



# QuickBooks Online Advanced **Advisor Manual**



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## **Purpose**

This document has been specifically created as a training guide only for ProAdvisors using QuickBooks Online Advanced and is current at the time of publication.

## **Version**

Version 1 - November 2023

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## Section 1 - Introducing QuickBooks Online Advanced

### Welcome the latest addition to the QuickBooks platform

QuickBooks Online Advanced is the latest addition to the QuickBooks platform. It provides greater automation, customisation and control to help growing businesses to get more done faster, so they can spend less time on bookkeeping and repetitive tasks and focus more on the insights they need to grow their business.

QuickBooks Online Advanced is the most feature rich version in the QuickBooks family, providing functionality to support thriving businesses with more complex needs.

<b>Simple Start</b>	<b>Essentials</b>	<b>Plus</b>	<b>Advanced</b>
Track income & expenses	Track income & expenses	Track income & expenses	Track income & expenses
Send unlimited invoices & quotes	Send unlimited invoices & quotes	Send unlimited invoices & quotes	Send unlimited invoices & quotes
Snap & store receipts	Snap & store receipts	Snap & store receipts	Snap & store receipts
Track kilometres	Track kilometres	Track kilometres	Track kilometres
Connect your bank	Connect your bank	Connect your bank	Connect your bank
Track GST & e-lodge BAS	Track GST & e-lodge BAS	Track GST & e-lodge BAS	Track GST & e-lodge BAS
Insights & reports	Insights & reports	Insights & reports	Insights & reports
Cash flow planner	Cash flow planner	Cash flow planner	Cash flow planner
Phone & chat messaging support	Phone & chat messaging support	Phone & chat messaging support	Phone & chat messaging support
	Free data migration	Free data migration	Free data migration
	Manage suppliers & bills	Manage suppliers & bills	Manage suppliers & bills
	Multi-currency	Multi-currency	Multi-currency
	Set-up recurring transactions	Set-up recurring transactions	Set-up recurring transactions

	Manage users (up to 3)	Track inventory	Track inventory
		Track projects & locations	Track projects & locations
		Manage budgets	Manage budgets
		Manage users (up to 5)	Automate workflows
			Customise reports
			Customise dashboards
			Manage tasks
			Customise roles
			Backup & restore data
			Manage employee expenses
			Manage revenue recognition
			Manage users (up to 25)

Head to the website to [see more detail](#).

## Getting started

This user manual is an annexure to the [QuickBooks Online Advisor Manual](#) and focuses on the features unique to QuickBooks Online Advanced. We have assumed you have experience with the QuickBooks Online products so if you haven't used QuickBooks before, we recommend you review the [QuickBooks Online Advisor Manual](#) first.

## Which businesses is QuickBooks Online Advanced ideal for?

As you know better than anyone, every business has different needs. For businesses outgrowing the capabilities of their current accounting solution, QuickBooks Online Advanced could be the next step for their business.

Businesses most suited for QuickBooks Online Advanced tend to:

- have revenue greater than \$500,000pa
- have more complex workflows or approval processes
- want to automate repetitive tasks
- want to customise their reporting
- want to back-up their data
- have more than 5 team members requiring access

## Benefits of using QuickBooks Online Advanced

QuickBooks Online Advanced includes all the features found in QuickBooks Online Plus as well as the following new features:

Boost productivity with automation

- Easily reclassify bulk transactions\*
- Create tasks to manage projects and workflows
- Create custom workflows to streamline processes and approvals
- Easily manage employee expense claims

Access intelligent customisable insights

- See key information in the Performance centre\*
- Use 12 additional custom fields across all reports#
- Create custom reports with data visualisation
- Automate revenue recognition for greater accuracy
- Embed custom fields in Projects#

Feel confident, secure and in control

- Add up to 25 concurrent users
- Add up to 3 accountant users
- Utilise automatic backup, and restore data to a point in time
- Customise role permissions to manage access to sensitive business information

\*These features are available in QuickBooks Online Accountant and are now available in QuickBooks Online Advanced.

#These features are available today however have been enhanced in QuickBooks Online Advanced.



## Section 2 - Navigating QuickBooks Online Advanced

In this section we explore the new features available in QuickBooks Online Advanced. We provide step by step instructions on how to use these features along with a short instructional video.

Should you require assistance at any time, please contact our Customer Success team by phone on 1800 114 837 or head to [QuickBooks Support](#) to access help articles, Community discussions with other QuickBooks users, video tutorials and more.

Let's jump in and take a look at QuickBooks Online Advanced.

---

### Reclassify Transactions

You may need to edit multiple transactions such as update the GST or move them to a different account. In QuickBooks Online Advanced you can reclassify multiple transactions in a single step instead of one at a time.

The following changes are available using the reclassify transaction feature:

- Accounts - transferring from one chart of account to another
- Class or Location - transferring or updating the Class or Location of transactions
- GST Codes - update the GST categorisation of transactions

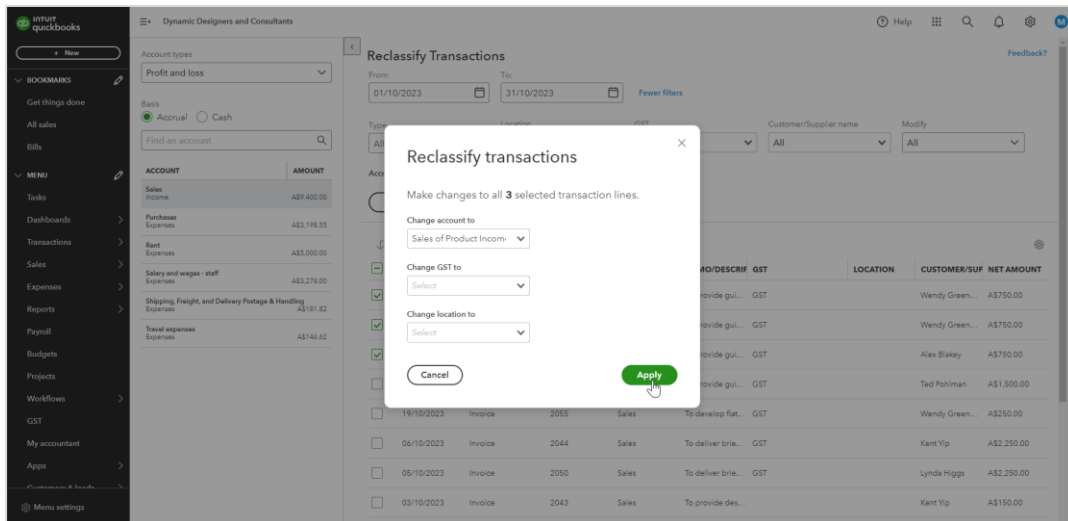
#### How to reclassify transactions

1. Open your client's QuickBooks Online company.
2. Select the Accountant Tools and then Reclassify transactions.
3. From the **Account types** dropdown menu, select **Profit and loss** to see income and expense accounts. Or select **Balance sheet** to see your asset, liability, and equity accounts.
4. From the Account list, select the account with the transactions you want to change.
5. Use these type, class, customer/supplier, and modify filters to filter the list. **Tip:** You can also select **Accrual** to see all paid and unpaid transactions or **Cash** to see only paid transactions.
6. Select Find transactions.
7. Tick the box for each transaction you want to change.

**Note:** if you don't see **Change location to**, you may need to set up locations for your account.

**Important:** Before you move transactions to Accounts Receivable or Accounts payable, make sure there's a customer or supplier. Don't leave these fields blank.

8. Select Reclassify.



9. Select a new account to move the transactions to from the **Change account to** dropdown, or a new class from **Change class to** dropdown.

10. When you're ready, select **Apply**.

**See it in action.**

[See how to reclassify transactions \(2:29\)](#)

## Tasks

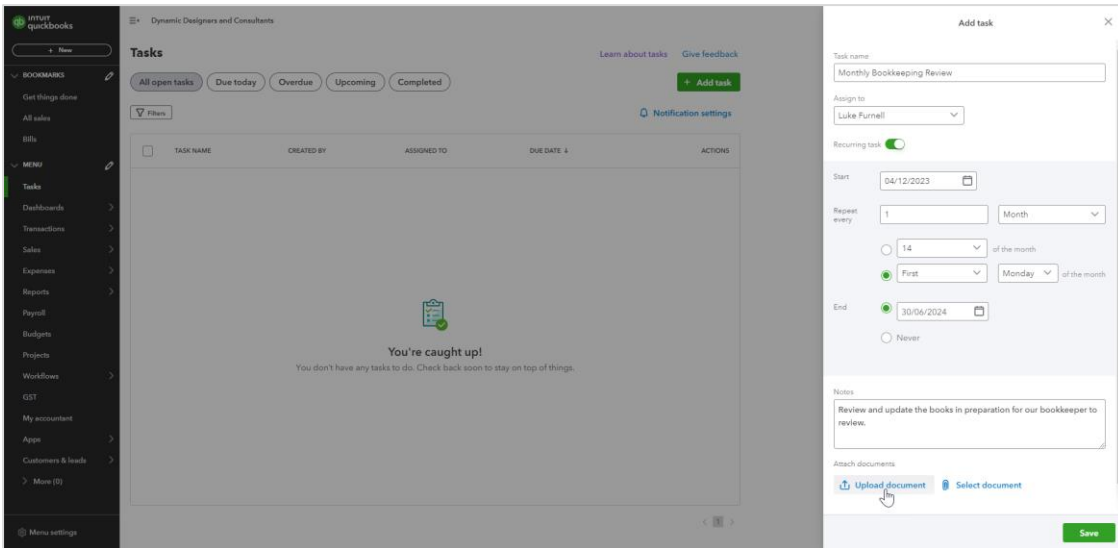
Tasks help your clients manage what work needs to be completed and by when. They can create one-off tasks or set up tasks that recur regularly. Best of all, tasks can help organise their work in one central location so nothing falls through the cracks.

Where defined, the new Workflow feature in QuickBooks Online Advanced can automatically create tasks for team members to complete. Using Tasks, your clients can:

- Create tasks for themselves
- Create tasks for team members where permissions allow
- Automate tasks from Workflows
- Create recurring tasks
- Upload documents to tasks
- Add comments to tasks

### How to create custom tasks

1. Go to the **Tasks** menu.
2. Select **+Add task**.
3. Enter the task name and set the due date.
4. In the **Assign to** dropdown, select the task owner. **Note:** The user needs to have admin access.
5. (Optional) If you'd like the task to repeat, turn on **Recurring task**. You then have the option to set the task to repeat on certain days of the week, month or year. Choose the option that works best for you.  
**Tip:** To change/delete a recurring task, select **Edit recurring task** or **Delete recurring task**.
6. In the **Notes** field, enter a description. These are the instructions for the task.
7. To upload a file, select **Upload document**.  
**Note:** Documents uploaded here are visible to all users of your company. Or, select **Select document** to fetch files that are already in QuickBooks.
8. Then select **Save**.



**See it in action.**

[How to use tasks \(3.45\)](#)

## Workflows

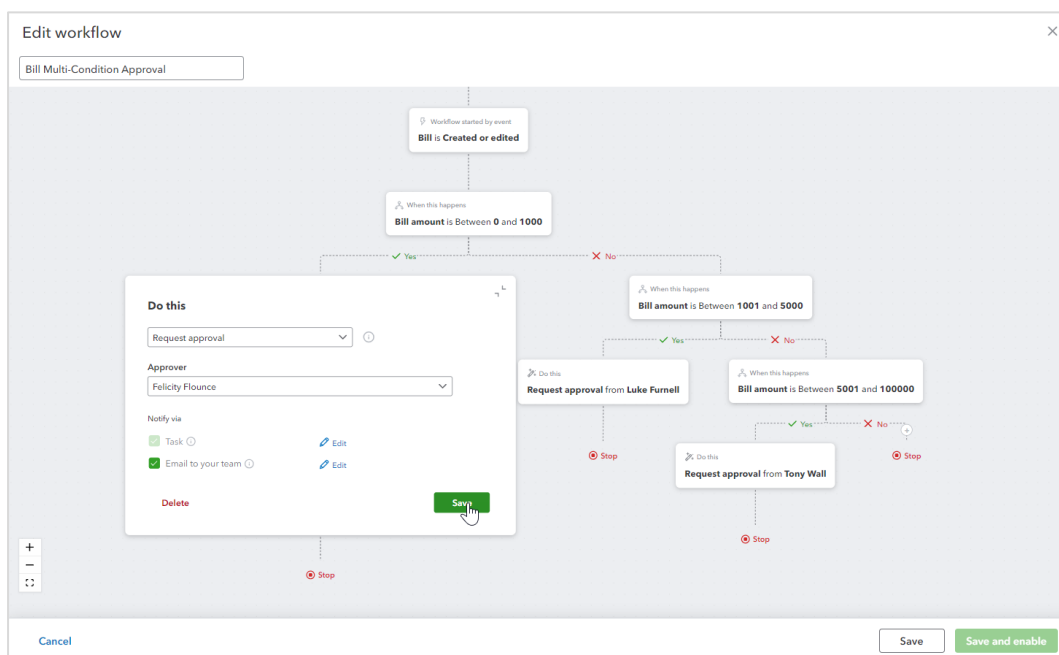
With QuickBooks Online Advanced, your clients can use workflows to automate common tasks in QuickBooks, like sending payment reminders, or new invoices to customers. They can also send reminders to their team to complete specific tasks like reviewing open invoices. Automating tasks with workflows saves time so your clients can focus on their business.

Your clients can streamline the following using workflows:

- Automate key accounting tasks
- Set reminders for transactions like invoices, payments, or deposits with a due date
- Notify customers when their payment has been received
- Route invoices on pre-set approval flows quickly
- Setup custom templates

### How to create custom workflows

1. Select the **Workflows** menu. Or select **Settings** ⚙️ and then **Manage Workflows**.
2. Select the **Templates** tab.
3. Select **+ Custom workflow** to create a new template.
4. In the ▼ dropdown for **Select record for workflow**, select the transaction type.
5. In the **Define action that you'd like QuickBooks to do** section, select action. The options that display depend on the type of transaction you select.
6. Select **Next**.
7. In the **Workflow name** field, enter a name for the template.
8. Complete the fields in the window.
9. When you're done, select **Save and enable** to turn on your workflow.



**See it in action.**

[How to setup a custom workflow](#) (4.42)

[Create your own template such as send recurring statement to customers](#) (2.34)

## Employee Expense Claims

Your clients' team members can now submit their expenses and upload receipts for review by their manager in QuickBooks Online Advanced. This helps you and your client track and record employee expenses in one place. Using employee expense management;

- Team members can submit expenses and record receipts
- Managers can review, track, and store employee expenses in one location
- Managers can be notified when their employees submit expenses for review

### Giving employees access to submit expense claims

Firstly, before employees can submit expense claims, they have to be set up as a QuickBooks Online user. Next, they need to be given access to submit expenses claims and there are 2 ways your clients can give their employees access to submit expense claims in QuickBooks Online Advanced:

#### 1. Assign access from the manage users option by using a role which provides access to expense claims

1. In QuickBooks Online, select **Settings** ⚙, then select **Manage users**.
2. Select **Add user**, then enter the employee's name and email address.  
**Note:** Special characters aren't allowed other than a period in the user's name. For the email field, you can use a period and the @ symbol.
3. Select the **Roles** ▼ dropdown, then select the role, **Track time and submit expense claims**.

The screenshot shows the 'Add a new user' interface in QuickBooks Online. The user is 'Mandy Woodlands' with email 'mandywoodlands@gmail.com'. The 'Roles' dropdown is open, and 'Track time and submit expense claims' is selected. The 'Send invitation' button is visible at the bottom right.

4. Review the features this role gives access to. You can expand each section.
5. In the **time tracking** section, **select sync team member** to link this user to an employee or supplier record in QuickBooks.
6. Choose from existing employees and suppliers present in your QuickBooks or choose to add a new one by selecting **+ add new**.
7. A right side drawer opens where you add the new supplier or employee. Switch between adding a supplier or employee using the **contact type** field at the top of the drawer.
8. Enter contact details of the supplier or employee, then select **Save**.
9. With the employee or supplier details entered, they will now appear in the sync your team member pop-up and select **Sync**.
10. Select Send invitation.

## 2. Assign access from the expense claims page

1. In QuickBooks Online, go to **Expenses**, then **Expense claims**.
2. Select Manage settings.
3. Select Manage users.
4. Here, you can see a list of employees who have been assigned expense claims access.
5. Select **Add user**.
6. You will be redirected to the add user page where you can enter the employee's name and email address.  
**Note:** Special characters aren't allowed other than a period in the employee's name. For the email field, you can use a period and the @ symbol.
7. The track time and submit expense claims role will be pre-selected.
8. Review the features this role gives access to. You can expand each section.
9. In the **time tracking** section, click on **sync team member** to link this user to an employee or supplier record in your QuickBooks.
10. You can choose from existing employees and suppliers present in your QuickBooks or choose to add a new one by clicking on **+ add new**.
11. A right side drawer opens where you can add the new supplier or employee. You can switch between adding a supplier or employee using the **contact type** field in the drawer.
12. Enter the contact details of the supplier or employee, and then select **Save**.
13. With the employee or supplier details entered, they will now appear in the sync your team member pop-up and select **Sync**.
14. Select Send invitation.



## Turning on expense submission notifications

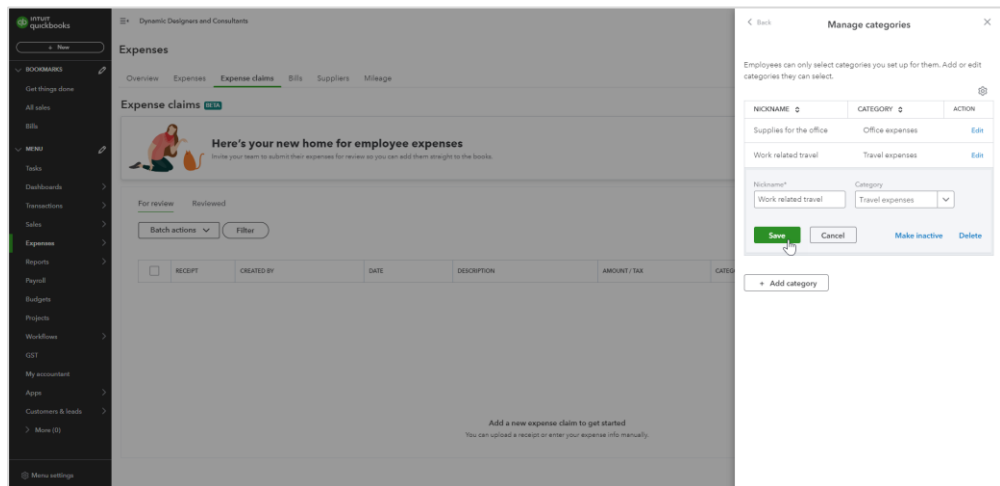
**Note:** All administrators in QuickBooks Online Advanced will receive an email notification.

1. In QuickBooks Online, go to **Expenses**, then **Expense claims**.
2. Select Manage settings.
3. Select Notify me when an employee submits an expense.
4. Select **Done**.

## Managing expense categories

Set up category nicknames so it's easier for your employees to assign the correct category to an expense.

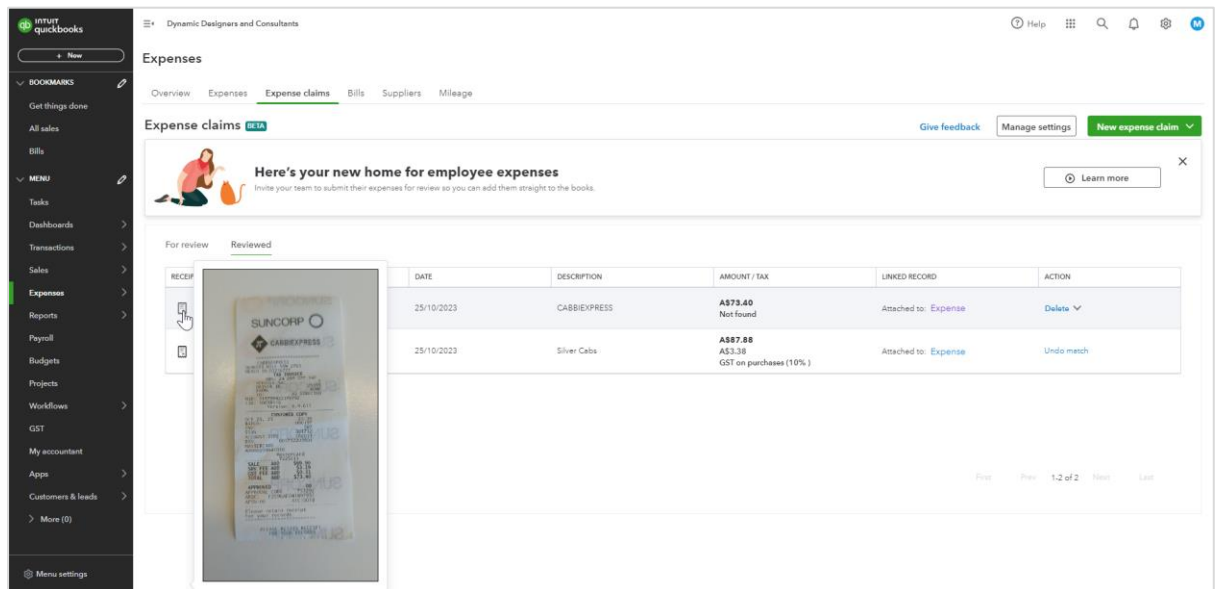
1. In QuickBooks Online, go to **Expenses**, then **Expense claims**.
2. Select Manage settings.
3. Select **Manage categories** to edit categories employees can select.
4. Enter a nickname, then choose the category it belongs to.
  - a. For example: Use the nickname "Client meals" for the "Meals & Entertainment" category to keep it simple.



5. Select **Save**.
6. In the Action column, select **Edit** if you need to make any changes to that category.
  - a. Select **Make inactive** to remove that category from employee view.
  - b. To hide/view any previously disabled categories, select the gear icon, then **Show inactive** or **Hide inactive**.

## Reviewing claims and create expenses

1. In QuickBooks Online, go to **Expenses**, then **Expense claims**.
2. In the **For review** tab, select a receipt.



3. Review the details, add info, select/enter sales taxes, and make any necessary adjustments.
4. Select Save and next, then Create expense.

## Submitting expenses as an employee

To submit an expense claim, the team member will need to be invited into the QuickBooks file. Once they have accepted the email invitation, they can submit expenses on a mobile device or computer for tracking or reimbursement.

### Mobile

1. On your mobile device, open a **web browser**\* and sign in to QuickBooks.

**\*Note:** Expenses claims cannot be submitted through the QuickBooks mobile app. You can use a mobile web browser.

2. Go to Expenses, then Expense claims.
3. Select New expense claim.
4. Do one of the following:
  - To take a photo or choose an image from your photo library, select **Use receipt capture**.
    - a. Make sure the photo looks good, then select **Next**.
    - b. Make sure the info pulled from the receipt is correct, and make adjustments if necessary\*.  
**\*Note:** The expense 'Amount' should include sales taxes paid.
    - c. (optional) Select I need to be reimbursed.
    - d. Add the supplier, category, and business purpose.
    - e. Select Submit for review.

- If you don't have a receipt, select **Enter expense manually**.
  - a. Enter the amount.
  - b. (optional) Select I need to be reimbursed.
  - c. If necessary, add the transaction date.
  - d. Add the supplier, category, and business purpose.
  - e. Then select Submit for review.

## Computer

1. Sign in to QuickBooks Online, go to **Expenses**, then **Expense claims**.
2. Select New expense claim.
3. Do one of the following:
  - To choose a file or photo, go to **Upload receipt**.
    - a. Select the receipt to upload.
    - b. Make sure the photo or file looks good, then select **Upload**.
    - c. Make sure the info pulled from the receipt is correct, and make adjustments if necessary\*.  
**\*Note:** The expense 'Amount' should include sales taxes paid.
    - d. (optional) Select I need to be reimbursed.
    - e. Add the supplier, category, and business purpose.
    - f. Select Submit for review.
  - If you don't have a receipt, select **Enter expense info manually**.
    - a. Enter the amount.
    - b. (optional) Select I need to be reimbursed.
    - c. If necessary, add the transaction date.
    - d. Add the supplier, category, and business purpose.
    - e. Then select Submit for review.

## See it in action.

[How to manage employee expense claims](#) (3:27)

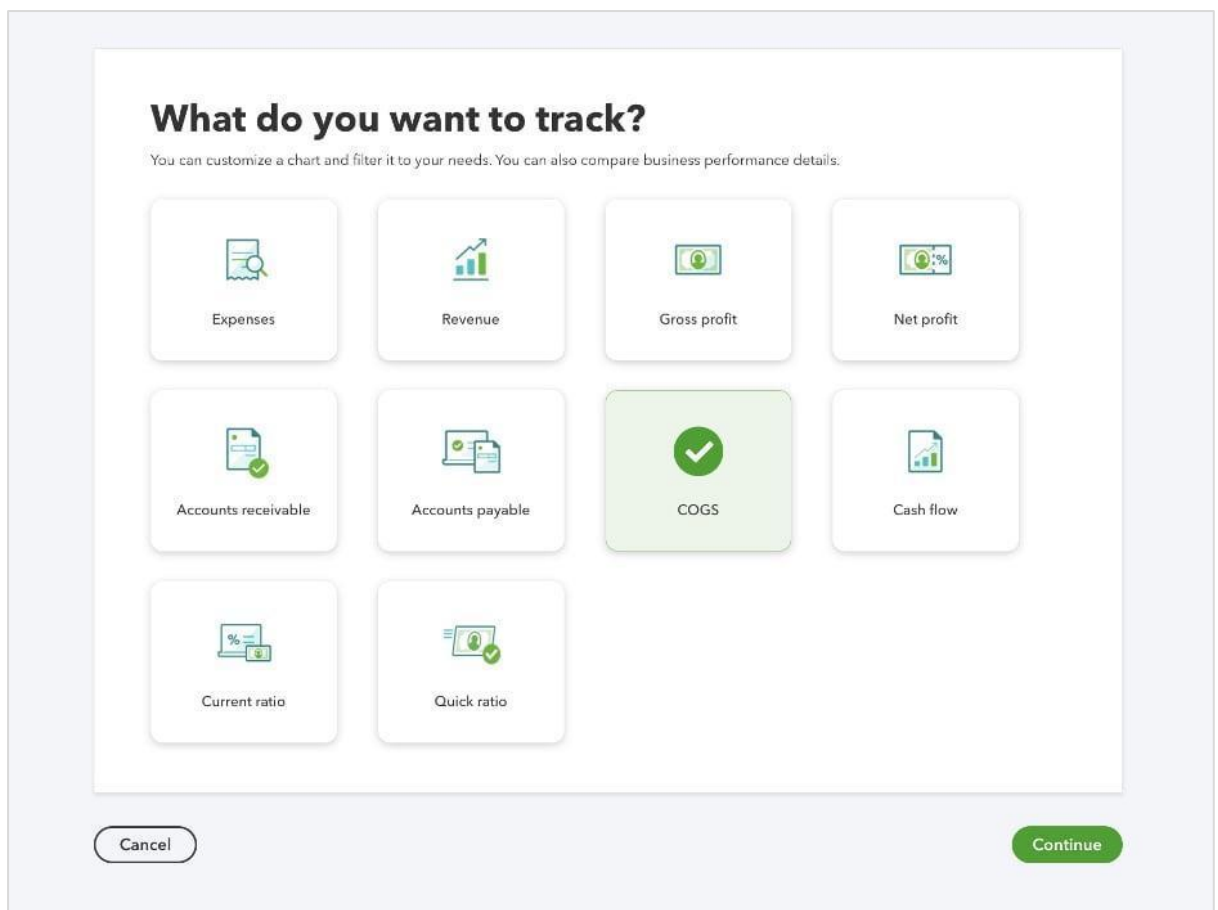
## Performance Centre

Every business tracks unique metrics to measure its performance. Within the Performance Centre, your clients can create a custom dashboard as well as custom charts to track what matters most to their business. The Performance Centre is a central repository where businesses can:

- Track unique metrics to measure business performance
- Create and customise charts to track what matters most to the business
- Easily create a chart from scratch or customise one of the templates provided

### Create a custom chart from scratch

1. Select +Add new chart.
2. Select the metric you want this chart to track. Then select **Continue**.



This opens a customization window. As you make selections, the preview updates to show you exactly what the chart will look like.

3. Give your chart a name.
4. Select the type of chart, such as **Trend line**, **Vertical bar**, or **Pie chart**. These options vary based on the metric.
5. In the **Time period** dropdown, select the time period you want to track.

6. In the **Group by** dropdown, select the category you want to group your data by. You can group by classes, suppliers, locations, or other categories. In the **Select from multiple** dropdown, select the items in the category you want to track. These are what appear in the bars or lines of the chart.
7. If you want to see only data from a specific category, select it in the **Filter by** dropdown. Then use the **Select from multiple** dropdown to narrow it to items in that category.  
**Tip:** The Group by dropdown determines the type of data the chart will track. The Filter dropdown is where you decide what specific data is included. For instance, you may only want to see data when it applies to specific classes or locations. You can have up to 10 filters.
8. To compare the results over different time periods, select **Compare**. Then select **Previous period** or **Previous year same period**. For some charts, you can also compare against a budget or goal.
9. When you're done, select **Add to Dashboard**.

When you go back to the performance centre, you'll see your new chart.

### [Edit or delete a chart](#)

Success metrics always need fine-tuning. You can adjust your charts at any time:

1. Go to **Reports**
2. Select the Performance centre tab.
3. Find the chart.
4. Select the **vertical ellipsis** **:** on the chart and then **Edit chart**.
5. Make the changes you need. Then select **Save**.
6. To delete the chart, select **Delete chart**.

### **See it in action.**

[How to use the Performance Centre](#) (3:24)

## Custom Fields

Enhanced custom fields in QuickBooks Online Advanced tracks specific details important to your clients' business. You can create custom fields for almost anything e.g. sales reps, customer types, supplier IDs, and more. You can then add your custom fields to sales forms, purchase orders, expense forms, customer profiles, and supplier profiles.

Custom fields can also be used to organise lists, narrow search results, and filter financial reports. Track the little things to get the big picture:

- Create more detailed reports with multiple field types
- Search, sort, and filter the data you need, faster
- Add up to 12 custom fields per form

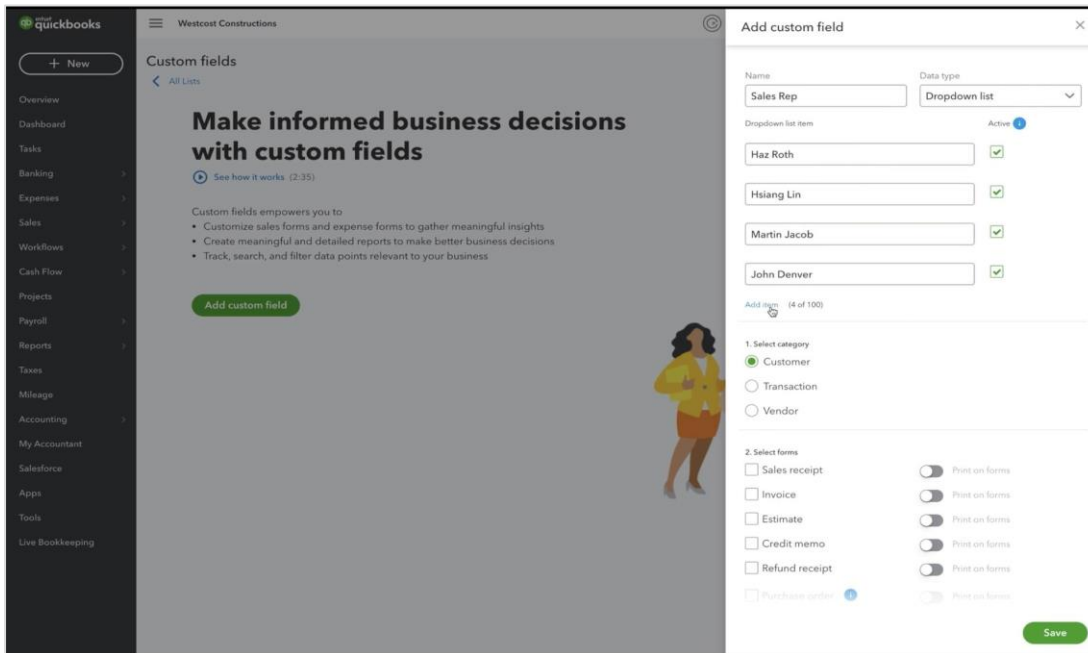
Note: Up to 156 unique active custom fields are available across Sales Receipts, Invoices, Quotes, Credit Memos, Refund Receipts, Purchase Orders, Expenses, Bills, Cheques, Supplier Credits and Credit Card Credits transaction forms, as well as Customer and Supplier profile forms.

### Creating custom fields

Your clients can have up to 12 active custom fields for each type of form (invoice, quote, purchase order, expense, bill, and so on), and each type of profile (customer and supplier).

Besides text, you can also create custom dropdown, date, and number fields.

1. Go to **Settings** ⚙️. Then select **Custom fields**.
2. Select **Add custom field**. If you've already created a field, you'll see **Add field** instead.
3. Give your custom field a name.
4. Select the type of data that will go in your custom field: **Text and number**, **Number**, **Date**, or **Dropdown list**. If you select Dropdown list, enter the items in the list.
5. Select the category the custom field belongs to: **Customer**, **Transaction**, **Supplier**, or **Project**. Customer fields are for customer profiles, and supplier fields are for supplier profiles. You can assign transaction fields to sales forms (like invoices, quotes, and sales receipts) and purchase forms (like purchase orders, bills, expenses, and cheques).



6. Select the forms where you want the custom field to appear. **Note:** To use custom fields in purchase orders, you need to [turn on purchase orders for your company](#) first.
7. If you want customers or suppliers to see the field on a form (such as invoices, estimates, or purchase orders), turn on the **Print on form** switch.

**Note:** Out of a total of twelve available custom fields per transaction-type form, only three fields can be shown/printed.

8. When you're finished, select **Save**.

Now that you have custom fields, learn about how you can use them:

- [Search and sort with custom fields](#)
- [Use custom fields for suppliers and expenses](#)
- [Use custom fields in reports](#)

## Manage your custom fields in one place

The custom fields page lists all your custom fields so you can manage them easily. To see it, go to **Settings** ⚙️, then select **Custom fields**.

CUSTOM FIELDS		SALES					PURCHASES						
NAME	CATEGORY	SALES RECEIPT	INVOICE	ESTIMATE	CREDIT MEMO	REFUND RECEIPT	PURCHASE ORDER	EXPENSE	BILL	CHECK	VENDOR CREDIT	CREDIT CARD CREDIT	ACTIONS
Customer ID	Customer	✓	✓	✓	✓	✓							Edit ↓
Customer Locatio...	Customer	✓	✓	✓	✓	✓							Edit ↓
Phone Number	Customer												Edit ↓
Invoice Type	Transaction		✓										Edit ↓
Vendor Location	Vendor						✓	✓	✓	✓	✓	✓	Edit ↓
Vendor Registrat...	Vendor						✓	✓	✓	✓	✓	✓	Edit ↓
Vendor ID	Vendor												Edit ↓
Vendor Category	Vendor						✓	✓	✓	✓	✓	✓	Edit ↓
Sales Channel	Customer	✓	✓	✓	✓	✓							Edit ↓
Department	Vendor						✓						Edit ↓

For each custom field, you can see what category it applies to and which forms it appears in. You also see the Print icon if the custom field is visible to customers or suppliers on a form.

To edit a custom field:

1. In the Actions column, select **Edit**.
2. Edit the field's name, select the forms it appears on, and choose whether it's visible to customers or suppliers.
3. When you're done with your changes, select **Save**. Any edits you make here apply to all forms that use the field.

To make a custom field active or inactive:

1. Select the **arrow** next to Edit.
2. Select Make active (or Make inactive).
3. Select **Yes** in the pop-up message to confirm your choice.



Don't worry about losing inactive custom field data. If you make a custom field inactive, your past data won't disappear. You'll still see the field on sales forms and purchase orders you've used it on, but it won't appear on new forms.

## Create or edit custom fields from a form or profile

You can also create and edit custom fields from any sales form, purchase order, expense form, customer profile, or supplier profile.

From a sales form (invoice, sales receipt, expense) or purchase form (expense and purchase order):

1. Open an existing form or create a new one.
2. Select the **Gear** icon at the top of the form (not on the navigation bar). This opens a panel with the **Custom fields** section.

The screenshot shows a 'Purchase Order #1001' form. The main form area includes fields for Vendor (Yash Suppliers), Email (yash@eu.com), Mailing address, Ship to, Purchase Order date (07/15/2020), Department, Vendor Category, Shipping address, Ship via, and Vendor Registration Number. There are also sections for Tags, Category details, and Item details. A 'Choose what you use' panel is open on the right, showing a list of custom fields: Department, Vendor Category, and Vendor Registration Number. Each field has a pencil icon for editing. At the bottom of the panel is a '+ Add custom field' button. The main form has a 'Cancel' and 'Revert' button at the bottom left, and 'Print', 'Make recurring', and 'More' buttons at the bottom right.

- To create a custom field, select **+ Add custom field**. Fill out the info about the field, then select **Save**.
- To edit an existing field, select the pencil icon next to the field. Or, select **Manage custom fields**. This opens the Custom fields page so you can make edits. When you're done making changes, close the window to return to the form.

**Important:** Keep in mind, any changes you make on forms affect all forms and customer profiles using the custom field, not just this form.

From customer profile:

1. Go to **Sales** and select **Customers**
2. Find and open a customer profile.
3. Select **Edit**.
4. Go to the **Custom fields** section.
  - To create a custom field, select **+ Add custom field**. Fill out the info about the field, then select **Save**.
5. Select **Save** to save your changes.

**See it in action.**

[How to create custom reports](#) (5.18)


## Custom Reports

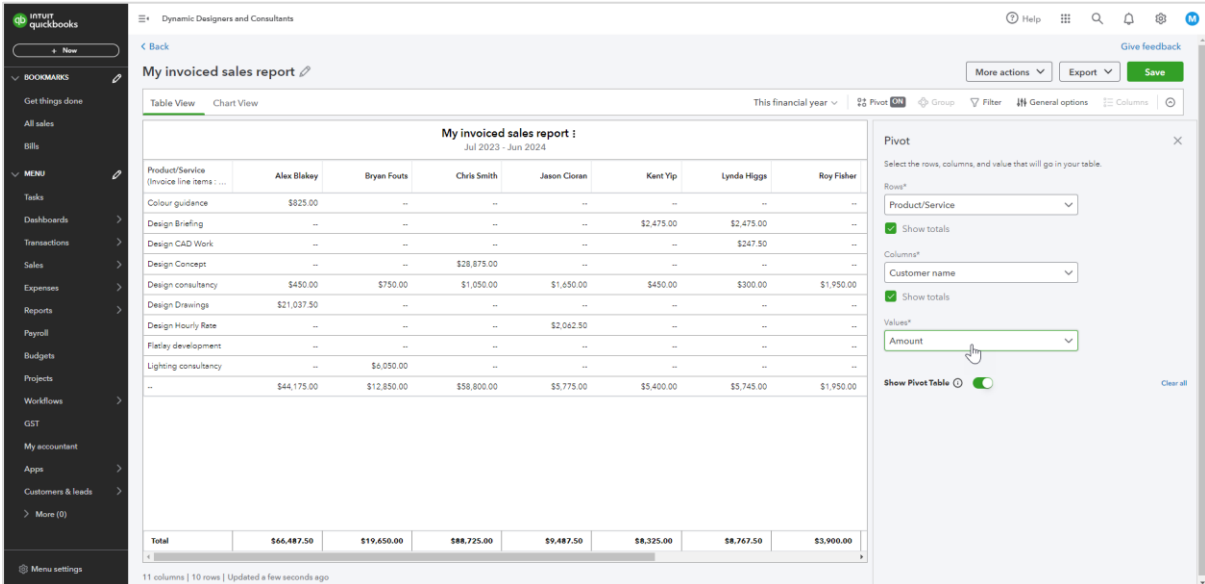
QuickBooks Online Advanced makes it possible for you and your clients to build custom reports in addition to the hundreds of ready-made reports available. This allows you and your clients to easily view company financial data and insights to better run their business. Using custom reports you can:

- Select and sort reports by group filter to suit your needs
- Create pivot tables and group data for easier analysis
- Save reports for future reference

### Creating a custom report

You can generate a customized report through the use of filters. If you haven't yet, sign in to QuickBooks Online as an administrator.

1. Go to **Reports**, then select **Reports**.
2. Select +Create new report, select how you would like to build the report - Start by report creation wizard or Start by adding data columns
3. Select the **pencil icon** , then enter/edit the name of your report.



Product/Service (Invoice line items ...)	Alex Blakey	Bryan Fouts	Chris Smith	Jason Cloran	Kent Yip	Lynda Higgs	Roy Fisher
Colour guidance	\$825.00	--	--	--	--	--	--
Design Briefing	--	--	--	--	\$2,475.00	\$2,475.00	--
Design CAD Work	--	--	--	--	--	\$247.50	--
Design Concept	--	--	\$28,875.00	--	--	--	--
Design consultancy	\$450.00	\$750.00	\$1,050.00	\$1,650.00	\$450.00	\$300.00	\$1,950.00
Design Drawings	\$21,037.50	--	--	--	--	--	--
Design Hourly Rate	--	--	--	\$2,042.50	--	--	--
Flatlay development	--	--	--	--	--	--	--
Lighting consultancy	--	\$6,050.00	--	--	--	--	--
--	\$44,175.00	\$12,850.00	\$58,800.00	\$5,775.00	\$5,400.00	\$5,745.00	\$1,950.00
<b>Total</b>	<b>\$66,487.50</b>	<b>\$19,650.00</b>	<b>\$88,725.00</b>	<b>\$9,487.50</b>	<b>\$8,325.00</b>	<b>\$8,767.50</b>	<b>\$3,900.00</b>

**Note:** The New Enhanced Experience shows all the categories up front, so you can select how you want to personalize your report.

Customization Options	What you can do
Date range dropdown ▼	Select the date coverage of your generated data.

Pivot	<p>Select <b>Pivot</b> to summarize and total your report data. Here's how:</p> <ol style="list-style-type: none"> <li>1. Select which fields to categorize in the rows and columns, then select which value field you want to summarize.</li> <li>2. Select <b>Show totals</b> to add a totals row or column.</li> <li>3. Once you've selected <b>Rows</b>, <b>Columns</b>, and <b>Values</b>, the report view displays as a pivot table. Switch off <b>Show Pivot Table</b> to return to the original view.</li> </ol>
Group	<p>Select <b>Group</b> to categorize line items by any column.</p> <p>Select <b>Edit group calculations ▼</b> to calculate totals, averages, or percentages for numeric groups.</p> <p><b>Tip:</b> When a report is grouped, select <b>expand ▼</b> to view the details inside that group. Hierarchical grouping options are only available when grouping by the first column, and cannot be used with other grouping options.</p>
Filter	<p>Select <b>Filter</b> to view only certain entries.</p> <p>Select what you want to filter by, select the operation, then select from the provided values.</p> <p><b>Tip:</b> You can apply multiple filters.</p>

## Customize

Select **Customize** to set the report's number of fields and what's in them. Here's how:

1. Select **Columns**, look for a topic you want to report on, and select it to reveal the available fields.
2. Select any field you want to view in the report.

**Note:** Some fields may not work in a report together. When you select a field, non-compatible fields will be unavailable. If you use custom fields, they appear in this list.

3. To change the order in which selected fields appear, select **Layout**, then select and drag the listed fields in the order you want.

**Note:** Select **show/hide**  to hide or unhide a field.

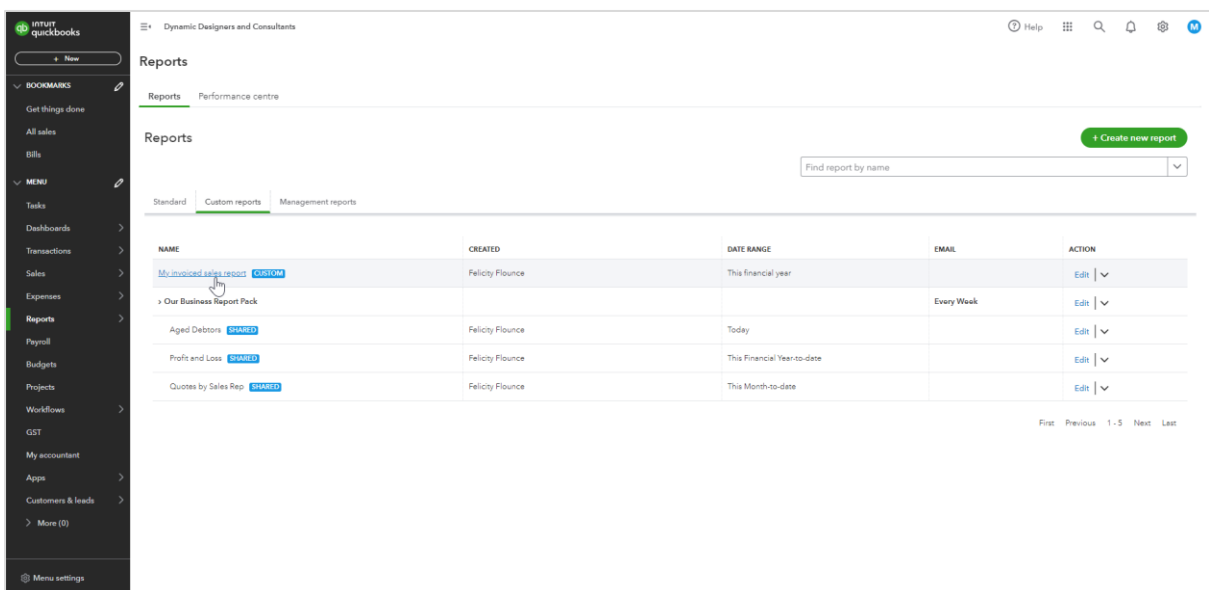
4. Select **Save** to save your report. You can edit the report at any time.

**Tip:** Select **Export** to export the data to a spreadsheet to store and access it in the future.

## View your custom reports

If you haven't yet, sign in to QuickBooks Online as an administrator.

1. Go to **Reports** then select **Reports**.
2. Select **Custom reports** and select the report name to open it.



The screenshot shows the Intuit QuickBooks interface. On the left is a dark sidebar with navigation options like 'All sales', 'Bills', 'Tasks', 'Dashboards', 'Transactions', 'Sales', 'Expenses', 'Reports', 'Payroll', 'Budgets', 'Projects', 'Workflows', 'GST', 'My accountant', 'Apps', 'Customers & leads', and 'More (8)'. The main area is titled 'Reports' and has tabs for 'Reports' and 'Performance centre'. Under 'Reports', there are sub-tabs for 'Standard', 'Custom reports', and 'Management reports'. A search bar 'Find report by name' is present. A table lists reports with columns: NAME, CREATED, DATE RANGE, EMAIL, and ACTION. The reports listed are:

NAME	CREATED	DATE RANGE	EMAIL	ACTION
My invoiced sales report <b>CUSTOM</b>	Felicity Flounce	This financial year		Edit
Our Business Report Pack			Every Week	Edit
Aged Debtors <b>SHARED</b>	Felicity Flounce	Today		Edit
Profit and Loss <b>SHARED</b>	Felicity Flounce	This Financial Year-to-date		Edit
Quotes by Sales Rep <b>SHARED</b>	Felicity Flounce	This Month-to-date		Edit

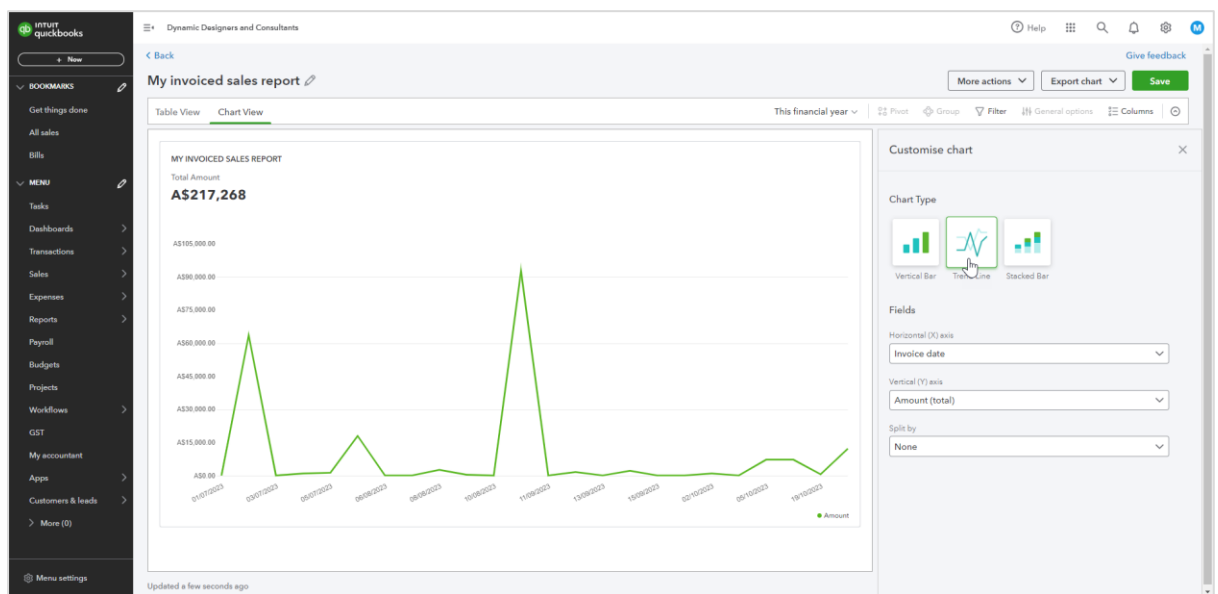
At the bottom right of the table, there are pagination controls: 'First Previous 1-5 Next Last'.

**Tip:** If you want to view any transaction in your report, select any field in the report row to open the transaction in a new tab.

## Visualize your report

Visualize your report with a chart view to create presentation-ready charts of your report data.

1. Open your custom report.
2. Select Chart View.
3. Select the chart type to see how you want to visualize your data.



4. Adjust which field displays on the Horizontal (X) axis and the Vertical (Y) axis by selecting an option in the dropdowns.
5. Select **Save**.

## Schedule an emailed report

1. In the **Custom reports** tab, select the report name.
2. In the Action column, select the down arrow and select **Create a Schedule**.
3. Enter a Workflow name.
4. Select a start date, then choose how often you want the report to be sent.  
Ex: If you want the report sent every other Monday, enter 2, select **Week**, then select **Mo**.
5. Enter the email address or addresses you want to send the report to.
6. Fill out a desired **Subject** and **Message**.
7. Select Save and enable.

**Create workflow**

Workflow name:  Source transaction:

**1. Do this in QuickBooks**

What do you want QuickBooks to do?  Report Name:

Note:  
We'll automatically send reports at selected schedule

Create and send recurring report

Start:  Repeat every:

Su  Mo  Tu  We  Th  Fr  Sa

How would you like this action to happen?

Send a company email

Send to:  [Add CC](#)

[Cancel](#) [Save](#) [Save and enable](#)

**Note:** If you need to turn off the scheduled report or update the frequency, select **Settings**, then select **Manage workflows**. Here's how you can learn more about how to [create and manage workflows](#).

Dynamic Designers and Consultants

Workflows

Templates My Workflows Run History

Search by workflow name

+ Custom workflow

NAME ↑	TRANSACTION TYPE ↓	WORKFLOW TYPE ↓	LAST UPDATED BY ↓	UPDATED ON ↓	ON/OFF	ACTIONS
Bill Multi-Condition Approval	Bill	Approval	Felicity Flounce	17/10/2023	<input checked="" type="checkbox"/>	⋮
Invoice Approval Greenberg	Invoice	Approval	Felicity Flounce	18/10/2023	<input checked="" type="checkbox"/>	⋮
Quote creation > \$500	Quote	Notification	Felicity Flounce	17/10/2023	<input checked="" type="checkbox"/>	⋮
Weekly Sales Report	Report	Create and send	Felicity Flounce	14/11/2023	<input checked="" type="checkbox"/>	⋮

TIPS AND RESOURCES  
[Find out more about workflows](#)

**See it in action.**

[How to create custom reports](#)

## Revenue Recognition

Get a more complete and accurate view of your finances with deferred revenue automatically reflected in your books. Record customer payments for future services and QuickBooks Online Advanced will automatically recognize the revenue over the predefined period.

Using the revenue recognition feature in QuickBooks Online Advanced, you can:

- Set up a service to invoice once and recognise the revenue each month
- View when revenue will be recognised, what the balance of the liability account will be, the amount you'll recognize and the total amount you'll have recognised at that time

### Why Revenue Recognition is important

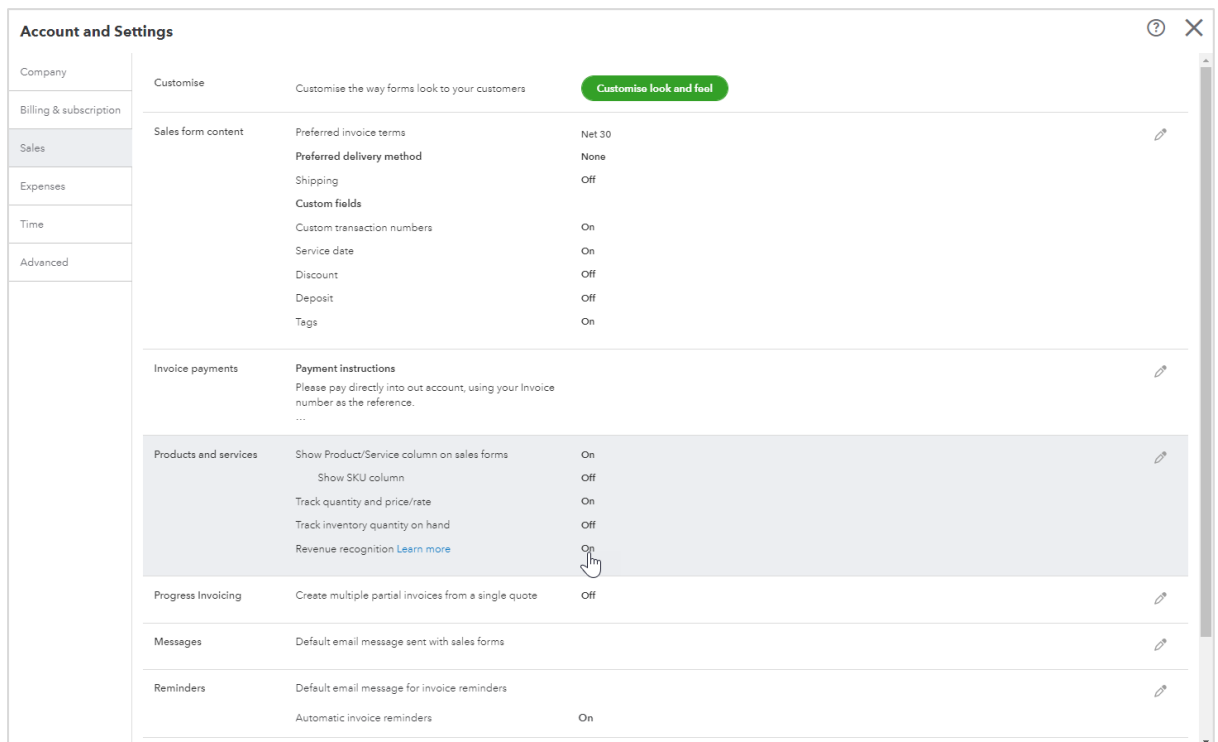
Here are some business models that may use revenue recognition.

Business Model	Product or Service example
Subscription based	A wine club charges a membership fee on top of subscription fees and wants to recognize the membership revenue upfront, but defer wine subscription revenue until they can deliver to the customer.
Project based / contractors	A project-based business or a contractor, who charges their customers upfront, wants to recognize some of the revenue only when that part of the job is complete.
Software	A hosted software company that charges CA \$ 240 yearly and recognizes CA \$20 every month until the software agreement ends.
eCommerce	E-commerce businesses receive payment upfront, but recognize the revenue upon delivery.
Pre-paid Billing	An insurance company charges an annual premium at a discount, but the revenue is recognized monthly.
Consulting Services / Law Firms	A law firm charges their client a retainer fee before rendering services and wants to recognize the revenue only when the work is complete.



## Setting up Revenue Recognition on QuickBooks Online Advanced

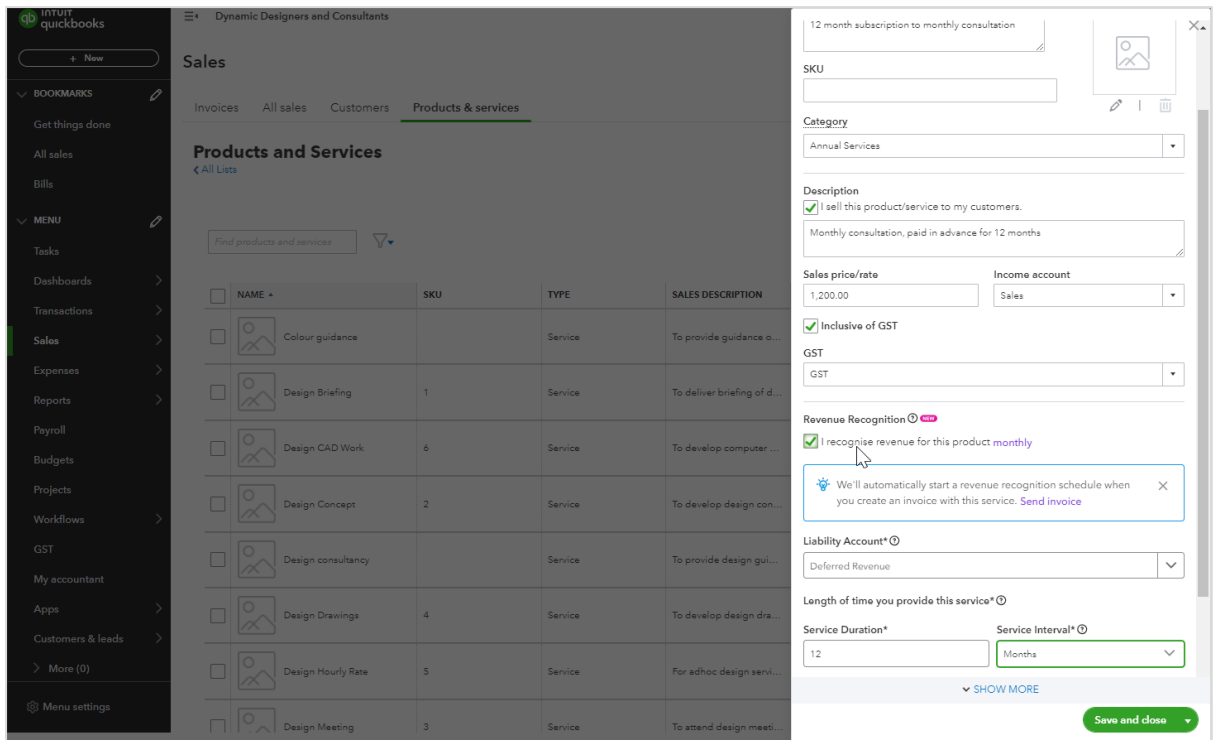
1. Go to Settings ⚙️, then select Account and settings.
2. Select **Sales**.
3. In Products and services, select Edit 📝.
4. Turn on Revenue recognition.
5. Select **Save**, then **Done**.



**Note:** Revenue can now be recognized on a daily or monthly basis.

### Add a service with revenue recognition

1. Go to Sales, then Products & services.
2. Select **New**, then select **Service**.
3. Fill out the details.
4. Check "**I recognize revenue for this product**" and select the frequency (for example, daily or monthly).
5. Choose a **Liability account**, and in **Service Duration** enter the number of days, weeks, months, or years over which the revenue should be recognized.



**Note:** You can enter up to 1826 days for daily frequency, up to 260 weeks for weekly frequency, up to 60 months for monthly frequency, or up to five years for yearly frequency.

6. Select Save and close.

## Create an invoice with revenue recognition

Now, create an invoice for this service you just set up. The **Service Date** on the invoice will let QuickBooks know when to start the revenue recognition schedule.

1. Go to **New**, and select **Invoice**.
2. Fill out your invoice details. Be sure to add the service you just created.
3. Under **Service Date**, choose the date this service will start. The service date can be in the current calendar month or a future calendar month.
4. Select **Save**.

**Note:** Once the invoice is saved, the schedule will start at the end of the month selected in the **Service Date**.

5. Once saved, next to the service line item, select **View Revenue Recognition**.

**Invoice no.2060** APPROVED

Customer: Bryan Fouts | Customer email: midfieldps@example.com.au | Payment Options:  Accept card payments with PayPal

Billing address: Bryan Fouts, Midfield Primary School, 44 Hobart Street, Midfield NSW 2685

Invoice date: 14/11/2023 | Due date: 14/12/2023

Invoice no.: 2060 | BALANCE DUE: **A\$1,200.00**

#	SERVICE DATE	PRODUCT/SERVICE	DESCRIPTION	QTY	RATE	AMOUNT	GST
1	01/12/2023	Annual Services:12 month subscription to mo	Monthly consultation, paid in advance for 12 months	1	1,090.91	1,090.91	GST
2							

Subtotal: A\$1,090.91 | GST @ 10% on 1,090.91: 109.09 | Total: A\$1,200.00 | Balance due: A\$1,200.00

6. The schedule for your revenue recognition for that service displays.

**Revenue Recognition** Give feedback

Recognition date	Liability Account	Amount Recognised	Income account
<b>2023</b>			
31/12/2023	AS1,000.00	A\$90.91	A\$90.91
<b>2024</b>			
31/01/2024	AS909.09	A\$90.91	AS181.82
29/02/2024	AS818.18	A\$90.91	AS272.73
31/03/2024	AS727.27	A\$90.91	AS363.64
30/04/2024	AS636.36	A\$90.91	AS454.55
31/05/2024	AS545.45	A\$90.91	AS545.46
30/06/2024	AS454.54	A\$90.91	AS636.37
31/07/2024	AS363.63	A\$90.91	AS727.28
31/08/2024	AS272.72	A\$90.91	AS818.19
30/09/2024	AS181.81	A\$90.91	AS909.10
31/10/2024	AS90.90	A\$90.91	AS1,000.01
30/11/2024	AS0.00	A\$90.90	AS1,090.91

## [More about service interval and frequency](#)

**Service Interval and Duration** define how a company sells their product/service. For example: An annual subscription sold at \$1200 can be set up as 12 months or 52 weeks.

**Revenue Recognition Frequency** is how often you recognize revenue for a product or service. It's automatically set to monthly, but you can change it at any time. Once updated, it applies to all the future transactions. For example, an annual subscription sold at \$1200 with a daily frequency will be prorated based on the number of days in a month.

**Posting Frequency** is when we post the recognized amounts to the books. We post all automatic revenue recognition entries at the end of the month.

How the posting frequency is calculated every month

For a service item that is priced at \$1200, the recognized revenue will be automatically moved to the income account at the end of the month. The monthly recognized amount varies depending on the recognition frequency selected in Settings.

**Formula:** Total price of the item / # of frequencies for the duration \* # of frequencies per month.

Here's an example of how the recognized revenue is calculated and posted at the end of the month for different frequencies:

Frequency Selected	Recognized Amount (at the end of the month)
Monthly Example	$1200 / 12 * 1 = 100$
Weekly Example (when 4 weeks in a month)	$(1200 / 52) * (4) = 92.30$
Weekly Example (when 5 weeks in a month)	$(1200 / 52) * (5) = 115.38$
Daily Example (when 31 days in a month)	$(1200 / 365) * 31 = 101.91$
Daily Example (when 28 days in a month)	$(1200 / 365) * 28 = 92.05$

**See it in action.**

[How to use revenue recognition](#) (3.48)

## Extended collaboration with up to 25 users and 3 accountant users

QuickBooks Online Advanced provides room for the entire team to grow. Your clients will be able to provide access for up to 25 users along with unlimited reports-only users, and unlimited time tracking-only users.

Plus your clients can now provide access for up to three accountants or bookkeepers to collaborate and finalise their books.

## Backup and Restore company data

With QuickBooks Online Advanced, your data is automatically backed-up and stored securely in the cloud. This ultimately means you can restore data to resolve unwanted changes and to fix mistakes. Using the backup and restore app you and your clients can:

- Set up automatic and continuous backups
- Restore data to a specific date and time, and track changes with history logs
- Take a manual backup at any time
- Make a copy of the QuickBooks Online Advanced file for another level of security
- Export the file's data into a CSV file for another level of data security

### What data you can and can't back up

While you can back up data related to your chart of accounts, there is some data you can't back up. Here's a list of data you can and can't back up.

#### Data you can back up

Transaction data	List data	Other data
<ul style="list-style-type: none"><li>• Invoices</li><li>• Quotes</li><li>• Sales</li><li>• Receipts</li><li>• Payments</li><li>• Deposits</li><li>• Bills and bill payments</li><li>• Credit memos</li><li>• Supplier credits</li><li>• Journal entries</li></ul>	<ul style="list-style-type: none"><li>• Accounts</li><li>• Budgets</li><li>• Classes</li><li>• Currencies</li><li>• Customers</li><li>• Departments</li><li>• Employees (except their SSN)</li><li>• Items</li><li>• Payment methods</li></ul>	<ul style="list-style-type: none"><li>• Attachments</li><li>• Company info</li><li>• Entitlements</li><li>• Exchange rates</li><li>• Preferences</li><li>• Intuit Payroll info backs up as journal entries</li><li>• Inventory shrinkage and adjustments back up as journal entries</li></ul>

<ul style="list-style-type: none"> <li>• Purchases and purchase orders</li> <li>• Refund receipts</li> <li>• Time activities</li> <li>• Transfers</li> </ul>	<ul style="list-style-type: none"> <li>• Tax agencies</li> <li>• Tax codes and tax rates</li> <li>• Terms</li> <li>• Suppliers (except the Tax fields)</li> </ul>	
--	---	--

### Data you can't back up

Some data can't be backed up. Since this data is non-posting, it won't affect your accounts:

- QuickBooks Online Payments info
- Customer types and price rules
- Delayed credits and charges (although associated invoice are backed up)
- Recurring transactions
- Bank feeds and their links to transactions and bank rules
- Reconciliation reports
- Account-based billable expenses
- Item-based billable expenses with markup
- Custom reports
- Custom form templates
- Audit log entries

### Data you can't restore

When you restore a backup, you can restore everything except:

- Budgets - you need to export them as a CSV file.
- Inventory - it doesn't include the inventory history and inventory adjustments.
- Tax rates using expense accounts - the Online Backup and Restore app restores them in your liability accounts.
- Data backed up using the Local Backup feature - This data is saved in .cab format on your personal cloud account; Google Drive or Dropbox, for example. Restoring the data from a local backup is not supported at this time.

## Turning on Backup and Restore

When you turn on the Online Backup and Restore app, QuickBooks automatically backs up your data. Once it's complete, it'll track any changes made to your company data. You can restore a backup at any point in time.

1. Go to Settings ⚙️.

2. Select **Back up company**.

**Note:** You might need to sign in to your Intuit account to proceed.

## Turning off automatic backup

If you no longer need to backup your company, here's how to turn it off.

1. Sign in to the QuickBooks Online Advanced company you want to back up, as an admin user

2. Go to Settings ⚙️ and select Back up company.

3. Find the company with the automatic backup you want to turn off.

4. Select the **Action ▼** dropdown menu, then select **Turn off backup**.

The screenshot displays the 'Online Backup & Restore' section of the QuickBooks interface. At the top, there's a header with the Intuit QuickBooks logo and a 'Home' label. Below this, a 'Give feedback' link is visible. The main content area features a section titled 'Never lose your financial data with Online Backup & Restore' with a green 'Add company' button. Below this is a table with columns: Name, Backed Up, Backed Up Since, Last Backup At, and Actions. The table contains one entry for 'Dynamic Designers and Consultants' with a green checkmark in the 'Backed Up' column, a timestamp of '10/18/2023 11:42 AM' in the 'Backed Up Since' column, and '11/9/2023 7:11 PM' in the 'Last Backup At' column. The 'Actions' column has a dropdown menu open, showing options: 'Run backup', 'Restore', 'Copy...', 'Local Backup', and 'Turn off Backup'. The 'Turn off Backup' option is highlighted in green. Below the table are three 'How-To Guides' cards: 'Backup', 'Restore', and 'Copy', each with a 'Learn How' link. The footer includes '© 2020 Intuit Inc. - Privacy - Security - Terms of Service'.

## Manually create a one-time backup

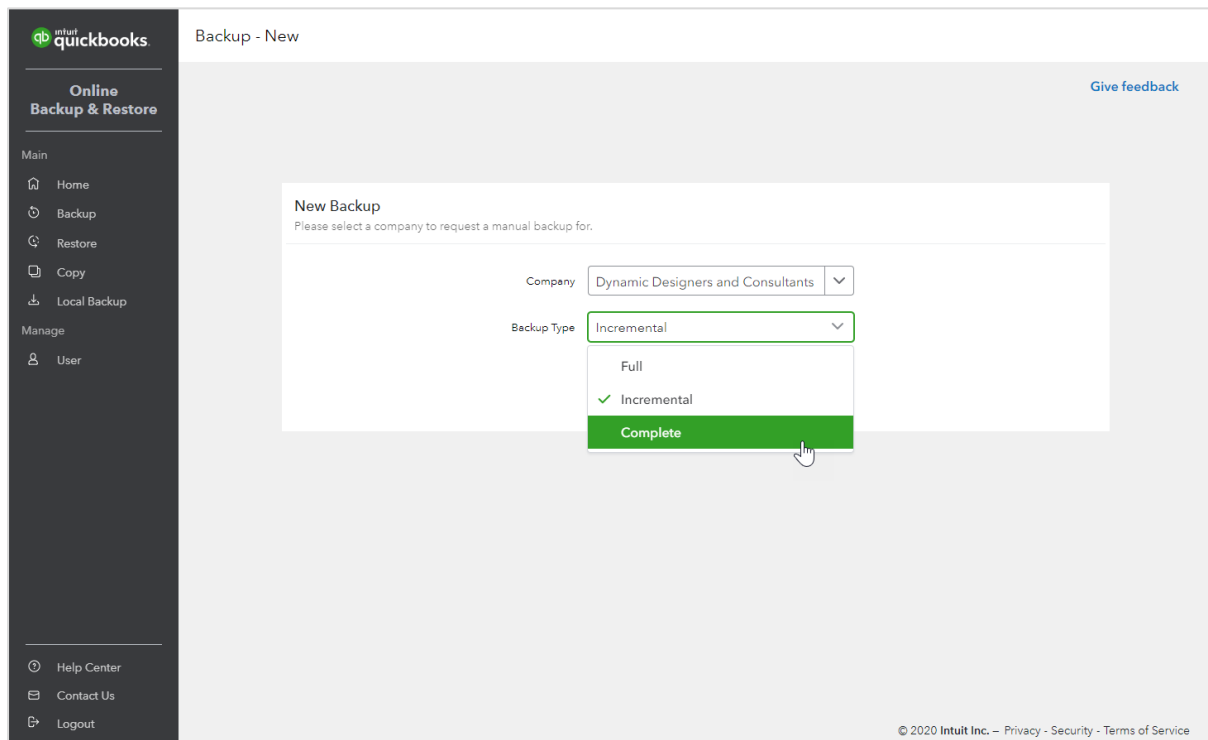
Maybe you're in the middle of an important project and want to save everything. No problem. You can do a manual backup anytime. Here's how.

1. Sign in to the QuickBooks Online Advanced company you want to back up, as an admin.

2. Go to **Settings** ⚙️ and select **Back up company**. **Note:** You might need to sign in with an Intuit account to proceed.

3. Select **Backup** from the menu.

4. Select New Manual Backup.
5. Select the company you want to manually backup.
6. From the **Backup Type** dropdown ▼, select **Incremental**, **Full**, or **Complete**.  
**Note:** The Incremental option only saves changes since your last backup. Full saves your financial data. Complete saves everything, including your company data.
7. Select Request Backup.



## Save your backups to Dropbox or Google Drive

QuickBooks Local Backup is a convenient feature that enables you to export essential business data such as invoices, customers, and bills to Excel. It's an excellent tool for archiving historical data that can be easily accessed and shared with external stakeholders like accountants. You can save your data to your personal Dropbox or Google Drive.

However, it's important to note that Local Backup cannot be restored. So, while it's a great way to keep track of past records, it cannot be used to recover lost or damaged information.

## Connecting your Google Drive or Dropbox account

1. Go to **Settings** ⚙️ and then select **Back up company**. **Note:** You might need to sign in with an Intuit account to proceed.
2. Select Local Backup.
3. Select Link a Service.
4. Select Link Google Drive or Link DropBox.
5. Follow the steps to allow QuickBooks to create the backups.

**Note:** Data saved using Local Backup cannot be restored using Online BackUp and Restore at this time.

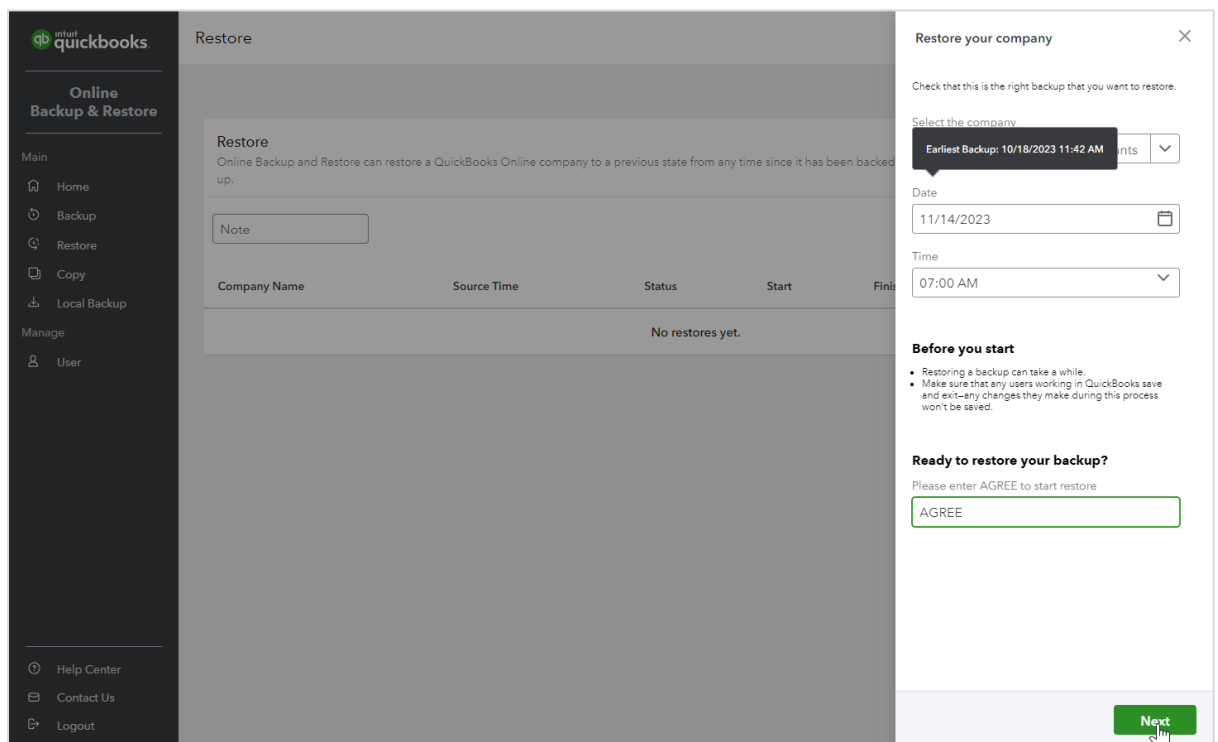


## Restoring your data from a backup

Use the backup to restore your data from a specific date and time. It may take up to an hour to restore a backup, but it usually takes much less. The fewer data the company has, the faster it takes.

**Important:** Don't do anything in your company while the Online Back-up & Restore app restores your data. When it's ready, you'll see a checkmark in the status. That's when it's safe to go back and use your company.

1. Sign in to the QuickBooks Online Advanced company you want to restore, as an admin.
2. Go to **Settings** ⚙️ and select **Back up company**. **Note:** You might need to sign in with an Intuit account to proceed.
3. Select **Restore**, then select **New Restore**.
4. From the **Select the company** dropdown ▼, select the company you want to overwrite and restore accounting data to.
5. From the **Date** field, select the date you want to restore to.
6. From the **Time** dropdown ▼, select the time you want to restore to.
7. Enter "AGREE" in Ready to restore your backup?



8. Select **Next**. If you see a list of recommended actions, follow them first. After you finish everything on the list, select **Refresh to continue**.
9. Select Start Restore.

It takes about 5 - 10 minutes to restore your data. Depending on the amount of data, it can take up to an hour.

See it in action.

[How to backup and restore your data \(3.29\)](#)

## Custom Role Permissions

Control access to sensitive areas in QuickBooks Online Advanced using the new role permissions feature. You can choose from predefined role options or create new roles with the required permissions. Set access permissions by assigning a role like sales manager, payroll manager or front-of-house to a team member or tailor their access individually.

Using role permissions you can:

- Delegate work, protect sensitive data, and manage user access with custom roles
- Preview their access to confirm each user can only see and do what they need to

### Adding and managing custom roles

With custom roles, you can manage user access in QuickBooks and give users only the access needed for their role. Choose what users can see and do within different areas of QuickBooks like banking, sales, payroll, expenses, reports, and inventory.

**Note:** Only administrators can set up custom roles plus some fields are read only and are automatically included in a role.

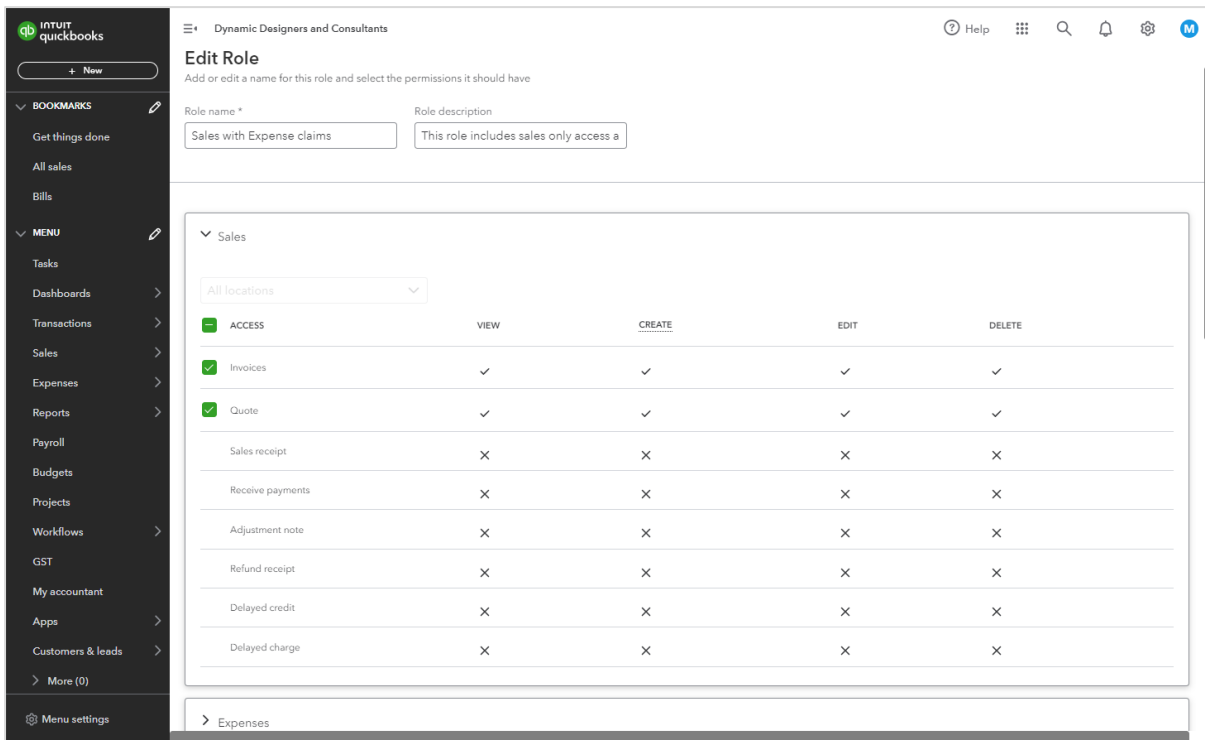
When you set up a new role, you have the option to:

- Create a new role and choose what the role can access.
- Choose a predefined custom role, like Sales Manager or Expense Manager.
- Choose from the list of QuickBooks roles, like Company admin or Time tracking only.
- Add a new role
- Create a sales role by location
- Assign a role to a new user
- Assign a custom role to a new user
- Edit access for a role
- Edit a user's role
- Reactivate or deactivate a user's role
- Custom roles and access

### Add a new role

If you'd like to create a new custom role, you just need to add the role and choose the different areas the role can access.

1. Go to **Settings** ⚙, then select **Manage users**.
2. Select the **Roles** tab, then select **Add role**.
3. Enter a Role name and Role description.
4. Select what the user role can access in QuickBooks, then select **Save Role**.



## Create a sales role by location

If you have businesses across different locations, you can create a role with different sales access for each. This way, your users can manage sales transactions based on their location.

**Note:** If you haven't yet, make sure to set up and add a location for your company.

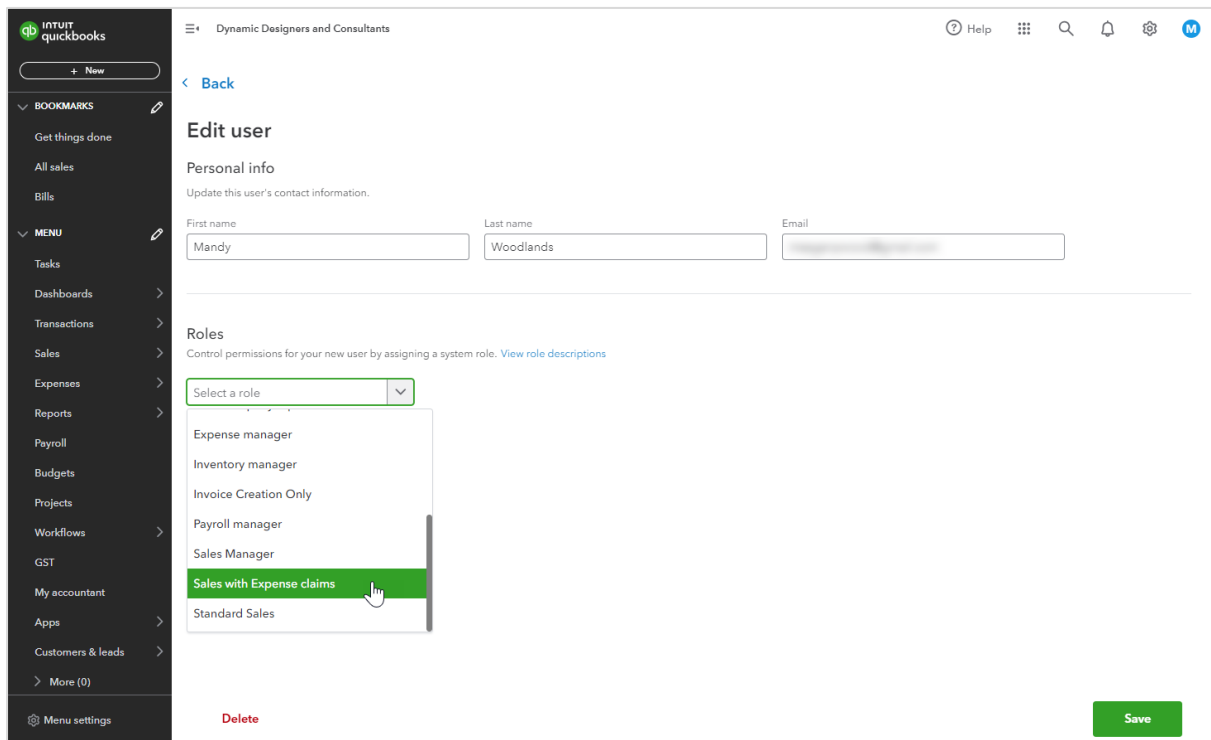
1. Go to **Settings** ⚙️, then select **Manage users**.
2. Select the **Roles** tab, then select **Add role**.
3. Enter a Role name and Role description.
4. Select **Sales**.
5. From the **All locations** drop-down menu, select one or more locations.
6. Select what your user can access.
7. Select Save Role.

## Assign a role to a new user

If you have a new user, you'll need to add them in QuickBooks and assign a role.

1. Go to **Settings** ⚙️, then select **Manage users**.
2. Select **Users** tab, then select **Add user**.
3. Enter the user's First name, Last name and Email.
4. From the **Roles** drop-down menu, select the role you want to assign to the user.
5. Review the permissions this role has and select **Send invitation**.

The user will get an email invite and will need to select **Let's go!** to sign in.



**Note:** If your user forgot their password, they can reset their own password.

### [Assign a custom role to a new user](#)

If you have a new user, you'll need to add them in QuickBooks and assign a custom role.

1. Go to **Settings** ⚙️, then select **Manage users**.
2. Select **Users** tab, then select **Add user**.
3. Enter the user's First name, Last name and Email.
4. From the **Roles**, select **View all permissions**, then assign the custom permissions you want to assign to the user.
5. Review the permissions, then select **Send invitation**.
6. You'll be asked to **Create a custom role**, since you have used custom permissions.
7. Enter the Custom role name and Role description.
8. Select Save role.

The user will get an email invite and will need to select **Let's go!** to sign in.

**Note:** If your user forgot their password, they can reset their own password.

### [Edit access for a role](#)

Once the user accepts your email invite, you can edit the access of the roles you created at any time. Here's how.

1. Go to **Settings** ⚙️, then select **Manage users**.
2. Select the **Roles** tab. In the **Action** column, select **Edit**.
3. Select access for a role.

4. Enter a Role name and description, then select Save Role.


### Edit a user's role

Sometimes your user's roles will change or you may need to allow a user more access. Here's how to edit a user's role.

1. Go to **Settings** ⚙, then select **Manage users**.
2. Select the **Users** tab, then find the user you want to edit.
3. Select **Edit** from the **Action** column.
4. Choose from the existing custom or QuickBooks roles.
5. Select **Save**. If you edited permissions after selecting the role, you'll be asked to save a new custom role. Enter a **Role name** and **description**, then select **Save Role**.

### Reactivate or deactivate a user's role

You can activate or deactivate a user role if needed. But before you can make a role inactive, you have to assign any associated users to a different role.

1. Go to **Settings** ⚙, then select **Manage users**.
2. Select the **Roles** tab, then find the role you want to edit.
3. In the **Action** column, select  next to **Edit**, then select **Deactivate**.
4. Select Deactivate.

If the user role is already deactivated, select **Reactivate**. Then select **Reactivate Role**.

If you need to reduce your users, you can delete them so you won't reach your usage limit. [Learn more about usage limits](#).

See it in action.

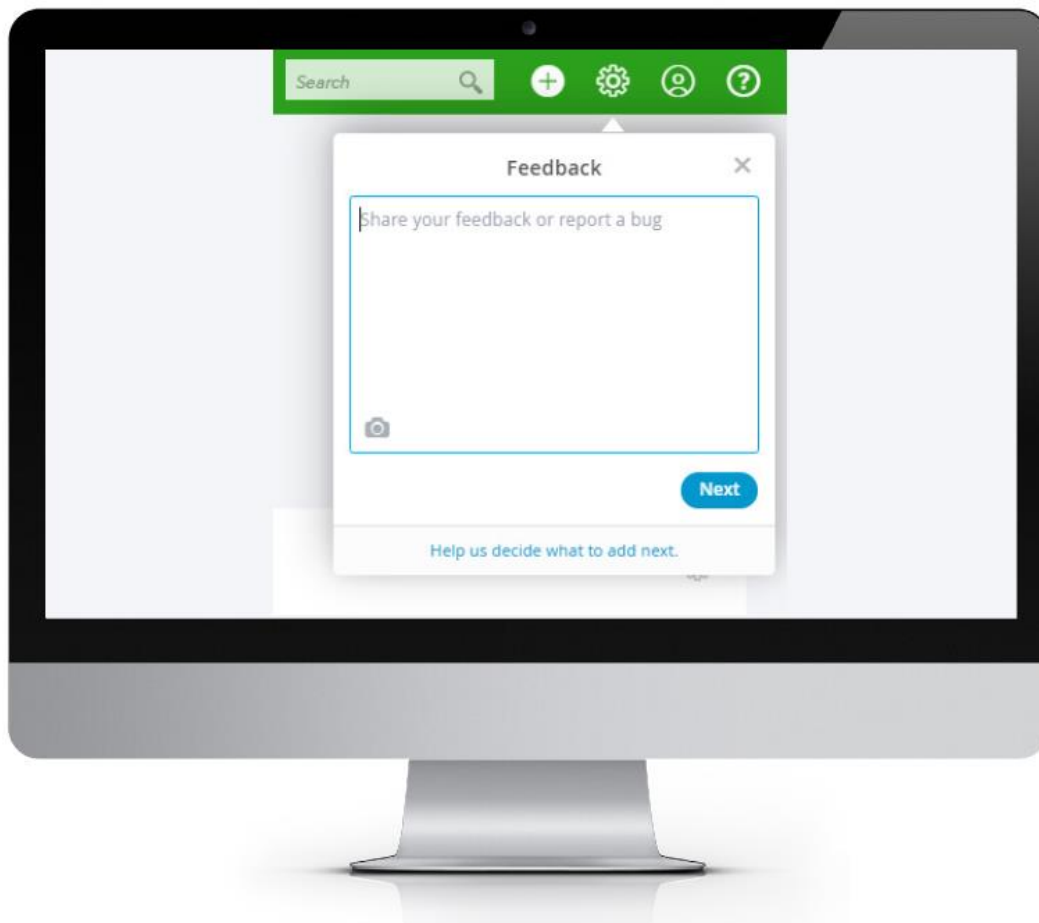
[Creating custom roles and adding users](#) (5:09)

[Custom User Permissions](#) (1:56)

## SECTION 3 - Feedback

### Providing Feedback

So that's an overview of the new functionality in QuickBooks Online Advanced. As you get familiar with the product, we'd appreciate receiving your feedback, which you can provide through the top right corner of the QuickBooks Online screen. Here you can provide product feedback and suggestions. This link provides access to a screenshot of the page in question.



For additional information about our products and our latest enhancements, please visit our product update page:

<https://quickbooks.intuit.com/au/product-updates/>

