



Hello Bookkeeping/Accounting Firm!

We are so excited to help you along your journey. Please think of us as an extension of your TEAM! There are a couple of things that we need for you to do in order for us to get access to your client's QuickBooks Account.

1. You will need to add the following email address as a Team Member in your Accountant QuickBooks Account

support@alignprofessional.com

2. Please provide the following access to this email address above.

- Edit Firm Users = Allows me to assign my team (such as QA, Compliance Support Manager, etc.) if necessary. You will be able to see anyone from my Team that I have added.
- Manage Your Clients/Yes = I am only able to assign my Team (or do anything) with only the clients that you assign me. I will not be able to see in my dropdown list any other clients. Just the ones that are assigned to me.

User Profile | Firm Administration and Books | Client Access

Access: Custom

YOUR FIRM ADMINISTRATION	ACCESS
Firm information	View only
Firm users	Edit
Subscriptions and billing	None

YOUR FIRM BOOKS	ACCESS
Customers and accounts receivable	No
Vendors and creditors	No

YOUR CLIENTS	ACCESS
Manage your clients	Yes

Access to firm administration and books

Full

- Full access to administrative functions for your firm
- Full access to managing clients
- Full access to your firm's books
- Administrator access to client QuickBooks

Basic

- Limited access to administrative functions for your firm
- No access to managing clients
- No access to your firm's books
- Administrator access to client QuickBooks

Custom

- Custom access to administrative functions for your firm
- Custom access to managing clients
- Custom access to your firm's books
- Administrator access to client QuickBooks

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3. Our firm also uses Keeperapp to help us manage our client's clients. We will not directly communicate with your client via Keeper unless you have Client Facing Management services. Otherwise, Keeperapp will be used to communicate with you and your firm and you will be responsible for communicating with your client to get us the information.

Keeper is an all-in-one app to help accountants run a better month-end close. All of this is powered by a 2-way sync with the client's QuickBooks file, so you can edit QuickBooks data *directly in Keeper*.

With Keeper, firms:

- **Get faster responses from clients** in a custom-branded client portal
- **Deliver better books** with File Review tools to catch coding errors
- **Streamline their close** by making their workflow tool the place they actually do their work

Keeper is a software option that you can take a look at especially as you grow your business. If you are interested in more information regarding Keeper please let a member of your Client Support Team know and we can get you additional information.

Because our firms uses Keeper, when we connect your client's QBQ Account to Keeper, you or your client may receive a IntuitAppCenter notification. This notification let's you and/or your client that their QBO has been connected with an application.

Please notify any clients that we will be teaming up with you on that they may see this notification. You can let them know that you are using this application to better manage them and your clients. In some cases only you will get the notification but some times, clients will get one as well. Please let your Client Support Team know if you need additional information to help communicate this with your client. We can help!

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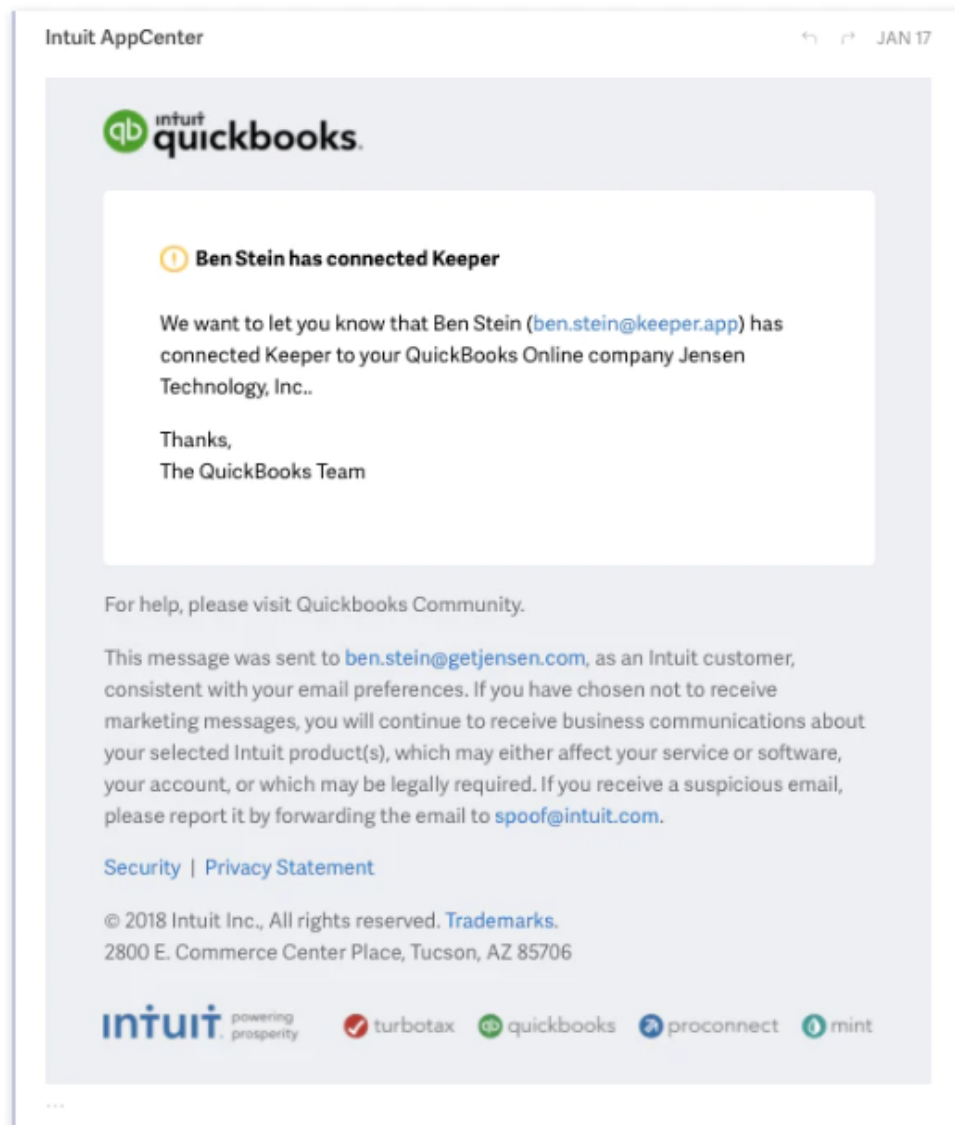
What is Keeper?

Hi there! If you're on this page, your bookkeeper is using Keeper and wants to tell you a bit more about it.

Keeper is the app that powers their Client Portal for communicating with you about questions they have while working on your books. It is directly integrated with QuickBooks to allow them to easily make changes once you have responded to their questions.

Keeper takes privacy and security very seriously – we use bank grade encryption to keep your data secure, and we will never sell it. You're welcome to read more on our security standards here: [Security at Keeper](#).

You might have received an email that looks something like this:



This is just to let you know that the Keeper QuickBooks app has been added to your file. This lets your bookkeeper ask about and fix transactions directly in Keeper.