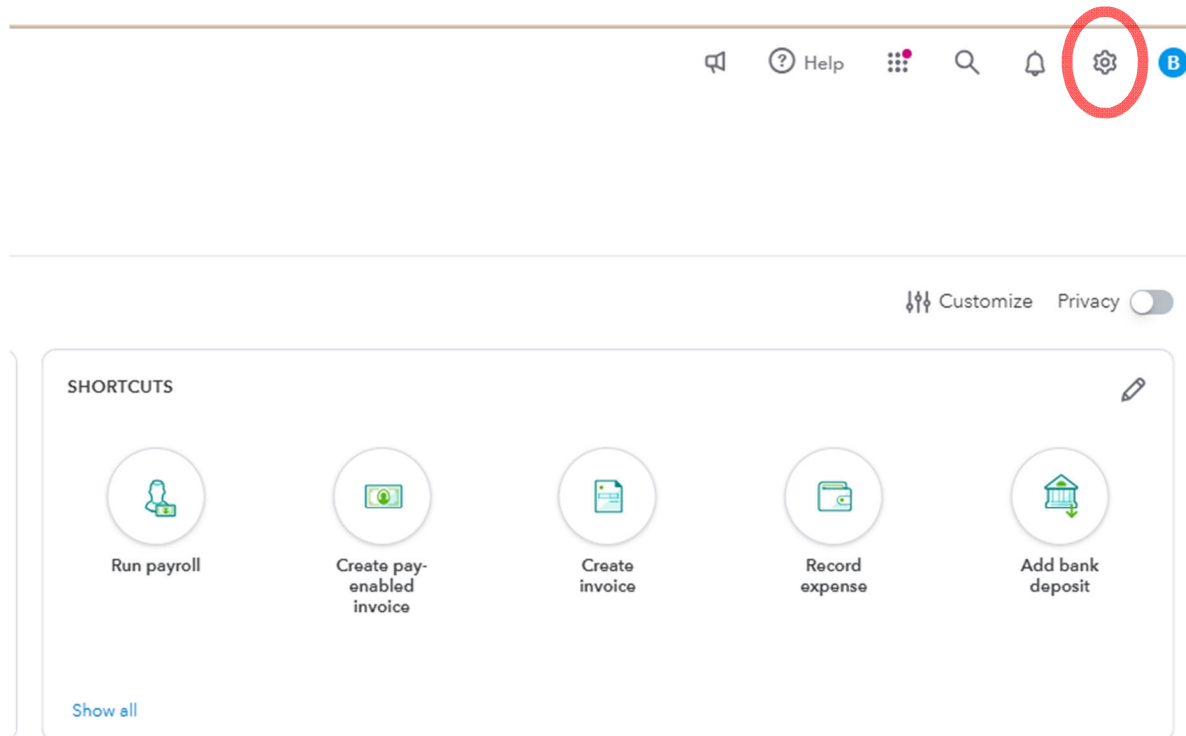
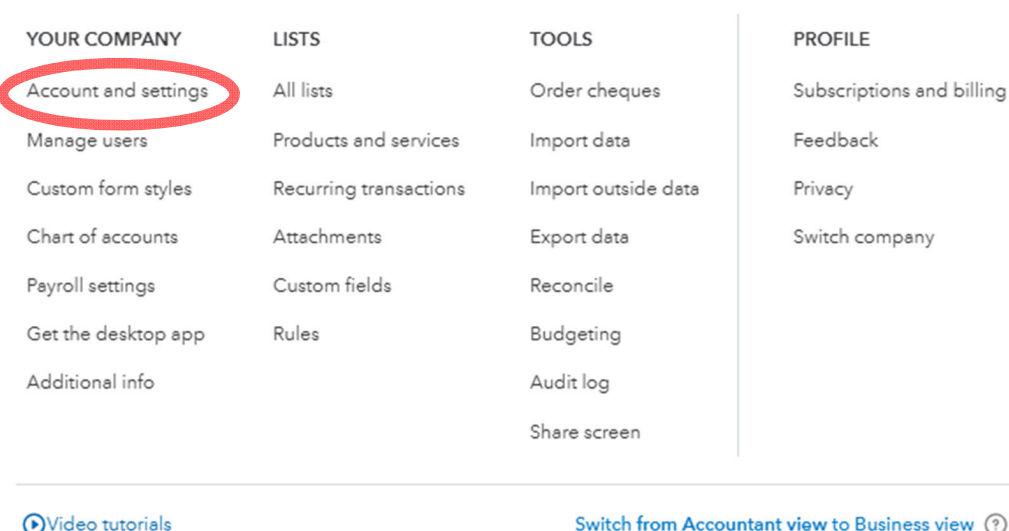


HOW TO LOCK DOWN QUICKBOOKS ONLINE TO PREVENT POSTING IN PRIOR YEARS

1. Select the gear icon at the top right corner of the window.



2. From the pop-up window, choose "Account and settings":



3. From this window, choose “Advanced” from the left-hand side menu:

Account and settings

- Company
- Usage
- Payments
- Sales
- Expenses
- Time
- Advanced**

Company name

Company name

Legal name

Business Number (BN)

Company type

Tax form

Industry

Contact info

Company email

Customer-facing email

Company phone

Website

4. Select the edit pencil icon in the Accounting section at the top:

Account and settings

- Company
- Usage
- Payments
- Sales
- Expenses
- Time
- Advanced

Accounting

First month of fiscal year

First month of income tax year

Accounting method ⓘ

Close the books ⓘ

Default tax rate selection

April

Same as fiscal year

Accrual

Off

Exclusive of Tax

Company type

Tax form

Chart of accounts

Enable account numbers

Billable expense income account

On

Categories

Track classes

Track locations

Off

Off

Automation

Pre-fill forms with previously entered content

Automatically apply credits

Automatically invoice unbilled activity

Automatically apply bill payments

Off

On

Off

On

Projects

Organize all job-related activity in one place

On

Language

Language

English

Currency

Home Currency

Multicurrency

Canadian Dollar

Off

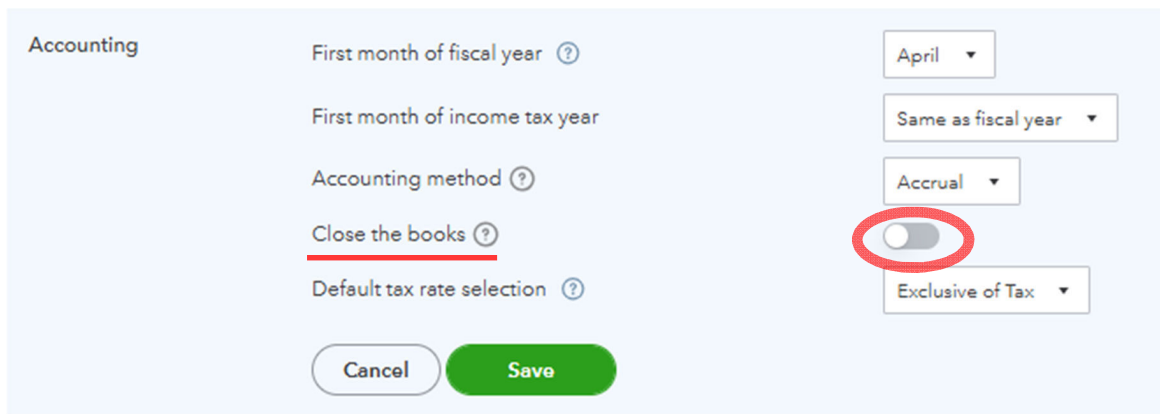
Business Network

Allow members to find me

On

Done

- Click on the slider next to "Close the books":



Accounting

First month of fiscal year ? April ▾

First month of income tax year Same as fiscal year ▾

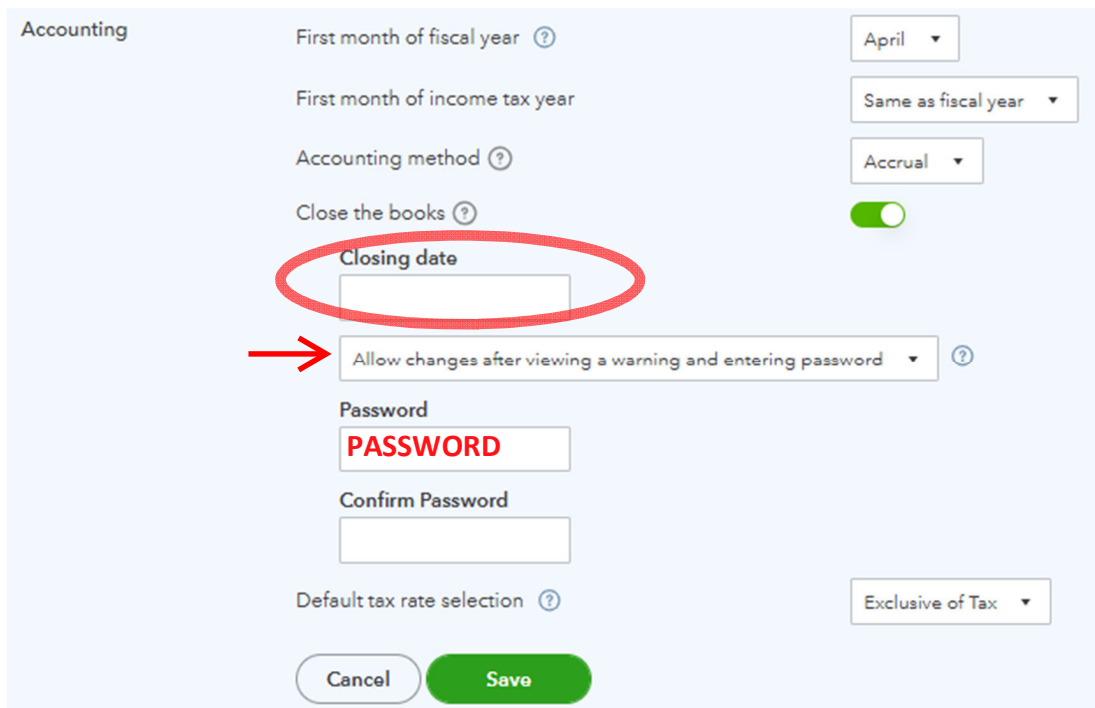
Accounting method ? Accrual ▾

Close the books ? ☒

Default tax rate selection ? Exclusive of Tax ▾

Cancel Save

- Select the date on which you want to lock down the file. This should be the year-end date. Change the drop-down option to read "Allow changes after viewing a warning and entering password":



Accounting

First month of fiscal year ? April ▾

First month of income tax year Same as fiscal year ▾

Accounting method ? Accrual ▾

Close the books ? ☒

Closing date

Allow changes after viewing a warning and entering password ▾ ?

Password **PASSWORD**

Confirm Password

Default tax rate selection ? Exclusive of Tax ▾

Cancel Save

- Type a password of your choosing and click Save. Do not share with others if you want to prevent them from posting in prior years.