April 2017

Need to Set Up Users in QuickBooks Online?

Your employees probably don't need access to every corner of QuickBooks Online. Here's how to set limits.

One of the best attributes of QuickBooks Online is that multiple users can access it without having software installed on their PCs. No more paying up front for a boxed copy that you'll store on your hard drive. You just pay a monthly subscription fee.

Unless you assign specific access rights to your users, though, they'll be able to see and do everything that you see and do on the site. You undoubtedly trust your employees or you wouldn't have hired them, but it's just good business practice to restrict individuals to their specific work areas. You probably did the same thing if you ever ran a manual accounting system.

QuickBooks Online makes this easy. Once you've set up individuals for a specific set of screen permissions, that's all they'll see when they log in with their user names and passwords. Here's how it works.

Several Levels

Click the gear icon in the upper right of the QuickBooks Online screen, then select **Manage Users** under **Your Company**, then click **New**. This mini-interview will open.
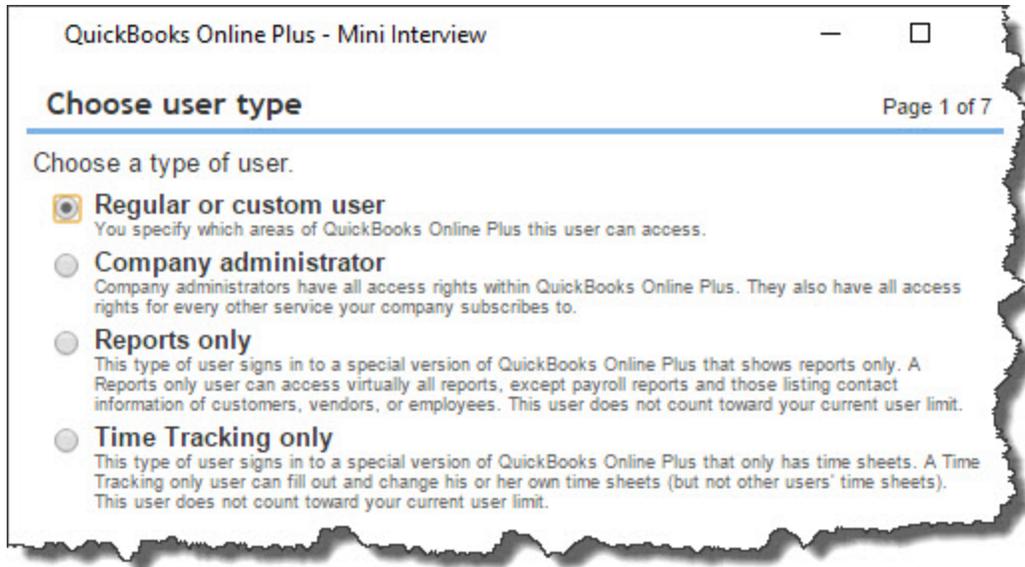
QuickBooks Online's mini-interview will walk you through the steps required to assign access rights to employees.
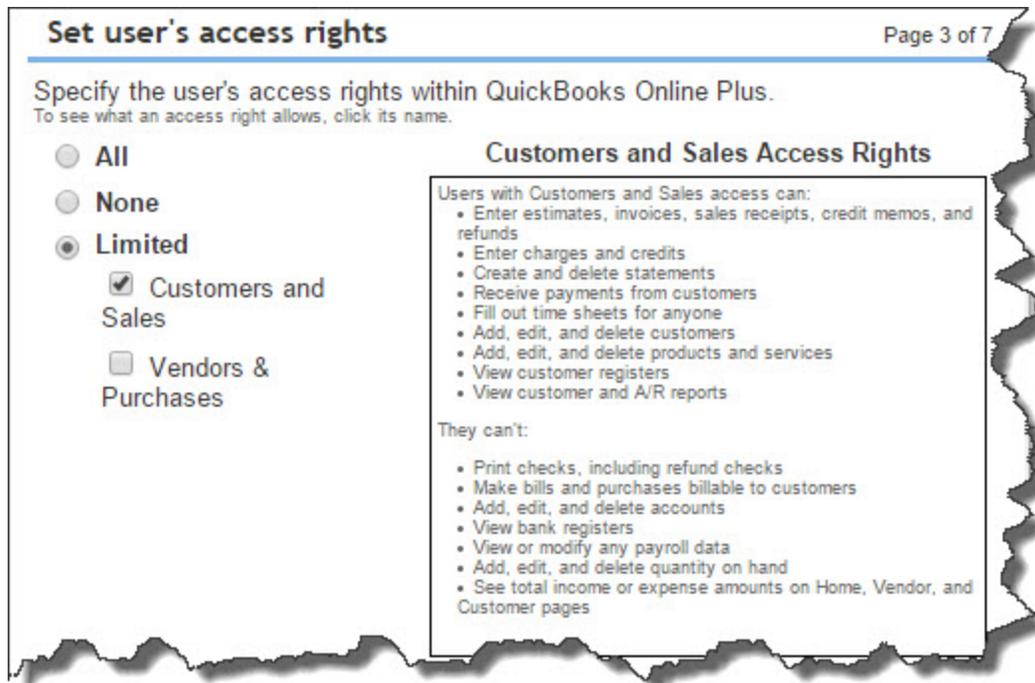
As you can see, four access levels are supported. You'll probably select **Regular or custom user** most often because you can drill down and set permissions at the screen level. The **Company administrator** is you, of course, unless you've assigned this role to someone else. The user at this level has access to everything.

You can also let someone see **Reports only**, with the exception of payroll reports and those that contain contact information about customers, vendors, and employees. If you have employees who submit time sheets but don't otherwise work in QuickBooks Online, you can let them in to do **Time Tracking only**.

Tip: There's a fifth option here. You can grant us access to your QuickBooks Online company data, making it easier for us to monitor and troubleshoot your accounting information. Let us know if you want to take advantage of this.

Paring Down Access

Click the button in front of **Regular or custom user** if it's not already highlighted, and then click **Next**. This third screen in the mini-interview deals with **Customers and Sales** and **Vendors and Purchases Access Rights.** Click **All** or **None** if appropriate.

Set user's access rights

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Specify the user's access rights within QuickBooks Online Plus.
To see what an access right allows, click its name.

○ All

○ None

● Limited

　☑ Customers and Sales

　☐ Vendors & Purchases

Customers and Sales Access Rights

Users with Customers and Sales access can:
- Enter estimates, invoices, sales receipts, credit memos, and refunds
- Enter charges and credits
- Create and delete statements
- Receive payments from customers
- Fill out time sheets for anyone
- Add, edit, and delete customers
- Add, edit, and delete products and services
- View customer registers
- View customer and A/R reports

They can't:

- Print checks, including refund checks
- Make bills and purchases billable to customers
- Add, edit, and delete accounts
- View bank registers
- View or modify any payroll data
- Add, edit, and delete quantity on hand
- See total income or expense amounts on Home, Vendor, and Customer pages

*This screen in the mini-interview helps you restrict user access in **Sales** and **Purchase** areas.*

If you're allowing **Limited** access in these two areas, be sure to read the fine print explaining what is and isn't allowed. When you're satisfied with your selection, click **Next**. On the next screen, you'll set administrative rights for that user by indicating whether he or she can manage other users' access rights and work with your subscription status and other company information.

You'll supply the individual's email address and name on the following screen. This will be used to send an email inviting the user to sign in using an existing Intuit Business Services user name or one he or she creates. Click through the next screen and click **Finish** when you're done. The mini-interview will close, and you'll be back at the **Manage Users** page.

Your User Overview

The **Manage Users** page displays a list of all users who have been invited or are active.

Access Rights		Billable User?		
Time Tracking Only		No	Active	
Custom Access		Pending	Invited	Resend
Custom Access		Pending	Invited	Resend
Master Admin		Yes	Active	

*The **Manage Users** screen*

The table here lists all users' names, email addresses, access rights, billable standing, and status. If you haven't received a response to an invitation (**Invited**), you can click the **Resend** button to issue another email. When he or she responds, **Invited** changes to **Active**. Click on a row to highlight an individual, and you can **Edit** or **Delete** him or her, and see an audit log of **Activity**.

You or your appointed **Master Administrator** should set up access rights before any new employee is admitted to QuickBooks Online. Let us know if you're having trouble with this element of the site, and if you'd like us to join your list of active users. It's a lot easier for you and us if we can get in there and see what problems you're having -- and resolve them.