



QuickBooks Tips and Tricks

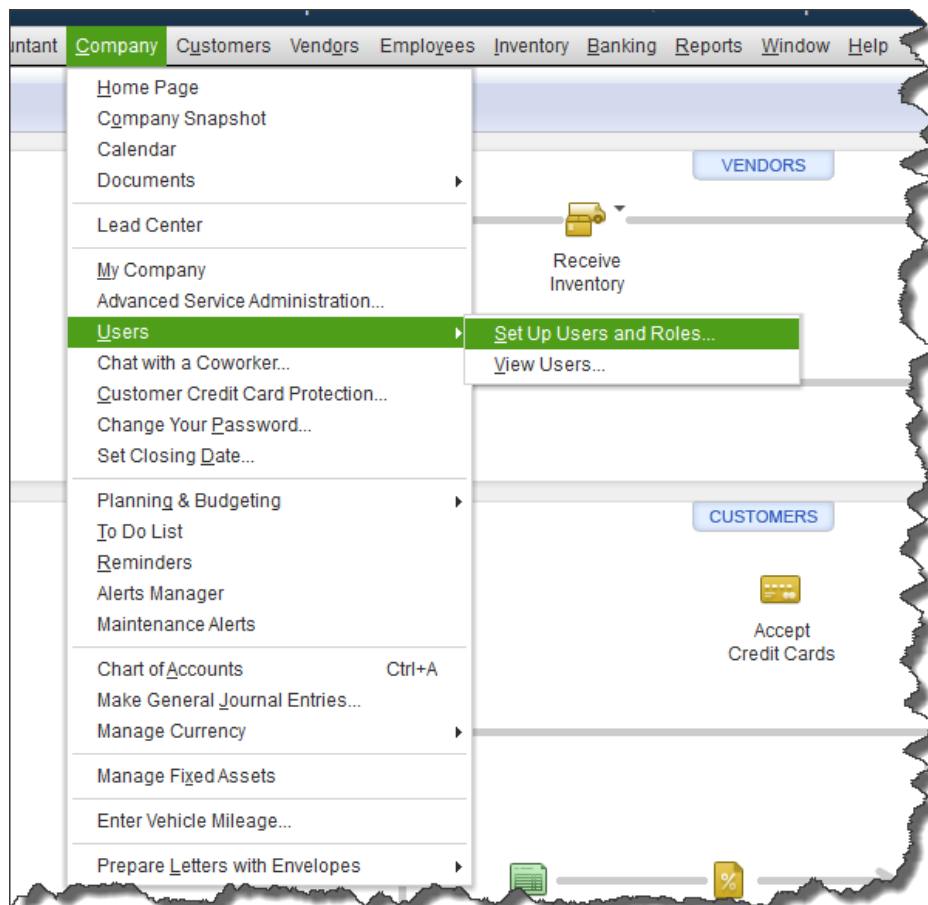
Software: QuickBooks Enterprise and QuickBooks Pro/Premier
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QuickBooks Enterprise Security Features

Security is important to all of us. Whether it's locking our doors, protecting our identity, or hiding our passwords—we know it is vital to keep ourselves and our information protected. How does this apply to QuickBooks? Well, there is certain information that not everyone within a company needs to have access to—wouldn't it be nice to have some control over this? QuickBooks Enterprise offers impressive security features that can give you piece of mind. The power is in your hands!

Let's Get Started...

To change user preferences, you must be signed in as an **Admin** user.

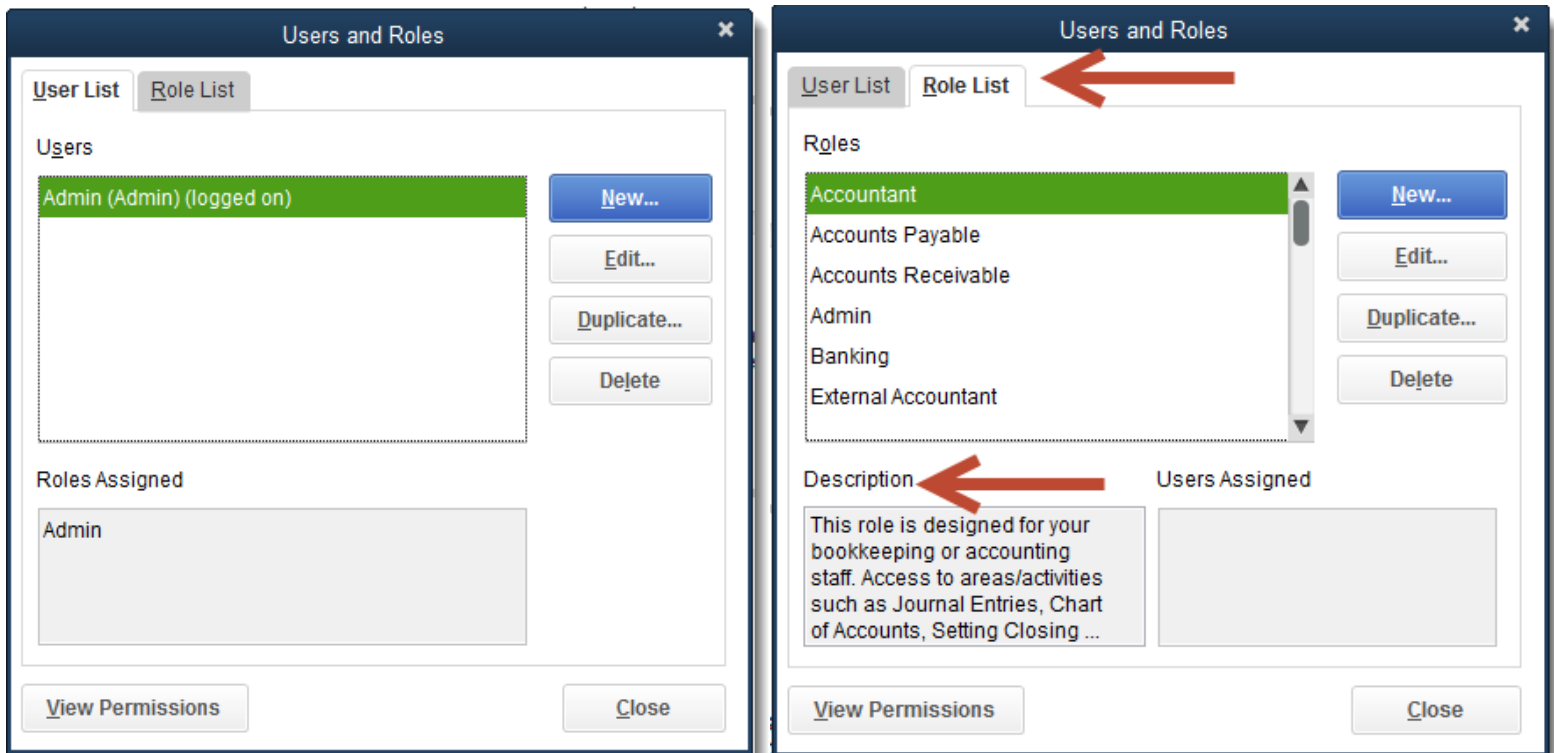


To change the company security preferences click on:

Company → Users → Set Up Users and Roles.

Enterprise Security Features Cont.

Enterprise gives you the option to create a **new** user, **edit** or **duplicate** an existing user, or **delete** a user. The duplicate button is a great feature! After creating a user, you can then assign one or more roles to the user – each specified exactly the way you want it to be. Simply duplicate an existing role, customize it, name it and assign it to one or more users!



The **Role List** offers 15 different user choices to select from out of the box. Above, you can see the description box which gives an overview of what each particular role can do. This can come in handy when you are trying to figure out which role may be the best fit for a user within the software. Of course, there are many more ways to customize the role, but this provides a good starting point.

As you can see below, when clicking the **Edit** or **Duplicate** button, a whole new screen appears with even more customizable role options! You can also create your very own role from scratch by clicking on **New**.

There are several different **Areas and Activities** that control user access by customizing the **Access Levels**. Each role can be molded to uniquely fit the job each user needs to perform in QuickBooks (as seen below).

Enterprise Security Features Cont.

Edit Role

Role Name: [How do I set up a new role?](#)

Description: This role is designed for your Accounts Payable staff members. Access to areas/activities such as entering and paying bills, Purchase Orders, and Vendors & Payables reports.

ROLE ACCESS

Area and Activities

- Accounting
- Asset Registers
- Edit Closed Transactions
- Equity Registers
- General Journal
- Liability Registers
- Manage Fixed Assets
- Working Trial Balance
- Banking
- Centers
 - Customer Center
 - Employee Center
 - Vendor Center
- Company
- Customers & Receivables
- Employees & Payroll
- File
- Lists
- Reports
- Time Tracking

AREA ACCESS LEVEL

None

Full

Partial

View

Create

Modify

Delete

Print

View Balance

[Tell me more about Areas and Activities.](#)

When duplicating a role, you can name it specifically to each employee/user if you wish. We really like how easy it is to choose what privileges a user has and the role access options are easily explained and shown. You can also customize the description if you change the role or create your own. Each area of QuickBooks and all activities are accounted for. The control is in the hands of the admin user which can give you greater security and confidentiality. The software does not limit you to an “all or nothing” scenario.

Enterprise Security Features Cont.

Now, let's compare!

Role Name: Accounts Payable [How do I set up a new role?](#)

Description: This role is designed for your Accounts Payable staff members. Access to areas/activities such as entering and paying bills, Purchase Orders, and Vendors & Payables reports.

ROLE ACCESS

Area and Activities

- Statement Charges
- Statements
- Undeposited Funds Account
- Use Credit Card Numbers
- View Credit Card Numbers
- Employees & Payroll
- File
- Lists
- Reports
- Time Tracking
- Vendors & Payables
 - Accounts Payable Accounts
 - Adjust Quantity on Hand
 - Build Assemblies
 - Enter Bills
 - Item Receipts
 - Pay Bills
 - Pay Sales Tax
 - Print 1099s/1096
 - Purchase Orders

AREA ACCESS LEVEL

Mixed Access*

None

Full

Partial

View

Create

Modify

Delete

Print

View Balance

*Activities in this Area have different levels of access. Change to the Area will impact all of its Activities.

[Tell me more about Areas and Activities.](#)

OK Cancel

← Enterprise
VS.
Pro/Premier
↓

Set up user password and access: Guest Page 2 of 10

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

Back Next Finish Help Cancel

It is easy to see the many customizable options that Enterprise offers. Look at the selective access options to the right that Pro and Premier allow. The amount of access is either too restricted or too free. Get exactly what you want with Enterprise! Check it out and see what you think! 😊