CPA

Practice **Advisor**

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manage new users and give them access to a specific company.

Nov. 02, 2016



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"We're excited about this enhancement," says Annie Hambach, Patriot's Director of Training and Development. "Now our Certified Advisors can allow their own clients to administer their own payrolls. The beauty is in the flexibility, as the Certified Advisor can also administer payrolls, or just oversee the client account and ensure the information is accurate."

Certified Advisors can add new users by providing their client's email address and selecting the company or companies the user can access. New users receive a welcome email from Patriot and create their own user ID and password.

The new multi-user login comes with security restrictions that prevents added users from viewing confidential billing and payment information between the Certified Advisor and Patriot Software. And, no more than one person can access a task-oriented page at a time.

Accounting

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