manage Business Account**:

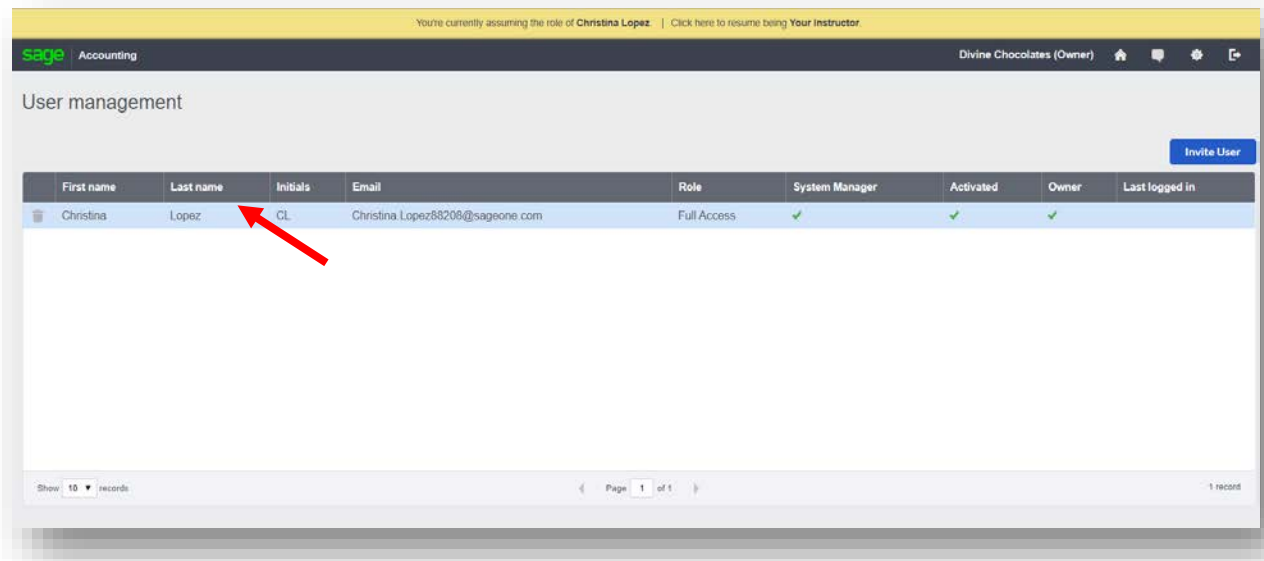


4. In **Settings Overview** menu select **User Management**:

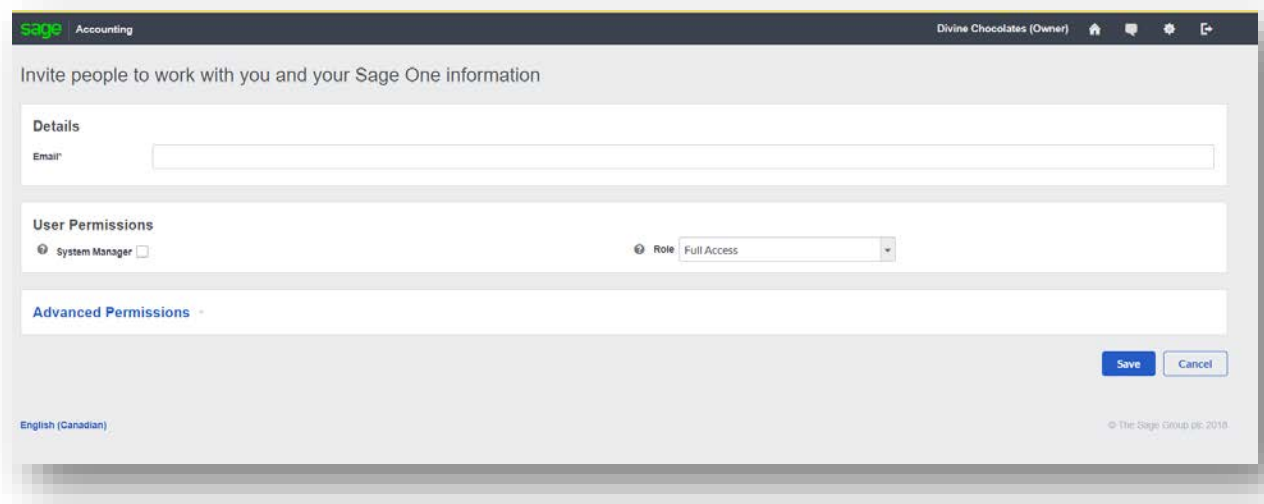


5. Select the student from within **User Management** list. You can view a list of all students, their access level, determine whether or not they have **System Manager** privileges, if the account has been activated, if they're the owner of the account and when they last logged into **Accounting**.

- To edit the student's permission levels, simply double click the name and adjust the role accordingly.



The screenshot shows the Sage Accounting User Management interface. At the top, it indicates the user is currently assuming the role of Christina Lopez. Below the header, there is a table with columns: First name, Last name, Initials, Email, Role, System Manager, Activated, Owner, and Last logged in. The first row contains the user 'Christina Lopez' with initials 'CL' and email 'Christina.Lopez88206@sageone.com'. A red arrow points to the 'Last name' field of this user. At the bottom right of the table, there is an 'Invite User' button. The footer shows 'Show 10 records', 'Page 1 of 1', and '1 record'.



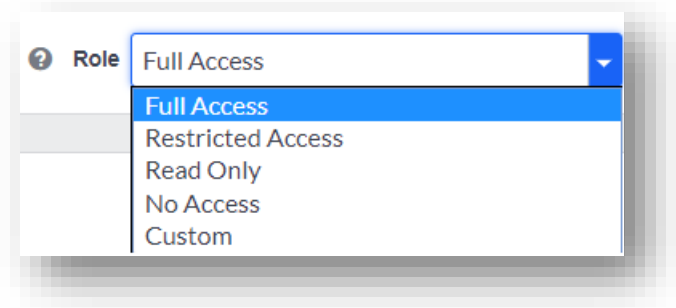
The screenshot shows the Sage Accounting 'Invite people to work with you and your Sage One information' form. It has three main sections: 'Details' with an 'Email' input field; 'User Permissions' with a radio button for 'System Manager' (which is selected) and a 'Role' dropdown menu set to 'Full Access'; and 'Advanced Permissions' which is currently collapsed. At the bottom right, there are 'Save' and 'Cancel' buttons. The footer includes 'English (Canadian)' and '© The Sage Group plc 2018'.

- You can also set student permissions when inviting a student for the first time simply by selecting **Invite User** and set **User Permissions**.



# User Permissions

As we just did in the previous lesson, navigate down to set **Role** level and select the level of access to determine which permissions your student should have. Click **Save**.



## Check Your Knowledge

Answer the following questions about the material covered in this lesson.

### Short Answer

Write a short answer to the question below.

1. What are the five different roles that can be assigned to manage users?

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### Multiple Choice

Mark the correct answer(s) to the question below.

2. The User Management feature:
  - A. \_\_\_\_\_ Allows businesses to customize access for employees in Accounting based on user role/security to perform job-related tasks.
  - B. \_\_\_\_\_ Allows instructors to access unlimited student accounts to perform class assignments/tasks
  - C. \_\_\_\_\_ Allows an instructor to see the date/time a student last signed in
  - D. \_\_\_\_\_ Manage time off
  
3. Once a student accepts an invitation and is signed in, they are able to tell what company file they are working in by:

- A. \_\_\_\_\_ The instructor telling them
- B. \_\_\_\_\_ It's notated in the menu bar at the top of the screen to the right.
- C. \_\_\_\_\_ When they sign out, a message will appear
- D. \_\_\_\_\_ You don't have a way of knowing which company file your working in

**True or False**

Enter 'T' for True or 'F' for False for each of the affirmations below.

- 4. \_\_\_\_\_ Instructors can authorize and invite up to 10 users (students) to access companies and their data/files within **Accounting**.
- 5. \_\_\_\_\_ For students to access a company file, they have to accept the email invitation first
- 6. \_\_\_\_\_ If a user does not receive the invitation sent by the instructor, you are unable to resend the invitation

**Please note:**

Every effort has been made to ensure that the information provided in this educational series is accurate, up-to-date, and complete, but no guarantee is made to that effect. URLs and additional resources 'Beyond the Classroom' are continuously changing. Because the software is customizable in a number of ways, the language used in this guide may be different from what you 'see' when you work with your company's data file(s).

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