

Area	Restriction
Banking	<ul style="list-style-type: none"> <li>Order Checks and Envelopes</li> <li>Set up Account for Online Services</li> <li>Import Web Connect File</li> <li>Create Online Banking Message</li> <li>Loan Manager</li> <li>Set Check Reorder Reminder</li> <li>Participating Online Institutions</li> <li>Learn about Online Bill Payments</li> <li>Change Online Banking Mode</li> </ul>
Company Menu Items	<ul style="list-style-type: none"> <li>Advanced Service Administration</li> <li>Alerts Manager</li> <li>Customer Credit Card Protection</li> <li>Manage Currency</li> <li>Planning and Budgeting Tools</li> </ul>
Customer Center	<ul style="list-style-type: none"> <li>The Collections Center</li> <li>The following Credit Card Processing activities: <ul style="list-style-type: none"> <li>Add Credit Card Processing</li> <li>Add Electronic Check Processing</li> <li>Add Mobile Payment Processing</li> <li>Link Payment Service to Company File</li> <li>Process Payments</li> <li>Authorize/Capture Payments</li> <li>Set up Recurring Payments</li> <li>Get Online Payments</li> <li>Record Merchant Service Deposits</li> <li>Download Fees</li> <li>Merchant Service Center</li> <li>How to Process Credit Cards</li> <li>Add Billing Solutions</li> </ul> </li> </ul>
Complex Password	The Complex Password Setup for Credit Card Protection
Customize Design and Layout	Estimate, Purchase Order, Sales Order, Invoice, Sales Receipt, and Credit Memo forms
File Menu Items	<ul style="list-style-type: none"> <li>All items on the Import and Export submenus of the Utilities menu: <ul style="list-style-type: none"> <li>Convert</li> <li>Send Forms</li> <li>Shipping Manager</li> <li>Ship FedEx Package</li> <li>Ship UPS Package</li> <li>Track or Cancel a Shipment</li> <li>Shipping Settings</li> <li>Synchronize Contacts</li> <li>Update Web Services</li> </ul> </li> </ul>
New Business Checklist	All items on the checklist
Payroll	<ul style="list-style-type: none"> <li>My Payroll Service (all items)</li> <li>Pay Employees (including starting scheduled payroll)</li> <li>Setup</li> <li>Add, Edit, and Delete Payroll Items</li> <li>Get Payroll Updates</li> <li>Create Termination Check</li> <li>Edit Filing Methods</li> <li>Edit Payment Due Dates/Methods</li> <li>Set up Workers' Comp</li> </ul>
Printer Setup	You can only setup a printer in the Primary window.
QuickBooks Messenger	Restricted in the Secondary window
Template List	<ul style="list-style-type: none"> <li>New</li> <li>Edit</li> <li>Delete</li> <li>Duplicate</li> <li>Active/Inactive</li> <li>Download</li> </ul>
Year-End Guide	Restricted in the Secondary window