

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

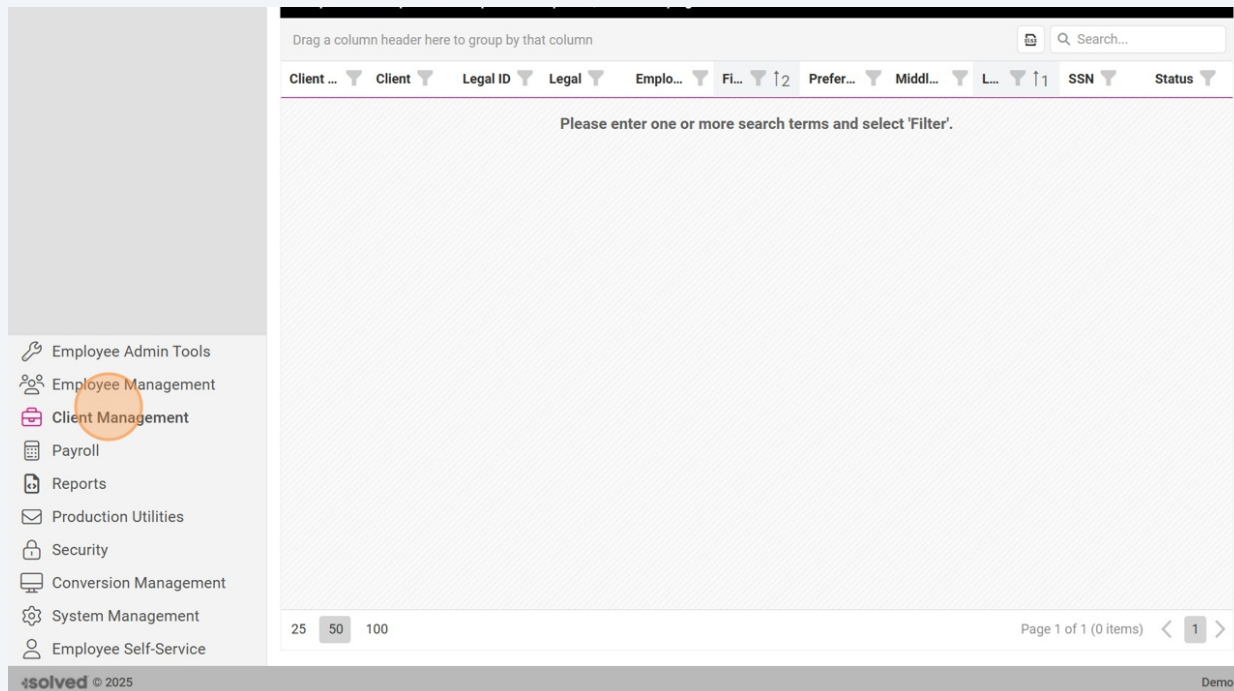


This guide will walk you through how to create a Client Contact and Client User in iSolved. This will then also show how to give that user permissions to access QuickBooks Transmission.

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 iSolved and in the client you going to be adding the user, navigate to 'Client Management' in the left menu.



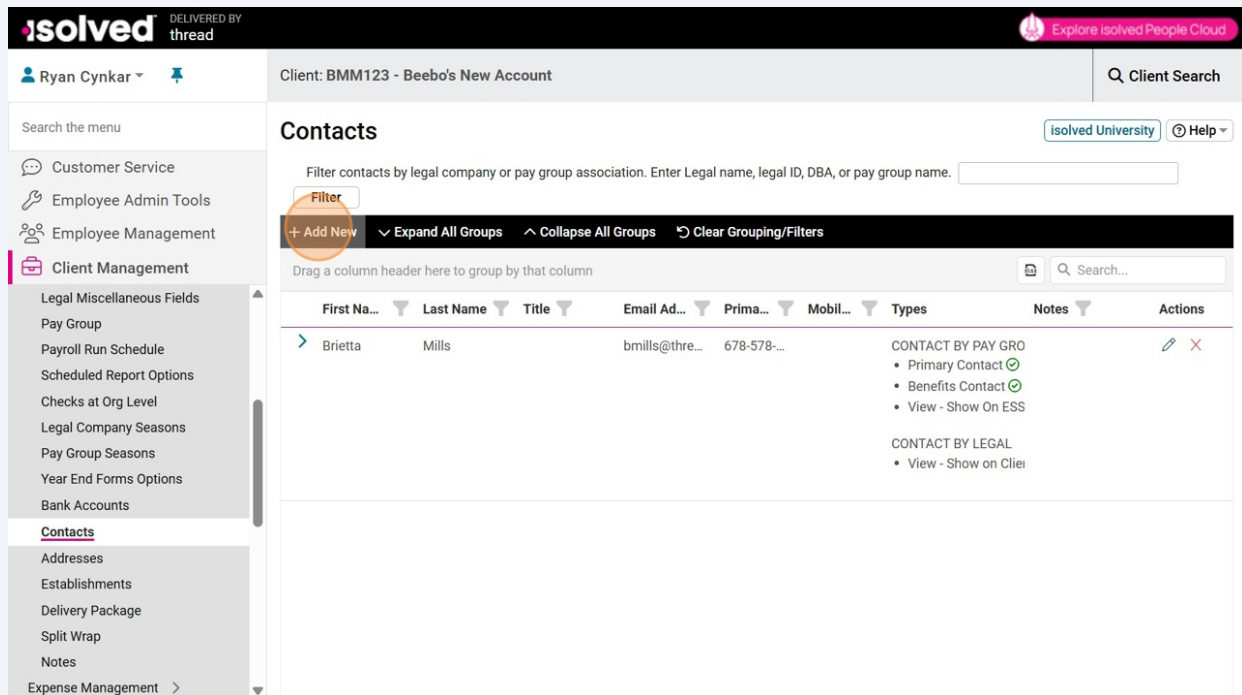
2 Click Client Maintenance

The screenshot shows the Isolved People Cloud interface. The top navigation bar includes the Isolved logo, a user profile for Ryan Cynkar, and a 'Client Search' button. The left sidebar contains a menu with 'Client Management' highlighted, and a sub-menu where 'Client Maintenance' is circled in orange. The main content area is titled 'Employee Search' and features search fields for Employee ID, First name, Middle name, Last name, SSN, and Email address, along with a 'Filter' button. Below the search fields are options to 'Expand All Groups', 'Collapse All Groups', and 'Clear Grouping/Filters'. A table header is visible with columns: Client, Legal ID, Legal, Emplo..., Fi..., Prefer..., Middl..., L..., SSN, and Status. The table body contains the text 'Please enter one or more search terms and select 'Filter'.'

3 Scroll down and click 'Contacts'

The screenshot shows the Isolved People Cloud interface with the 'Contacts' menu item highlighted in the left sidebar. The 'Contacts' item is circled in orange. The main content area is titled 'Employee Search' and features search fields for Email address and a 'Filter' button. Below the search fields are options to 'Expand All Groups', 'Collapse All Groups', and 'Clear Grouping/Filters'. A table header is visible with columns: Client, Legal ID, Legal, Emplo..., Fi..., Prefer..., Middl..., L..., SSN, and Status. The table body contains the text 'Please enter one or more search terms and select 'Filter'.'

4 Click 'Add New' within Contacts



The screenshot shows the 'isolved' web application interface. The top navigation bar includes the 'isolved' logo, 'DELIVERED BY thread', and a 'Client Search' button. The left sidebar contains a menu with categories like 'Customer Service', 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The 'Client Management' section is expanded, showing options like 'Legal Miscellaneous Fields', 'Pay Group', 'Payroll Run Schedule', 'Scheduled Report Options', 'Checks at Org Level', 'Legal Company Seasons', 'Pay Group Seasons', 'Year End Forms Options', 'Bank Accounts', 'Contacts', 'Addresses', 'Establishments', 'Delivery Package', 'Split Wrap', 'Notes', and 'Expense Management'. The main content area is titled 'Contacts' and shows a table of contacts. The 'Add New' button is highlighted with an orange circle.

Client: BMM123 - Beebo's New Account

Search the menu

Customer Service

Employee Admin Tools

Employee Management

Client Management

Legal Miscellaneous Fields

Pay Group

Payroll Run Schedule

Scheduled Report Options

Checks at Org Level

Legal Company Seasons

Pay Group Seasons

Year End Forms Options

Bank Accounts

Contacts

Addresses

Establishments

Delivery Package

Split Wrap

Notes

Expense Management >

Filter

+ Add New

Expand All Groups

Collapse All Groups

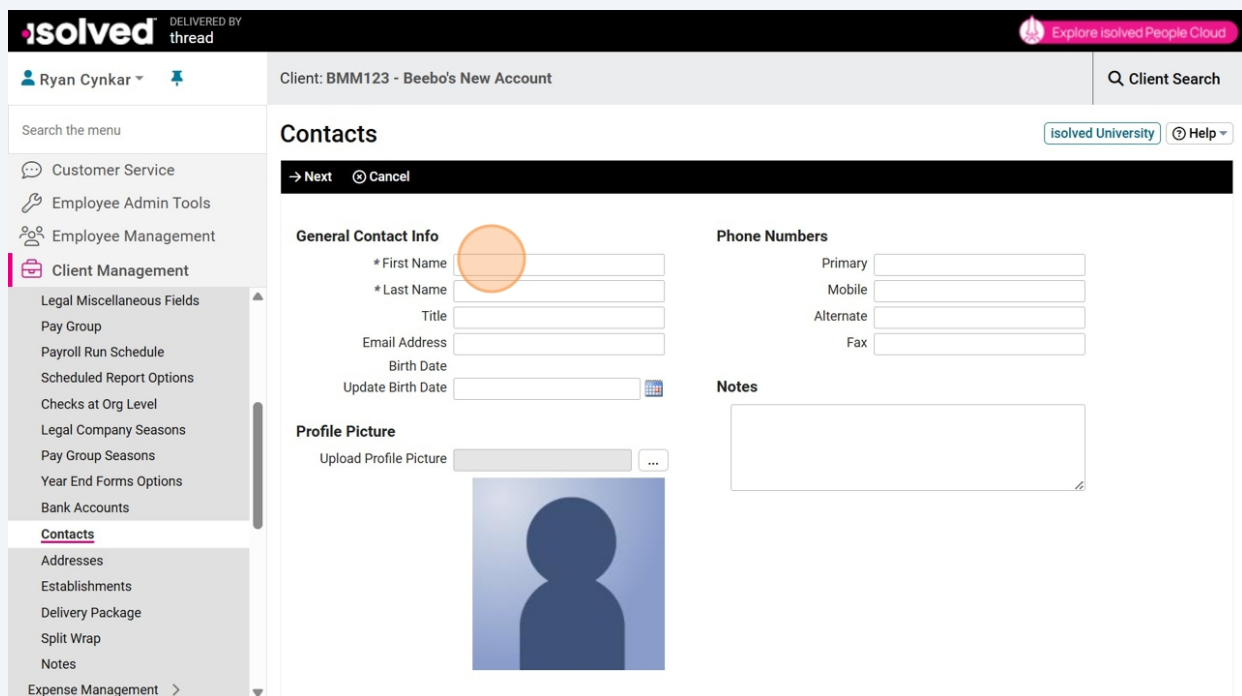
Clear Grouping/Filters

Filter contacts by legal company or pay group association. Enter Legal name, legal ID, DBA, or pay group name.

Drag a column header here to group by that column

First Na...	Last Name	Title	Email Ad...	Prima...	Mobil...	Types	Notes	Actions
Brietta	Mills		bmills@thre...	678-578-...		CONTACT BY PAY GRO • Primary Contact ✓ • Benefits Contact ✓ • View - Show On ESS		Edit Delete

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



The screenshot shows the 'isolved' web application interface. The top navigation bar includes the 'isolved' logo, 'DELIVERED BY thread', and a 'Client Search' button. The left sidebar contains a menu with categories like 'Customer Service', 'Employee Admin Tools', 'Employee Management', and 'Client Management'. The 'Client Management' section is expanded, showing options like 'Legal Miscellaneous Fields', 'Pay Group', 'Payroll Run Schedule', 'Scheduled Report Options', 'Checks at Org Level', 'Legal Company Seasons', 'Pay Group Seasons', 'Year End Forms Options', 'Bank Accounts', 'Contacts', 'Addresses', 'Establishments', 'Delivery Package', 'Split Wrap', 'Notes', and 'Expense Management'. The main content area is titled 'Contacts' and shows the 'Add New' form. The 'Next' button is highlighted with an orange circle.

Client: BMM123 - Beebo's New Account

Search the menu

Customer Service

Employee Admin Tools

Employee Management

Client Management

Legal Miscellaneous Fields

Pay Group

Payroll Run Schedule

Scheduled Report Options

Checks at Org Level

Legal Company Seasons

Pay Group Seasons

Year End Forms Options

Bank Accounts

Contacts

Addresses

Establishments

Delivery Package

Split Wrap

Notes

Expense Management >

Next

Cancel

General Contact Info

* First Name

* Last Name

Title

Email Address

Birth Date

Update Birth Date

Phone Numbers

Primary

Mobile

Alternate

Fax

Notes

Profile Picture

Upload Profile Picture

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

The screenshot shows the 'isolved' web application interface. The top navigation bar includes the 'isolved' logo, 'DELIVERED BY thread', and a link to 'Explore isolved People Cloud'. The user 'Ryan Cynkar' is logged in. The client is 'BMM123 - Beebo's New Account'. The left sidebar shows a menu with 'Client Management' selected. The main content area is titled 'Contacts' and shows the 'Contact Name: Test User'. Below this, there is a section for selecting contact types. The 'Next' button in the top navigation bar is highlighted with an orange circle.

Contacts

← Previous → Next ⌂ Cancel ⌵ Expand All Groups ⌴ Collapse All Groups

Contact Name: **Test User**

Be sure to review each Contact Type and select the appropriate Legal(s) / Pay Group(s) for the Contact.

Search all types Filter

⌵ Contact Types by Pay Group ⌵ Contact Types by Legal ⌵ Other Contact Types

Q Search Q Search Q Search

☐ Select All ☐ Select All ☐ Select All

▶ ☒ Primary Contact ▶ ☐ Tax Contact ▶ ☐ Accountant Contact

▶ ☐ Benefits Contact ▶ ☐ View - Show on Client Summary ▶ ☐ Broker Contact

▶ ☐ HR/Payroll ▶ ☐ W3 ▶ ☐ Direct Deposit Contact

▶ ☐ isolved Engage Admin ▶ ☐ WOTC Contact ▶ ☐ Equifax TWN

▶ ☐ View - Show On ESS Landing Page ▶ ☐ Executive Contact

▶ ☐ HR Contact

▶ ☐ Other - See Notes

▶ ☐ Payroll Contact

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.

The screenshot shows the 'isolved' web application interface. The top navigation bar includes the 'isolved' logo, 'DELIVERED BY thread', and a link to 'Explore isolved People Cloud'. The user 'Ryan Cynkar' is logged in. The client is 'BMM123 - Beebo's New Account'. The left sidebar shows a menu with 'Client Management' selected. The main content area is titled 'Contacts' and shows the 'Contact Name: Test User'. Below this, there is a section for selecting notification types. The 'Save' button in the top navigation bar is highlighted with an orange circle.

Contacts

← Previous ⌂ Save ⌂ Cancel ⌵ Expand All Groups ⌴ Collapse All Groups

Contact Name: **Test User**

Be sure to review each Notification Type and select the appropriate Pay Group(s) for the Contact.

⌵ Notifications

Q Search

☐ Select All

▶ ☐ Client Processor Notifications

▶ ☐ Client Transmission Alert

▶ ☐ Duplicate Direct Deposit Notification

▶ ☐ Payroll Notification

▶ ☐ Payroll Run Date Reminder

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

Legal Miscellaneous Fields
Pay Group
Payroll Run Schedule
Scheduled Report Options
Checks at Org Level
Legal Company Seasons
Pay Group Seasons
Year End Forms Options
Bank Accounts
Contacts
Addresses
Establishments
Delivery Package
Split Wrap
Notes
Expense Management >
Payroll
Reports
Production Utilities
Security
Conversion Management
System Management
Employee Self-Service

Drag a column header here to group by that column

First Na...	Last Name	Title	Email Ad...	Prima...	Mobil...	Types	Notes	Actions
> Brietta	Mills		bmills@thre...	678-578-...		CONTACT BY PAY GRO • Primary Contact ✓ • Benefits Contact ✓ • View - Show On ESS		✎ ✕
> Test	User	New Contact	user@threa...	999-999-...		CONTACT BY PAY GRO • Primary Contact ✓		✎ ✕

25 50 100 Page 1 of 1 (2 items) < 1 >

4solved © 2025 Demo

9 Click 'Client Users'

Client Management
Payroll
Reports
Production Utilities
Security
Service Bureau Contacts
Service User Groups
Service User Setup
SAML Connector Setup
Service Teams
Partner Users
Client Users
Client Roles
Roles Setup
IP Address Restrictions
Service User Report Groups
Conversion Management
System Management
Employee Self-Service

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> Test	User	New Contact	user@threa...	999-999-...		CONTACT BY PAY GRO • Primary Contact ✓		✎ ✕

25 50 100 Page 1 of 1 (2 items) < 1 >

10 Click "Add New"

The screenshot shows the 'Client Users' page in the 'isolated' system. The left sidebar contains a menu with options like 'Customer Service', 'Employee Admin Tools', 'Employee Management', 'Client Management', 'Payroll', 'Reports', 'Production Utilities', 'Security', and 'Client Users' (which is highlighted). The main content area shows the 'Client Users' page for 'Client: BMM123 - Beebo's New Account'. The page has a header with 'Client Search' and a 'Status' dropdown. Below the header, there are buttons for '+ Add New', 'Expand All Groups', 'Collapse All Groups', and 'Clear Grouping/Filters'. A table with columns 'User Name', 'Email', 'Last Login Date', 'Roles', and 'Actions' is shown, but it contains no records. The 'Add New' button is highlighted with an orange circle.

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

The screenshot shows the 'Client Users' page in the 'isolated' system. The left sidebar is the same as in the previous screenshot. The main content area shows the 'Client Users' page for 'Client: BMM123 - Beebo's New Account'. The page has a header with 'Client Search' and a 'Status' dropdown. Below the header, there are buttons for 'Next' and 'Cancel'. The 'Next' button is highlighted with an orange circle. Below the buttons, there is a form with fields for '* User Name:' and '* Email:'. There is also a checkbox for 'Account Locked' and a message: 'Please complete all required fields on the other tabs before saving.'

12

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'

isolved DELIVERED BY
thread

Explore isolved People Cloud

Ryan Cynkar

Client: BMM123 - Beebo's New Account

Client Search

Search the menu

Customer Service

Employee Admin Tools

Employee Management

Client Management

Payroll

Reports

Production Utilities

Security

Service Bureau Contacts

Service User Groups

Service User Setup

SAML Connector Setup

Service Teams

Partner Users

Client Users

Client Roles

Roles Setup

IP Address Restrictions

Service User Report Groups

Client Users

isolved University

Help

Previous

Next

Cancel

User Name: **username**

Associate Existing Contact

* Contact: **User, Test**

General Contact Info

* First Name: Test

* Last Name: User

Title: New Contact

Email Address: user@threadhcm.com

Birth Date:

Update Birth Date:

Phone Numbers

Primary: 999-999-9999


Mobile:

Alternate:

Fax:

Profile Picture

Upload Profile Picture:



Notes

Go to Client Management > Client Maintenance > Contact to select Notifications, Alerts and Type of Contact.

7

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'

Client: BMM123 - Beebo's New Account

Client Users

User Name: **username**

System Roles

- ☐ Client Mgmt - Work Locations
- ☐ Client Mgmt - Workflows
- ☐ Client User - Data Imports
- ☐ Client User - E-Verify
- ☐ Client User - isolated Import Tool SSO
- ☒ Client User - Quickbooks Online Transmitting
- ☐ Conversational Virtual Assistant Configuration
- ☐ Forms I9 SSO
- ☐ HR Acuity SSO

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'

Client: BMM123 - Beebo's New Account

Client Users

User Name: **username**

Organization

* Organization Level: **None**

15

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

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: BMM123 - Beebo's New Account Client Search

Search the menu

- Customer Service
- Employee Admin Tools
- Employee Management
- Client Management
- Payroll
- Reports
- Production Utilities
- Security**
 - Service Bureau Contacts
 - Service User Groups
 - Service User Setup
 - SAML Connector Setup
 - Service Teams
 - Partner Users
 - Client Users**
 - Client Roles
 - Roles Setup
 - IP Address Restrictions
 - Service User Report Groups

Client Users isolved University Help

Previous Next Cancel

User Name: **username**

Pay Groups

☐ Beebo's New Account - Weekly

16

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'

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: BMM123 - Beebo's New Account Client Search

Search the menu

- Customer Service
- Employee Admin Tools
- Employee Management
- Client Management
- Payroll
- Reports
- Production Utilities
- Security**
 - Service Bureau Contacts
 - Service User Groups
 - Service User Setup
 - SAML Connector Setup
 - Service Teams
 - Partner Users
 - Client Users**
 - Client Roles
 - Roles Setup
 - IP Address Restrictions
 - Service User Report Groups

Client Users isolved University Help

Previous Next Cancel

User Name: **username**

Report Groups

☐ Default Report Group

☒ Standard Reports

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

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: BMM123 - Beebo's New Account Client Search

Search the menu

- Customer Service
- Employee Admin Tools
- Employee Management
- Client Management
- Payroll
- Reports
- Production Utilities
- Security**
 - Service Bureau Contacts
 - Service User Groups
 - Service User Setup
 - SAML Connector Setup
 - Service Teams
 - Partner Users
 - Client Users**
 - Client Roles
 - Roles Setup
 - IP Address Restrictions
 - Service User Report Groups

Client Users

Previous Next Cancel

User Name: **username**

Document Category Restrictions

Available Categories	Restricted Categories
<input type="text"/>	<input type="text"/>
Confidential PHI	
Confidential-Other	
EE Uploads	
I-9	
Other	
Payroll	
Personnel	
Signed Acknowledgements	

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'

isolved DELIVERED BY thread Explore isolved People Cloud

Ryan Cynkar Client: BMM123 - Beebo's New Account Client Search

Search the menu

- Customer Service
- Employee Admin Tools
- Employee Management
- Client Management
- Payroll
- Reports
- Production Utilities
- Security**
 - Service Bureau Contacts
 - Service User Groups
 - Service User Setup
 - SAML Connector Setup
 - Service Teams
 - Partner Users
 - Client Users**
 - Client Roles
 - Roles Setup
 - IP Address Restrictions
 - Service User Report Groups

Client Users

Previous Next Cancel

User Name: **username**

Restricted Fields

SSN	<div>Not Restricted</div>
	<div>Mask: XXX-XX-XXXX</div>
Bank Account Numbers	<div>Not Restricted</div>
	<div>Mask: #####</div>
Salary	<div>Not Restricted</div>
	<div>Mask: ####</div>

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'

The screenshot shows the iSolved web interface. The top header includes the iSolved logo, 'DELIVERED BY thread', and a link to 'Explore iSolved People Cloud'. The user 'Ryan Cynkar' is logged in. The client is 'BMM123 - Beebo's New Account'. The left sidebar shows a menu with 'Security' expanded, and 'Client Users' selected. The main content area is titled 'Client Users' and has a 'Save' button highlighted with an orange circle. Below the title, there is a 'User Name' field with the value 'username'. Under 'SAML Connectors', there is a 'Connector' dropdown menu currently set to 'None'. A note below the dropdown states: 'Note: Only one SAML connector can be selected per Client User. Turning on the SAML connector will turn off iSolved user creation logic and identity administration will be controlled by your company's IT via your Active Directory.'

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.