



BOOKS

Users & Roles

Invite team members and accountants. Roles, plan-based seat limits, multi-company access.

Prepared by Terrance Bortell · May 16, 2026

On this page

- [User Types](#)
- [Plan Limits](#)
- [Inviting a User](#)
- [Roles](#)
- [Removing Users](#)
- [Multi-Company Access](#)
- [Audit Trail](#)

Books supports multiple users per company, with role-based access. This guide covers inviting users, available roles, and how accountant access differs from team-member access.

User Types

- **Team Members** — your staff. Full access to everything (configurable).
- **Accountants** — your CPA or bookkeeper. Separate seat that doesn't count against the team-member limit. Designed for view + reconciliation access without payroll-style admin reach.

Plan Limits

- **Books Individual** — 1 team member, 0 accountants
- **Books Founder** — 2 team members + 1 accountant
- **Books Growth** — 2 team members + 1 accountant
- **Books Pro** — 5 team members + 2 accountants

Inviting a User

1. Go to **Settings** → **Users** → **Invite User**.
2. Enter their email and pick the role.
3. They receive an email inviting them to sign in via UrTravelPro Core (or create an account if new).
4. Once they accept, they have access to the company you invited them to.

Roles

- **Owner** — full access including billing, plan changes, and deleting the company. One owner per company.
- **Admin** — full access except billing and company deletion. Can invite other users.
- **Member** — full access to transactions, banking, reports, but can't change plan or invite users.

- **Read-only** — can view everything but can't edit. Useful for board members or advisors.
- **Accountant** (separate seat) — view + reconciliation. Can't edit transactions outside reconciliation flow.

Removing Users

Go to **Settings** → **Users** → click the user → **Remove**. Their access ends immediately. Their historical edits (audit log entries) are preserved.

Multi-Company Access

A user invited to Company A is not automatically in Company B. Each company manages its own user list. The same email can be a user in multiple companies; they switch between them via the company selector.

Audit Trail

Every change to a transaction is logged with the user who made it and when. Go to any transaction → **History** to see the trail. Per-user activity is also available in the **Audit Log** report.