

# HOW TO ADD EPITELEO BOOKKEEPING TO YOUR HUBDOC FILE



EPITELEO BOOKKEEPING

1. Log in to your Hubdoc account and select the gear icon in the top right corner



2. Select the 'Users' tab

3. Click the 'Invite a user' button



4. Enter your Advisor's email address (hannah@epiteleobookkeeping.com) and select 'Accountant/Bookkeeper'

## Invite a User

User's Email Address

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	✓

6. Click 'Send Invite' and you are done!

Epileteo Bookkeeping

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BRONZE  
PARTNER