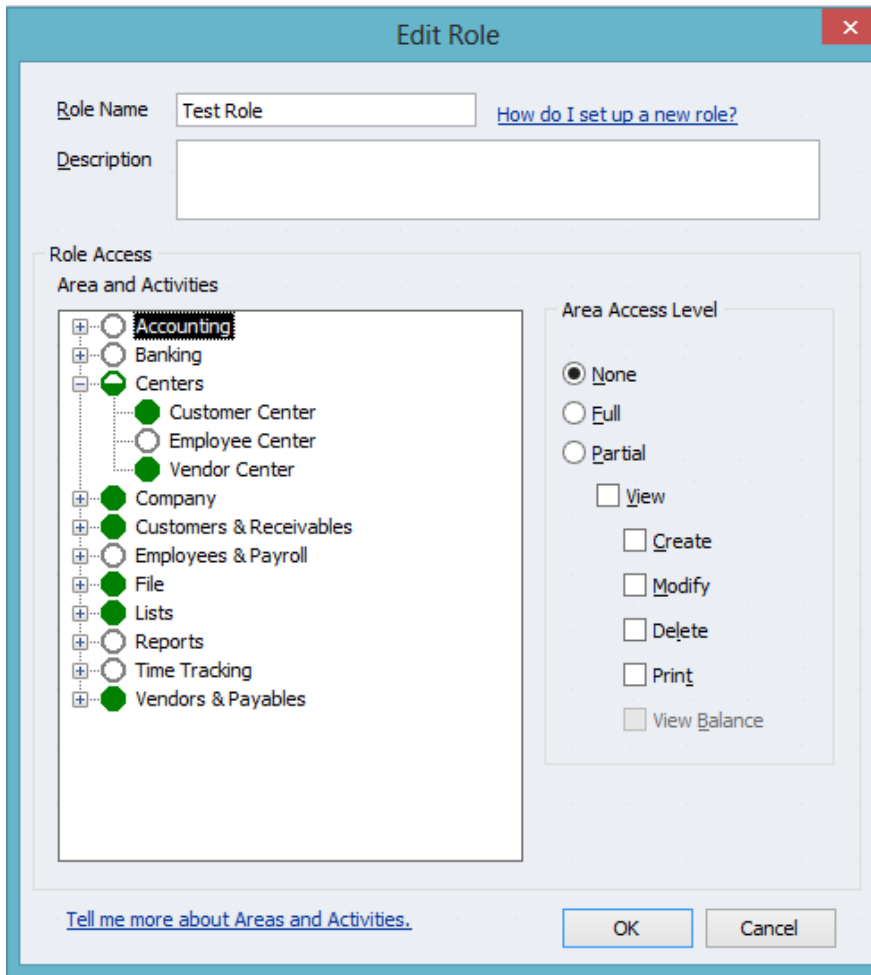


QuickBooks Permissions for proper QSalesData Toolbar Functionality



Edit Role

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

Description:

Role Access

Area and Activities

- Accounting
- Banking
- Centers
 - Customer Center
 - Employee Center
 - Vendor Center
- Company
- Customers & Receivables
- Employees & Payroll
- File
- Lists
- Reports
- Time Tracking
- Vendors & Payables

Area Access Level

None

Full

Partial

View

Create

Modify

Delete

Print

View Balance

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

Permissions Access by Roles

Areas and Activities	Test Role
Accounting	None
Asset Registers	None
Edit Closed Transactions	None
Equity Registers	None
General Journal	None
Liability Registers	None
Manage Fixed Assets	None
Working Trial Balance	None
Banking	None
Bank Registers	None
Checks	None
Credit Card Charges	None
Credit Card Registers	None
Deposits	None
Loan Manager	None
Online Banking	None
Reconcile	None
Transfer Funds	None
Centers	Mixed
Customer Center	Full
Employee Center	None
Vendor Center	Full
Company	Full
Billing Solutions Sign Up	Full
Calendar	Full
Company Information	Full
Company Preferences	Full
Enter Vehicle Mileage	Full
Find All Transactions	Full
Planning & Budgeting	Full
Business Planning & Analysis	Full
Set Up Budgets and Forecast	Full
Print Labels	Full
Remote Access	Full
Set Closing Date & Password	Full
Set Up Online Banking	Full
Synchronize Contacts	Full
Customers & Receivables	Full
Accounts Receivable Accounts	Full
Assess Finance Charges	Full
Billable Time and Costs	Full
Change Item Prices	Full
Credit Card Refunds	Full
Credit Memos	Full
Estimates	Full
Invoices	Full
Override Credit Limit	Full
Receive Payments	Full

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

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

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