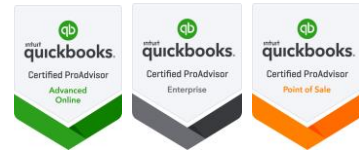


The CertifiedQB Group, LLC

QuickBooks® Services, Products, Resources & Training



1233 Shelburne Road #410, South Burlington, Vermont 05403
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QuickBooks Online Permissions

5 different types of users:

- Master Administrator
 - Purchases Software
 - Invites Users including accountant
 - Email is primary for communication with Intuit.
- Regular (Access to All, None, or Limited)
 - Limit to Sales and Customers
 - Limit to Vendors and Purchases
- Company Administrator
 - Access to everything
- Reports Only
 - Does not count as a paid user (
 - Access to all but payroll and contact information of customers, vendors and employees.
- Time Tracking Only.
 - Does not count as a paid user
 - Can enter own time

Choose user type

Page 1 of 7

Choose a type of user.

Regular or custom user

You specify which areas of QuickBooks Online Plus this user can access.

Company administrator

Company administrators have all access rights within QuickBooks Online Plus. They also have all access rights for every other service your company subscribes to.

Reports only

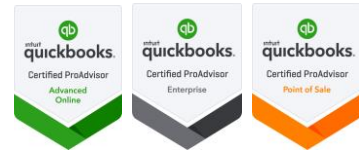
This type of user signs in to a special version of QuickBooks Online Plus that shows reports only. A Reports only user can access virtually all reports, except payroll reports and those listing contact information of customers, vendors, or employees. This user does not count toward your current user limit.

Time Tracking only

This type of user signs in to a special version of QuickBooks Online Plus that only has time sheets. A Time Tracking only user can fill out and change his or her own time sheets (but not other users' time sheets). This user does not count toward your current user limit.

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Regular User Access Rights Customer and Sales

Set user's access rights

Page 3 of 7

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
- Add, edit, and delete quantity on hand
- See total income or expense amounts on Home, Vendor, and Customer pages

Later, you set this user's administrative abilities (creating other users, changing company information, and subscribing to services).

Vendors and Purchases:

Set user's access rights

Page 3 of 7

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

Vendors and Purchases Access Rights

Users with Vendors and Purchases access can:

- Enter bills from vendors
- Pay bills
- Make bills and purchases billable to customers
- Write checks
- Enter cash and credit card purchases
- Add, edit, and delete vendors
- View vendor and A/P reports
- View Check Detail reports
- Print checks, except refund checks
- Add, edit, and delete products and services

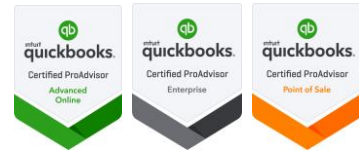
They can't:

- Add, edit, and delete accounts
- View bank registers
- Add, edit, and delete quantity on hand
- See total income or expense amounts on Home, Vendor, and Customer pages

Later, you set this user's administrative abilities (creating other users, changing company information, and subscribing to services).

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Time Sheet Options for Vendors and Purchases

Set user's time sheet options

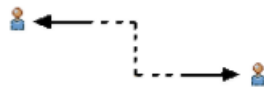
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Should this user be able to fill out his or her own time sheet?

- Yes
 No

This user can't fill out time sheets for anyone else. Users with Customer & Sales access rights can fill out time sheets for everyone.

Connect this user to an employee or vendor



Employee or Vendor

Choose an employee so the user will fill out time sheets for the correct person. For subcontractors, choose (or create) a vendor instead of an employee.

If you don't see the name to connect with this user, add it: Type the person's name and press Enter. Create subcontractors as vendors, not employees.

Administrative Rights for Regular users:

Set user's administrative rights

Page 5 of 7

QuickBooks Online Plus Administration

User management

Can the user add users, delete users, and change access rights?

- No
 View Manage Users
 Add, delete, & modify users

Company Information

Can the user edit company information in Preferences?

- View only
 Edit

Subscription & billing

Can the user subscribe to new services, unsubscribe from services, and change how you're billed for QuickBooks Online Plus?

- No
 View subscription information
 Manage subscriptions and billing