Synergy Acc2026 - User Login Accounts

This guide shows how to create a login account for a staff member, switch it off when it is no longer needed, and choose which groups the person belongs to. The groups decide what the person can do.

Before you start

- Create the permission groups first (see the guide Permission Groups and User Rights), because only groups that already exist can be ticked.

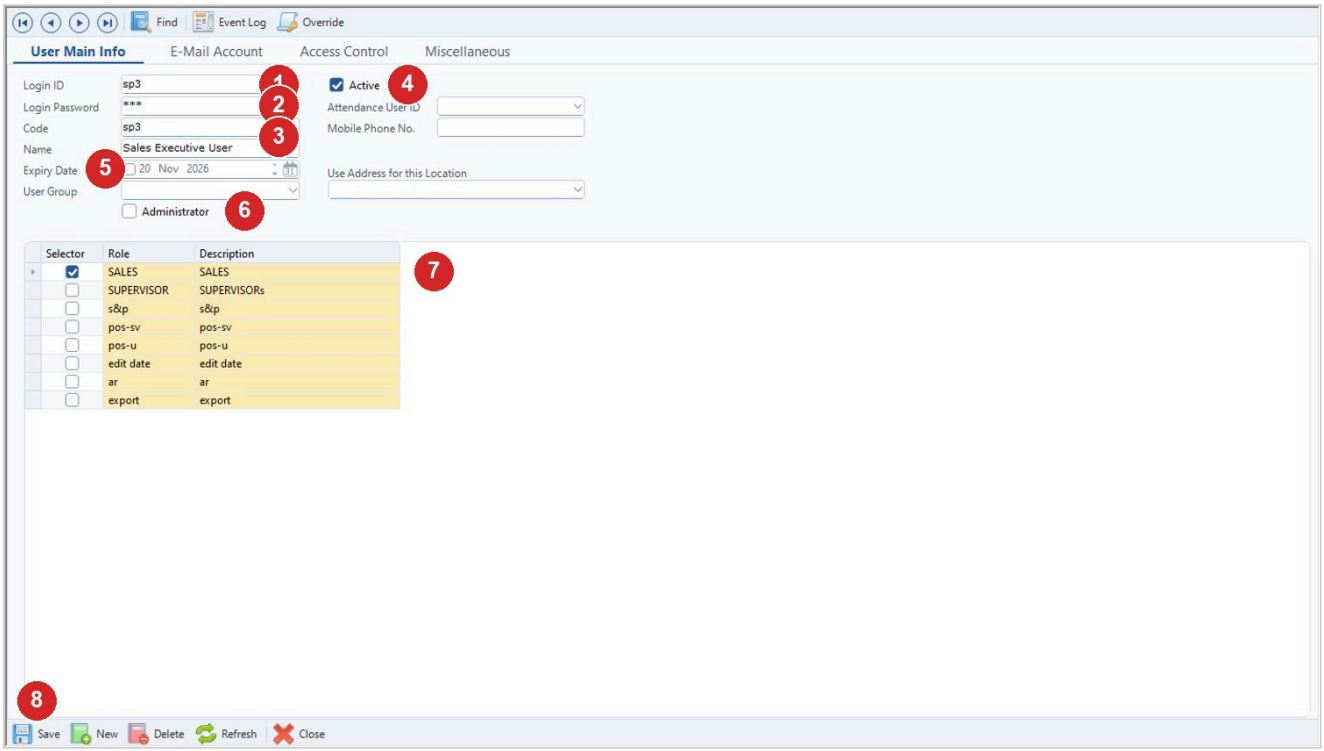
Steps

1. Open the User screen

From the menu, go to Main > Application Security > User.

2. Enter the login details

Here the user sp3, Sales Executive User, in role SALES. The E-Mail Account, Access Control and Miscellaneous tabs hold more options.



Step	What to do
1	Login ID the person signs in with.
2	Login Password.
3	Code and Name of the user.
4	Active: keep it ticked if the account may be used.
5	Expiry Date (optional): tick it and choose the day the account stops working.
6	Administrator: only for a person who needs full control.

Step	What to do
7	Roles: tick the groups (roles) this user belongs to (here SALES).
8	Save.

Tips

- Untick Active to stop a person signing in without deleting the account.
- To change what a person can see or do, change the group ticks here or change the permissions of the group itself.

Common problems

[Login ID], [Login Password], [Code] or [Name] must be specified.

The named box is empty. Fill it in and save again.

The user cannot sign in.

Check that Active is ticked and the Expiry Date has not passed.

The user sees too little.

Tick the right group for the user and check the permissions of that group.

The user sees too much.

Untick Administrator or remove the broad group from the user.

Draft: written from Synergy's support notes (checked by AI against the program), not yet reviewed by Synergy staff.

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