User Guide
Sharing your file in Reckon Accounts Hosted

Contents

Checks before Sharing

To allow other users to access a company file, it must be shared and users granted access to the shared folder. This process can only be done by an Admin user.

Note for Accountants and Bookkeepers:

If you are setting up Reckon Accounts Hosted for your client, you should do this logged in with your client's Reckon Accounts Hosted Administrator credentials. This will ensure that the ownership of the company file remains with your client. You can share the file to your own Reckon (PP/AP) ID so that you have access to the file from your own Reckon ID. When the setup process is complete, your client should change their Reckon password to maintain security integrity.

Before you start:

1. Before sharing your Reckon Accounts data file/QBW file, you must first have it set up(Created or Uploaded) in Reckon Accounts Hosted;

2. The Reckon Accounts data file/QBW file and folder that will be shared must already exist in the Administrators personal folder (Q:\) and in the shared folder;

3. Only the Reckon Accounts Hosted Administrator user can share the file and folder;

4. No other users should be logged into the file you wish to share at the time of sharing;

5. Determine whether the file has already been shared, if either of the following is true then your file has already been shared:

   i. Users have a shared folder for the file in their Q-drive;

   ii. In **Control Panel** > **Manage Shared Folder Access**, the file is listed in the Shared Folders box.

Sharing the file for the first time

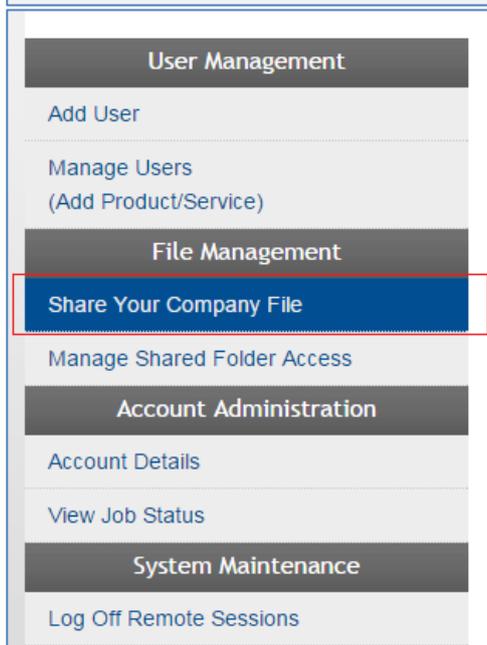1. On the **Control Panel** homepage, click on **Share Your Company File**;

2. Select the **user** who will be sharing the file (usually the Administrator);

3. Highlight the **company file** that will be shared and click on **Add** > **Next**;

4. If the user to be granted access is a sub-user of this Reckon Accounts Login eg 1432667-2, select the **User** in the All Users box > **Add**> **Next**. You can add more than one user here;

5. Otherwise, in the **Search User by box**, select Used Id, and in the next box enter the user's Reckon Customer Number (eg: 1234567; the same as their Reckon Accounts Hosted login username without the qbi at the start and "dash number" at the end) and click on Search;

6. Highlight the user from the **All Users box** that you want to share access to your file with and click on Add. When the name appears in the Selected Users box, click on **Next;**
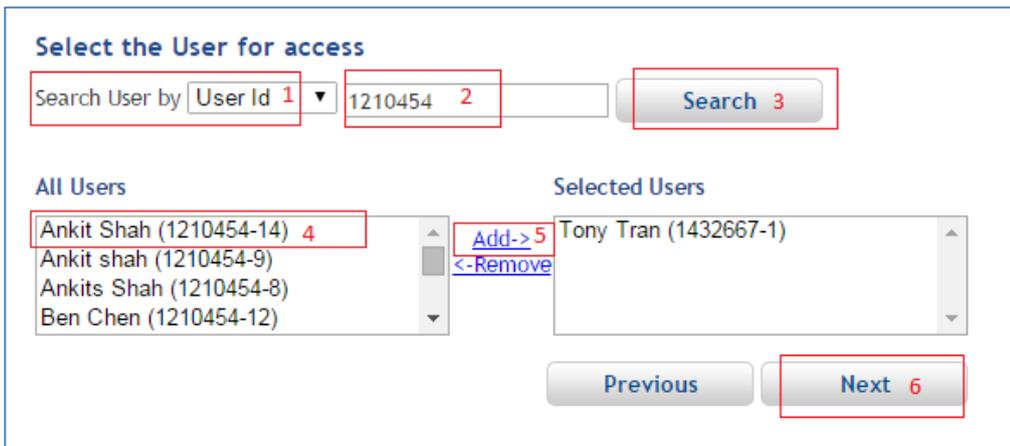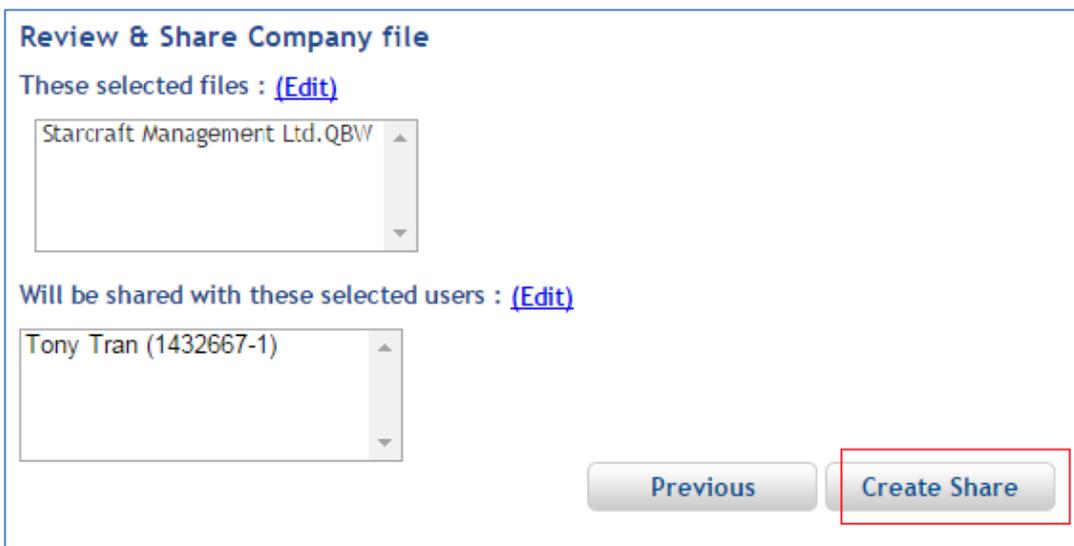

7. Click on **Create Share**

8. When complete the Status screen will open and you will see the new user added to the existing list with **"Grant User Access succeeded"**

Congratulations!
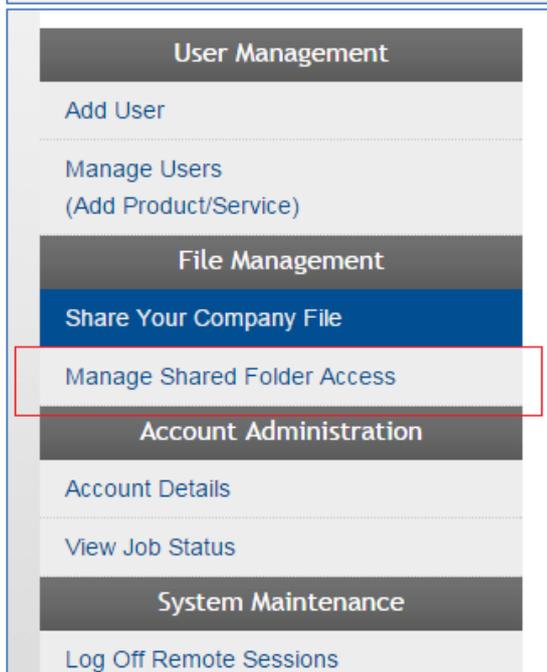
Your folder shares have been created.

Company File	UserID	Status
Starcraft Management Ltd.QBW	1432667-1	Grant User Access succeeded - 1432667-1

Adding Users to an existing Shared File:

1. On the **Control Panel** homepage, click on **Manage Shared Folder Access**;

2. In Shared Folders, select the **folder** to be shared. A list of current users of the file will appear;
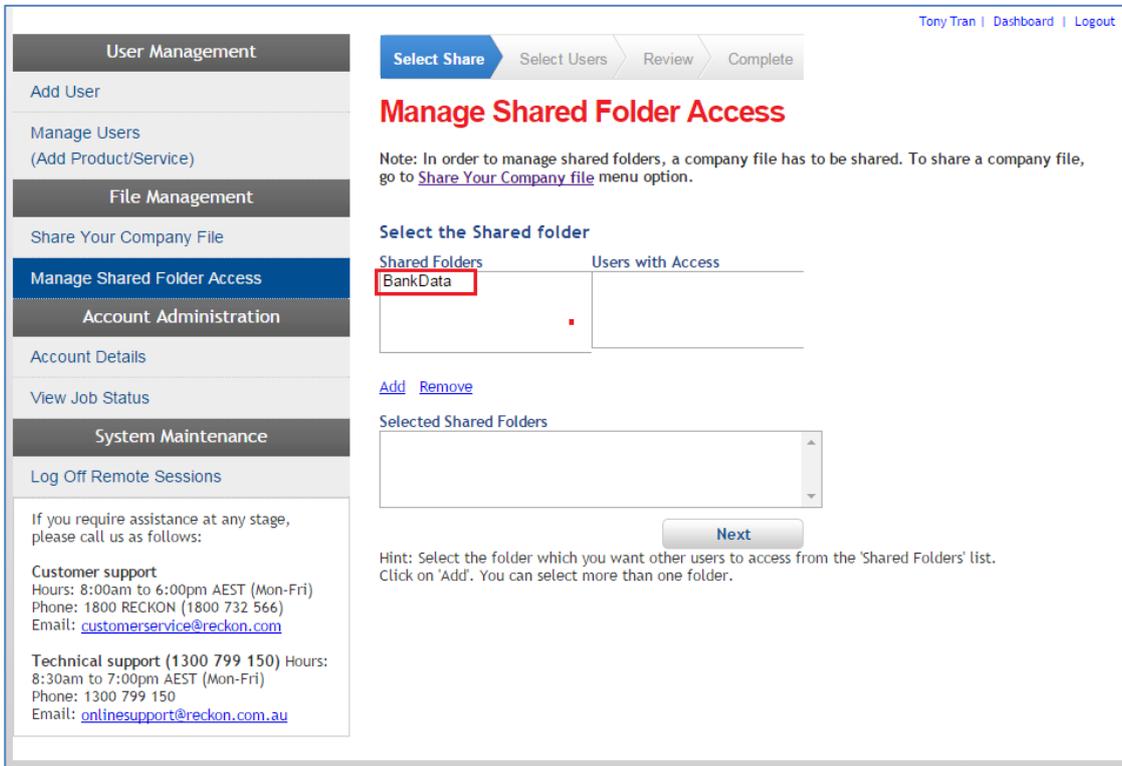
3. Click on **Add** and see the selected folder appear in Selected Shared Folders. Click **Next**;

4. If the user to be granted access is a sub-user of this account, select the **User** you want to give access in the All Users box > **Add** > **Next**. You can add more than one user here;

5. Otherwise, in the **Search User by** box, select Used Id, and in the next box enter the users Reckon Customer Number (eg: 1234567; the same as their Reckon Accounts Hosted login username without the qbi at the start and "dash number" at the end) and click on Search;

   a. Highlight the user from the **All Users** box and click on Add. When the name appears in the Selected Users box, click on **Next;**

6. In **Review & Grant Access**, check details are correct and click on **Grant Access**

7. When complete the Status screen will open and you will see the new user added to the existing list with **"Grant User Access succeeded"**

Allow 20 minutes for these changes to propagate through the Hosted system, then login to Reckon Accounts Hosted with the user's account and see that the shared folder exists in their Q-drive and that they can open the file in the shared folder.

Video – How to share your company file to other Hosted Users

https://community.reckon.com.au/reckon/topics/how_to_share_your_company_file_to_other_hosted_users