

When can I use the Financial Role

The Financial Role limits user access to financial assets like widgets and dashboards, and the Accounting Mapping. This role is granted to the user that integrates Accounting Software like Xero and Quickbooks to the MSPbots App. This user is in charge of assigning the financial role to other users.

The financial role is required to perform the following tasks:

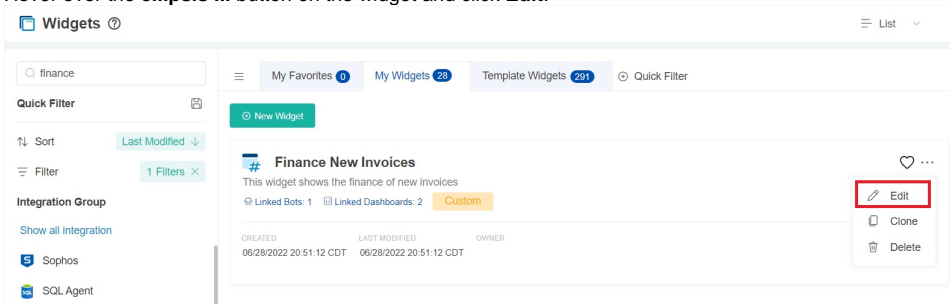
- To access the Accounting Mapping feature
- To limit access to information on widgets
- To limit access to information on dashboards
 - Related Topics

To access the Accounting Mapping feature

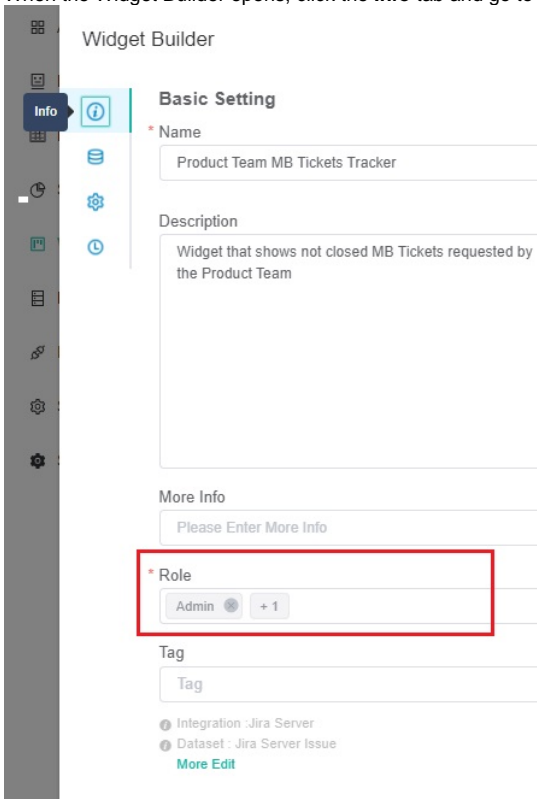
The [Accounting Mapping](#) feature allows users to display and map their chart of accounts in MSPBots and use it to create widgets, bots, and dashboards. Only users with a financial role have access to Accounting Mapping.

To limit access to information on 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**.



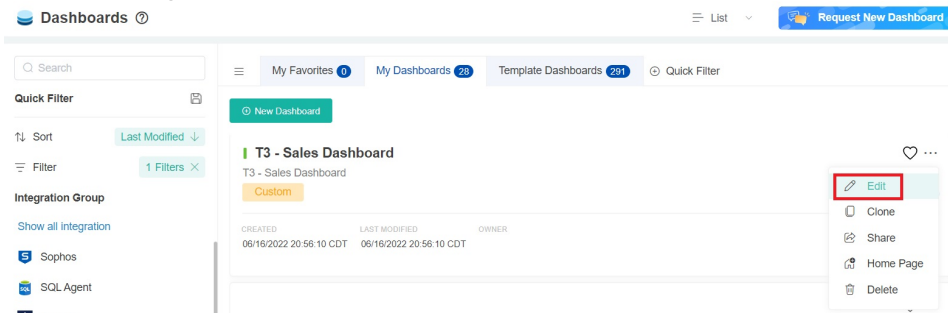
3. When the Widget Builder opens, click the **Info** tab and go to the **Role** section.



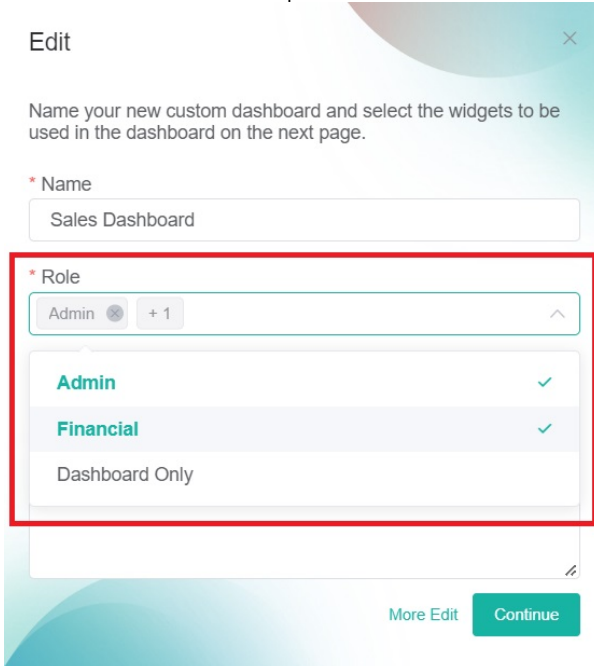
4. Select **Financial** in the Role dropdown and unselect the roles not needed by the user.
5. Click **Apply**.

To limit access to information on 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. When the Edit pop-up appears, go to the **Role** field.
4. Select **Financial** in the Role dropdown and unselect the roles restricted from accessing the report.



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



5. Click **Continue** to save.

To create and delete roles, and to assign or remove role access from specific menu items or tabs in the app, please refer to [Role Management in MSPbots](#).
Note: Currently, the app has no 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.

Related Topics

- [How to Access and Use the Accounting Mapping Feature](#)
- [MSPbots User Roles and Descriptions](#)
- [Role Management in MSPbots](#)
- [Financial Suite for ConnectWise Manage Integration](#)
- [Financial Suite for Autotask Integration](#)