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Declare Your Independence From Security Worries: Use QuickBooks' Protection Tools

If there's one application that you don't want compromised by a security breach, it's the one that contains all of your financial information. Recognizing that, Intuit has built a number of security features into QuickBooks that are designed safeguard your debits and credits.

Tip: QuickBooks integrates with Microsoft Internet Explorer for some of its work. We'll discuss some of its safety tools, but you may want to check with your accounting professional to see if your larger system is well-protected against malware, viruses, etc.

Set Up Preferences

Fortunately, QuickBooks is open for integration with many outside applications that complement QuickBooks' native capabilities and extend its usefulness. But you should make sure that your system is set up to accommodate the features that you want to use.

To do this, click **Edit | Preferences | Integrated Applications**. Then click on the tab labeled **Company Preferences**. Here you'll be able to indicate that:

- no applications should be allowed access, and
- you should be notified if an application's certificate has expired.

This window also displays a list of applications that are currently integrated with QuickBooks. Highlight one, then click **Remove** if you want to break the link. Click **Properties**, and you'll see the window shown in **Figure 1**.
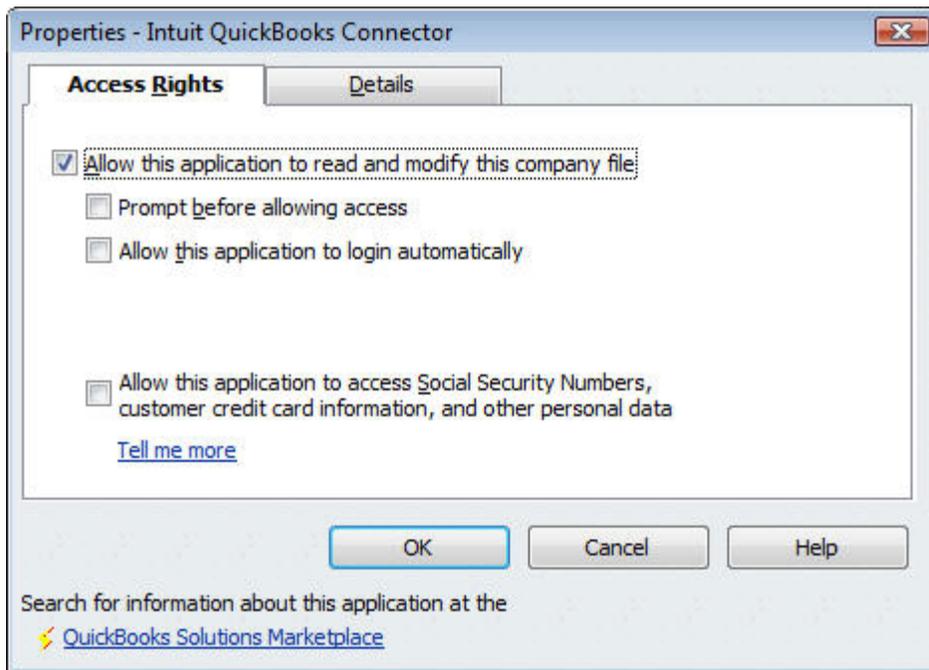
Figure 1: QuickBooks lets you specify who gets in, and what they can do.

Check the top box if this outside application should be allowed in, and make decisions about the other options here. If you have any questions, give us a call and we'll make sure your choices suit your business.

Broaden Your Horizons

QuickBooks relies on the Internet for many of its functions, which makes the program much more versatile. You can use this Web connection to update your copy of QuickBooks, receive payroll updates, download financial institution transactions, and access myriad business resources.

If your copy of QuickBooks is not yet integrated with Internet Explorer, click on the **Help** menu, then **Internet Connection Setup.** Work through the wizard to specify the correct connection to use, as shown in **Figure 2**.
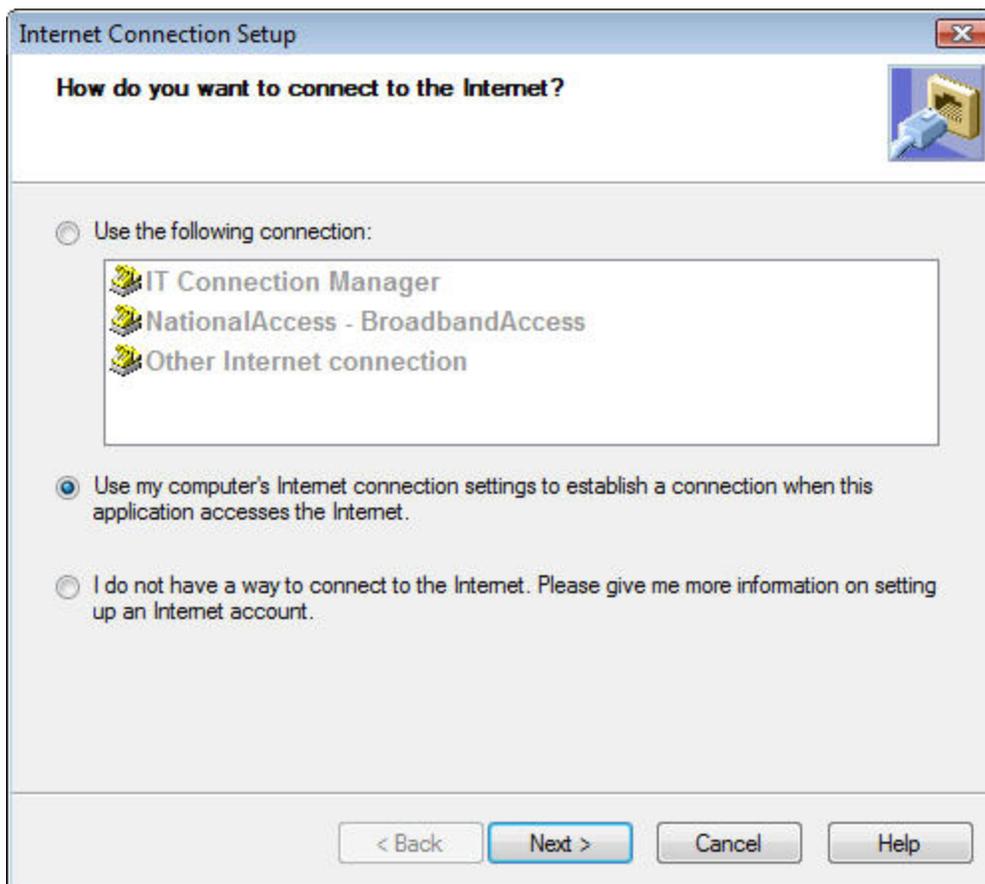
Figure 2: To make sure your QuickBooks/Internet Explorer integration is working securely, specify the correct Internet connection.

Click on **Edit | Preferences** again, then click **Service Connection**. Under the **My Preferences** tab, you'll be asked to decide whether:

- data downloaded from your financial institution—or information previously downloaded—should be processed immediately or saved to a file, or

- Internet Explorer should remain open after you've completed a Web-based task (only applicable if QuickBooks has opened IE).

Check or uncheck the appropriate boxes.

Click the **Company Preferences** tab. Here, you'll tell QuickBooks whether it should automatically connect to Web services (other than **Payroll** or **Online Banking;** these have their own passwords**)** or if a password will be required. You'll also specify whether service updates from Intuit should be automatically downloaded, as shown in **Figure 3**.
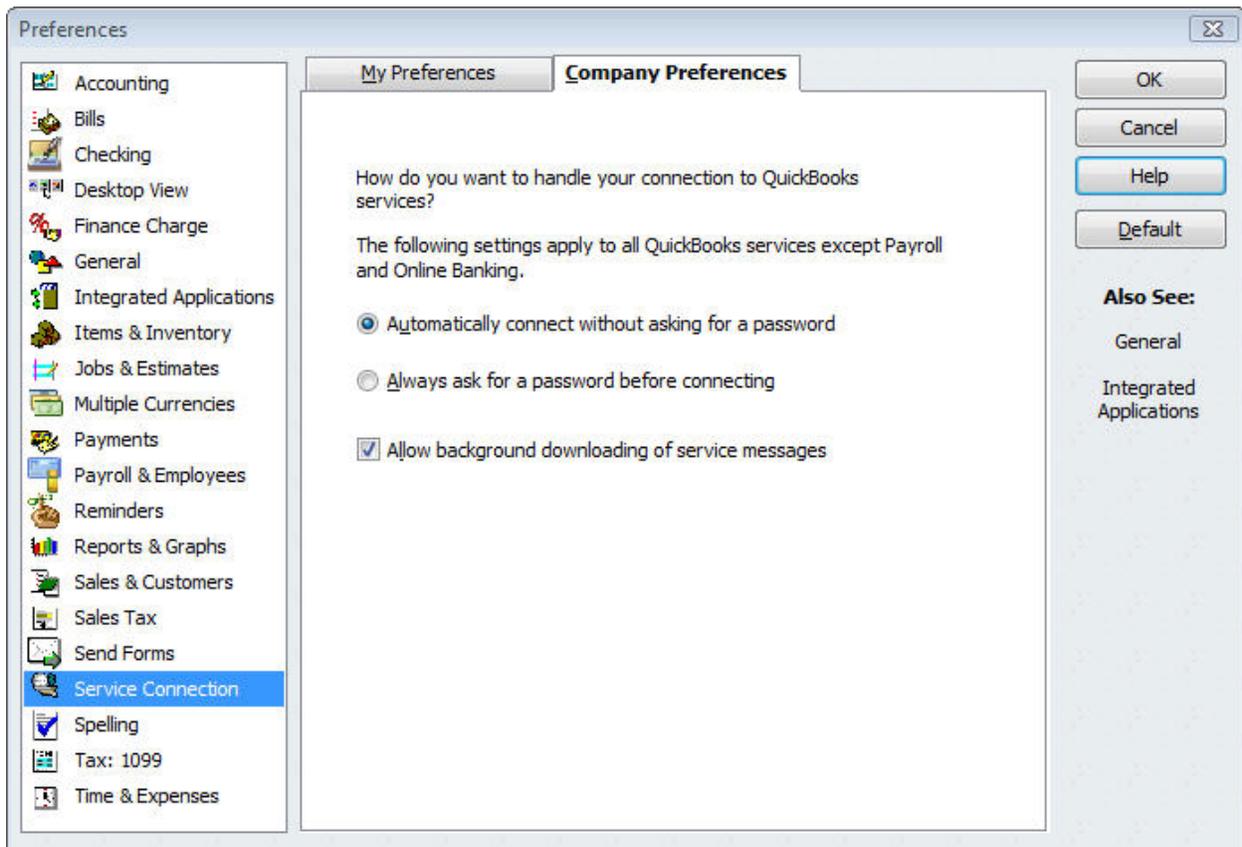
Figure 3: In the window, you can specify your preferences for password requirements and background downloading of service updates.

To ensure that you'll be able to see all QuickBooks-related content on the Web, open Internet Explorer. Click the **Tools** menu, then **Internet Options.** Click the **Security** tab, and make sure the level is set to **Medium**, as suggested by Intuit.

Internal Security

Of course, QuickBooks offers internal tools to prevent unauthorized employees from reaching sensitive information. To access these, click **Company | Set Up Users and Passwords | Set Up Users**. You must be the Administrator to enter this area.

The window that opens gives you several options. You can add, edit, delete, or view a user. Click the **Add User** button, and assign a user name and password on the next screen. Click **Next**, and in the next window, choose whether to give the individual access to all areas of QuickBooks, or just a subset (the **External Accountant** option lets your accounting professional enter most areas of the program).

Choose **Selected areas of QuickBooks** and click **Next** in the window shown in **Figure 4**.
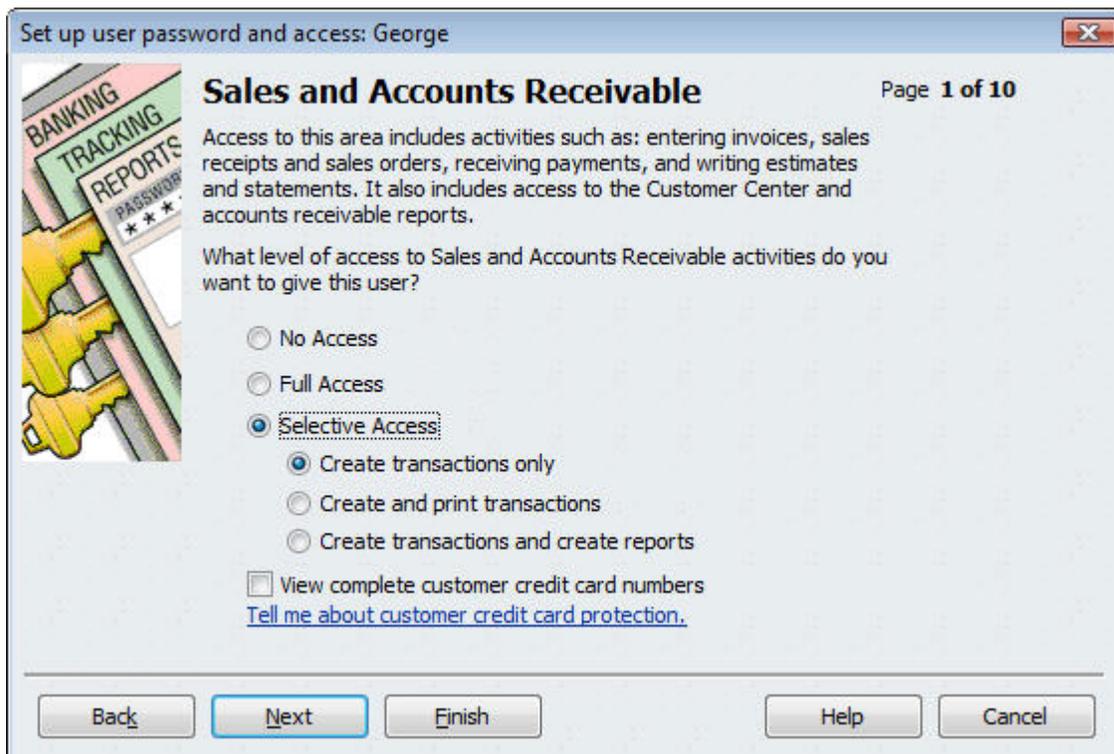
Figure 4: QuickBooks lets you specify which areas and functions individual users can access.

On each page in this wizard, you can assign no, full, or selective access to tasks for each employee. Other functional areas include **Payroll and Employees**, **Time Tracking**, and **Sensitive Accounting Activities**. When you're done, click **Finish**.

Keep It Safe

Remember, too, that Intuit employs high-level encryption that secures your sensitive financial information. And it of course recommends that you back up frequently to further protect your data. If this all seems like too much poking around in QuickBooks, give us a call and we'll help you make the right choices.