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## Product Tips

### Dealing with User Permissions and Third Party Applications in QuickBooks Financial Software

Nancy Smyth, Certified QuickBooks ProAdvisor<sup>SM</sup>

**Product:** QuickBooks Financial Software

**Tip Category:** Install/Backup



#### Situation

In QuickBooks® financial software, issues about user permissions can arise especially when dealing with third party applications. In some cases, it appears that all users need to have the same administrative rights when they sign into QuickBooks as when the software was installed.

#### Response

Better understanding of the process may help reduce some of the frustration and allow you to assist your clients in installing the third party application satisfactorily.

#### The Process

When a third party software program is initially installed, and sends its first request for data to QuickBooks, the person who is the QB Administrator must be logged into QuickBooks in Single User Mode to grant permissions.

This logging in is a two-step process.

Example:

Larry is the QuickBooks administrator and Karen is an employee who will be using the third party application. Karen does not have the same user rights in QuickBooks as Larry.

Larry would initially grant permission to the third party application, and after selecting Yes, Always in the dialogue box to grant permission, and clicking the OK button, he is then taken back to the main QuickBooks screen.

Larry would then choose Edit, Preferences, scroll to integrated applications, select the company preferences tab, click on the app in question and select Properties. There is a middle section that has a checkbox for "Allow this application to login automatically" and a drop down for the login as.

In an example like this Larry would place a checkmark in the Allow this application to login automatically, and in the login as he should select himself (or create a new user with the apps name with access to ALL portions of QB), setting permissions up like this - Karen could have access to and use the program even though she does not have the same QB user rights -

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because the program would log in as Larry or someone with the same QB permissions as Larry.

So while essentially what you are saying is correct - by going back to the Preferences and completing the Properties section you will avoid the problem you are describing.

I hope this is helpful & not confusing.

*Nancy Smyth  
Sunburst Software Solutions, Inc.*

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