

Let us help you in your Enterprise Solutions Journey!
 Contact The CertifiedQB Group, LLC
 802.865.1051
 www.certifiedqb.com

Permissions Access by Roles

Areas and Activities	Accountant	Accounts Payable	Accounts Receivable	Banking	External Accountant	Finance	Full Access	Inventory	Payroll Manager	Payroll Process
Accounting	Mixed	None	None	None	Full	Mixed	Mixed	None	None	None
Accounting Tools	None	None	None	None	Full	None	None	None	None	None
Asset Registers	Full	None	None	None	Full	Full	Full	None	None	None
Edit Closed Transactions	Full	None	None	None	Full	None	Full	None	None	None
Equity Registers	Full	None	None	None	Full	Full	Full	None	None	None
General Journal	Full	None	None	None	Full	None	Full	None	None	None
Liability Registers	Full	None	None	None	Full	Full	Full	None	None	None
Manage Fixed Assets	Full	None	None	None	Full	None	Full	None	None	None
Working Trial Balance	Full	None	None	None	Full	None	Full	None	None	None
Banking	Mixed	Mixed	Mixed	Full	Full	Mixed	Full	None	None	None
Bank Feeds	None	None	None	Full	Full	Full	Full	None	None	None
Bank Registers	Full	None	None	Full	Full	Full	Full	None	None	None
Bank	Full	None	None	Full	Full	Full	Full	None	None	None
Cash in Drawer	Full	None	None	Full	Full	Full	Full	None	None	None
Register 1	Full	None	None	Full	Full	Full	Full	None	None	None
Register 2	Full	None	None	Full	Full	Full	Full	None	None	None
Checking	Full	None	None	Full	Full	Full	Full	None	None	None
Clearing	Full	None	None	Full	Full	Full	Full	None	None	None
PayPal	Full	None	None	Full	Full	Full	Full	None	None	None
Savings	Full	None	None	Full	Full	Full	Full	None	None	None
Checks	View	None	None	Full	Full	View	Full	None	None	None
Credit Card Charges	View	Full	None	Full	Full	View	Full	None	None	None
Credit Card Registers	Full	Full	None	Full	Full	Full	Full	None	None	None
Deposits	View	None	Full	Full	Full	View	Full	None	None	None
Loan Manager	None	None	None	Full	Full	Full	Full	None	None	None
Reconcile	Full	None	None	Full	Full	Full	Full	None	None	None
Transfer Funds	Full	None	None	Full	Full	Full	Full	None	None	None
Centers	View	Mixed	Mixed	Mixed	Full	Mixed	Full	Mixed	Mixed	Mixed
Customer Center	V-VB	View	Full	VC	Full	VC	Full	View	None	None
Employee Center	View	View	View	View	Full	View	Full	View	Full	Full
Vendor Center	View	Full	None	Full	Full	View	Full	Full	None	None
Company	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed

Bill Tracker	None	None	None	None	None	None	None	None	None	None	None
Billing Solutions Sign Up	None	None	None	None	None	Full	None	Full	None	None	None
Calendar	Full	Full	Full	Full	Full	Full	Full	Full	Full	Full	Full
Company Information	None	None	None	None	None	Full	None	Full	None	None	None
Company Preferences	None	None	None	None	None	Full	None	Full	None	None	None
Enter Vehicle Mileage	None	None	Full	None	Full	Full	Full	Full	None	None	None
Find All Transactions	Full	None	None	None	Full	Full	Full	Full	None	None	None
Income Tracker	None	None	None	None	None	None	None	None	None	None	None
Insights On Homepage	None	None	None	None	None	None	None	None	None	None	None
Planning & Budgeting	Mixed	None	None	None	None	Full	Full	Full	None	None	None
Business Planning & Analysis	None	None	None	None	None	Full	Full	Full	None	None	None
Set Up Budgets and Forecast	Full	None	None	None	None	Full	Full	Full	None	None	None
Print Labels	None	Full	Full	Full	Full	Full	Full	Full	Full	None	None
Remote Access	Full	Full	Full	Full	Full	Full	Full	Full	Full	Full	Full
Set Closing Date & Password	Full	None	None	None	None	Full	None	None	None	None	None
Set Up Bank Feeds	None	None	None	None	None	Full	None	Full	None	None	None
Synchronize Contacts	None	None	Full	None	None	Full	None	Full	None	None	None
Customers & Receivables	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	None	None
Accounts Receivable Accounts	Full	None	Full	None	Full	Full	Full	Full	None	None	None
Assess Finance Charges	None	None	Full	None	None	Full	None	Full	None	None	None
Billable Time and Costs	None	None	Full	None	None	Full	None	Full	None	None	None
Change Item Prices	None	Full	Full	None	None	Full	None	Full	Full	None	None
Credit Card Refunds	None	None	None	None	None	Full	None	None	None	None	None
Credit Memos	View	None	Full	Full	Full	Full	View	Full	None	None	None
Estimates	View	None	Full	None	None	Full	View	Full	None	None	None
Invoices	View	None	Full	None	None	Full	View	Full	None	None	None
Override Credit Limit	None	None	Full	None	None	Full	None	Full	None	None	None
Receive Payments	View	None	Full	None	None	Full	View	Full	None	None	None
Sales Orders	View	None	Full	None	None	Full	View	Full	None	None	None
Sales Receipts	View	None	Full	None	None	Full	View	Full	None	None	None
Statement Charges	View	None	Full	None	None	Full	View	Full	None	None	None
Statements	None	None	Full	None	None	Full	None	Full	None	None	None
Undeposited Funds Account	Full	None	Full	None	None	Full	Full	Full	None	None	None
Use Credit Card Numbers	None	None	Full	None	None	None	None	Full	None	None	None
View Credit Card Numbers	None	None	Full	None	None	None	Full	Full	None	None	None
Employees & Payroll	Mixed	None	None	None	None	Full	Mixed	Full	None	Full	Mixed
Paychecks	View	None	None	None	None	Full	View	Full	None	Full	Full
Payroll Adjustments	View	None	None	None	None	Full	View	Full	None	Full	None
Payroll Liabilities	View	None	None	None	None	Full	View	Full	None	Full	Full
Payroll Service Activities	None	None	None	None	None	Full	None	Full	None	Full	Full
Payroll Tax Forms											

File	None	None	None	None	Full	None	Full	None	Full	None
Backup	None	None	Mixed	None	Mixed	None	Mixed	None	None	None
Clean Up Company Data	None	None	None	None	Full	None	Full	None	None	None
Export	None	None	None	None	Full	None	None	None	None	None
Import	None	None	None	None	Full	None	None	None	None	None
QuickBooks Advanced Reporting	None	None	None	None	None	None	None	None	None	None
Rebuild	None	None	None	None	Full	None	Full	None	None	None
Shipping	None	None	Full	None	Full	None	Full	None	None	None
Verify	None	None	None	None	Full	None	Full	None	None	None
Lists	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed
Chart of Accounts	Full	View	View	View	Full	View	Full	View	None	None
Class List	View	View	View	View	Full	Full	Full	View	None	None
Currency List	Full	Full	Full	Full	Full	Full	Full	Full	View	View
Customer & Vendor Profile Lists	View	Mixed	Mixed	View	Full	View	Full	Mixed	None	None
Customer Message List	View	None	Full	View	Full	View	Full	None	None	None
Customer Type List	View	View	Full	View	Full	View	Full	View	None	None
Job Type List	View	View	Full	View	Full	View	Full	View	None	None
Payment Method List	View	View	Full	View	Full	View	Full	View	None	None
Sales Rep List	View	None	Full	View	Full	View	Full	None	None	None
Ship Via List	View	View	Full	View	Full	View	Full	View	None	None
Terms List	View	Full	Full	View	Full	View	Full	View	None	None
Vehicle List	View	View	Full	View	Full	View	Full	View	None	None
Vendor Type List	View	Full	None	View	Full	View	Full	View	None	None
Fixed Asset Item List	Full	Full	Full	View	Full	View	Full	View	None	None
Inventory Site List	View	Full	Full	Full	Full	Full	Full	Full	None	None
Item List	View	Full	Full	Full	Full	Full	Full	Full	None	None
Other Names List	View	Full	Full	Full	Full	Full	Full	Full	None	None
Payroll Item List	View	None	None	None	Full	View	Full	None	Full	Full
Price Level/Billing Rate Level List	View	View	Full	View	Full	View	Full	View	None	None
Price Rule List	None	None	None	None	None	None	None	None	None	None
Sales Tax Code List	View	View	Full	View	Full	View	Full	View	None	None
Templates List	View	Full	Full	View	Full	Full	Full	Full	None	None
Reports	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed
Accountant & Taxes	Full	None	None	None	Full	Full	Full	None	None	None
Accountant & Taxes Detail	Full	None	None	None	Full	Full	Full	None	None	None
Accountant & Taxes Summary	Full	None	None	None	Full	Full	Full	None	None	None
Banking	None	None	None	Full	Full	Full	Full	None	None	None
Budgets & Forecasts	None	None	None	None	Full	Full	Full	None	None	None
Company & Financial	Full	None	None	None	Full	Full	Full	None	None	None
Company & Financial Detail										

	Full	None	None	None	Full	Full	Full	None	None	None
Company & Financial Summary	Full	None	None	None	Full	Full	Full	None	None	None
Custom Transaction	Mixed	None	None	None	Mixed	Mixed	Mixed	None	None	None
Custom Transaction Detail	Full	None	None	None	Full	Full	Full	None	None	None
Custom Transaction Detail Limited	None	None	None	None	None	None	None	None	None	None
Custom Transaction Summary	Full	None	None	None	Full	Full	Full	None	None	None
Customers & Receivables	None	None	Full	None	Full	None	Full	None	None	None
Employees & Payroll	None	None	None	None	Full	None	Full	None	Full	Full
Find Report	None	None	None	None	None	None	None	None	None	None
Inventory	None	Full	None	None	Full	None	Full	Full	None	None
Jobs	None	None	None	None	Full	Full	Full	None	None	None
Jobs Detail	None	None	None	None	Full	Full	Full	None	None	None
Jobs Summary	None	None	None	None	Full	Full	Full	None	None	None
Memorized Report List	None	None	None	None	Full	None	Full	None	None	None
Mileage	None	None	Full	None	Full	Full	Full	None	None	None
Purchases	None	Full	None	None	Full	None	Full	Full	None	None
Sales	None	None	Full	None	Full	None	Full	None	None	None
Time	None	None	None	None	Full	None	Full	None	Full	Full
Vendors & Payables	None	Full	None	None	Full	None	Full	None	None	None
Time Tracking	Mixed	None	None	None	Full	Mixed	Full	None	None	None
Single Time Activity	None	None	None	None	Full	None	Full	None	None	None
Timer Export	None	None	None	None	Full	None	Full	None	None	None
Timer Import	None	None	None	None	Full	None	Full	None	None	None
Weekly Timesheet	View	None	None	None	Full	View	Full	None	None	None
Vendors & Payables	Mixed	Mixed	None	Mixed	Full	Mixed	Full	Mixed	None	None
Accounts Payable Accounts	Full	Full	None	None	Full	Full	Full	None	None	None
Adjust Quantity on Hand	View	None	None	None	Full	View	Full	Full	None	None
Build Assemblies	View	None	None	None	Full	View	Full	Full	None	None
Enter Bills	View	Full	None	None	Full	View	Full	Full	None	None
Item Receipts	View	Full	None	None	Full	View	Full	Full	None	None
Pay Bills	View	Full	None	Full	Full	View	Full	None	None	None
Pay Sales Tax	View	Full	None	Full	Full	View	Full	None	None	None
Print 1099s/1096	Full	Full	None	None	Full	None	Full	None	None	None
Purchase Orders	View	Full	None	None	Full	View	Full	Full	None	None
Sales Tax Adjustment	Full	Full	None	None	Full	Full	Full	None	None	None
Transfer Inventory	View	None	None	None	Full	View	Full	Full	None	None

V=View C=Create M=Modify D=Delete P=Print VB=View Balance
Mixed=Activities in this area have different levels of access.