



# **User Guide**

## **Sharing your file in Reckon Accounts Hosted**

## Contents

Checks before Sharing .....	3
Before you start:.....	3
Sharing the file for the first time .....	4
Adding Users to an existing Shared File: .....	8
Video – How to share your company file to other Hosted Users.....	11

## 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**;



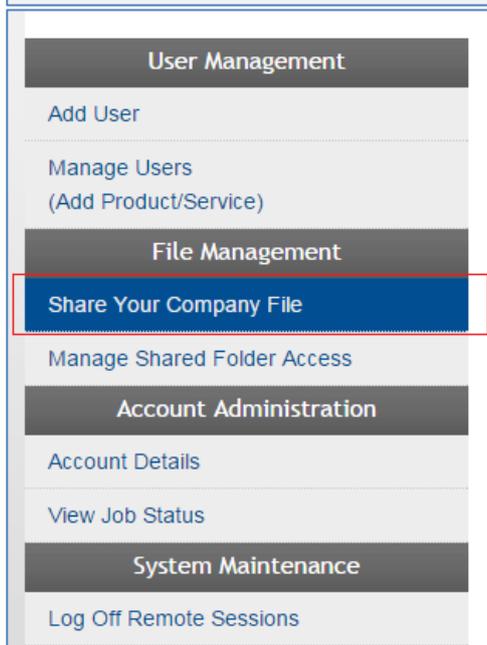
**Welcome to Reckon Accounts Hosted**

LAUNCH ACCOUNTS 2014 R3

**CONTROL PANEL**

**Useful links**

- How-to videos
- Community
- Test your internet speed
- View backup log



**User Management**

- Add User
- Manage Users  
(Add Product/Service)

**File Management**

- Share Your Company File**
- Manage Shared Folder Access

**Account Administration**

- Account Details
- View Job Status

**System Maintenance**

- Log Off Remote Sessions

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**;

**Select User**

Tony Tran (1432667-1) 1 ▼

**Select Company File**

Personal Company Files of Tony Tran (1432667-1)

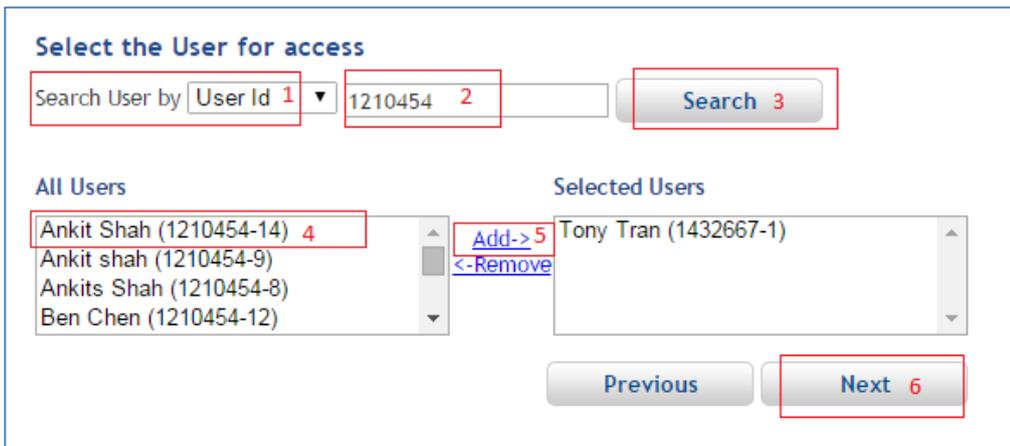
<p>Test.QBW 2</p> <p>Upload\Starcraft Management Ltd.QB</p>	<p>Add-&gt; 3</p> <p>&lt;-Remove</p>	<p><b>Selected Files to share</b></p>
---	--------------------------------------	---------------------------------------

Next 4

Hint: Select the company file you want to share with other users and click 'Add'.  
If there are no files in the list "Personal Company Files", it means that there are no Reckon Accounts company files in the home folder (Q: drive) of the selected user.

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**;



Select the User for access

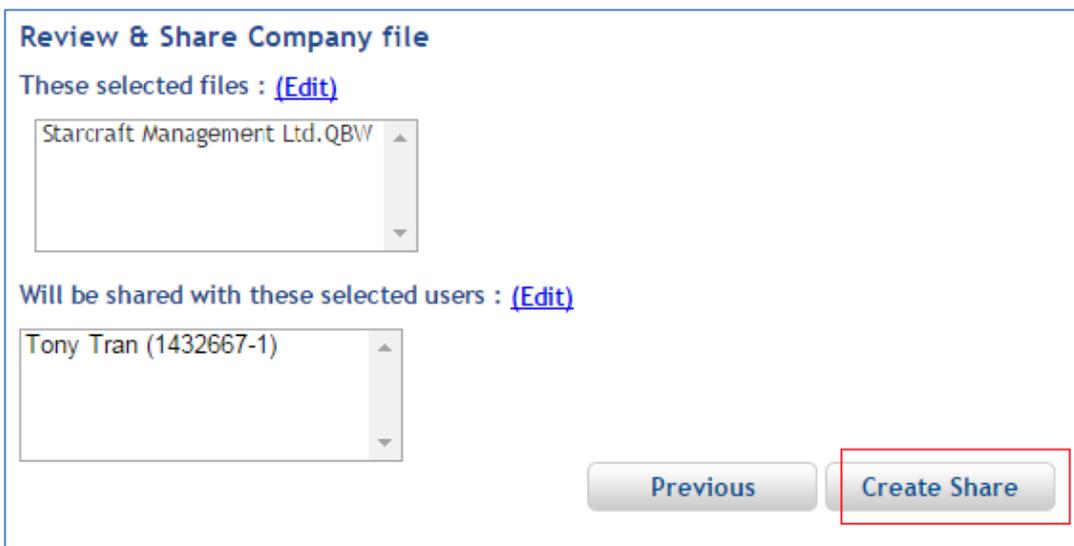
Search User by User Id 1 1210454 2 Search 3

All Users Selected Users

Ankit Shah (1210454-14) 4 Add-> 5 Tony Tran (1432667-1)  
Ankit shah (1210454-9) <-Remove  
Ankits Shah (1210454-8)  
Ben Chen (1210454-12)

Previous Next 6

7. Click on **Create Share**



Review & Share Company file

These selected files : (Edit)

Starcraft Management Ltd.QBW

Will be shared with these selected users : (Edit)

Tony Tran (1432667-1)

Previous Create Share

- 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.

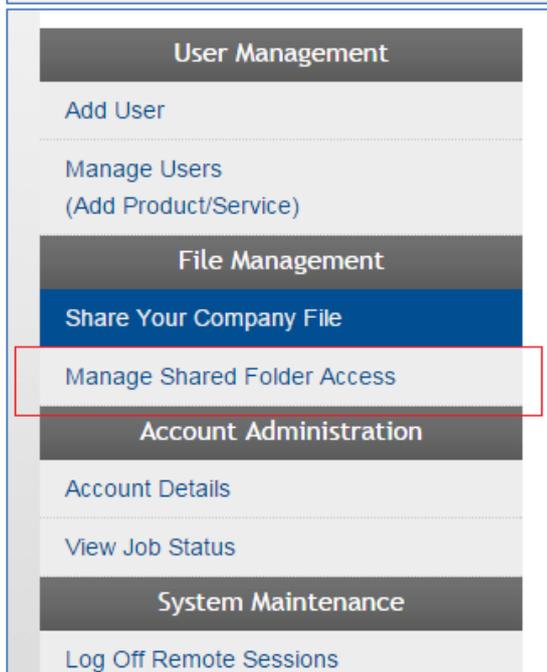
Company File	UserID	Status
Starcraft Management Ltd.QBW	1432667-1	Grant User Access succeeded - 1432667-1

## Adding Users to an existing Shared File:

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

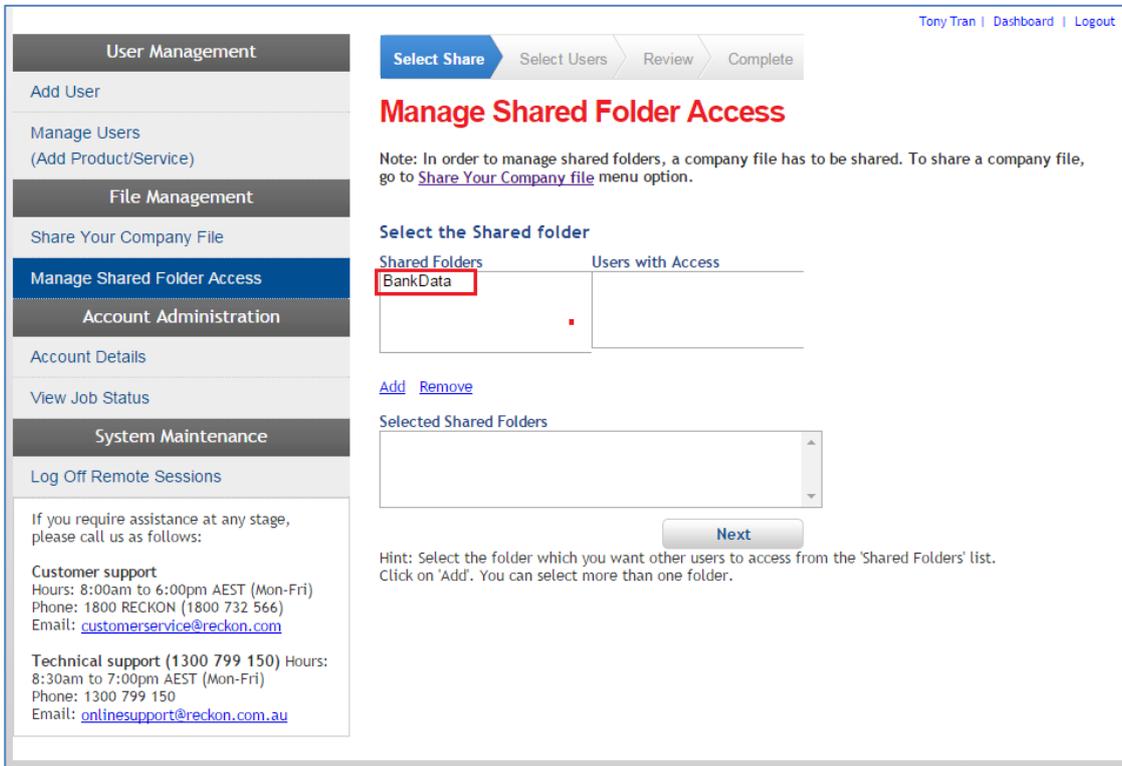


The screenshot shows the Reckon Control Panel homepage. On the left, there is a 'Welcome to Reckon Accounts Hosted' section with two buttons: 'LAUNCH ACCOUNTS 2014 R3' (green) and 'CONTROL PANEL' (dark grey). The 'CONTROL PANEL' button is highlighted with a red rectangle. On the right, there is a 'Useful links' section with four links: 'How-to videos', 'Community', 'Test your internet speed', and 'View backup log'.



The screenshot shows the Reckon Control Panel navigation menu. The menu is organized into several sections: 'User Management' (Add User, Manage Users (Add Product/Service)), 'File Management' (Share Your Company File, Manage Shared Folder Access), 'Account Administration' (Account Details, View Job Status), and 'System Maintenance' (Log Off Remote Sessions). The 'Manage Shared Folder Access' option is highlighted with a red rectangle.

2. In Shared Folders, select the **folder** to be shared. A list of current users of the file will appear;



Tony Tran | Dashboard | Logout

**Select Share** | Select Users | Review | Complete

### Manage Shared Folder Access

Note: In order to manage shared folders, a company file has to be shared. To share a company file, go to [Share Your Company file](#) menu option.

**Select the Shared folder**

Shared Folders	Users with Access
BankData	

[Add](#) [Remove](#)

Selected Shared Folders

**Next**

Hint: Select the folder which you want other users to access from the 'Shared Folders' list. Click on 'Add'. You can select more than one folder.

**User Management**

- Add User
- Manage Users (Add Product/Service)

**File Management**

- Share Your Company File
- Manage Shared Folder Access**

**Account Administration**

- Account Details
- View Job Status

**System Maintenance**

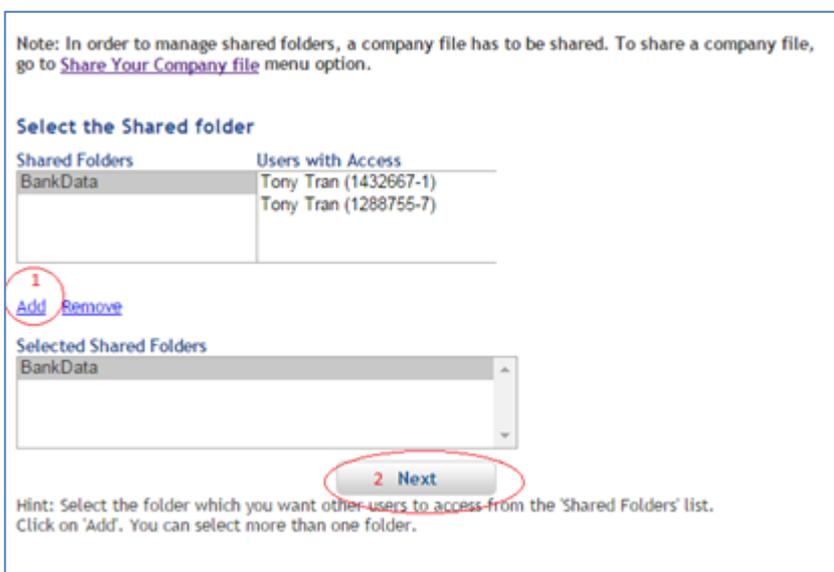
- Log Off Remote Sessions

If you require assistance at any stage, please call us as follows:

**Customer support**  
Hours: 8:00am to 6:00pm AEST (Mon-Fri)  
Phone: 1800 RECKON (1800 732 566)  
Email: [customerservice@reckon.com](mailto:customerservice@reckon.com)

**Technical support (1300 799 150) Hours:**  
8:30am to 7:00pm AEST (Mon-Fri)  
Phone: 1300 799 150  
Email: [onlinesupport@reckon.com.au](mailto:onlinesupport@reckon.com.au)

3. Click on **Add** and see the selected folder appear in Selected Shared Folders. Click **Next**;



Note: In order to manage shared folders, a company file has to be shared. To share a company file, go to [Share Your Company file](#) menu option.

**Select the Shared folder**

Shared Folders	Users with Access
BankData	Tony Tran (1432667-1) Tony Tran (1288755-7)

**1** [Add](#) [Remove](#)

Selected Shared Folders

BankData

**2 Next**

Hint: Select the folder which you want other users to access from the 'Shared Folders' list. Click on 'Add'. You can select more than one folder.

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;

Note: In order to manage shared folders, a company file has to be shared. To share a company file, go to [Share Your Company file](#) menu option.

**Select the User**

Search User by

All Users: Tony Tran (1432667-1)

Selected Users: (empty)

Buttons: Add->, <-Remove, Previous, Next

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**;

Note: In order to manage shared folders, a company file has to be shared. To share a company file, go to [Share Your Company file](#) menu option.

**Select the User**

Search User by

All Users: IT AUS (1210454-18)

Selected Users: (empty)

Buttons: Add->, <-Remove, Previous, Next

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

Note: In order to manage shared folders, a company file has to be shared. To share a company file, go to [Share Your Company file](#) menu option.

**Review & Grant access**

These selected users : [\(Edit\)](#)

Jason Jiao (1210454-1)

Will be granted access to these selected folders : [\(Edit\)](#)

BankData

[Previous](#) [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”**

Note: In order to manage shared folders, a company file has to be shared. To share a company file, go to [Share Your Company file](#) menu option.

**Congratulations!**

Your folder shares have been created.

UserID	Shared Folder	Status
1210454-14	BankData	Grant User Access succeeded - 1210454-14

**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>