Sales and Accounts Receivable

Access to this area includes activities such as: entering invoices, sales receipts and sales orders, receiving payments, and writing estimates and statements. It also includes access to the Customer Center and accounts receivable reports.

What level of access to Sales and Accounts Receivable activities do you want to give this user?

- ◉ No Access
- ○ Full Access
- ○ Selective Access
  - ○ Create transactions only
  - ○ Create and print transactions
  - ○ Create transactions and create reports

- ☐ View complete customer credit card numbers

Tell me about customer credit card protection.

Purchases and Accounts Payable

Access to this area includes activities such as: Entering and paying bills, entering credit card charges, and entering purchase orders. It also includes access to the Vendor Center and accounts payable reports.

What level of access to Purchases and Accounts Payable activities do you want to give this user?

- ◉ No Access
- ○ Full Access
- ○ Selective Access
  - ○ Create transactions only
  - ○ Create and print transactions
  - ○ Create transactions and create reports

Access for user: normanm

What do you want this user to have access to?

- ○ All areas of QuickBooks

- ● Selected areas of QuickBooks
  (You will make the selections in the screens that follow)

- ○ External Accountant
  (Access to all areas of QuickBooks except sensitive customer data, such as credit card numbers)

Time Tracking

Access to this area includes activities such as: entering time sheets, importing and exporting Timer data, and running Time reports.

What level of access to Time Tracking activities do you want to give this user?

- ◉ No Access
- ○ Full Access
- ○ Selective Access
  - ○ Create transactions only
  - ○ Create and print transactions
  - ○ Create transactions and create reports

Payroll and Employees

You can grant or restrict user access to the following activities: create paychecks and paystubs; print payroll tax forms; pay/e-pay payroll taxes; access Employee and Payroll Centers; and run/view payroll reports.

What level of access to Payroll activities do you want to give this user?

- ○ No Access
- ○ Full Access
- ◉ Selective Access
  - ○ Create transactions only
  - ○ Create, print, e-pay, and e-file transactions and forms
  - ◉ Create transactions and create reports

Access to this area includes common banking activities such as writing and printing checks, making deposits, and entering credit card charges.

What level of access to Checking and Credit Card activities do you want to give this user?

- ◉ No Access
- ○ Full Access
- ○ Selective Access
  - ○ Create transactions only
  - ○ Create and print transactions

Sensitive Accounting Activities

This area allows the user to perform activities such as transfer funds between accounts, make general journal entries, and do online banking.

What level of access to Sensitive Accounting Activities activities do you want to give this user?

○ No Access

◉ Full Access

○ Selective Access

    ○ Create transactions only

    ○ Create and print transactions

    ○ Create transactions and create reports

Sensitive Financial Reporting

This area gives access to all QuickBooks reports. It overrides any other reporting restrictions placed on this user.

What level of access to Sensitive Financial Reporting do you want to give this user?

○ No Access

◉ Full Access

○ Selective Access

    ○ Create sensitive reports only

    ○ Create and print sensitive reports

Changing or Deleting Transactions

Do you want this user to have the ability to change or delete transactions in the areas they have access to?

○ Yes

◉ No

Should this user also have the ability to change or delete transactions that were recorded before the closing date?

○ Yes

◉ No

Access for user: normanm

You have finished setting this user's access rights and password. Below is a summary of this user's access rights. Click the Finish button to complete this task.

AREA	CREATE	PRINT	REPO...
Sales and Accounts Receivable	N	N	N
Purchases and Accounts Payable	N	N	N
Checking and Credit Cards	N	N	n/a
Time Tracking	N	N	N
Payroll and Employees	Y	N	Y
Sensitive Accounting Activities	Y	Y	Y
Sensitive Financial Reports	Y	Y	n/a

You have finished setting this user's access rights and password.
Below is a summary of this user's access rights. Click the Finish button
to complete this task.

AREA	CREATE	PRINT	REPO...
Checking and Credit Cards	N	N	n/a
Time Tracking	N	N	N
Payroll and Employees	Y	N	Y
Sensitive Accounting Activities	Y	Y	Y
Sensitive Financial Reports	Y	Y	n/a
Changing or Deleting Transactions	N	n/a	n/a
Changing Closed Transactions	N	n/a	n/a