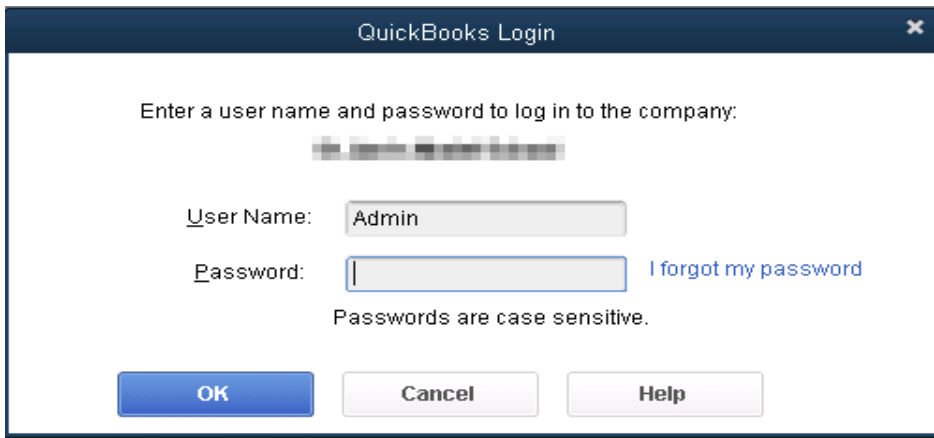


## Allowing CathoNet Reports to Access Your QuickBooks Files

In order for your QuickBooks data to be included in the CathoNet reporting system, you must grant the CathoNet reporting system permission to access your QuickBooks file. This is accomplished by adding a user to your QuickBooks file. The CathoNet reporting system will use this user to copy data from your QuickBooks file into the reporting system when the reporting system performs a “refresh” of your reporting data.

Use the instructions below to add this user to your QuickBooks file.

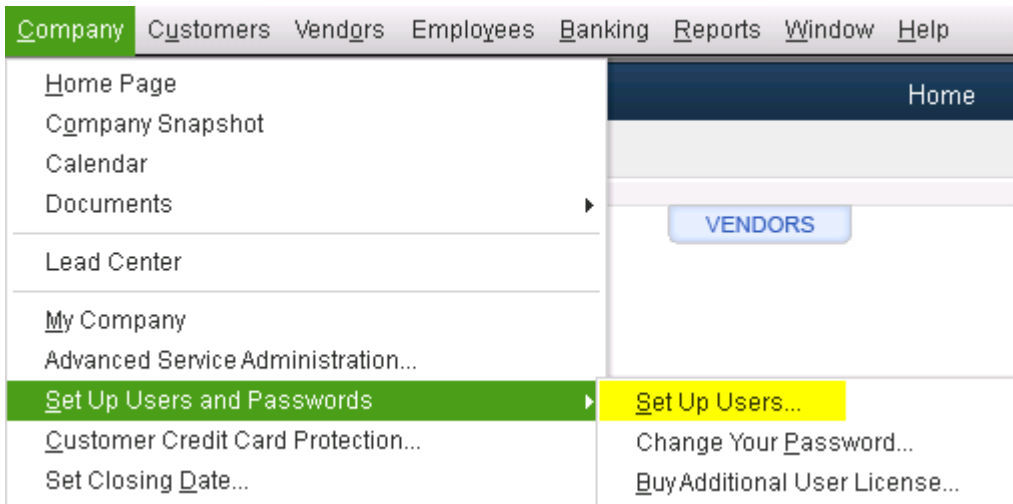
1. Log in as the **Admin** user to the QuickBooks company file you wish to include in CathoNet Reporting



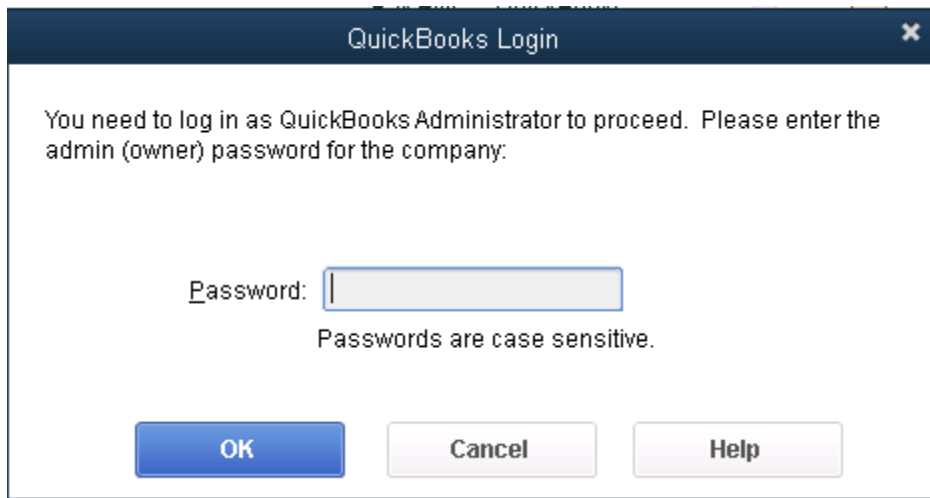
The screenshot shows a 'QuickBooks Login' dialog box. It contains the following elements:

- Title bar: QuickBooks Login
- Instruction: Enter a user name and password to log in to the company:
- Company name: [Blurred]
- User Name field: Admin
- Password field: [Empty]
- Link: I forgot my password
- Note: Passwords are case sensitive.
- Buttons: OK, Cancel, Help

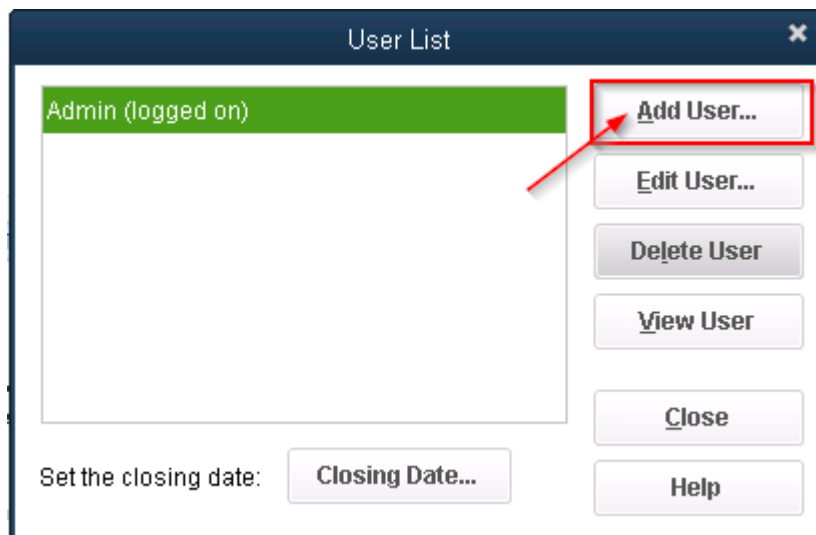
2. Select **Company > Set Up Users and Passwords > Set Up Users...**



3. Re-enter the Admin password on the **QuickBooks Login** prompt and click **OK** (SEEN BELOW)



4. The **User List** will display as seen below. Click the **Add User...** button



5. Enter "cathonet" for the User Name (ensure all letters are lowercase)
6. Set and confirm **Cathonet123** as the password (capitalize the letter "C")

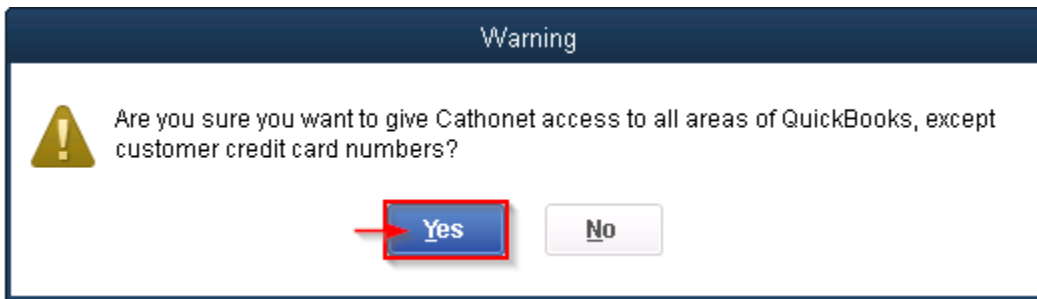
**Confirm this info using the image below**

The screenshot shows a dialog box titled "Set up user password and access" with a close button (X) in the top right corner. On the left side, there is a vertical stack of icons labeled "Tracking", "Banking", and "Reports" with a "PASSWORD" label and three stars below them, and a key icon at the bottom. The main heading is "User Name and Password". Below the heading, it says "Provide a name and an optional password for this user." There are three input fields: "User Name:" containing "cathonet", "Password:" containing "Cathonet123", and "Confirm Password:" containing "Cathonet123". A red box highlights these three fields. Two blue callout boxes point to the "User Name" and "Password" fields with the text "Must be lowercase" and "Cathonet123" respectively. Below the input fields is a checkbox labeled "Add this user to my QuickBooks license. Explain." which is currently unchecked. At the bottom of the dialog, there are five buttons: "Back", "Next" (highlighted in blue), "Finish", "Help", and "Cancel". A red arrow points from the "Next" button to the "Next" callout box.

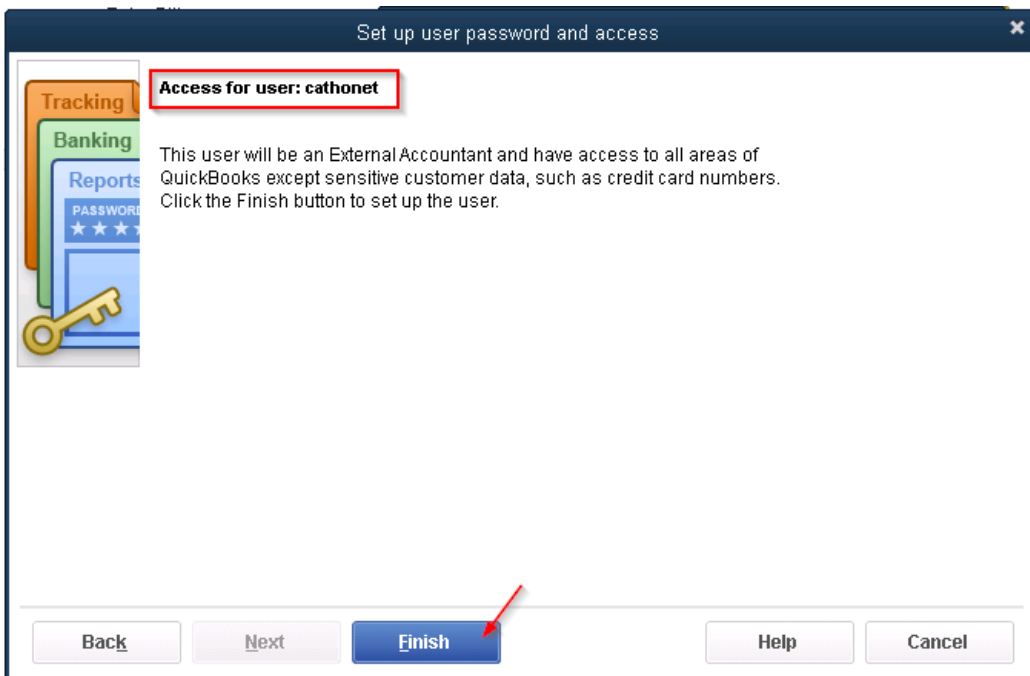
7. Click **Next** to proceed to the next page
8. Select **External Accountant** and click **Next** (SEEN BELOW)

The screenshot shows the same dialog box titled "Set up user password and access" with a close button (X) in the top right corner. On the left side, there is a vertical stack of icons labeled "Tracking", "Banking", and "Reports" with a "PASSWORD" label and three stars below them, and a key icon at the bottom. The main heading is "Access for user: cathonet". Below the heading, it says "What do you want this user to have access to?". There are three radio button options: "All areas of QuickBooks", "Selected areas of QuickBooks (You will make the selections in the screens that follow)", and "External Accountant" (highlighted in yellow). A red circle highlights the "External Accountant" radio button, and a red arrow points from it to the "Next" button. Below the radio buttons, there is a sub-heading "(Access to all areas of QuickBooks except sensitive customer data, such as credit card numbers)". At the bottom of the dialog, there are five buttons: "Back", "Next" (highlighted in blue), "Finish", "Help", and "Cancel".

9. Click **Yes** to confirm the following prompt (SEEN BELOW)



10. Click **Finish** to complete the setup process (SEEN BELOW)



To confirm that the CathoNet reporting system has access to your QuickBooks data, close/exit the QuickBooks company file and open the reports menu using your diocesan reports desktop shortcut. Refresh the report data from QuickBooks using the button at the bottom of the menu page. If you encounter an error stating the "username or password has changed" during the refresh, please refer to these instructions and edit the **cathonet** user as shown (steps 5-10).