# How to Grant or Remove Access to Financial Reports

You can allow or disallow users to have access to financial information in dashboards and widgets. This is done by adding or removing the financial role of specific MSPbots users. This article gives a guide on how to do the following:
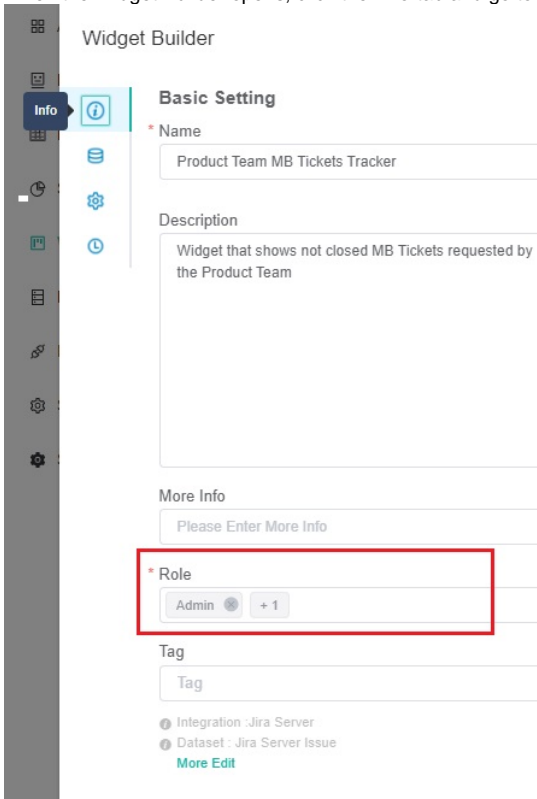
- Add or remove access to financial widgets
- Add or remove access to financial dashboards
- Assign a financial role to a user
    - Related Topics

Add or remove access to financial widgets

1. Go to **Widgets** on the MSPbots menu and find the widget whose access needs to be modified.
2. Hover over the **ellipsis ...** button on the widget and click **Edit**.
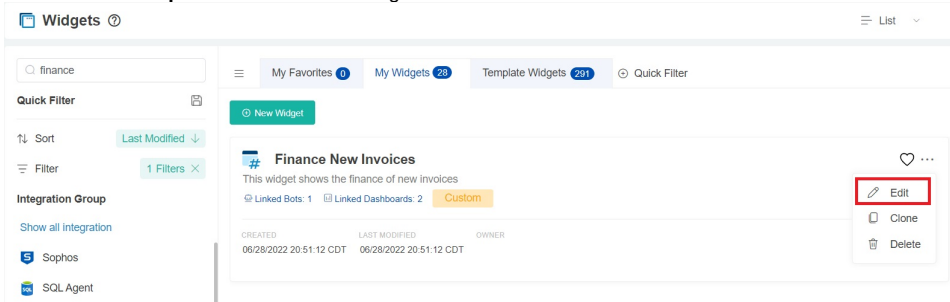
3. When the Widget Builder opens, click the **Info** tab and go to the **Role** section.
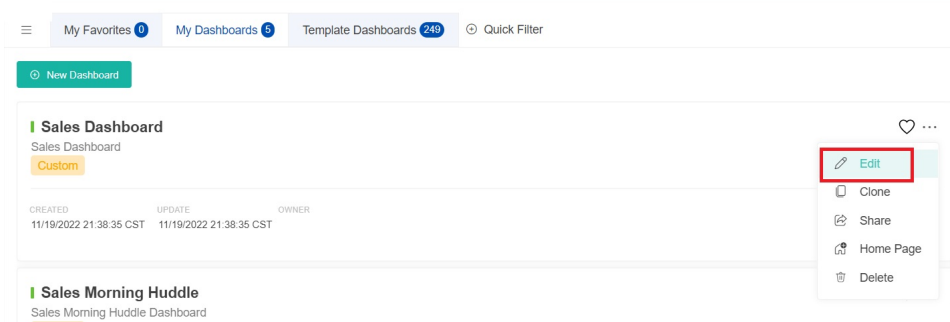

4. Add the role(s) that should have access to the widget, or delete the role(s) that should be restricted from accessing the widget.
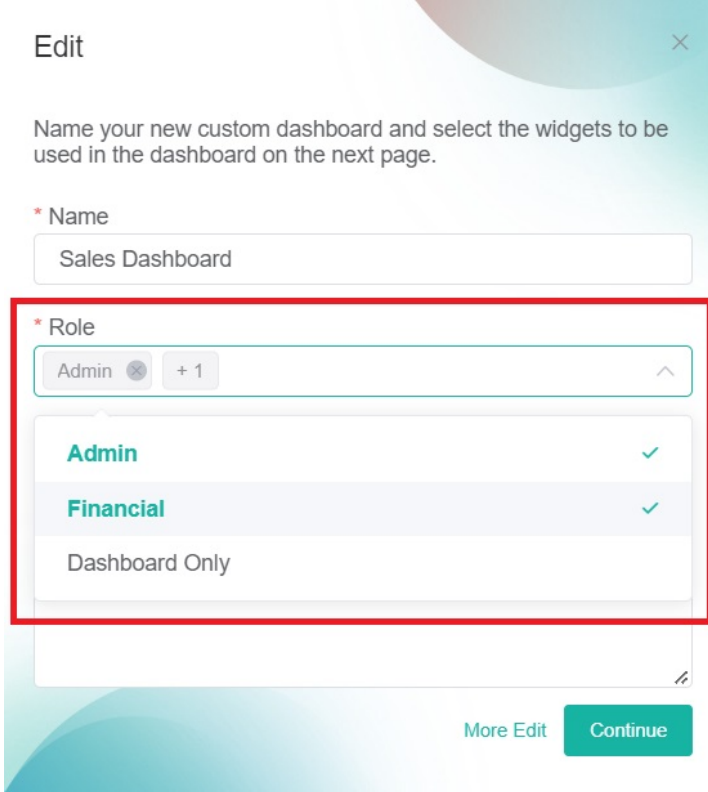5. Click **Apply**.

Add or remove access to financial dashboards

1. Go to **Dashboards** on the MSPbots menu and find the dashboard whose access needs to be modified.
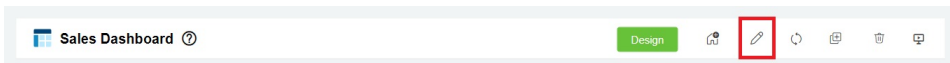
2. Hover over the **ellipsis ...** button on the dashboard and click **Edit**.

3. Go to the **Role** field in the Edit popup. Add the role(s) that should have access to the report, or delete those that should not have access.

Alternatively, you can click on the dashboard and click the **Edit** icon to show the Edit window with the **Role** field.


4. Click **Continue** to save.

Currently, the app does not have a feature that enables users to change role access for multiple assets simultaneously. If you need to update a batch, send the list of assets and the corresponding role access to the MSPbots Support Team at support@mspobots.ai.

Assign a financial role to a user

A financial role allows a user to have access to the MSPbots accounting mapping feature and your company's financial information. The following steps show how to give a user access to your company's financial data and reports:

1. On the MSPbots app, navigate to **Settings** > **User Management**.
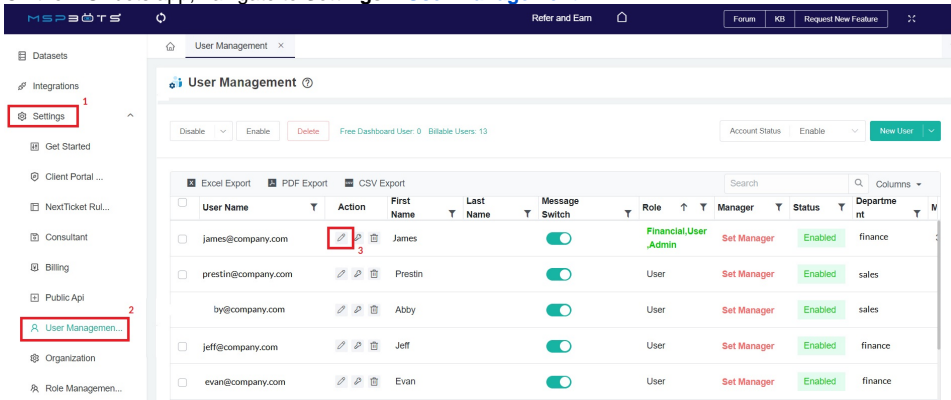
2. Locate the user that needs the financial role and click the edit icon beside it.
3. On the Edit popup, locate **Role Config** under Account Information. Click on the **Role Config** field and select **Financial**.

4. Click **Confirm** to save the modifications.

To create and delete roles, and to give access to specific menu items or tabs in the MSPbots app, please refer to Role Management in MSPbots.

Related Topics

- How to Access and Use the Accounting Mapping Feature
- Financial Suite for ConnectWise Manage Integration
- When can I use the Financial Role
- Financial Suite for Autotask Integration