



The QuickBooks™ Client Newsletter

Helping You Grow a Profitable Business with QuickBooks™ Software

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How QuickBooks Protects Your Data, and How You Can Help

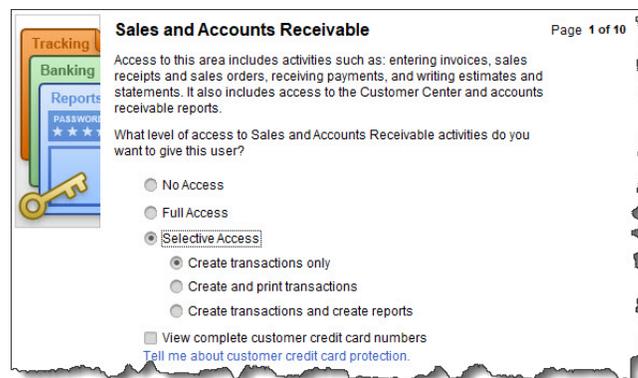
The data in your QuickBooks company file contains some of the most sensitive information on your computer. Make sure it is secure.

Your customer list is gold. And those Social Security and bank card numbers in your payroll, client, and vendor records need to be protected from intruders and only viewed by authorized employees.

Many people think only large corporations and financial institutions are hacked. That is what the bad people want you to think. In reality, small businesses are often the victims of data breaches because their owners think they are immune from data theft and destruction. Password protecting your PCs and running antivirus and anti-malware software is definitely the smart thing to do, however, there are other measures you need to take to protect your accounting records. Here is what we suggest.

Restrict access by setting up user permissions.

If you have multiple staff members using QuickBooks, do not share the same user name and password. That obviously gives everyone access to all data and activity. If something goes awry, you have no way of knowing when or how it happened, and who was responsible. To protect yourself and everyone else who logs in, it's critical that all users have their own unique logins. They should only be allowed to access information and functions that relate to their job duties.



You can restrict QuickBooks users to certain screens and activities.

To assign these permission levels, open the **Company** menu and click on **Set-Up Users and Passwords**, then **Set-Up Users**. This opens the **User List** window, where you should be identified as the **Admin**. Click **Add User**. Enter a user name and password for an employee who needs access (this can be changed later). Check the box in front of **Add this user to my QuickBooks license**.

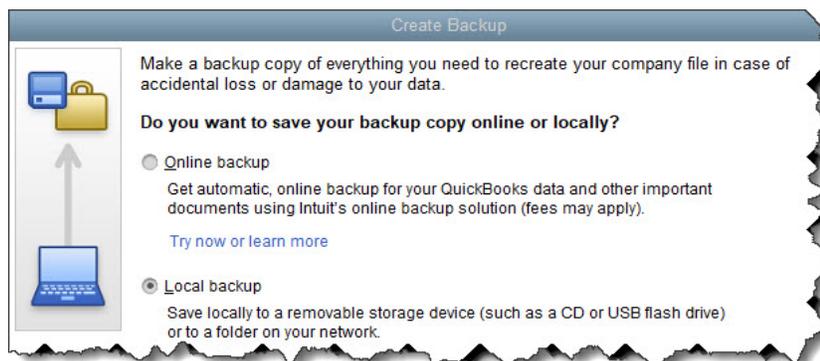
Tip: Not sure how many users are allowed under your current license? Click **F2** and look in the upper left corner. If you need to add licenses, let us know.

Click **Next**. The next screen lists three options. You can grant access to all areas or to selected areas. You can also create a login for us as your external accountant, which lets us see everything except sensitive customer data. Select the second option and click **Next**. You can see in the image above that you can give the employee different levels of responsibility. When you've made your choice, click **Next**. The subsequent nine screens deal with different areas of QuickBooks and their related activities.

Tip: When you need to change your password, which you should do at a minimum every three months, go to **Company | Set-Up Users and Passwords | Change Your Password**.

Save your company file elsewhere.

You should always be backing up your company file to an external storage device (like a CD or thumb drive). To set this up, open the **File** menu and select **Back Up Company**, then **Create Local Backup**. This window will open:



The Create Backup window

Make sure **Local backup** is selected, then click the **Options** button below (not pictured here). Click **Browse** to see a directory of your PC and select the correct destination. Leave the two boxes below it checked; this will add the backup date/time to the filename and limit the number of backup copies to three.

By default, QuickBooks will remind you to back up your file every fourth time you close your company file; you can change this number if you prefer. Leave the **Complete verification** option checked and click **OK**, then **Next**. Specify when you want to save your backup copy and click **Next** again. You can schedule regular backups of your company file on the next screen if you'd like. When you have completed this screen, click **Finish**.

You should also consider saving a copy of your company file to the cloud. Intuit offers its own service for this; it costs \$9.95/month or \$99.95 annually, but it gives you 100 GB of storage space, so you can backup other

critical business files, too. If you choose not to backup to the cloud, at least store your backups to a portable device that you can carry offsite.

Other Safety Steps to Take

There are other things you can do to protect your QuickBooks data, including:

- Insist on strong passwords. Yes, it's a pain to create and remember them, but it's critical here.
- Keep everything updated. That includes your operating system and anything else that requires updates.
- Minimize web browsing on work computers and remind employees about smart email behaviors.

We strongly recommend that you consult with us as you're setting up any kind of backup system for QuickBooks. The software's instructions are straightforward, but we don't want you to do anything that would jeopardize the integrity of your company file.

We hope you find this QuickBooks tip helpful. Please visit our company website <http://www.accountingconnections.org> often as it is updated constantly and offers a wealth of tax and accounting tips, along with links to better serve your business needs.

Our QuickBooks Tips newsletters are archived on our website as well.

Accounting and Taxation is **our** business; having us a part of your team allows **you** to concentrate on **your** core business.



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