

Job Aid

QuickBooks Online

Managing and Changing Users

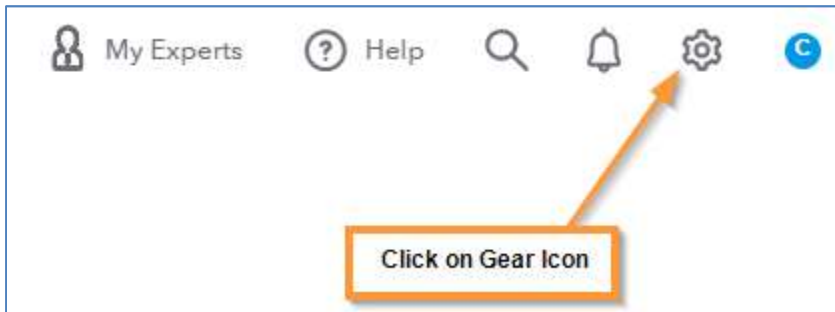
Purpose: This Job Aid will assist in managing the people that are able to access the QuickBooks Online Company.

Adding a User

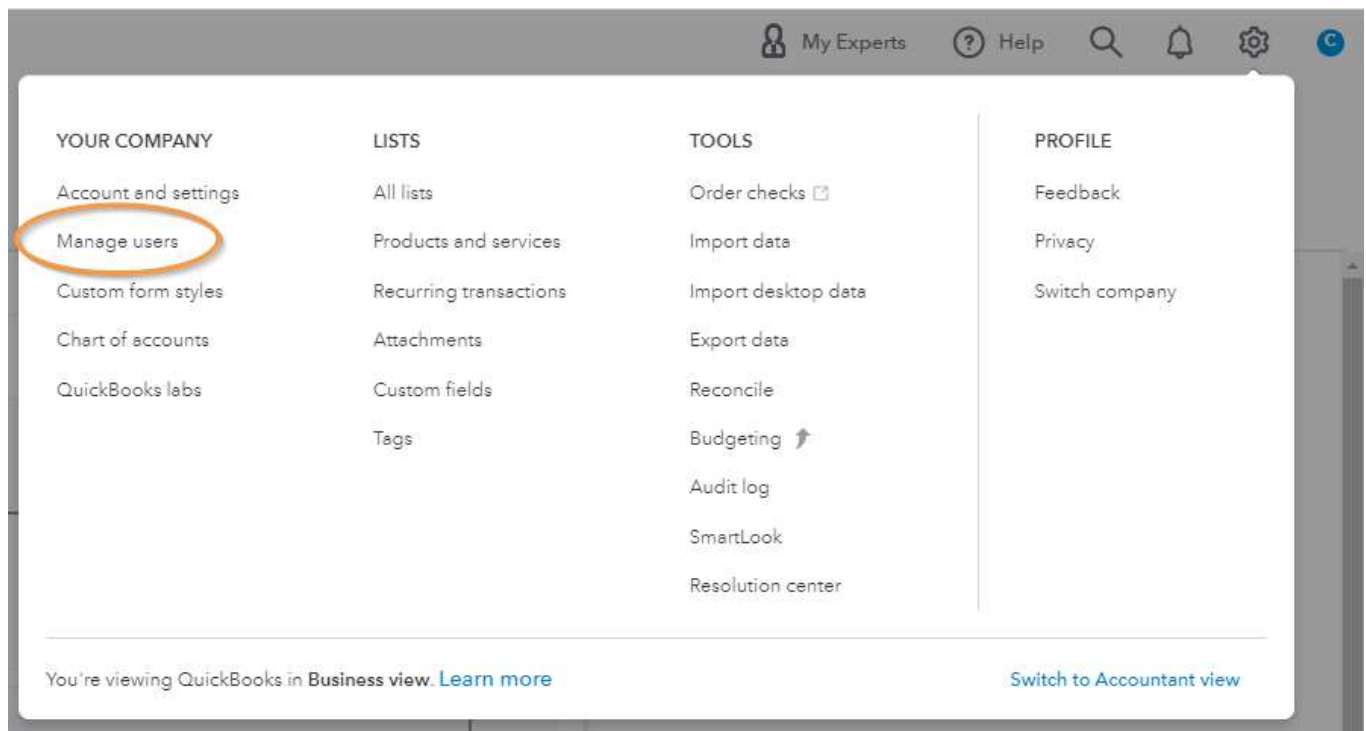
In order to Add a User please follow the steps below:

NOTE: When adding a User make sure to check that there is a User slot available as there are only 2 Users allowed per company, other than Moose Intl.

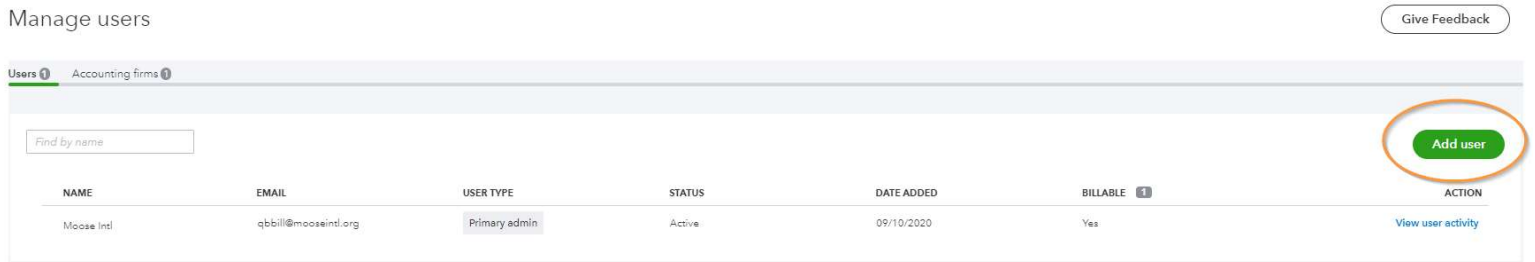
Step 1: Click on the Gear Icon in the top right-hand side of the screen.



Step 2: Click on “Manage users” in the pop-up box.



Step 3: Click on “Add User”



Step 4: Most users will be added as a “Company admin”, which gives them access to all parts of the QuickBooks Online Company.

Step 4a: Click the “Company admin” radial button so that it turns Green.

Add a new user

Select user type

These count toward your user limit.

Standard user

You can give them full or limited access, without admin privileges.

Company admin

They can see and do everything. This includes sending money, changing passwords, and adding users. Not everyone should be an admin.

These don't count toward your user limit.

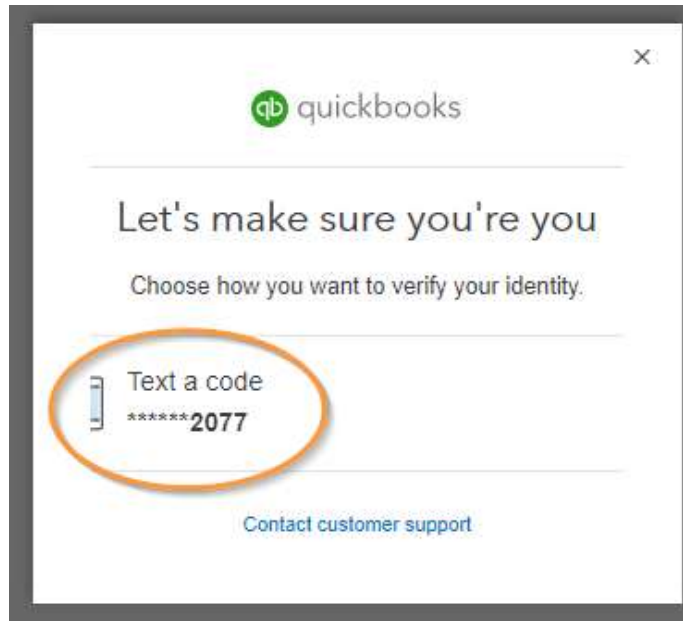
Time tracking only

They can add their own time sheets.

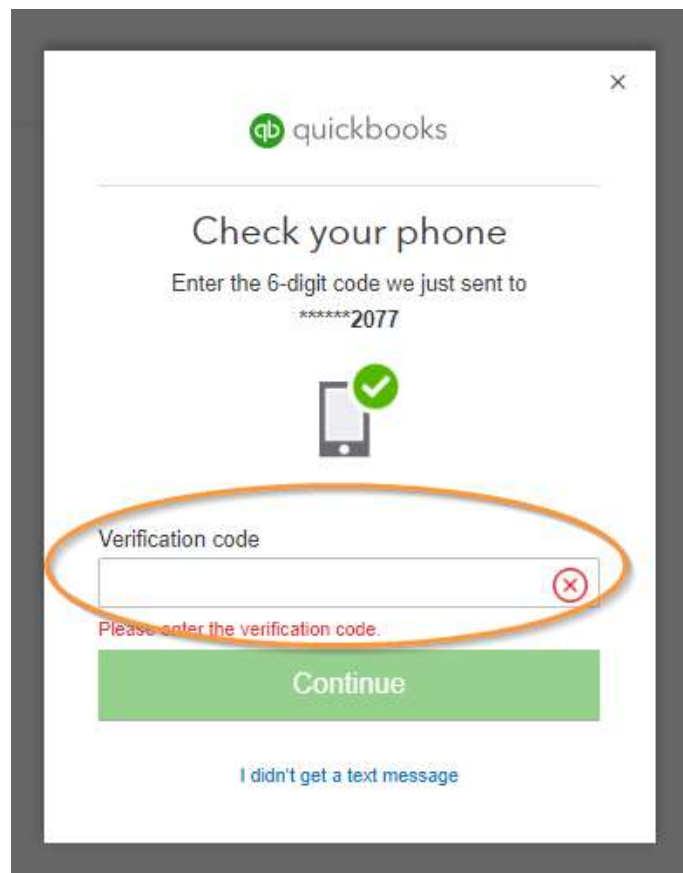
Step 4b: Click on the “Next” button on the bottom righthand side of the screen



Step 5: Click “Text a Code” and a text message will be sent to your phone for security purposes to verify who you are and that you can make the update,



Step 6: Enter the “Verification code” that was sent by text to your phone and then click “Continue”



Step 7: Enter the User contact information and then click on “Save in the bottom righthand corner of the screen.

Add a new user

What’s their contact info?

We'll invite them to create a QuickBooks account and password for access to your company. This invite expires after 30 days.

First name

Last name

Email

This will be their user id.



Contact Information

NOTE: After the “Save” button is clicked an invitation will be emailed to the new user. The new user will need to open the email and click on “Let’s go!” and follow the instructions to login for the first time.



Tue 4/19/2022 7:16 PM

MS 5 (via Intuit services) <do_not_reply@intuit.com>

Moose Intl has invited you to use QuickBooks Online Essentials

To Chris Maher

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

CAUTION: This email is from an external sender. Do not click on links or open attachments unless you know the content is safe.

Hi!

Moose Intl asked you to join the QuickBooks Online Essentials team for MS 5.

Ready to get started? **Let's go!**

Got questions? Our Support Center is here to help. Visit support.qbo.intuit.com.

We love that you're here!

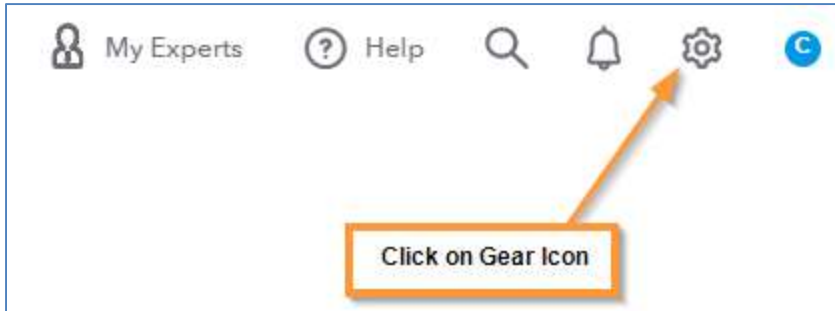
The QuickBooks Team

Removing a User

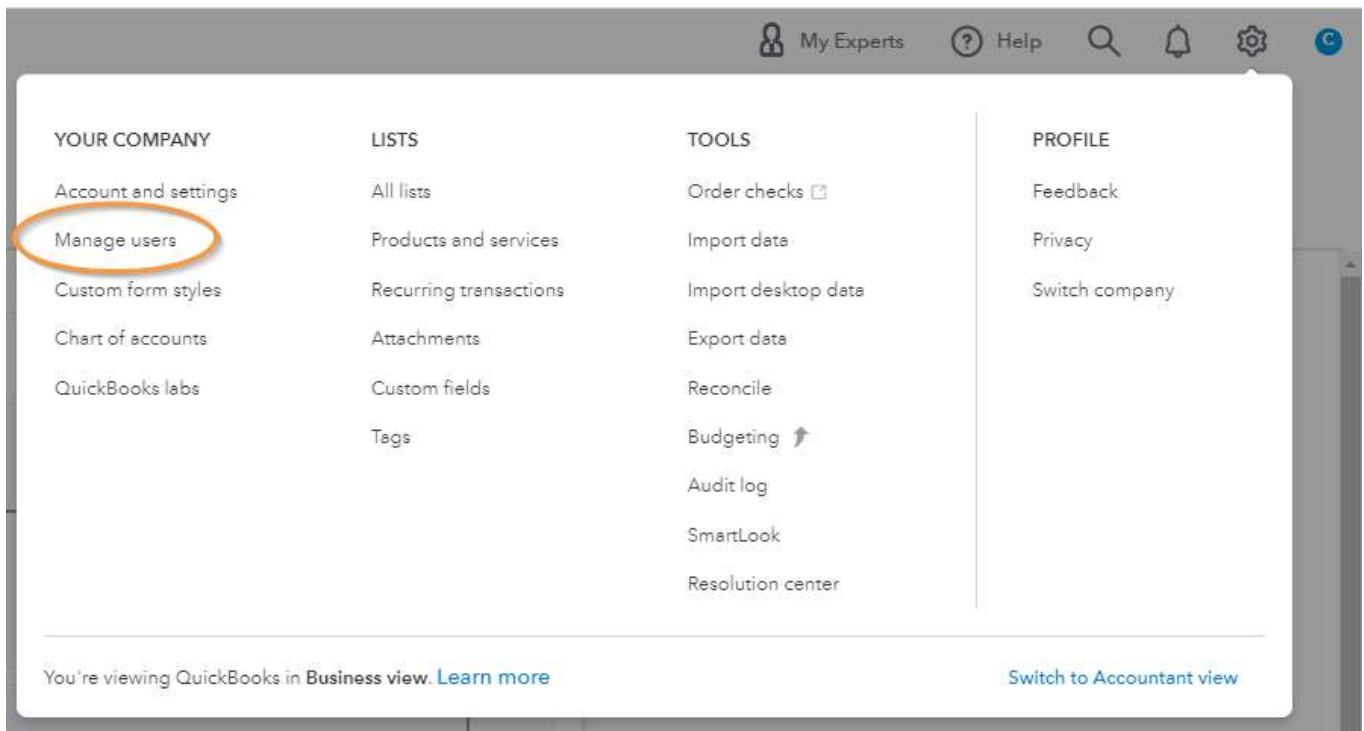
In order to Removing a User please follow the steps below:

NOTE: When removing a User make sure that there is at least one User other than Moose Intl that is able to access the QuickBooks Online Company.

Step 1: Click on the Gear Icon in the top right-hand side of the screen.



Step 2: Click on “Manage users” in the pop-up box.




Step 3: Find the person that you want to remove and Click on the down arrow next to the word "Edit" and a dropdown menu will appear.

Manage users

Give Feedback

Users 2 Accounting firms 1

Find by name Add user

NAME	EMAIL	USER TYPE	STATUS	DATE ADDED	BILLABLE 2	ACTION
Moose Intl	qbbill@mooseintl.org	Primary admin	Active	09/10/2020	Yes	View user activity
Christopher Maher	cmaher@mooseintl.org	Admin	Active	04/19/2022	Yes	Edit 



Step 4: Click on "Delete" from the dropdown menu.

Manage users

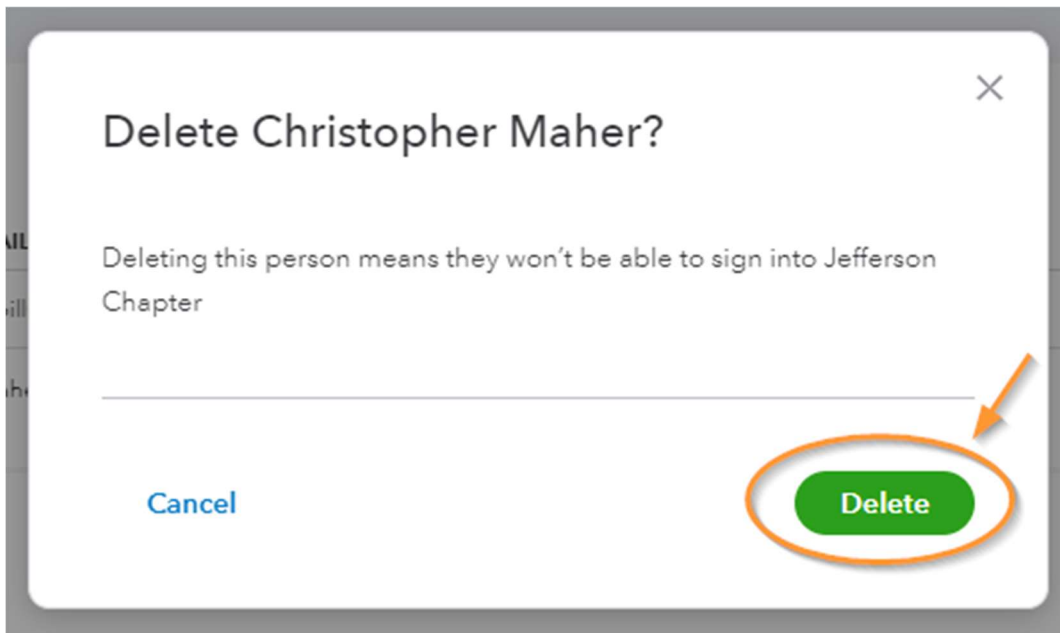
Give Feedback

Users 2 Accounting firms 1

Find by name Add user

NAME	EMAIL	USER TYPE	STATUS	DATE ADDED	BILLABLE 2	ACTION
Moose Intl	qbbill@mooseintl.org	Primary admin	Active	09/10/2020	Yes	View user activity
Christopher Maher	cmaher@mooseintl.org	Admin	Active	04/19/2022	Yes	Edit   <ul style="list-style-type: none">View user activityDelete

Step 5: Confirm that the correct person for deletion is in the popup box, then click on "Delete".



NOTE: An email will be automatically sent to the person, that was removed as a User, confirming that their access has been removed.

NOTE: If extra assistance is required, with this process contact the Territory Manager, Chapter Advocate, or the Moose Legion Area Manager.