MyKonto
OCTET SOLUTIONS

USER GUIDE 03 / BUSINESS OWNERS AND COLLEAGUES

# Give your team access to your business

Invite your accountant or colleagues. Choose what they can do and work in one business.



**Create team** → **Invite** → **Join** → **Work together**

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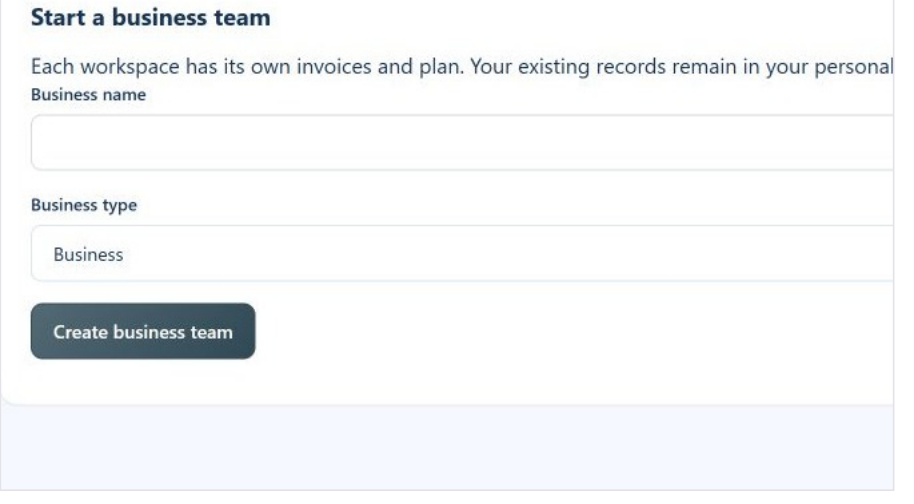
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**TEAM**

Business owner

# Set up a business for your team

1. Use your existing MyKonto sign-in. You do not need to create another personal account for yourself.
2. Open **Business teams**. Enter the business name, select **Business** and choose **Create business team**.
3. Open the business. As owner, complete its **Profile** and review the business plan before adding colleagues.




Actual application screen | Example data

**REMEMBER**
A business team is a separate workspace. Existing personal invoices, saved details and paid plans are not automatically transferred. Keep using the personal workspace for those existing records.

Next: One business, separate sign-ins

**TEAM**

Everyone in the team

# One business, separate sign-ins

1. Each person has their own verified MyKonto identity. An invitation connects that person to this business.
2. The business owns its invoices, quotations, shared saved details and numbering. Colleagues work within the same authorized business.
3. Check the selected business name before working. Each business has its own plan and shared invoice allowance.




**REMEMBER**
For an accountant working inside your business, invite them as Staff to prepare documents, or Viewer to read/export only. For an external CA office, follow Guide 02, page 7.

Next: Choose what your accountant can do

**TEAM**

Owner / manager

# Choose what your accountant can do

1. **Owner:** controls documents, team access, business profile, bank settings, plan and CA authorization.
2. **Manager:** prepares documents and manages permitted Staff/Viewer access. No owner, business-profile or billing control.
3. **Staff:** prepares documents and reads/exports authorized records.
4. **Viewer:** reads and exports records; does not prepare documents.



**Owner**
Business + access



**Manager**
Documents + team



**Staff**
Prepare documents



**Viewer**
Read + export

**REMEMBER**
Only the owner can invite or promote a Manager. A Manager cannot change the owner or another Manager. Use the lowest role that supports the person's work.

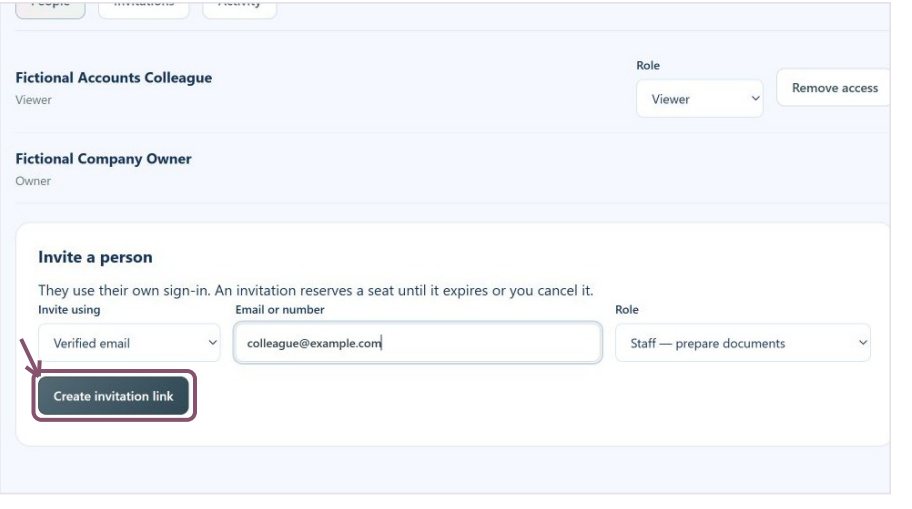
Next: Send an invitation to your colleague

**TEAM**

Owner / manager

# Send an invitation to your colleague

1. Open this business in **Business teams**. Under **People**, use **Invite a person**.
2. Choose verified email or WhatsApp number, enter the recipient and select Staff, Viewer or an allowed Manager role.
3. Choose **Create invitation link**. Copy and privately share the complete link with that colleague.




Actual application screen | Example data

**REMEMBER**
Share the private link with the intended colleague. Ask them to open it and join using their own matching sign-in. Do not share your password or OTP. Pending invitations reserve seats.

Next: Accept an invitation and join the business

**TEAM**

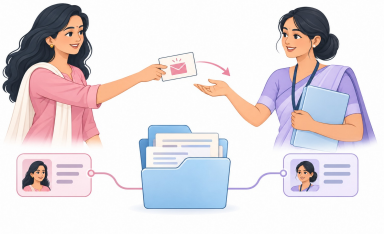
Invited person

# Accept an invitation and join the business

1. Open the complete invitation link. Sign in, or choose **Create an account** if you are new.
2. Use the verified email or WhatsApp identity the inviter selected. Complete the terms if requested.
3. Check the business name, role and signed-in identity. Explicitly join, then choose **Open business**.
4. If the invitation shows the wrong identity, switch account. Do not join by using somebody else's sign-in.

**Private link** → **Own sign-in** → **Confirm / join**

**REMEMBER**
For an email invitation, use a sign-in that verifies the same email address. If the account does not match, switch accounts or ask the inviter to check the recipient. Opening the link alone does not join the business.



**YOU ARE READY WHEN**

The colleague has joined the correct business.

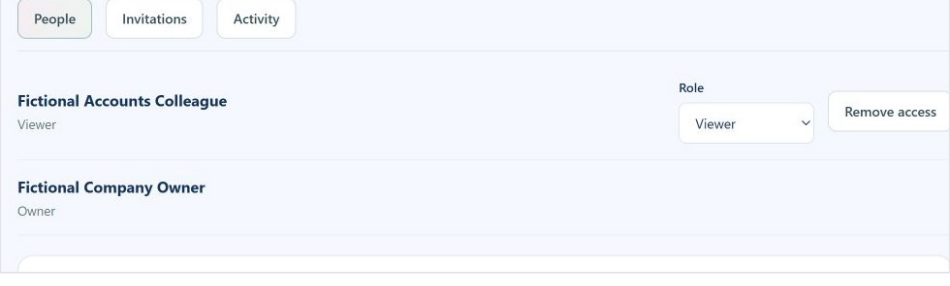
Next: Manage people and invitations

**TEAM**

Owner / manager

# Manage people and invitations

1. Under **People**, change the allowed Role or choose **Remove access**. Read the confirmation before removing someone.
2. Use **Invitations** to inspect pending invitations and cancel an unwanted link. Create a new invitation when needed.
3. Use **Activity** to review recorded access changes. Removing a person keeps the business records.
4. When two people edit one invoice, a conflicting save requires a reload. Preserve your entries instead of repeatedly retrying a stale version.




Actual application screen | Example data

**REMEMBER**
Rejoining does not restore old CA client assignments automatically. Ownership handover is a separate action, not the way to add another employee.

Next: Seats, plans and common fixes

HELP

Business owner

# Seats, plans and common fixes

1. **Review seats:** active members and pending invitations use capacity. In this edition, Free/Starter include one person; Business includes three.
2. **Seats full:** cancel an unwanted pending invitation, remove access that is no longer needed, or ask the owner to choose the appropriate plan.
3. **Invitation fails:** check its full link, recipient identity, expiry and whether it was cancelled. Ask the inviter to review it.
4. **Plan expired:** ask the owner to renew. Authorized access to existing records for read/export is separate from permission to prepare new documents.

**REMEMBER**
Existing personal subscriptions do not automatically cover a new business team. There is no automatic record deletion introduced by subscription expiry. Use Contact us for unresolved access or ownership questions.



**YOU ARE READY WHEN**

The owner knows how to check seats and the plan.

You have reached the end of this guide