Inviting an office person or bookkeeper

Office staff and bookkeepers sign in with their own accounts and see only what their role allows.

Steps

1. Open People and permissions.
2. Press Invite, enter their name and email, and pick their role.
3. They get an email with a link to choose a password.

Good to know

To stop someone signing in, open their row and remove them. Their past work stays, under their name.

If someone forgets their password, press Password reset link on their row.

https://orshihq.com/help/invite-office-person