

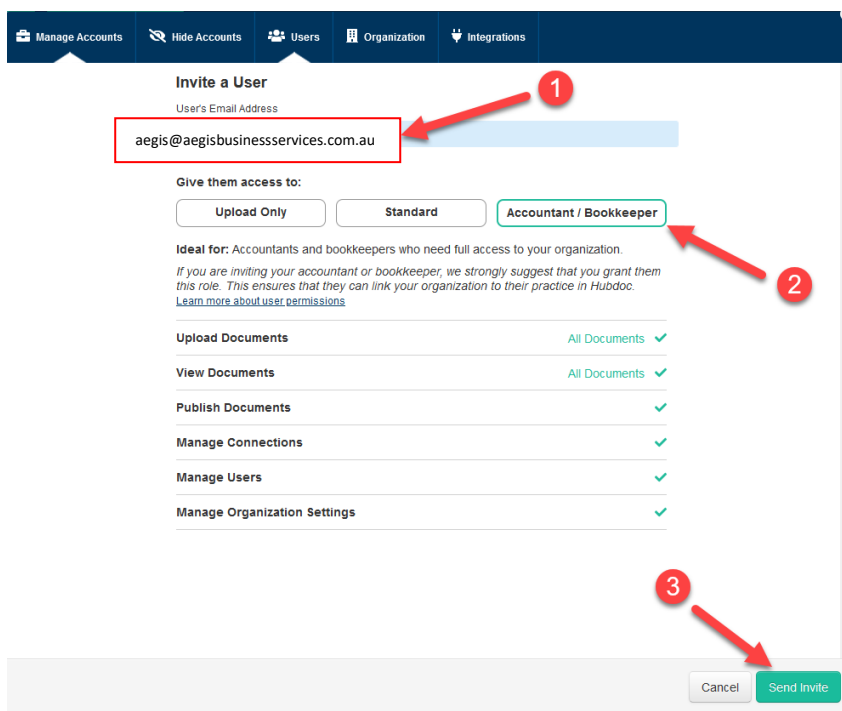
## Invite a new user

To add a new user with limited permissions to your Hubdoc organisation:

1. On the dashboard, click the settings icon in the top right hand corner.
2. Select the **Users** tab.
3. Click **Invite a User**.



4. Enter the user's email address, then click the user role they require. (Make sure you tick the Accountant / Bookkeeper role).
5. Adjust the permissions as needed (We need manage Users access), then click **Send Invite**.



**Invite a User**

User's Email Address

aegis@aegisbusinessservices.com.au

Give them access to:

Upload Only  Standard  Accountant / Bookkeeper

**Ideal for:** Accountants and bookkeepers who need full access to your organization.  
If you are inviting your accountant or bookkeeper, we strongly suggest that you grant them this role. This ensures that they can link your organization to their practice in Hubdoc.  
[Learn more about user permissions](#)

Upload Documents	All Documents ✓
View Documents	All Documents ✓
Publish Documents	✓
Manage Connections	✓
Manage Users	✓
Manage Organization Settings	✓

Cancel

New Hubdoc users receive an email prompting them to set up login credentials. Once their user account is created, they can access your Hubdoc organisation with the permissions you assigned them.

Existing Hubdoc users don't receive an email invitation. They can log in to Hubdoc and immediately access your organisation.