



The Peak Partnership  
BUSINESS ADVISERS

## MYOB ESSENTIALS. INVITE YOUR PEAK ADVISER INTO YOUR BUSINESS.



Welcome to cloud accounting with your MYOB Essentials Live software. Now your Peak advisers can work with you on your accounts in real-time, so your financial data is always up-to-date. But before we can start working collaboratively with you, we need your permission to access your live information.

- 1 Click on your organisation name in the top right corner. Select **Users** from the **Settings** drop-down menu.
- 2 Review your list of Users and delete any Users who should no longer have access to your files.
- 3 Click **Create advisor**.
- 4 In the **Create advisor** window (shown below), enter **The Peak Partnership** in the **Name** field and **email@peakpartnership.com.au** in the **Email** field.

Create advisor

Details

Name \*

Email \*

Access

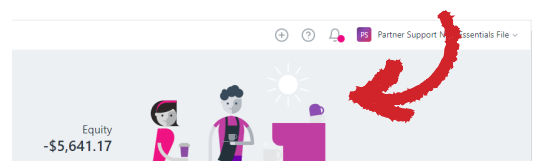
Roles and permissions Administrator

Business access All businesses with this serial number

Cancel Save and send invitation

- 5 Click **Save and send invitation**. Your invitation is sent to The Peak Partnership.

These Invite Adviser instructions relate to the latest version of MYOB Essentials, which displays an illustration in the top right of the Dashboard screen.



**myob** | MYOB Essentials

Learn more at [www.peakpartnership.com.au](http://www.peakpartnership.com.au)



The Peak Partnership  
BUSINESS ADVISERS



## MYOB ESSENTIALS. INVITE YOUR PEAK ADVISER INTO YOUR BUSINESS.

Welcome to cloud accounting with your MYOB Essentials Live software. Now your Peak advisers can work with you on your accounts in real-time, so your financial data is always up-to-date. But before we can start working collaboratively with you, we need your permission to access your live information.

- 1 Click on your organisation name in the top right corner. Select **Users** from the **Settings** drop-down menu.
- 2 Review your list of Users and delete any Users who should no longer have access to your files.
- 3 Click on your organisation name in the top right corner. Select **Advisors** from the **Settings** drop-down menu.
- 4 Click **Invite advisor**.
- 5 In the **Advisors** window (shown below), enter **email@peakpartnership.com.au** in the **Advisor's Email** field.

Home ▶ Advisors

### Advisors

Invite your accountant or bookkeeper to work with you. After accepting their invitation, your advisor will get full access to your MYOB Essentials business, including viewing information, entering data and making changes. [Learn more](#)

Invite advisor

Advisor's email

myob@practice.com

Send invitation

- 6 Click **Send invitation**. Your invitation is sent to The Peak Partnership.