

# Add Us To QuickBooks As Your Accountant

#### Navigate to the Manage Users Menu

From the home screen, click on the **Gear Menu** and beneath the column heading labeled "Your Company" select the **Manage Users** tab.

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Home	Get started with QuickBooks	Craig's Design and L	andscaping Services		
Customers		Settings	Lists	Tools	Your Company
Vendors	An overview of	Company Settings	All Lists	Import Data	Your Account
Employees		Custom Form Styles	Products and Services	Import Desktop [	Data Manage Users
Transactions		Chart of Accounts	Recurring Transactions	Export Data	Feedback
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https://qbo.intuit.com/app/u	serngt	\$390 Legal & Profession	nal		QuickBooks expert

## Open Invitation

On the Manage Users page, click **Invite Accountant** to open a new invitation.

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🖇 Transactions					New Edit	Delete Activity
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Ch Sales Tax	You can invite up to two account	ting or bookkeeping firms to provide them, and	any employees they may have authoriz	ed, access to your company	data.	
📣 Apps	Contact Name	Email Address	Status			
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### Enter Our Name and Email

Enter our name and email address into the text boxes and click **Next** when you've finished.

Enter Accountant's er	mail Address	Page 6 of 7
Accountant's email addres	s A	
Confirm email		
charles@tzinberg.com		
Name (Optional) First N	11 Last	
Charles	Tzinberg	
Your accountant will be sent	an email that contains a link for sid	ining into your

Your accountant will be sent an email that contains a link for signing into your company.

Your accountant will be asked to create a user ID before signing in the first time, unless they already have an account with Intuit Business Services.

Until your accountant signs in, their status on the Manage Users page is "Invited." After accepting the invitation, their status changes to "Active."

By default, your accountant will be given "Company Administrator" privileges for performing tasks like closing your books for prior periods. You can give to your accountant a Master Admin privilege allowing him a full access of your company by clicking Transfer Master Administrator on the Manage Users page.

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#### Finalize Invitation

Click **Finish** and you're done. Your accountant will get an email with a link to your QuickBooks. From there, it's up to your accountant to log in and start working on your books.

As always, should you have any questions, need further discussion, or we can be of assistance in any way, please contact us.