

## Password Protection Set Up Checklist

Role: \_\_\_\_\_

| Activity                   | None | Full | View | Create | Modify | Delete | Print | View |
|----------------------------|------|------|------|--------|--------|--------|-------|------|
| <b>Accounting</b>          |      |      |      |        |        |        |       |      |
| Assets                     |      |      |      |        |        |        |       |      |
| Closed Trans               |      |      |      |        |        |        |       |      |
| Equity                     |      |      |      |        |        |        |       |      |
| Genl Journal               |      |      |      |        |        |        |       |      |
| Liability                  |      |      |      |        |        |        |       |      |
| Manage F.A.                |      |      |      |        |        |        |       |      |
| Working TB                 |      |      |      |        |        |        |       |      |
| <b>Banking</b>             |      |      |      |        |        |        |       |      |
| Bank Acc'ts                |      |      |      |        |        |        |       |      |
| Acc't 1                    |      |      |      |        |        |        |       |      |
| Acc't 2                    |      |      |      |        |        |        |       |      |
| Acc't 3                    |      |      |      |        |        |        |       |      |
| Checks                     |      |      |      |        |        |        |       |      |
| Credit Cards               |      |      |      |        |        |        |       |      |
| CC Charges                 |      |      |      |        |        |        |       |      |
| Deposits                   |      |      |      |        |        |        |       |      |
| Loan Mgr                   |      |      |      |        |        |        |       |      |
| Online Bnkg                |      |      |      |        |        |        |       |      |
| Reconcile                  |      |      |      |        |        |        |       |      |
| Transfers                  |      |      |      |        |        |        |       |      |
| <b>Company</b>             |      |      |      |        |        |        |       |      |
| Billing Sol'n<br>Sign Up   |      |      |      |        |        |        |       |      |
| Co Info                    |      |      |      |        |        |        |       |      |
| Co Prefnce                 |      |      |      |        |        |        |       |      |
| Vehicle Mile               |      |      |      |        |        |        |       |      |
| Find All                   |      |      |      |        |        |        |       |      |
| Planning &<br>Budgeting    |      |      |      |        |        |        |       |      |
| Bus. Plan                  |      |      |      |        |        |        |       |      |
| Budget &<br>Forecast       |      |      |      |        |        |        |       |      |
| Print Labels               |      |      |      |        |        |        |       |      |
| Remote Accs                |      |      |      |        |        |        |       |      |
| Closing Date               |      |      |      |        |        |        |       |      |
| Online Bnkg<br>Synchronize |      |      |      |        |        |        |       |      |
|                            |      |      |      |        |        |        |       |      |

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|                       |  |  |  |  |  |  |  |  |
|-----------------------|--|--|--|--|--|--|--|--|
| <b>Cust &amp; Rec</b> |  |  |  |  |  |  |  |  |
| Acc't Rec             |  |  |  |  |  |  |  |  |
|                       |  |  |  |  |  |  |  |  |
| Finance Chg           |  |  |  |  |  |  |  |  |
| Bilable T&C           |  |  |  |  |  |  |  |  |
| Item Prices           |  |  |  |  |  |  |  |  |
| Credit Memo           |  |  |  |  |  |  |  |  |
| Estimates             |  |  |  |  |  |  |  |  |
| Invoices              |  |  |  |  |  |  |  |  |
| Credit Limit          |  |  |  |  |  |  |  |  |
| Rec Pymts             |  |  |  |  |  |  |  |  |
| Sales Orders          |  |  |  |  |  |  |  |  |
| Sales Recpts          |  |  |  |  |  |  |  |  |
| Stmnt Chges           |  |  |  |  |  |  |  |  |
| Statements            |  |  |  |  |  |  |  |  |
| Undep Funds           |  |  |  |  |  |  |  |  |
| View CC #             |  |  |  |  |  |  |  |  |
| <b>EE &amp; PR</b>    |  |  |  |  |  |  |  |  |
| EEOrganizer           |  |  |  |  |  |  |  |  |
| Paychecks             |  |  |  |  |  |  |  |  |
| Payroll Adj           |  |  |  |  |  |  |  |  |
| PR Liability          |  |  |  |  |  |  |  |  |
| PR Svc Act            |  |  |  |  |  |  |  |  |
| PR Tax Frms           |  |  |  |  |  |  |  |  |
| <b>File</b>           |  |  |  |  |  |  |  |  |
| Acct Review           |  |  |  |  |  |  |  |  |
| Archive &<br>Condense |  |  |  |  |  |  |  |  |
| Back Up               |  |  |  |  |  |  |  |  |
| Interview             |  |  |  |  |  |  |  |  |
| Export                |  |  |  |  |  |  |  |  |
| Import                |  |  |  |  |  |  |  |  |
| Rebuild               |  |  |  |  |  |  |  |  |
| Shipping              |  |  |  |  |  |  |  |  |
| Verify                |  |  |  |  |  |  |  |  |
| <b>Lists</b>          |  |  |  |  |  |  |  |  |
| C of A                |  |  |  |  |  |  |  |  |
| Class List            |  |  |  |  |  |  |  |  |
| Profile Lists         |  |  |  |  |  |  |  |  |
| Cust Mssge            |  |  |  |  |  |  |  |  |
| Cust Type             |  |  |  |  |  |  |  |  |
| Job Type              |  |  |  |  |  |  |  |  |
| Pymt Mthd             |  |  |  |  |  |  |  |  |
| Sales Rep             |  |  |  |  |  |  |  |  |
| Ship Via              |  |  |  |  |  |  |  |  |

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|                          |  |  |  |  |  |  |  |  |
|--------------------------|--|--|--|--|--|--|--|--|
| Terms                    |  |  |  |  |  |  |  |  |
| Vehicle                  |  |  |  |  |  |  |  |  |
| Vendor Type              |  |  |  |  |  |  |  |  |
| Cust:Job                 |  |  |  |  |  |  |  |  |
| Employee                 |  |  |  |  |  |  |  |  |
| FA Item                  |  |  |  |  |  |  |  |  |
| Item                     |  |  |  |  |  |  |  |  |
| Other Names              |  |  |  |  |  |  |  |  |
| PR Item                  |  |  |  |  |  |  |  |  |
| Price Lvl & Billing Rate |  |  |  |  |  |  |  |  |
| S. Tax Code              |  |  |  |  |  |  |  |  |
| Templates                |  |  |  |  |  |  |  |  |
| Vendor                   |  |  |  |  |  |  |  |  |
| <b>Reports</b>           |  |  |  |  |  |  |  |  |
| Acc't & Tax              |  |  |  |  |  |  |  |  |
| A&T Detail               |  |  |  |  |  |  |  |  |
| A&T Summary              |  |  |  |  |  |  |  |  |
| Banking                  |  |  |  |  |  |  |  |  |
| Budgets & Forecasts      |  |  |  |  |  |  |  |  |
| Co & Fin'l               |  |  |  |  |  |  |  |  |
| C&F Detail               |  |  |  |  |  |  |  |  |
| Custm Trans              |  |  |  |  |  |  |  |  |
| CT Detail                |  |  |  |  |  |  |  |  |
| CT Summary               |  |  |  |  |  |  |  |  |
| Cust & Rec               |  |  |  |  |  |  |  |  |
| EE & PR                  |  |  |  |  |  |  |  |  |
| Inventory                |  |  |  |  |  |  |  |  |
| Jobs                     |  |  |  |  |  |  |  |  |
| Jobs Detail              |  |  |  |  |  |  |  |  |
| Jobs Sumry               |  |  |  |  |  |  |  |  |
| Mem Repts                |  |  |  |  |  |  |  |  |
| Mileage                  |  |  |  |  |  |  |  |  |
| Purchases                |  |  |  |  |  |  |  |  |
| Sales                    |  |  |  |  |  |  |  |  |
| Time                     |  |  |  |  |  |  |  |  |
| Vend & Pay               |  |  |  |  |  |  |  |  |
| <b>Time Track</b>        |  |  |  |  |  |  |  |  |
| Single Time              |  |  |  |  |  |  |  |  |
| Timer Export             |  |  |  |  |  |  |  |  |
| Timer Import             |  |  |  |  |  |  |  |  |
| Wkly Time                |  |  |  |  |  |  |  |  |
|                          |  |  |  |  |  |  |  |  |

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|-----------------------|--|--|--|--|--|--|--|--|
| <b>Vend &amp; Pay</b> |  |  |  |  |  |  |  |  |
| Acc't Pay             |  |  |  |  |  |  |  |  |
|                       |  |  |  |  |  |  |  |  |
| Adj Qty/Val           |  |  |  |  |  |  |  |  |
| Build Assem           |  |  |  |  |  |  |  |  |
| Enter Bills           |  |  |  |  |  |  |  |  |
| Item Rec              |  |  |  |  |  |  |  |  |
| Pay Bills             |  |  |  |  |  |  |  |  |
| Pay SalesTax          |  |  |  |  |  |  |  |  |
| 1099/1096             |  |  |  |  |  |  |  |  |
| Purchase Ord          |  |  |  |  |  |  |  |  |
| PO List               |  |  |  |  |  |  |  |  |
| SalesTax Adj          |  |  |  |  |  |  |  |  |