

Changing the Accountant invite in QBO

Log into your QBO account

Select the Gear icon on the upper right corner

Select Manage Users

1. Delete the current Rich Bingaman contact under ACCOUNTING FIRMS
2. Select "Invite Accountant"
3. Enter our email and name: rich@rebingamancpa.com

Rich Bingaman

Your screen should look like this:

The screenshot shows the 'Manage Users' interface. At the top, there is a table with columns for 'Contact Name', 'Email Address', and 'Access Rights'. A row is visible with a contact name that has been redacted and 'Master Admin' listed under 'Access Rights'. Below this is the 'Accounting Firms' section, which includes a table with columns for 'Contact Name', 'Email Address', and 'Status'. A row for 'Rich Bingaman' with email 'rich@rebingamancpa.com' and status 'Active' is shown. A large 'X' is drawn over this row. Below the table are three buttons: 'Invite Accountant', 'Edit', and 'Delete'. The 'Invite Accountant' button is circled with a handwritten '2', and the 'Delete' button is circled with a handwritten '1'. To the right, a 'Mini Interview' dialog box is open, titled 'Enter Accountant's email Address'. It contains a form with fields for 'Accountant's email address' (filled with 'rich@rebingamancpa.com'), 'Name (Optional)' (First: 'Rich', MI: empty, Last: 'Bingaman'), and 'Cancel', '< Back', and 'Next >' buttons. A handwritten '3' is next to the email address field. The dialog box also contains explanatory text about the invitation process.

Select Next

Select Finish

We will accept the invite and have full access to assist in with your accounting books just like before.