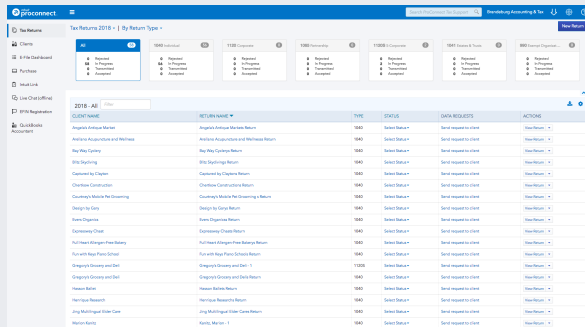


Managing Teams

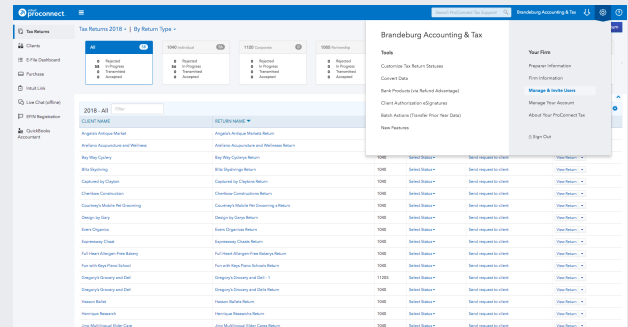
Growing your firm and adding more team members? No problem, ProConnect Tax Online makes it easy to set up and manage team members at no additional cost.

What to Expect



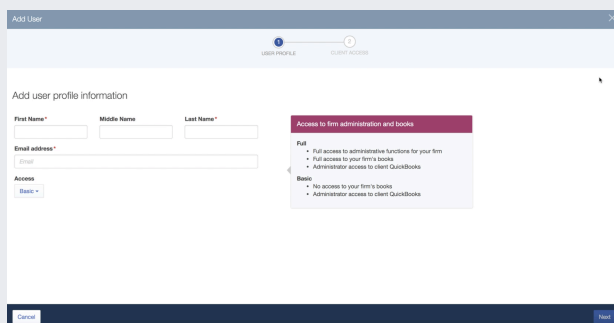
Get Started

Click the **Gear Icon** in the upper right-hand corner next to your firm's name. From the **Your Firm** column, select **Manage and Invite Users**.



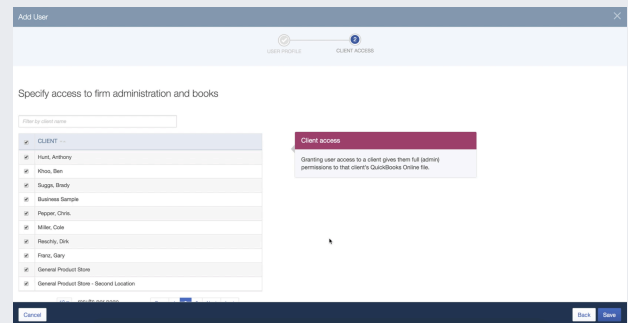
User Management

The user dashboard allows you to manage all your team members – edit contact info or add/delete users, check activity status and manage access to firm and client data. Click **Add User** to set up a new team member.



Set up User Profile

Add the new member's name and email address, then select their access type – full or basic access.



Set up Client Access

Select the clients the new member has permission to access. Click **Save As** to initiate an email invitation to the new member to accept and join your firm on ProConnect Tax Online.

Access Types

Full Access

- Full access to administrative functions for your firm
- Full access to your firm's books
- Administrator access to client Quickbooks

Basic Access

- No access to your firm's books
- Administrator access to client Quickbooks

Tips

1. If you're a current Quickbooks Online Accountant user, your team and set-up details will flow through to ProConnect Tax Online.
2. The email address entered to set up a new user will be their username to log in to ProConnect Tax Online.
3. If the user you're adding is already using an Intuit software, like QuickBooks Online, Lacerte or ProSeries, enter the same email address associated with that product(s). Start with a new email address if they no longer have access to that email account.
4. When they log in, they will only see the clients you select.