Managing Users

A guide to adding, editing, and deactivating the people who can log in to Data Fusion

Introduction

Every person who logs in to Data Fusion has a user record — their name, login email, role, and whether their account is currently active. The User Settings & Authorisations screen is where these records are set up and maintained. It's also where you switch someone off if they should no longer be able to log in, without losing their history.

Before You Begin — Prerequisites

- Roles must already be set up for your company before you can add a user — every user must be assigned to a role, and you can't save a new user without choosing one.
- Decide the person's login email address up front. This is also their Sage user name, so it should be an email address that's valid for your Sage user setup.
- You'll need access to Settings to reach this screen.

Key Terms — Glossary

Term	What It Means
User	A single person's login record — their name, email, role, and active status.
Role	A named set of permissions. Every user is assigned one role, which controls what they can see and do in the app. (Covered in full in a separate guide.)
Super User	An extra flag, separate from Role, that unlocks certain administrative areas of the app.
Active	Whether the user's account is currently switched on. An inactive user cannot log in, but their record and history are kept.
Last Activity	The last time the user was logged into and active in the app. Updated automatically — you can't set this yourself.

Where This Happens

Task	Data Fusion	Sage
Add, edit, or deactivate a user record	✓	
Assign a role or Super User status	✓	
Check the login email and password when someone logs in		✓

The Full Workflow

1. Go to Settings and open User Settings & Authorisations. You'll see a list of every user set up for your company, showing their name, email, role, active status, and last activity.
2. To add a new user, click Add New User. A details window opens.

3. Fill in the details:

Field	What It Means
Users Name	The person's name, as it will appear in the user list.
Sage User Name (email address)	Their login email address. This should match their Sage user name.
Sage Password / Confirm Password	Enter a password and re-type it to confirm. Both entries must match before the record can be saved.
Role	Choose the role that controls what this user can see and do. You must choose a role — the record won't save without one.
Is a Super User	Tick this if the person needs access to certain administrative areas of the app, in addition to their role.
Active	Leave ticked so the person can log in. Untick to block their login without deleting their record.

3. Click Save User. Data Fusion checks that the two passwords match, that a name and email have been entered, and that a role has been chosen — if anything is missing, you'll get a message explaining what to fix.
4. To edit an existing user, click anywhere on their row in the list. The same details window opens, pre-filled with their name, email, role, Super User flag, and active status — update what's needed and click Save User.
5. Click the X (top right of the window) or Cancel to close the window without saving.

Understanding User Access

- **Deactivating is how you remove access — there is no delete.** To stop someone logging in, open their record and untick Active, then save. Their history and past transactions stay exactly as they are; they simply can't log in anymore. Re-tick Active at any time to restore their access.
- **Your Sage user name and password are what's actually checked at login.** Data Fusion validates every login against your Sage user credentials, which is why the email and password fields on this screen are labelled as Sage details. Make sure the email address you capture here matches a genuine Sage user for that person.
- **Roles control permissions, not this screen.** What a role actually allows or restricts is set up separately — this screen only lets you assign which role a user belongs to.
- **Users are specific to your company.** You'll only ever see and manage users that belong to your own company.

Common Mistakes to Avoid

- **Not selecting a Role.** The record won't save until a role is chosen from the dropdown.
- **Typing mismatched passwords.** Both password entries must be identical, or you'll be prompted to fix them before you can save.
- **Opening Add New User straight after editing someone else.** Click Cancel first to clear the window, then click Add New User, so you don't accidentally carry over details from the record you were just viewing.
- **Looking for a delete button.** There isn't one — untick Active on the person's record instead.