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Certified Payroll Solution minimum permission setting for Enterprise 5.0

When granting Certified Payroll Solution access rights to your QuickBooks file, the user that is assigned in the "Login As" drop down selection of the Integrated Application properties screen **must have** the following access rights to the QuickBooks company file – otherwise Certified Payroll Solution will not be able to access the required information to complete your Certified Payroll Reports.

Example:
Larry, who is the QuickBooks Administrator (ADMIN) originally set up Certified Payroll Solution and initially chose Admin from the "Login As" dropdown menu of the Integrated Application properties screen. Larry ran the first few certified payrolls and then gave the task of generating the reports to Suzy, who normally handles only Accounts Payable. In QuickBooks, Suzy has no permission to access timesheet data. Suzy is logged into QuickBooks as herself and attempts to run Certified Payroll Solution, she will receive a QuickBooks Error message – stating:

> Retrieving "x" (time line entries or Jobs) from QuickBooks Failed.
> Error Code 0:
> "X" (Job) query failed. Insufficient permission level to perform this action.

And Suzy will be **unable** to run or print the reports because Certified Payroll Solution has been told that only someone with Admin level permissions can run the reports and Suzy does not have Admin permissions.

To avoid a call to Technical Support, Larry can:

1. Tell Suzy that when she runs Certified Payroll Solution that QuickBooks must be closed. This allows CSP to log into QuickBooks automatically using the Admin permissions. Using this method does cause a delay in CPS's initial connection to QuickBooks.
2. Edit Suzy's QuickBooks User Account and give her the required permissions so that she can have QuickBooks open while running CPS and to also correct any errors that CPS encounters.
3. Create a new user Account in QuickBooks called CPS, who has the permissions outlined below. Then go to Edit->Preferences->Integrated Applications->Company Preferences Tab->click on Certified Payroll Solution->choose Properties and select CPS from the "Login As" dropdown. Again Suzy must have QuickBooks closed when running CPS and there will be a delay in CPS's initial connection to QuickBooks.

Important Note: If Larry chooses option 1 or 3 and Suzy encounters any errors, such as **Timesheets (for Employee/Job/Wage) listed below are not in the Paycheck Detail, or Employees listed below have multiple rates for the same payroll item name in the QuickBooks Employee Record**; Suzy will be unable to go back into QuickBooks and correct the problems. Larry will have to log into QuickBooks and correct the error so Suzy can generate the reports without errors.

To ensure that the person who is responsible for running CPS has sufficient permissions to retrieve the data required for the certified payroll reports:

From the QuickBooks Company Menu, select Users, and then Set Up Users and Roles. Select the Role List Tab and then press the New Button. The Role Name should be CPS User and in the Description Box should contain Permissions required to run Certified Payroll Solution. These are the minimum permissions required to retrieve paycheck information from QuickBooks, but does not guarantee that the user will have the ability to create paychecks in QuickBooks.

Select the Company Area and expand the Activities by clicking on the + sign to expand the listing. Select the Company Information Activity and grant Full Access with View and Modify Access levels.

Select the Employees & Payroll Area and expand the Activities by clicking on the + sign to expand the listing. Select Paychecks and choose Full Activity Access Level including View, Create, Modify, Delete and Print.

Select the Lists Area and expand the Activities by clicking on the + sign.

1. Select Customer:Job List and Full Access with the ability to View List, Create Entries, Modify Entries, Delete, Print List, and View Balance.
2. Select Employee List and choose Partial Access with the ability to View Lists, Create entries, Modify Entries, and Print List.
3. Select Payroll Item List and choose Full Access with the ability to View List, Create Entries, Modify Entries, Delete Entries and Print Lists.
4. Select Vendor List and choose Partial Access with the ability to View List, Create Entries, Modify Entries, and Print List.

Select the Reports Area and expand the Activities by clicking on the + sign:

1. Select Custom Transaction, expand this and select Custom Transaction Detail and choose Partial Access to View.
2. Select Customers and Receivables and choose Full Access to View and Print Activities.
3. Select Employees and Payroll and choose Partial Access to View
4. Select Jobs and choose Full Access to View and Print
5. Select Time and choose Full Access to View and Print
6. Select Vendors and Payables and choose Full Access to View and Print

Select Time Tracking and choose Full Access to View, Create, Modify, Delete, and Print.