

QUICKBOOKS ONLINE BASICS:

How to Create a User Invitation

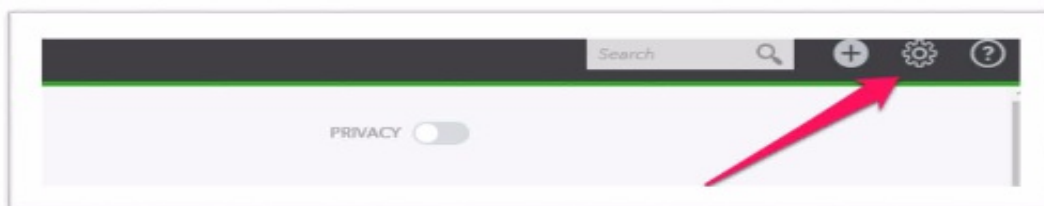
How to Create A User Invitation



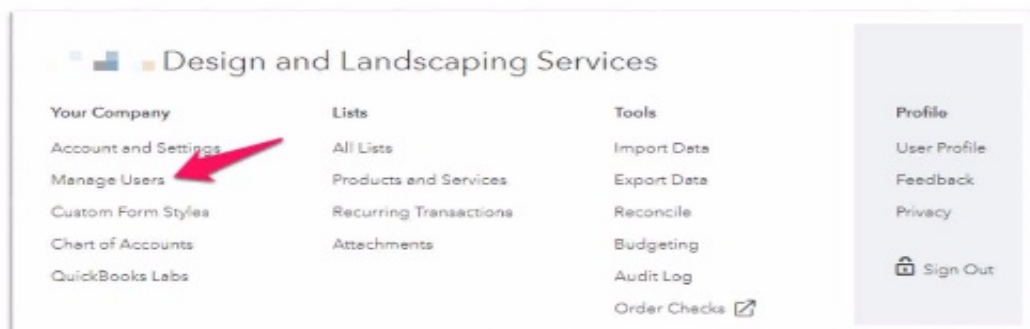
QBO BASICS

HOW TO INVITE A USER TO SHARE YOUR DATAFILE

1. START ON YOUR HOME SCREEN
2. SELECT THE "GEAR" IN THE UPPER RIGHT-HAND CORNER



3. GO TO "MANAGE USERS" WHICH YOU WILL FIND IN THE FIRST COLUMN UNDER "YOUR COMPANY"



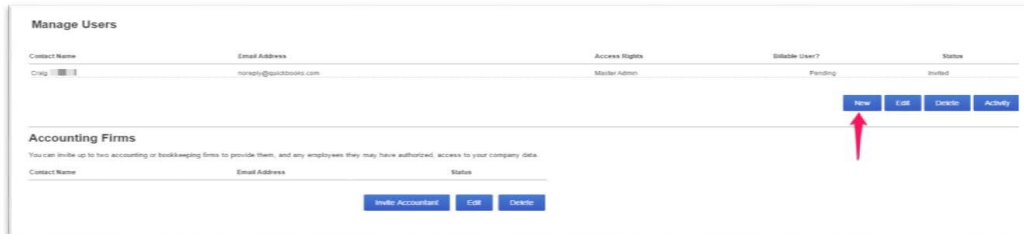
Now, you will be in the **Manage Users Screen**:

- A. The top portion of the screen is for regular users.

Should you wish to add a regular user, you will want to select the "New" button. You will then decide the type of user you need and select

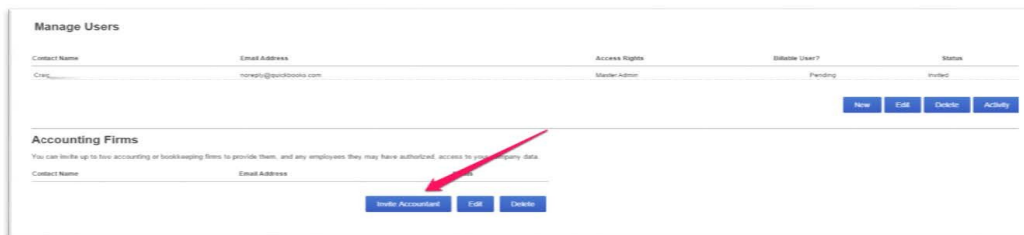
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accordingly. Simply follow the wizard to enter your selections and the required information.



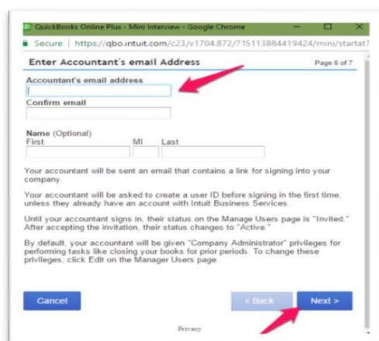
The screenshot shows the 'Manage Users' interface. At the top, there is a table with columns: Contact Name, Email Address, Access Rights, Billing User?, and Status. The first row contains 'Craig', 'ncroft@qbo.intuit.com', 'Master Admin', 'Pending', and 'Invited'. Below the table are buttons for 'New', 'Edit', 'Delete', and 'Active'. A red arrow points to the 'New' button. Below the table is the 'Accounting Firms' section, which includes a sub-header and a description: 'You can invite up to five accounting or bookkeeping firms to provide them, and any employees they may have authorized, access to your company data.' Below this is a form with fields for 'Contact Name' and 'Email Address', and buttons for 'Invite Accountant', 'Edit', and 'Delete'.

B. The bottom part of the screen is where you enter Accounting or Bookkeeper users. Simply select "Invite Accountant" and then enter the requested information.



This screenshot is identical to the previous one, but the red arrow now points to the 'Invite Accountant' button in the 'Accounting Firms' section.

C. Once you have entered the information, just select "next".



The screenshot shows a browser window with the URL 'https://qbo.intuit.com/...'. The page title is 'Enter Accountant's email Address' and it is 'Page 6 of 7'. The form has two input fields for 'Accountant's email address' and 'Confirm email', with a red arrow pointing to the first field. Below these are fields for 'Name (Optional)' with sub-fields for 'First', 'MI', and 'Last'. There is a paragraph of text explaining the invitation process. At the bottom, there are 'Cancel', 'Back <', and 'Next >' buttons, with a red arrow pointing to the 'Next >' button.

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D. And then "Finish".



After this, your user will receive an email invitation to access your datafile.

Once this is accepted, they will be an active user on your account.

NOTE: Should you wish to delete or modify their access at anytime, simply follow the same process as above, but instead of selecting "New", you will select "Edit" or "Delete".

For any questions or more assistance, please contact our office.

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Let's talk about how we can help you
achieve your goals.

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CONSULTATION TODAY.

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