

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
Accounting	Full	None	None	None	Full	Mixed
Asset Accounts	Full	None	None	None	Full	Full
Edit Closed Transactions	Full	None	None	None	Full	None
Equity Accounts	Full	None	None	None	Full	Full
General Journal	Full	None	None	None	Full	None
Liability Accounts	Full	None	None	None	Full	Full
Manage Fixed Assets	Full	None	None	None	Full	None
Working Trial Balance	Full	None	None	None	Full	None
Banking	Mixed	Mixed	Mixed	Full	Full	Mixed
Bank Accounts	Full	None	None	Full	Full	Full
Company Checking Account	Full	None	None	Full	Full	Full
Company Savings Account	Full	None	None	Full	Full	Full
Petty Cash Account	Full	None	None	Full	Full	Full
Checks	View	None	None	Full	Full	View
Credit Card Accounts	Full	Full	None	Full	Full	Full
Credit Card Charges	View	Full	None	Full	Full	View
Deposits	View	None	Full	Full	Full	View
Loan Manager	None	None	None	Full	Full	Full
Online Banking	None	None	None	Full	Full	Full
Reconcile	Full	None	None	Full	Full	Full
Transfer Funds	Full	None	None	Full	Full	Full
Centers	View	Mixed	Mixed	Mixed	Full	Mixed
Customer Center	V-VB	View	Full	VC	Full	VC
Employee Center	View	View	View	View	Full	View
Vendor Center	View	Full	None	Full	Full	View
Company	Mixed	Mixed	Mixed	Mixed	Full	Mixed
Billing Solutions Sign Up	None	None	None	None	Full	None
Company Information	None	None	None	None	Full	None
Company Preferences	None	None	None	None	Full	None
Enter Vehicle Mileage	None	None	Full	None	Full	Full
Find All Transactions	Full	None	None	None	Full	Full
Planning & Budgeting	Mixed	None	None	None	Full	Full
Business Planning & Analysis	None	None	None	None	Full	Full
Set Up Budgets and Forecast	Full	None	None	None	Full	Full
Print Labels	None	Full	Full	Full	Full	Full
Remote Access	Full	Full	Full	Full	Full	Full
Set Closing Date & Password	Full	None	None	None	Full	None
Set Up Online Banking	None	None	None	None	Full	None
Synchronize Contacts	None	None	Full	None	Full	None
Customers & Receivables	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed
Accounts Receivable Accounts	Full	None	Full	None	Full	Full
Assess Finance Charges	None	None	Full	None	Full	None
Billable Time and Costs	None	None	Full	None	Full	None
Change Item Prices	None	Full	Full	None	Full	None
Credit Card Refunds	None	None	None	None	Full	None
Credit Memos	View	None	Full	Full	Full	View
Estimates	View	None	Full	None	Full	View

Invoices	View	None	Full	None	Full	View
Override Credit Limit	None	None	Full	None	Full	None
Receive Payments	View	None	Full	None	Full	View
Sales Orders	View	None	Full	None	Full	View
Sales Receipts	View	None	Full	None	Full	View
Statement Charges	View	None	Full	None	Full	View
Statements	None	None	Full	None	Full	None
Undeposited Funds Account	Full	None	Full	None	Full	Full
Use Credit Card Numbers	None	None	Full	None	None	None
View Credit Card Numbers	None	None	Full	None	None	Full
Employees & Payroll	Mixed	None	None	None	Full	Mixed
Employee Organizer	None	None	None	None	Full	None
Paychecks	View	None	None	None	Full	View
Payroll Adjustments	View	None	None	None	Full	View
Payroll Liabilities	View	None	None	None	Full	View
Payroll Service Activities	None	None	None	None	Full	None
Payroll Tax Forms	None	None	None	None	Full	None
File	None	None	Mixed	None	Full	None
Backup	None	None	None	None	Full	None
Clean Up Company Data	None	None	None	None	Full	None
Export	None	None	None	None	Full	None
Import	None	None	None	None	Full	None
Rebuild	None	None	None	None	Full	None
Shipping	None	None	Full	None	Full	None
Verify	None	None	None	None	Full	None
Lists	Mixed	Mixed	Mixed	Mixed	Full	Mixed
Chart of Accounts	Full	View	View	View	Full	View
Class List	View	View	View	View	Full	Full
Currency List	Full	Full	Full	Full	Full	Full
Customer & Vendor Profile Lists	View	Mixed	Mixed	View	Full	View
Customer Message List	View	None	Full	View	Full	View
Customer Type List	View	View	Full	View	Full	View
Job Type List	View	View	Full	View	Full	View
Payment Method List	View	View	Full	View	Full	View
Sales Rep List	View	None	Full	View	Full	View
Ship Via List	View	View	Full	View	Full	View
Terms List	View	Full	Full	View	Full	View
Vehicle List	View	View	Full	View	Full	View
Vendor Type List	View	Full	None	View	Full	View
Fixed Asset Item List	Full	Full	Full	View	Full	View
Inventory Site List	View	Full	Full	Full	Full	Full
Item List	View	Full	Full	Full	Full	Full
Other Names List	View	Full	Full	Full	Full	Full
Payroll Item List	View	None	None	None	Full	View
Price Level/Billing Rate Level List	View	View	Full	View	Full	View
Sales Tax Code List	View	View	Full	View	Full	View
Templates List	View	Full	Full	View	Full	Full
Reports	Mixed	Mixed	Mixed	Mixed	Mixed	Mixed
Accountant & Taxes	Full	None	None	None	Full	Full
Accountant & Taxes Detail	Full	None	None	None	Full	Full
Accountant & Taxes Summary	Full	None	None	None	Full	Full
Banking	None	None	None	Full	Full	Full
Budgets & Forecasts	None	None	None	None	Full	Full
Company & Financial	Full	None	None	None	Full	Full
Company & Financial Detail	Full	None	None	None	Full	Full
Company & Financial Summary						

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

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