Fube

GUIDE

How to invite your team and assign roles in Fube



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> There comes a point when no longer working alone has an awkward cost: so that your partner, your administrative assistant or your advisory firm can log in, you end up handing them your username and password. It works on the first day and stops working as soon as a second person joins, because you no longer know who did what. This guide shows you the alternative: give each person **their own access, with exactly the right role**, without sharing a single password.



Before you start, it's worth being clear about two things: **who** you are going to give access to (their email) and **what** you want them to be able to do (create invoices, view only, manage clock-ins…). You need a role with permission to manage members — usually **Owner** or **Administrator** — to be able to invite people. If you'd like to know in advance how access is divided up, the members and roles section sums it up well.

Step 1. Open member management

All team management is in **Settings › Company**, in the **Members** tab. The screen has two tabs, **Members** (who has access today, with their role and status) and **Invitations** (those that are pending or expired). Click the **Invite member** button — at the top right — and the invitation form opens.

Step 2. Choose the mode: invite by email or create the account

Fube offers **two ways** of adding someone, and the first decision on the form — the **How they join** block — is which one to use:

- **Invite by email.** Fube sends an invitation with an acceptance link. The person opens the link, **creates their Fube account** and is added to your company. This is the recommended mode when you are giving access to someone external — your advisory firm, for example — because each person manages their own password.
- **Create the account.** Fube creates the account there and then (first name, surname, email and an initial password that you set) and the person is added instantly. Useful when you want to give immediate access and you will pass on the password yourself through a secure channel.

In both cases there is one thing that **never** happens: the welcome email **does not include the password**. If you create the account yourself, you pass on the initial password separately; the email only welcomes them.

Step 3. Fill in the invitee's details

What the form asks for depends on the mode:

- In **Invite by email**, the person's **email** is all you need. You can add their **name** (optional) to personalise the email and, if you like, a **personal message** that will be included in the invitation.
- In **Create the account**, you enter the **first name**, **surname**, **email** and an initial **password** (minimum 8 characters). Remember that you will have to pass that password on to the new user yourself.

Watch out for one case that catches people out: you cannot invite someone who already has a Fube account. If the email you enter belongs to a user registered in another organisation, Fube rejects the invitation with a clear message — 'This email is already registered in another organisation. It cannot be invited' — and does not create it. This is deliberate: nobody can bring a person into their company without their consent. If you need that person to work with you, they will have to sign up with a different email, or speak to support.

It's a different matter for someone who was already in your company and whom you removed from **Members** with **Remove member**: you can invite that person again with the same email, using **Invite by email** (with **Create the account**, Fube replies that a user with that email already exists). On accepting, they fill in the usual form — first name, surname and a password, which becomes theirs — and return with their account and the roles you give them now. Someone you only deactivated is not invited: they are reactivated.

Step 4. Assign one or more roles

In the **Roles** block you choose the new member's roles. The selector allows multiple choices: a person can have **more than one role** at a time if their work requires it (for example, invoicing and projects). Fube's thirteen roles are:

- **Owner.** Full control of the company, including the subscription and the tax settings. It is an exclusive role and there is usually only one.
- **Administrator.** Company-wide management: users, settings and integrations. This is the person who runs the account day to day without necessarily getting involved in each operational area.

- **Roles by area**, in three variants — **Manager** (full management), **Employee** (day-to-day work) and **Auditor** (read-only) — for each module:
  - **Invoicing**: *Invoicing Manager*, *Invoicer* and *Invoicing Auditor*. The Invoicer handles day-to-day invoices, quotes, delivery notes, customers, products and expenses; the Auditor only reads. The Invoicing Auditor is for someone on your team who needs to **review what has been issued and the Verifactu data without being able to change anything**; for your accountant there is a dedicated role, the next one on the list. Anyone who only holds auditor roles — for one module or several — is your **inspector** and does not take up a seat; this is explained in **the section on seats**.
  - **HR**: *HR Manager*, *Employee* and *HR Auditor*, for the team that uses **time tracking** and people management.
  - **Projects**: *Projects Manager*, *Projects Collaborator* and *Projects Auditor*.
- **Legal representative (RLT).** Read-only access to the **working time record**, intended for the workers' legal representatives. It is the only role in the catalogue that exists because of a legal obligation rather than an internal need: it gives access to the time record and nothing else.
- **Accountant.** For your accountant or advisory firm. It reads the same as the Invoicing Auditor — invoices, expenses, taxes, treasury, customers, suppliers and catalogue — downloads the books and the files for their A3 or Sage 50, and **does not take up a seat on your plan**. Only one is allowed per company. What it can do with your data is explained in the guide to **exporting to A3 and Sage 50 for your accountant**.

Choose the role — or combination — that reflects what that person needs to do, no more and no less. Each role appears with its name and colour so there is no doubt.

Three selector rules worth knowing before you wrestle with an error:

- **At least one role is required.** An invitation without roles is not created.
- **Owner and Accountant cannot be combined with anything.** They are exclusive roles: someone is either Owner, or Accountant, or any of the others. The Accountant role, moreover, does not accept additional permissions: it is read-only, and that is why it does not take up a seat.
- **Only one level per area.** Nobody can be both *Invoicing Manager* and *Invoicing Auditor* at the same time; you choose one.

Step 5. Send the invitation and confirm access

With the details and roles in place, click **Send invitation** (or **Create member**, if you are creating the account). From then on:

- With **Invite by email**, the invitation stays **pending** and the person receives the link. The link is valid for **7 days**; after that it expires and will need to be resent.
- With **Create the account**, the member is **added and active** straight away and can log in with the email and password you give them.

Each member has an **active or inactive status**. Active members can log in; inactive ones can't, but they keep their history and their links to documents. This lets you cut off someone's access without deleting anything.

How to read an invitation's status

In the **Invitations** tab, each row shows its status. There are four:

Status	What has happened
Pending	Sent and waiting to be accepted
Accepted	Accepted: the person is now an active member
Expired	The 7 days passed without anyone accepting it
Created directly	There was no invitation: you created the account and the member yourself

Your plan sets the limit, and pending invitations already take up places

Each plan includes a number of people—one on Starter, one on Pro, three on Business and ten on Elite—**and the first one is you**: on Starter and on Pro, your place is the only one. Fube checks this **when you invite**, not when the invitation is accepted. That works in your favour: you see the error yourself when you create the invitation, rather than the invitee running into it when they click the link without understanding a thing.

What not everyone expects is that **pending invitations count**. If you've sent three and nobody has accepted them, those three places are taken. When you run out of room, Fube tells you exactly that and gives you three ways out: delete a pending invitation, deactivate someone on the team or upgrade your plan.

Your accountant is separate. Anyone who joins with the **Accountant** role doesn't take up a place: you can invite them even when your plan is full, and while their invitation is pending it doesn't take a place from anyone either. What Fube does check is that there isn't another one: if you already have an accountant—active or deactivated—or a pending invitation for an accountant, it won't let you invite a second.

And so is the inspector. Anyone who only has auditor roles—*Invoicing Auditor*, *HR Auditor* or *Projects Auditor*, one or several—doesn't take up a place either, so there's always room for the Veri*factu and working-time record inspection user. So on Starter there's room for you, an inspector and your accountant. The difference from the accountant is that a second inspector can join, but takes up a place: the free one goes to whoever comes first, whether an active member or a pending invitation. And if you later give the inspector another role, they're no longer an inspector and need a free place.

Each person's page

Every member of your company has their own page, with their photo, their name and what they're working on. You get there from their name: in any list where someone appears—the owner of a lead or of an opportunity, whoever a task is assigned to, whoever logged some hours or filled in a work report—just hover over them to see their card and click **View person**. You can also get to it from the HR **Team** screen, the members of each project and the menu on each row in **Settings › Company**, in the **Members** tab.

What **the whole team** sees:

- **Who they are**: their name and photo, their job title, their department and their workplace—these three if they have an employee record in HR—, how long they've been with the company and their email.
- **What they're working on in projects**: their open tasks and the hours they've logged this month, but only for the projects you can also see.
- **What they're working on in the CRM**: their open opportunities and their total value, and their upcoming activities.

Each block only appears if your role can see that module. If you can't see the CRM, you won't see their opportunities; it's not that they don't have any, it's that they're not yours to see.

What **only HR and the person themselves see** is the **HR** block: how their day of clock-ins is going, the holiday they have left, their next absence and how many documents they have. It's visible to those who manage HR—Owner, HR Manager and HR Auditor—each row depending on what their role can read, and to the person themselves on their own page. Nobody else.

Roles aren't public either: they're only visible to those who manage members—Owner and Administrator—and to the person themselves. And what **doesn't appear anywhere** is the phone number: it's private to each account and the rest of the team can't see it.

If someone has left the company, their page is still there—what they did is kept—and it says so: **No longer with the company**.

Changing your name and photo

Your name and photo belong to your account, so you change them in your profile: in your user menu, click on your name and you'll go to **Details**. There you can change your **first name**, your **surname** and your **photo** (JPG, PNG or WebP, up to 5 MB; without a photo your initials are shown) and, below, your email. When you change anything, the **Unsaved changes** bar appears at the bottom: click **Save** and the change shows straight away, in your user menu and on your page. Your job title, department and workplace aren't changed there: HR manages them in your employee record.

To see your page as your team sees it, use **Your team page**, which is in your user menu and in the header of **Details**. On your page, the **Edit in your profile** button takes you back to **Details**.

Edge cases and variations

- **The invitation expired before it was accepted.** From the **Invitations** tab you **resend** it and a new link is generated, valid for another 7 days. And if a pending invitation is no longer needed, you **delete** it from that same list.

- **You need to change someone's role.** You can edit their roles—or their status—whenever you like, and the change applies as soon as you save, without them having to log in again; if they have Fube open, they'll see it when they return to the tab or reload. The exception is **Accountant**, which can only be given when inviting and doesn't change role: it can't be assigned to an existing member, and on an accountant member's record the role is greyed out. If that person needs different access, you have to remove them from **Members** and invite them again by email, with the same email address, with the role they need: when they accept, they get their account back with the new role. With a role other than Accountant they do take up a place, so you need a free one.
- **You change accountant.** Remove the previous one from **Members** with **Remove member**— deactivating them isn't enough, because a deactivated accountant still counts as your company's—or, if they hadn't accepted yet, delete their invitation. After that you can invite the new one.
- **The person in charge of the company changes.** You assign the **Owner** role to another person from their member record. There's an asymmetry here worth being clear about, because these are two different rules: **when inviting** you can only grant roles at a level **strictly lower** than yours —an Owner can't invite another Owner from the outset—but **when editing a member who already exists** you can assign roles at a level **no higher** than yours, your own included. That's why appointing another Owner is done in two steps: first you bring them in with another role, and then you change their role from their record.
- **You want to remove someone.** It's better to **deactivate** than to delete: deactivating cuts off their access but keeps their history and their links to documents; deleting removes their membership: if they come back, they join as a new member with the same account, without their previous roles. In an environment with **Verifactu**, where an issued invoice can't be modified, keeping a record of who did what is the sensible thing to do.
- **You don't want a collaborator to change anything by mistake.** Give them an **Auditor** role for the relevant area: read-only.

- **You want someone to see only their own invoices.** On their member record, under **Custom permissions**, add **View the whole team's sales documents** to **Revoked permissions**. From the moment you save, in invoices, simplified invoices, corrective invoices, quotes, pro forma invoices and delivery notes they only see the ones they've created themselves: their colleagues' ones don't appear in the list or open from a link. The same goes for everything attached to them (the payments, email sends, customer links, attachments, payment reminders and Veri*factu records), for exports, the invoice register and the sales in the accountant export file (A3 and Sage 50), and for the figures on the dashboard, the payments dashboard and each customer's record, which are calculated using only their documents. Expenses don't belong to anyone: they can still see and export all of them. Anything created without a person behind it, such as recurring invoices or orders coming in from the online shop, isn't visible to them either. Custom permissions depend on your plan: if it doesn't include them, the revocation is saved but not applied.

Frequently asked questions

Does the new member receive their password by email? No, never. The welcome email does not include passwords. If you create the account directly, you are the one who passes on the initial password through a secure channel.

Can I give my accountant read-only access? Yes, and without using up a seat. That is what the **Accountant** role is for: it can read invoices, expenses, taxes and treasury, download the books and the files for A3 and Sage 50, and it cannot change your documents or your settings. Only one is allowed per company, and since a Fube login belongs to a single company, an accountant who handles several customers on Fube needs a different email address for each one. You can find how they download the files in **export to A3 and Sage 50 for your accountant**.

Can I invite someone who already uses Fube at another company? No. Fube rejects the invitation if that email address already belongs to a registered user, precisely so that nobody can add a person to their organisation without their consent. They will have to use another email address. What you can do is invite again, with their usual email address, someone you removed from your **Members**.

How many members can I have? It depends on your plan: **one** person on Starter, **one** on Pro, **three** on Business and **ten** on Elite, including pending invitations. The accountant does not count. You can compare everything on the **pricing** page, and how to change plan in **manage your subscription**.

What about account security? In addition to roles, Fube offers two-step verification (2FA) and an access log at account level. It is especially recommended for the profiles with the most permissions; you will find it in the **account security** section.

Give your team access in minutes

Inviting someone is just that: their email, the method (link or direct account) and the right role. Each person logs in with their own access, the history stays attributed by name and you do not share a single password. **Create your free account** and set up your team, or review how access is shared out in **members and roles**.

Fube

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Put this into practice with Fube

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