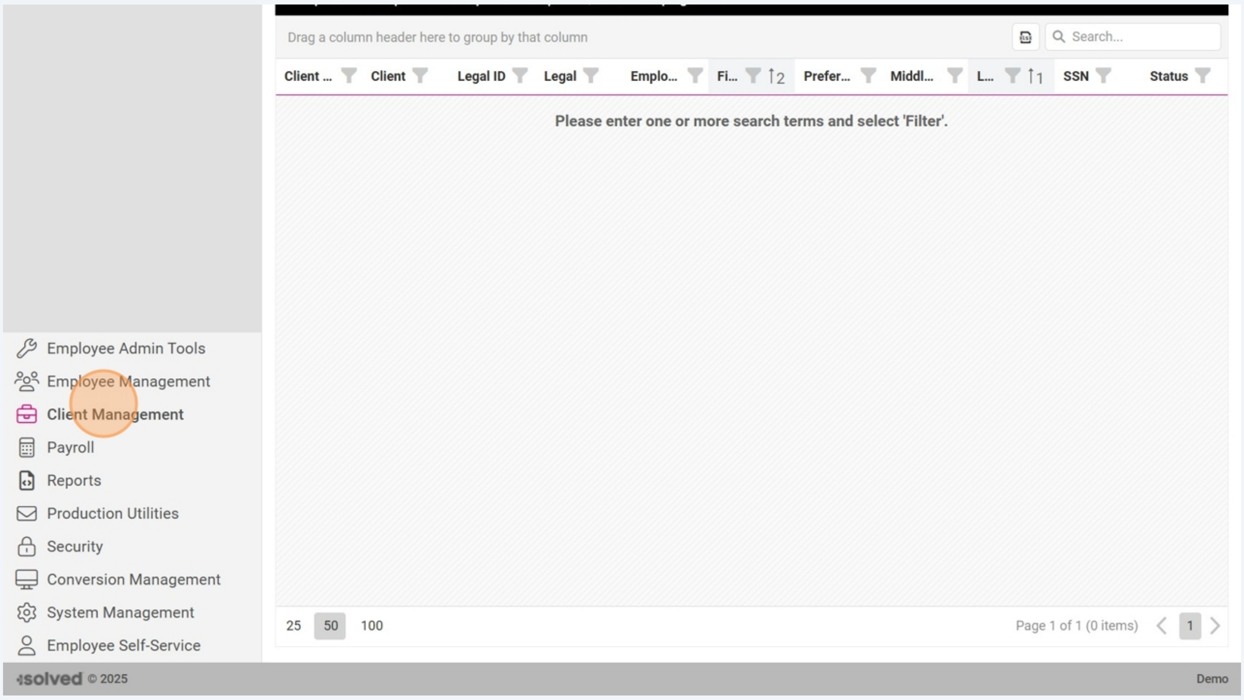
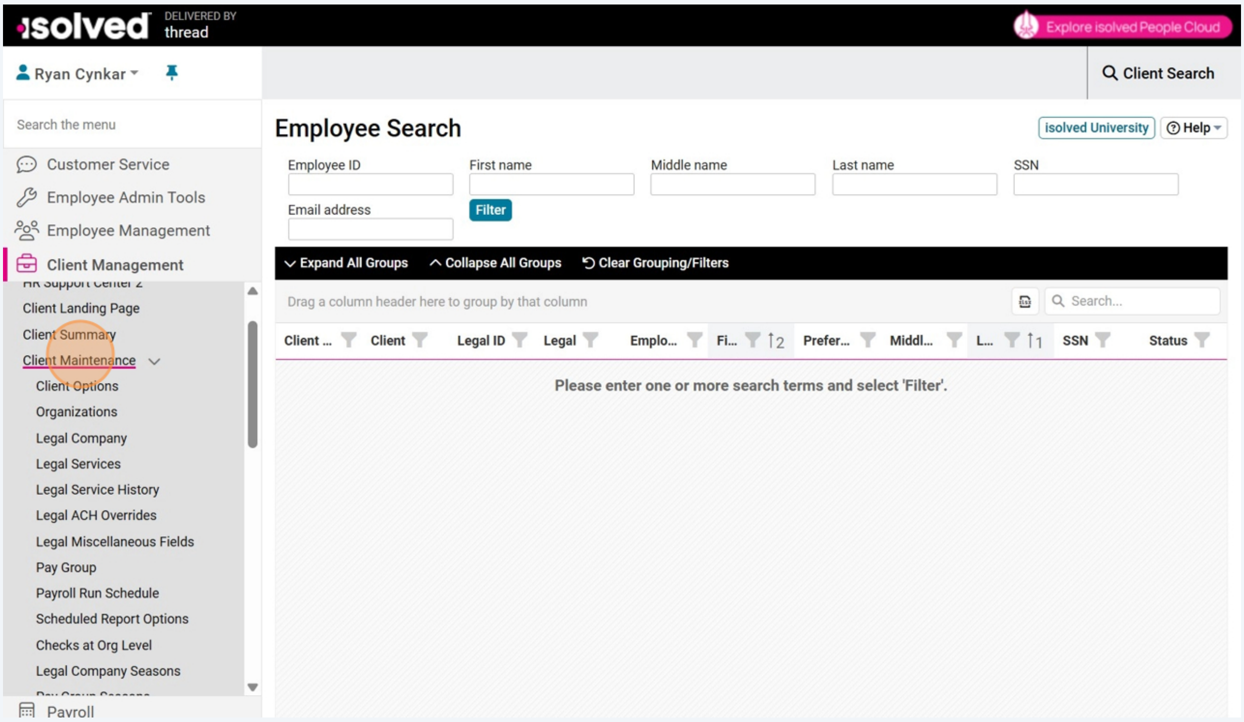
How to Add A New Contact and Client User with QuickBooks Transmission Access in iSolved

This guide will walk you through how to create a Client Contact and Client User in iSolved. This will then also show how to give that user permissions to access QuickBooks Transmission.
Please note that in order to add a Client User, you will first need to have them in the system as a Client Contact.

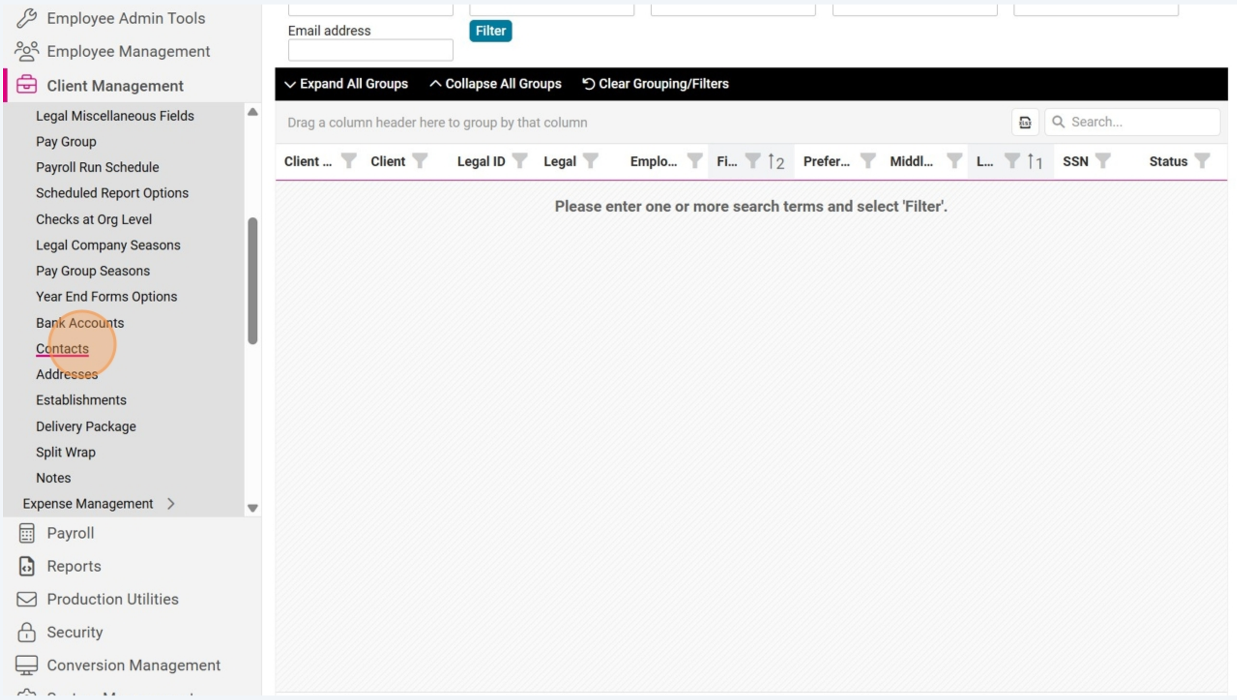
1. First we will be creating the new contact in iSolved.
Once you're logged into in iSolved and in the client you going to be adding the user, navigate to 'Client Management' in the left menu.



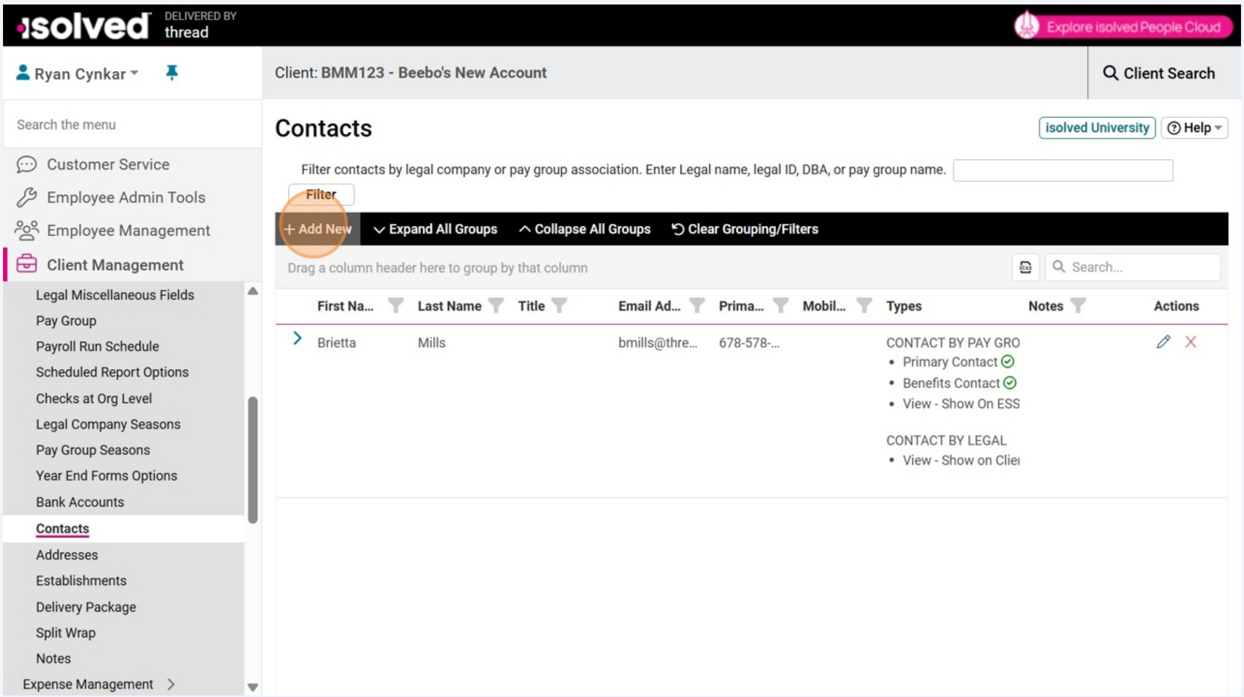
2 Click Client Maintenance



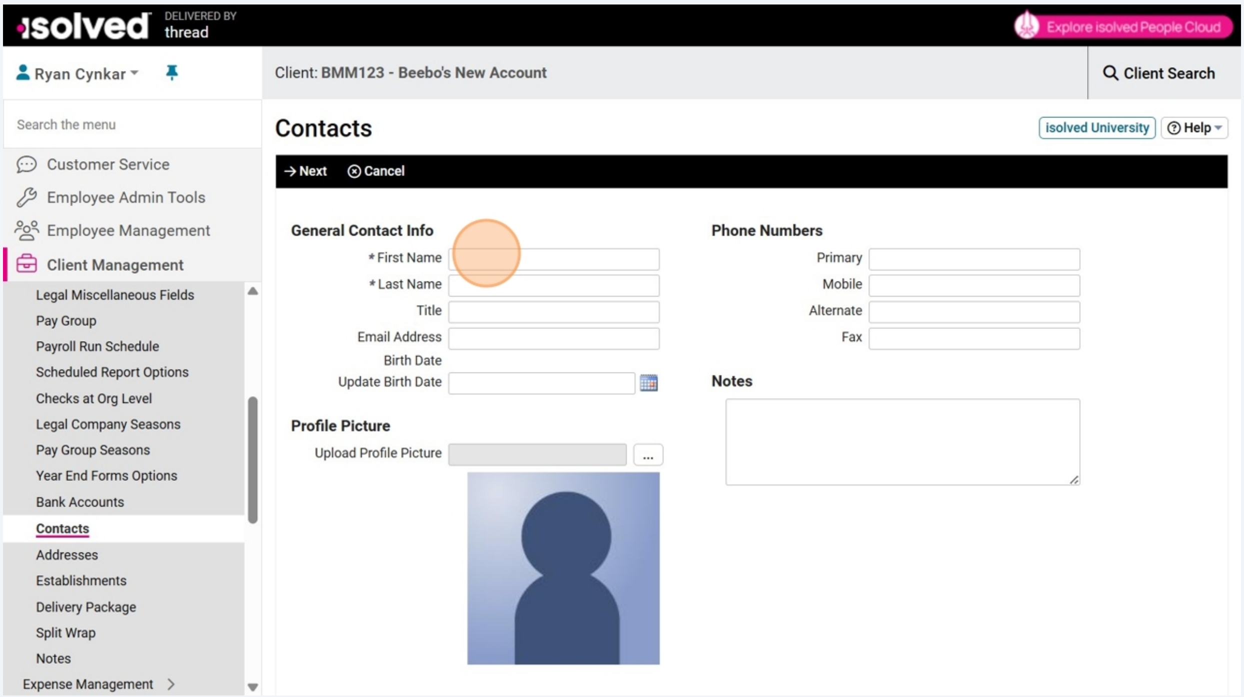
3 Scroll down and click 'Contacts'



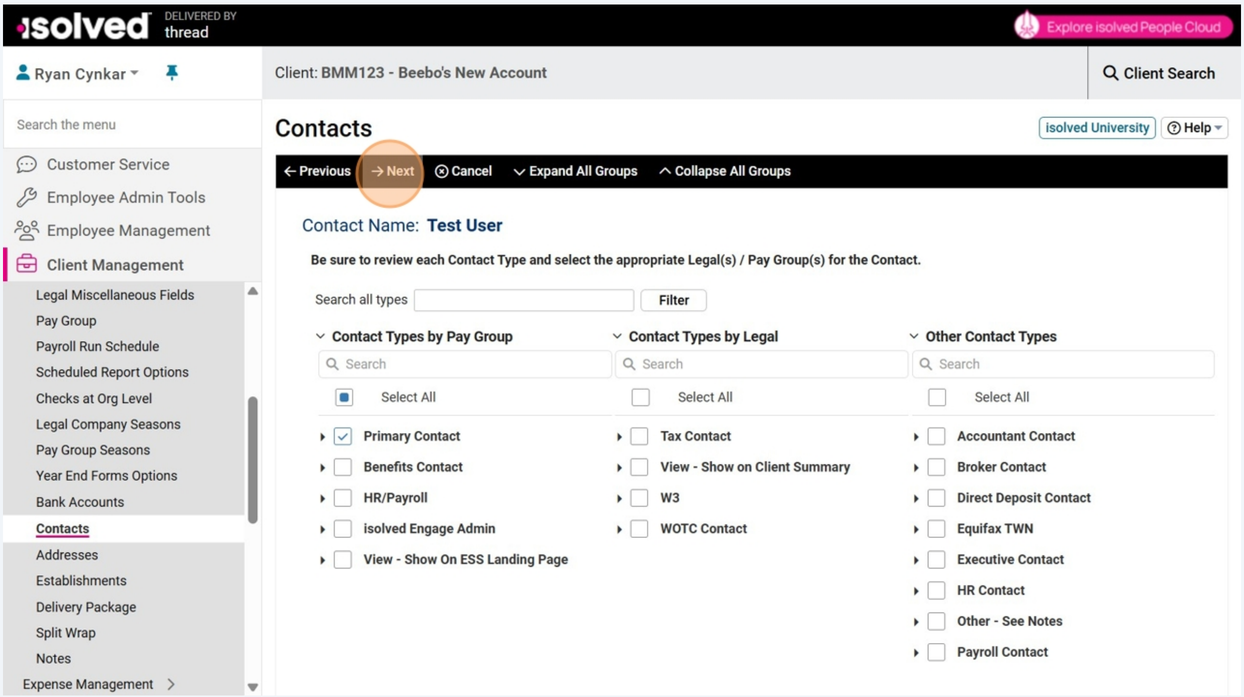
4 Click 'Add New' within Contacts



5 Fill out all information for this contact. Then click 'Next'

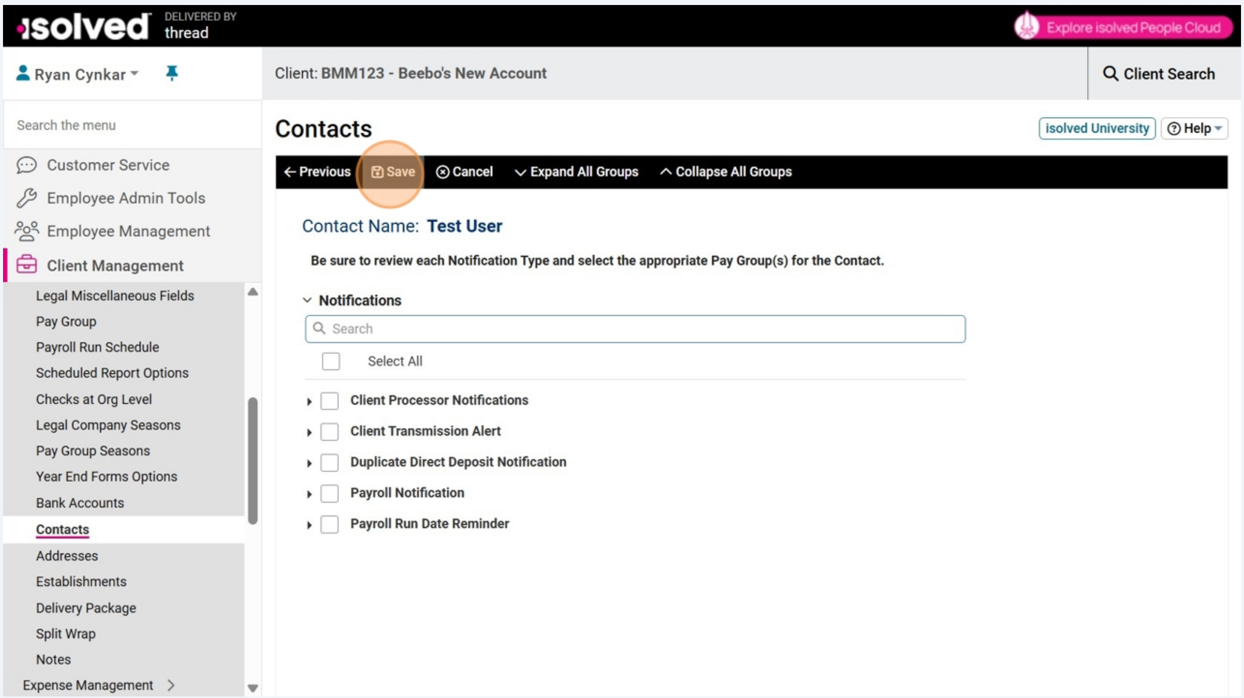


6 Select the User Type(s) and click 'Next'

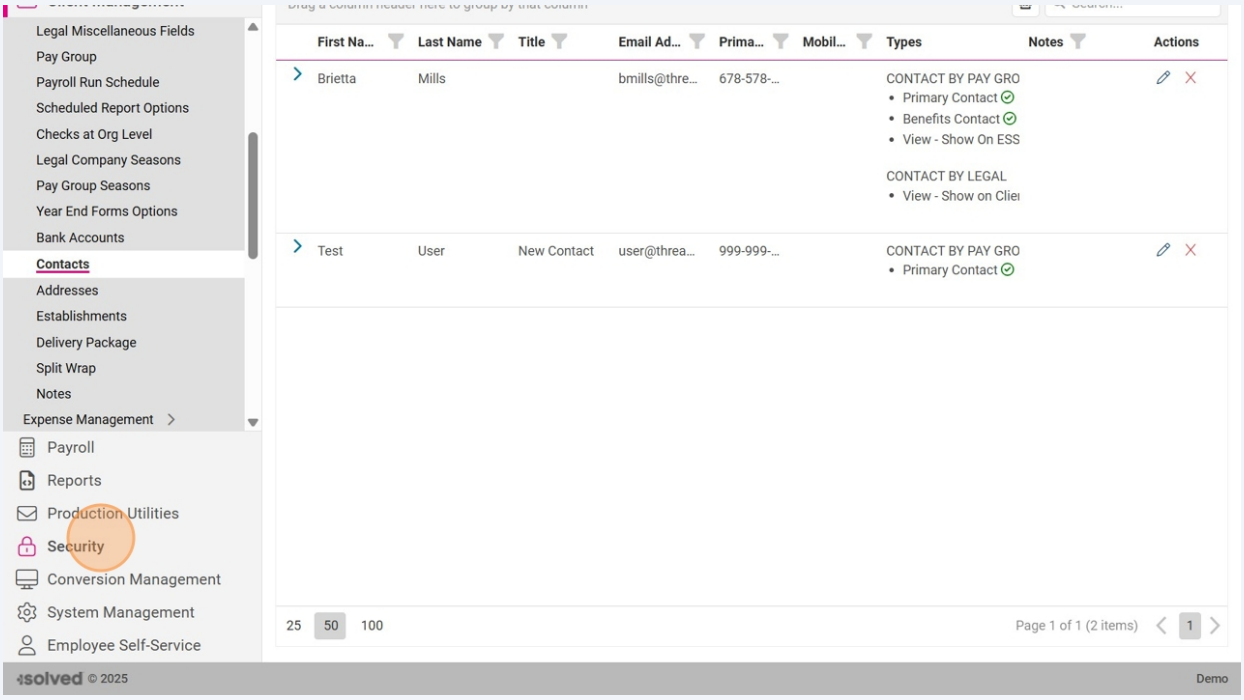


7 Select any Notification types you'd like for this user, and then hit 'Save'.
This will allow this contact to receive certain payroll notifications.

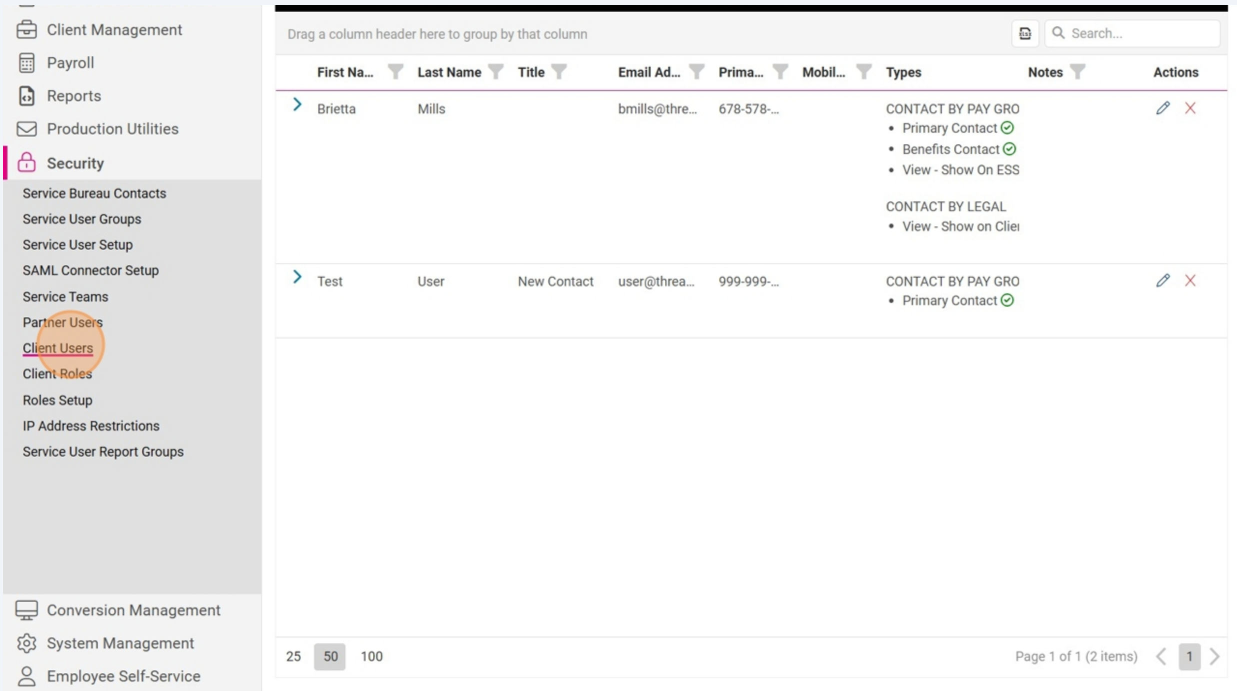
Once you have done that you have completed setting up the contact, and now will set up the Client User.



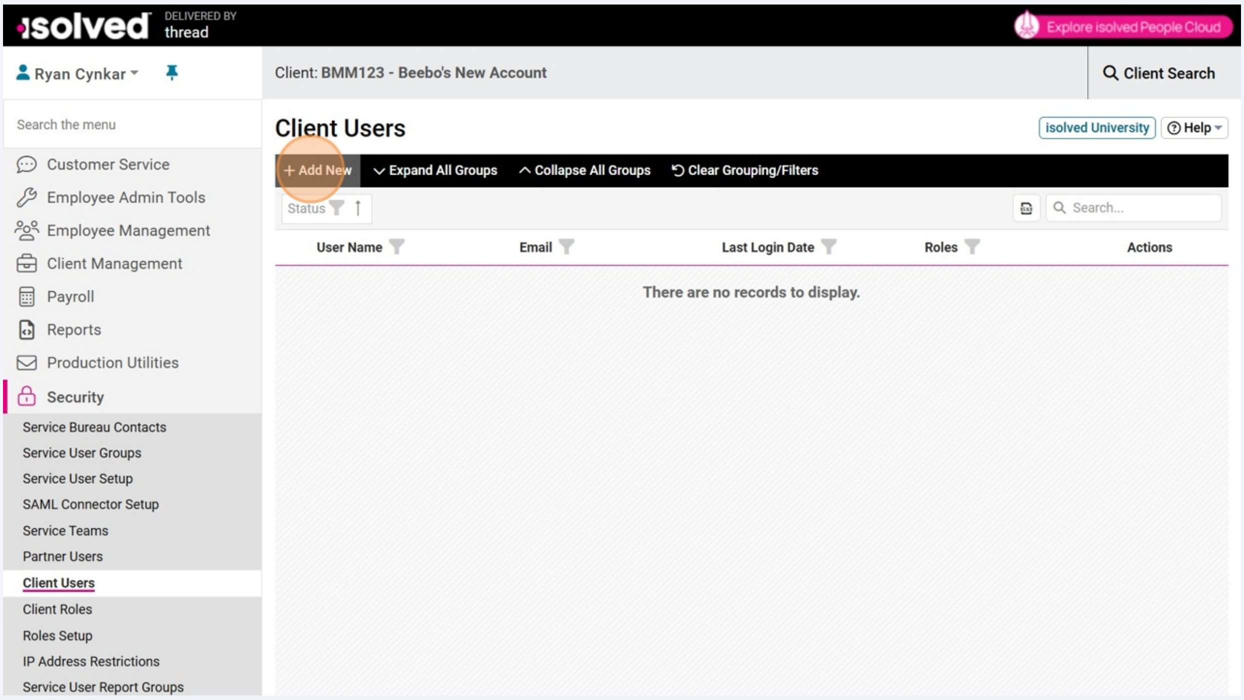
8 To set up the Client User, you will navigate to 'Security'



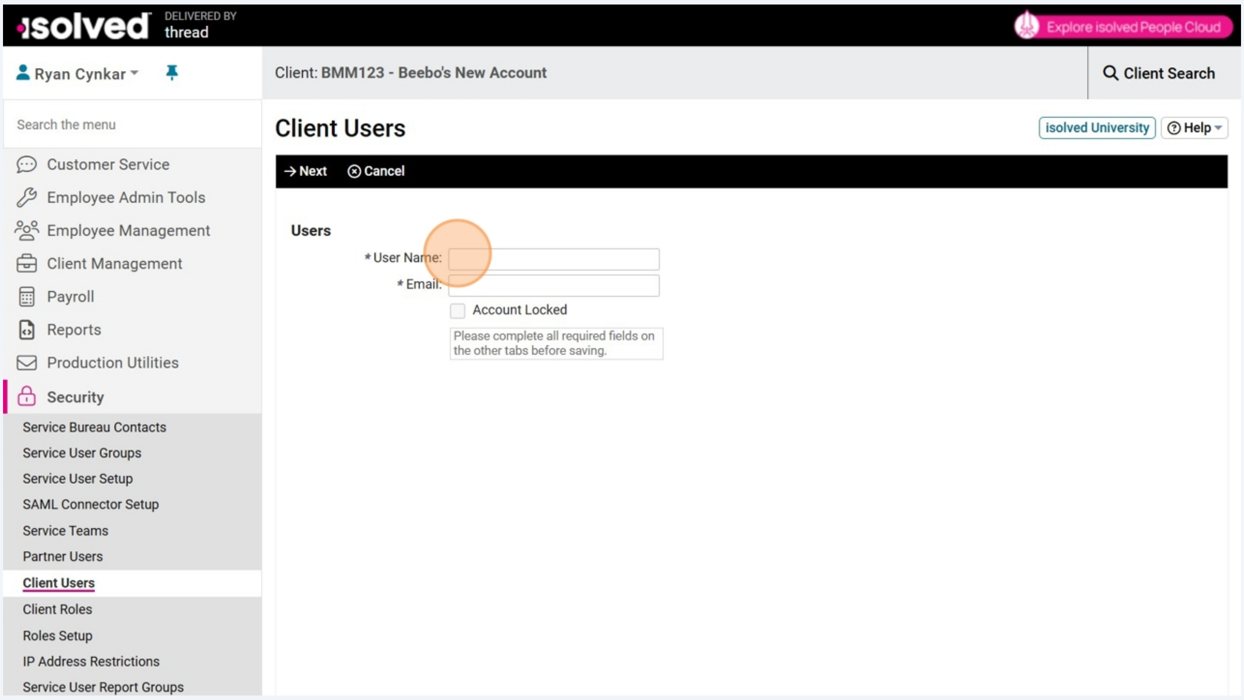
9 Click 'Client Users'



10 Click "Add New"



11 Enter the username and email for this user and click 'Next'



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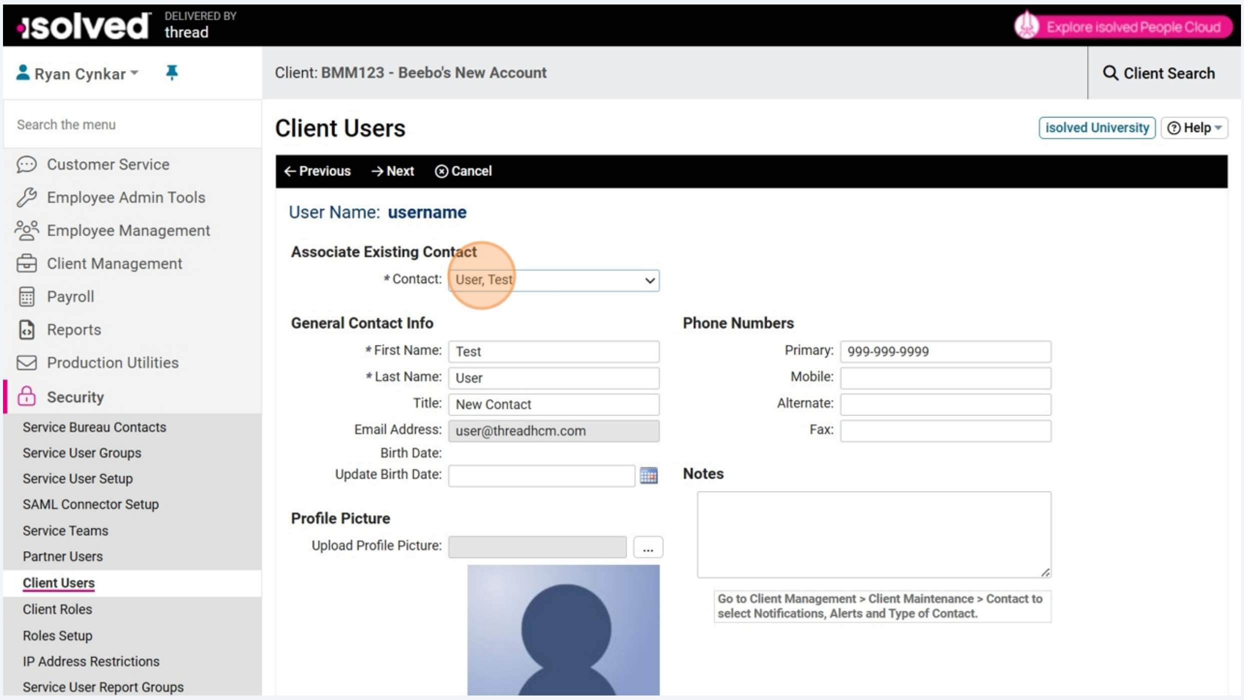
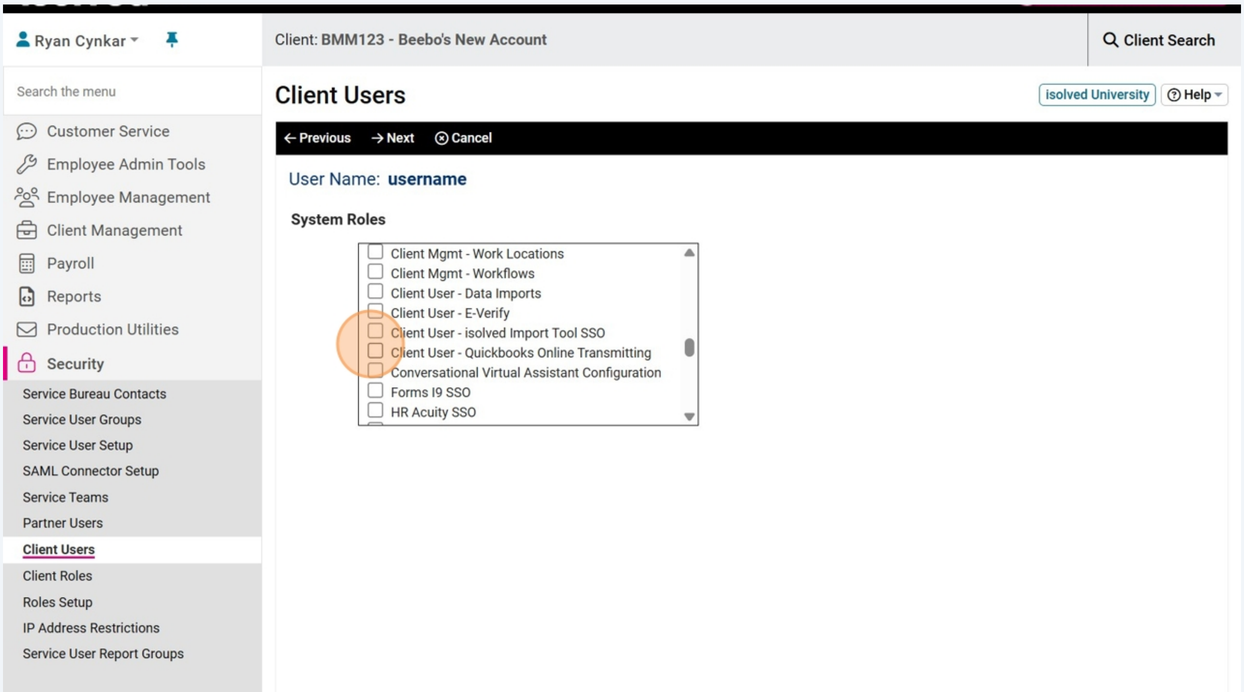
Select the Contact that coincides with this user.
Any information from the Contact will auto populate here.
Make any necessary changes and then click 'Next'



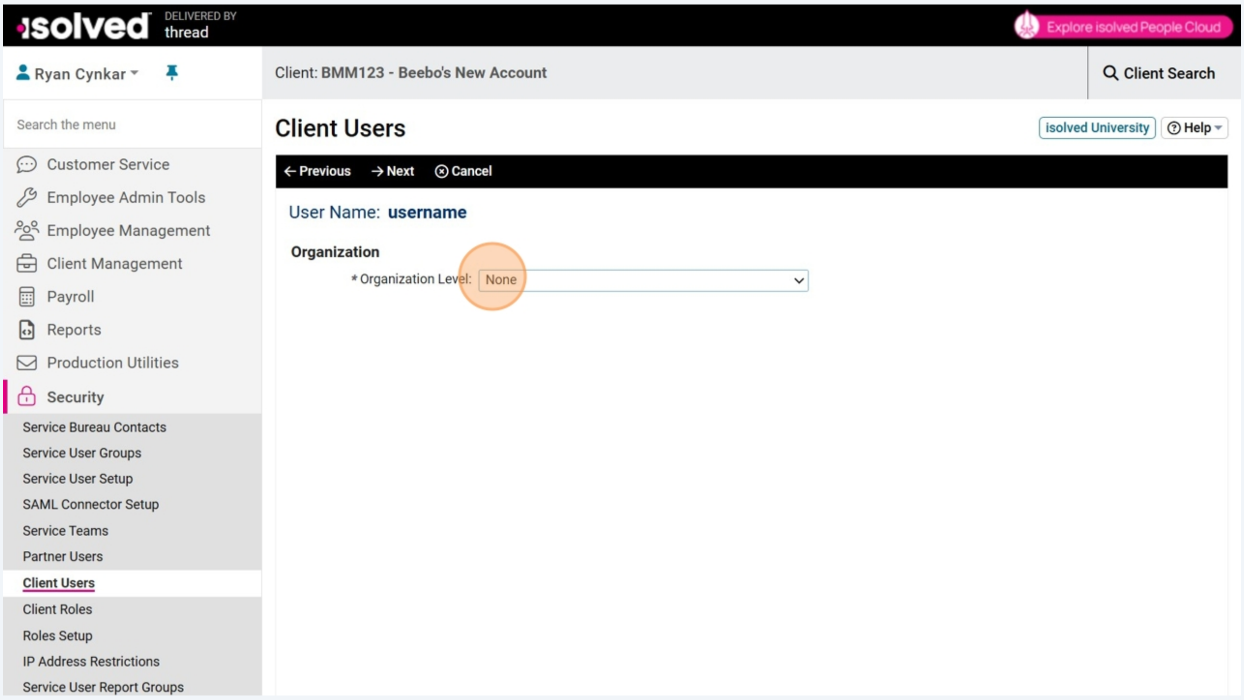
13 Click the 'Client User - Quickbooks Online Transmitting' check box from the System Roles List and any others you may need for this user

Then click 'Next'



14 Choose any Organization Levels from the drop down if you would like them to have limited access to certain Departments or other labor groups.

Then click 'Next'



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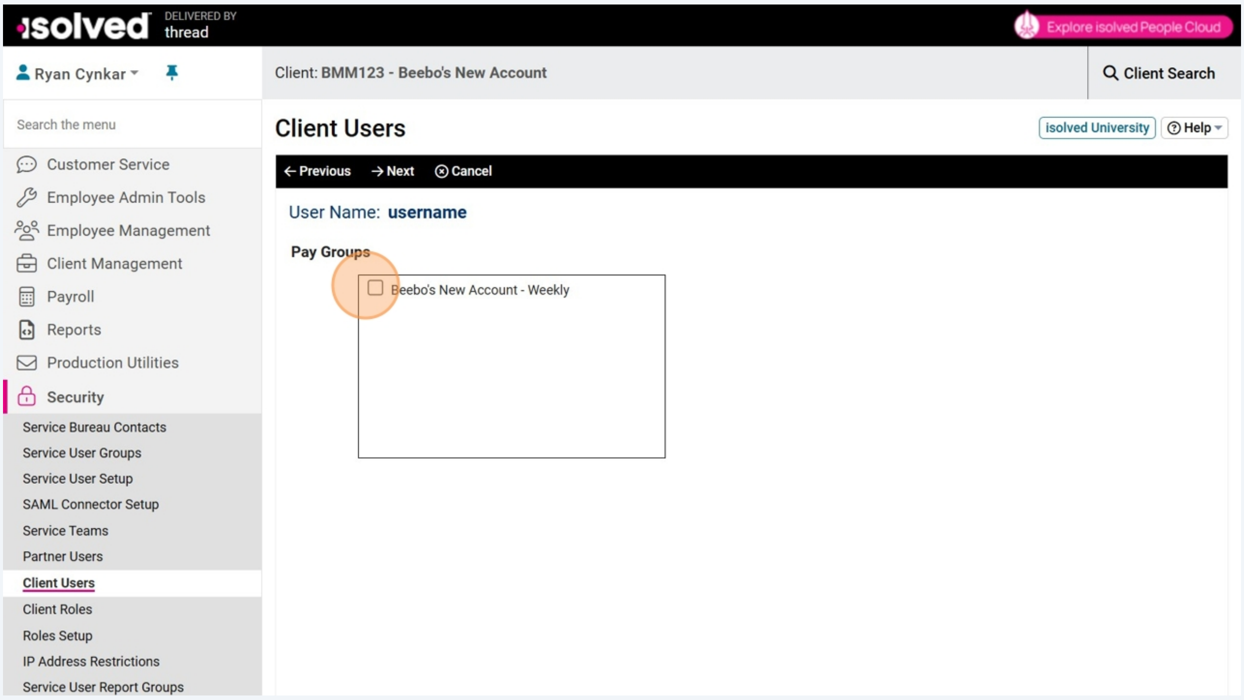
Select at least one pay group. If none are selected, the access will be very limited. Then click 'Next'



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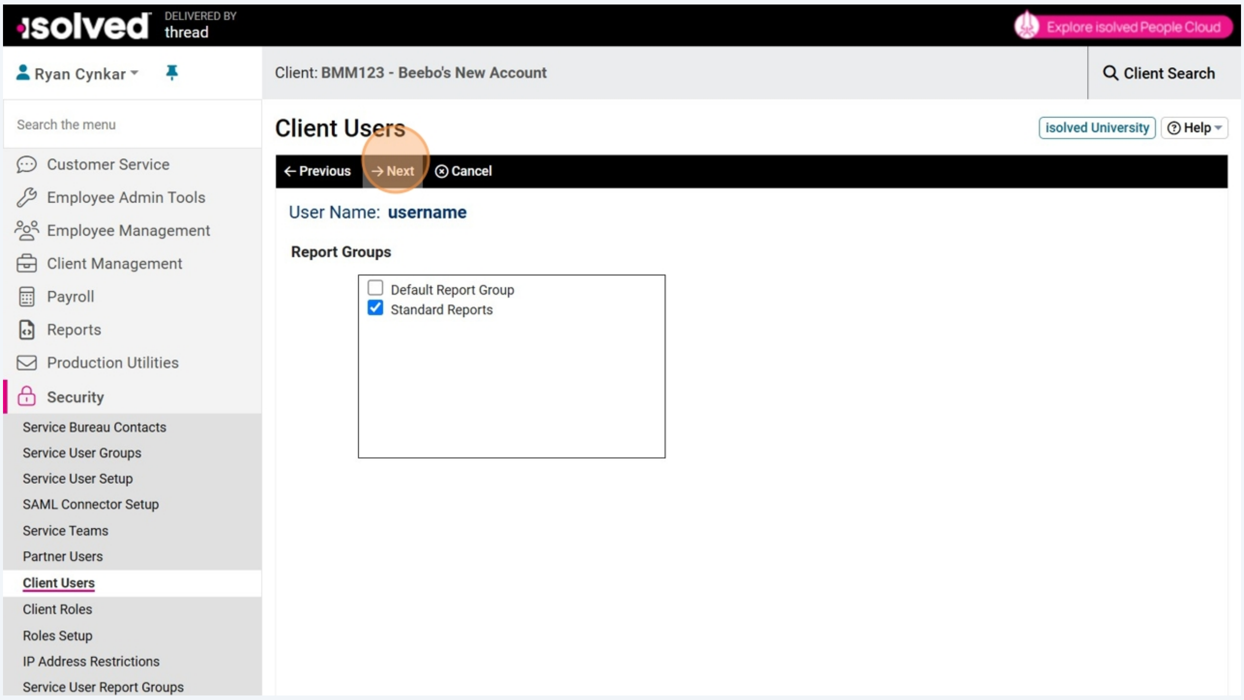
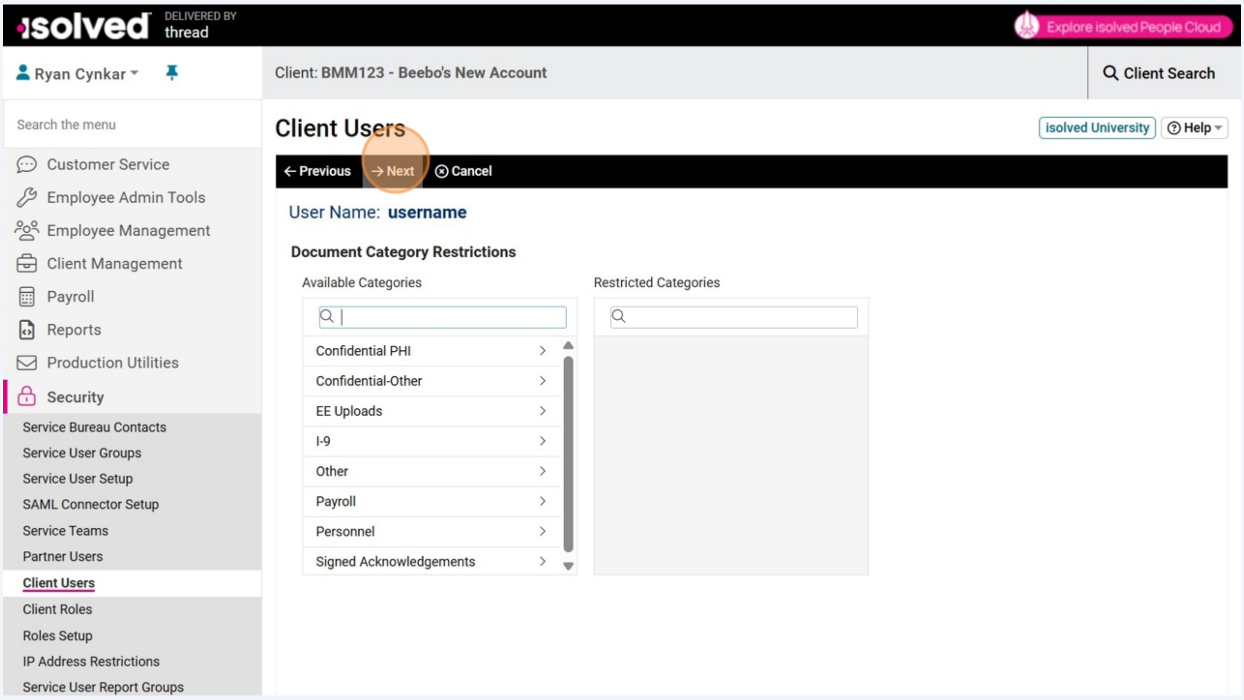
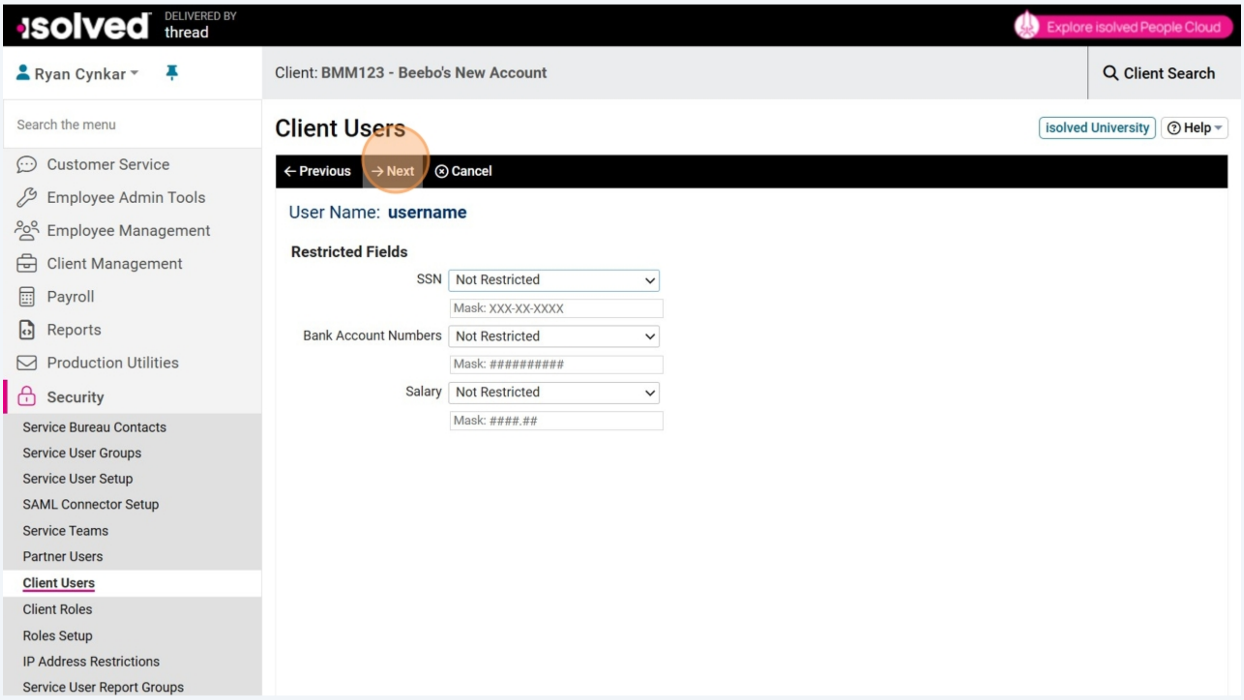
Here you can choose which report group they have access to. Keeping it to the default of Standard Reports is a safe option, uncheck the box or choose the appropriate option, depending on the level of access they should have.
Then choose 'Next'



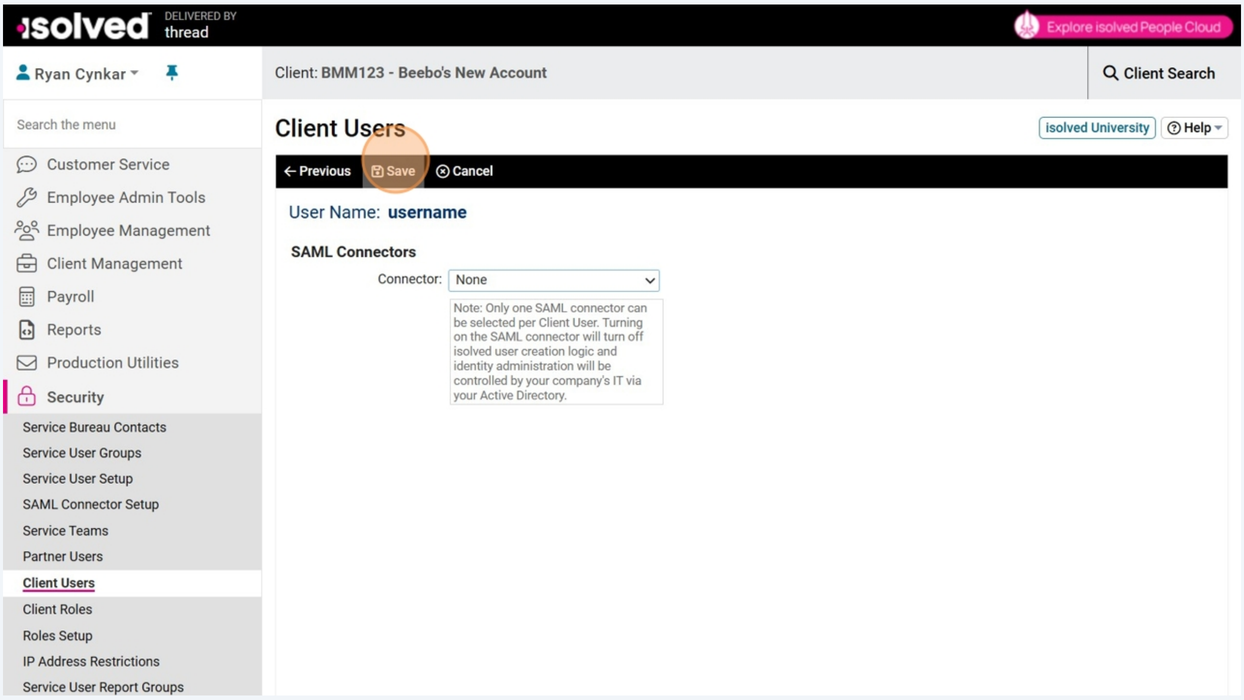
17 Move over any categories they shouldn't be able to see and then click 'Next'



18 Update any of these three dropdowns for any other sensitive fields they shouldn't have access to. If you're not sure what access they should have, it's usually safer to make them all restricted until you can confirm.
Then click 'Next'



19 On this screen, you can choose any SAML Connectors for Single Sign On. This is uncommon and if you don't need to set this up. you can click 'Save'



20 Once you click save, this user will receive an email that their account has been set up and they will be able to log in. They will create their own password and will have access to everything that was set up. This access can be updated at any time after the account has been created.

This completed the guide for setting up a Client Contact and Client User in iSolved and giving them permission to the QuickBooks Transmission.