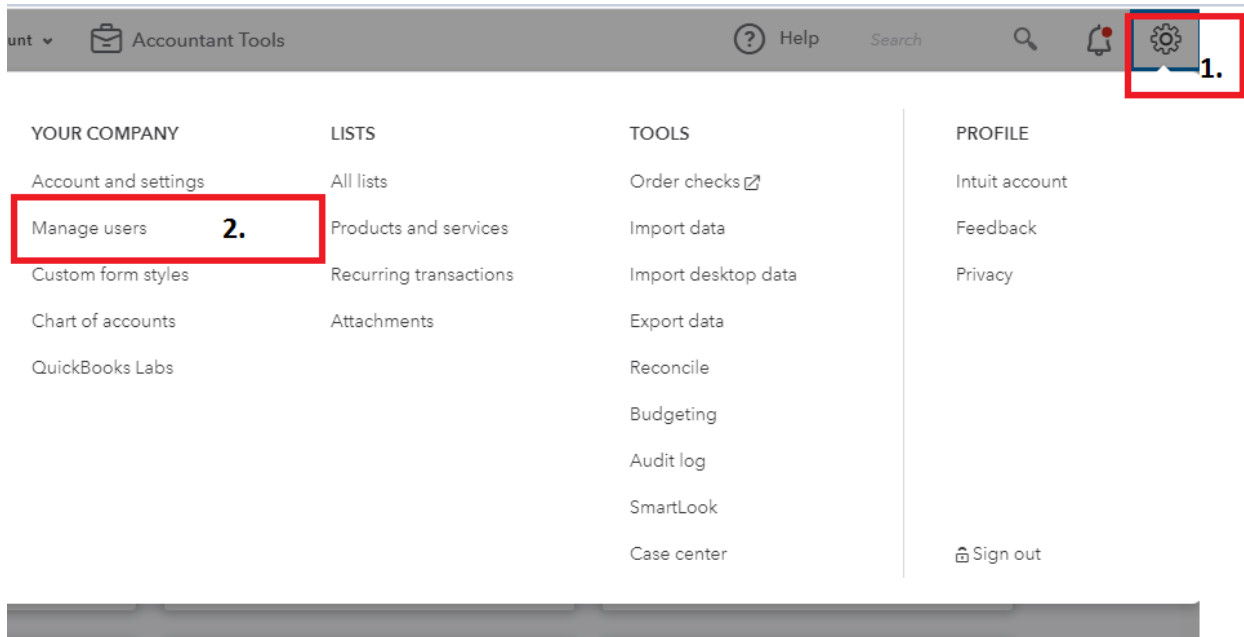


How to Invite Patrick Accounting to Your Quick Books

STEP 1: Click on “Gear” icon in the upper right corner

STEP 2: A new box will appear. Click on Manage Users.

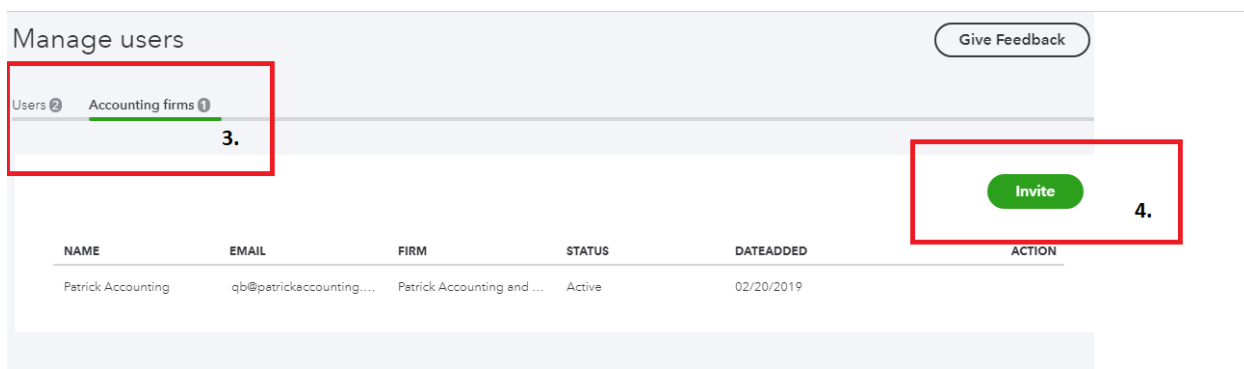


The screenshot shows the top navigation bar of the Patrick Accounting interface. The 'Gear' icon in the upper right corner is highlighted with a red box and labeled '1.'. Below the navigation bar, the 'Manage users' option under the 'YOUR COMPANY' section is highlighted with a red box and labeled '2.'. The interface is organized into four main sections: YOUR COMPANY, LISTS, TOOLS, and PROFILE.

YOUR COMPANY	LISTS	TOOLS	PROFILE
Account and settings	All lists	Order checks ↗	Intuit account
Manage users 2.	Products and services	Import data	Feedback
Custom form styles	Recurring transactions	Import desktop data	Privacy
Chart of accounts	Attachments	Export data	
QuickBooks Labs		Reconcile	
		Budgeting	
		Audit log	
		SmartLook	
		Case center	Sign out

STEP 3: Click on “Accounting Firm” – not Users

STEP 4: Invite (Big Green Button) will appear



The screenshot shows the 'Manage users' page. The 'Accounting firms' tab is highlighted with a red box and labeled '3.'. The 'Invite' button is highlighted with a red box and labeled '4.'. The page includes a 'Give Feedback' button and a table of users.

NAME	EMAIL	FIRM	STATUS	DATEADDED	ACTION
Patrick Accounting	qb@patrickaccounting...	Patrick Accounting and ...	Active	02/20/2019	Invite 4.



STEP 5: Enter qb@patrickaccounting.com and click save.

What's your accountant's contact info?

Your accountant and members of their firm will have admin access to your company data.

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

First name
Patrick

Last name
Accounting

Email
qb@patrickaccounting.com
This will be their user id.

Save

LAST STEP: Let us know you sent over an invite, and we'll get started. Thank you!

