

Authorized User Login Names are established in your QuickBooks (QB) Data File. Each User name has a unique name and password and designated access privileges to QuickBooks. Each person authorized to a specific QB User name may change the password and is responsible for transactions and changes in transactions created under the authorized User Name.

When personnel changes, the former authorized individual provides password to newly authorized individual. The new individual retains the same User name but should change the password.

bookkeeper	Full access to accounting data file, including creating and adjusting transactions, payroll entries, and generating reports.
cpd	Full access to accounting data file, including creating and adjusting transactions, payroll entries, and generating reports. Sets the Closing Date for the Fiscal Year after all transactions are entered and all appropriate reports are printed. To enter the Closing Date: Click Company, Setup Users, Set Closing Date
treasurer	Limited access to accounting data file. May display report on screen or print reports. No access to individual transactions. Treasurer may examine data together with the Bookkeeper or CPD.
admin	Unlimited access to accounting data file. The Administrator is authorized to add new users, change user's access permissions, and sets or changes accounting preferences.