



Reckon[®]

TRAINING GUIDE

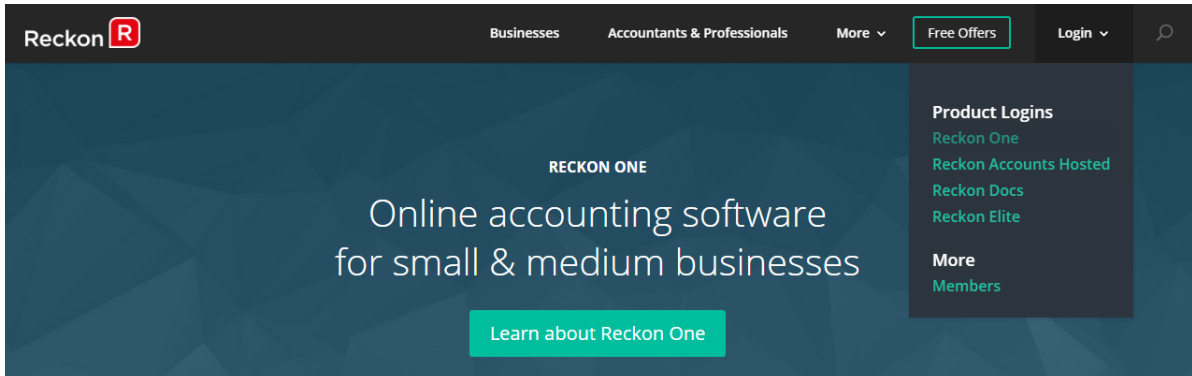
Reckon One Log in Portal

Signing in | Sharing your book

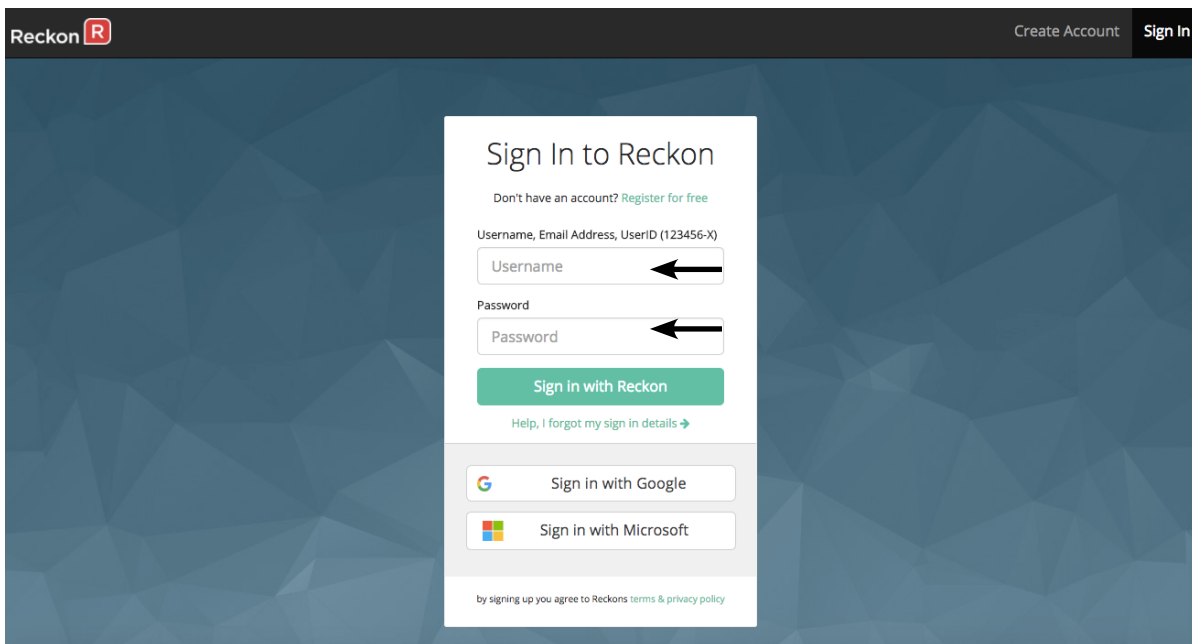
Sign in

Here is the link to log in to Reckon One: www.reckon.com

Select Login > Reckon One from the top right hand corner.



Here you will see the new and updated Sign In page to the Portal.



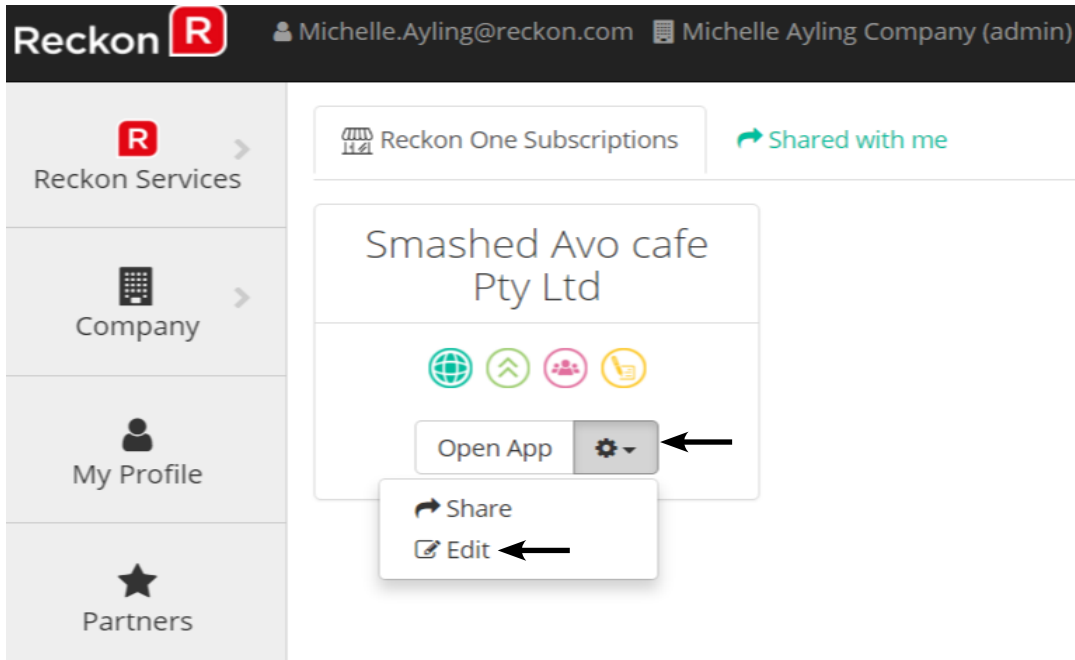
Important: Please only sign in with your existing username and password.

Do not use the Google and Microsoft sign in options as the system will not recognise you.

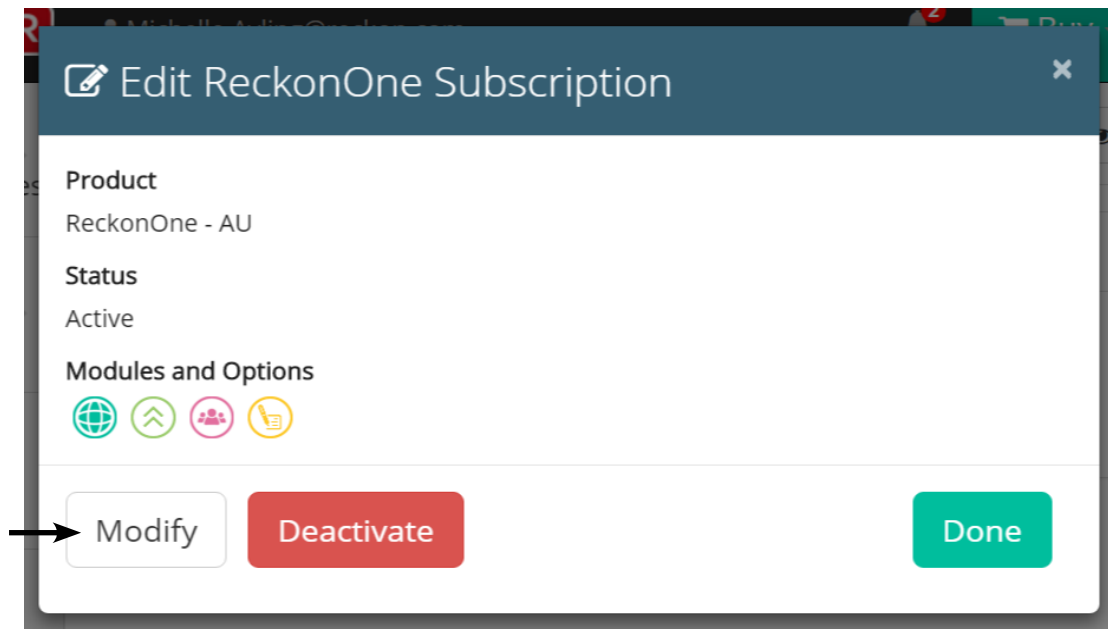
Book settings

Edit or modify your book


To share or edit your book click on the cog icon 

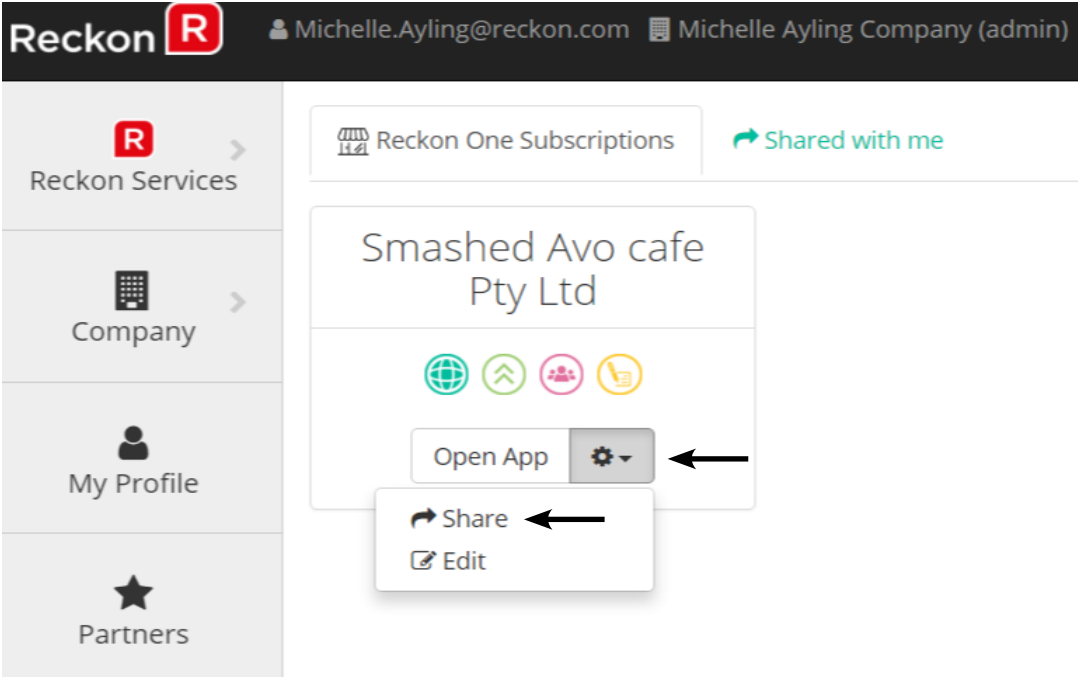


"Edit" then "Modify" to edit the modules on your book.



Share your book with a third party

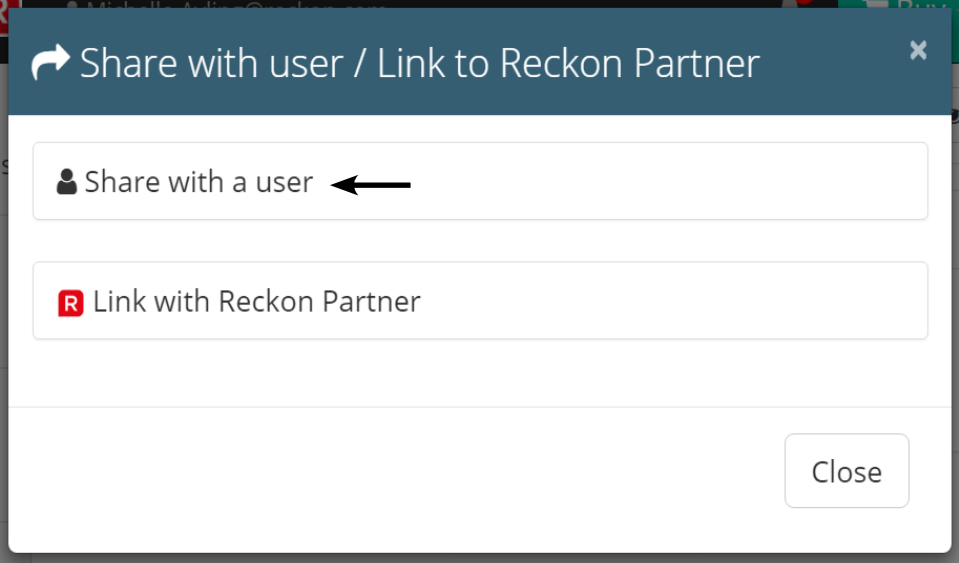
Click the Cog  icon on your book and select "Share".



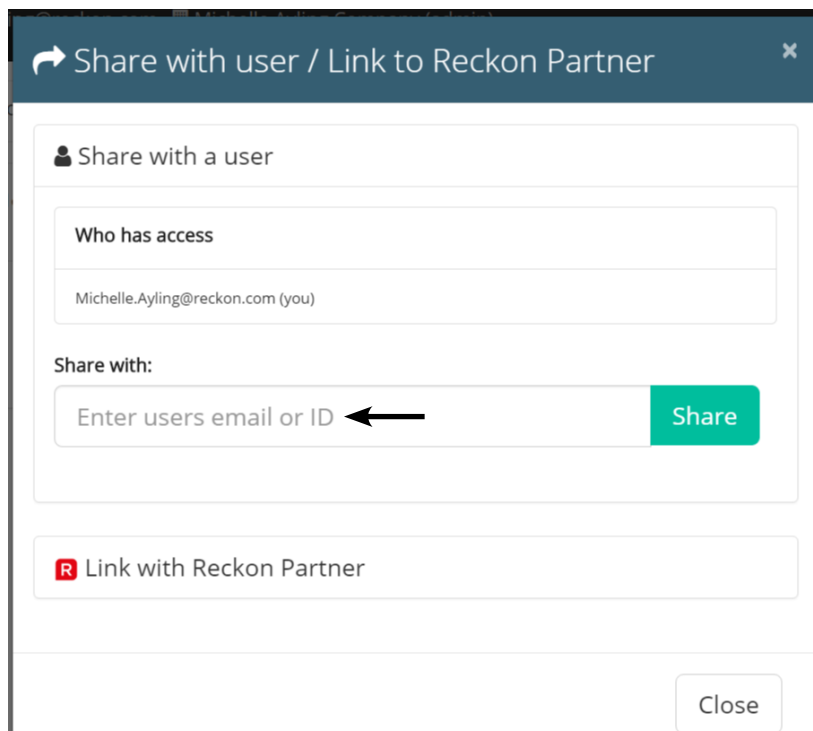
Under share you have two options: "Share with a user" or "Link with a Reckon Partner".

Share with a user:

Select "Share with User".

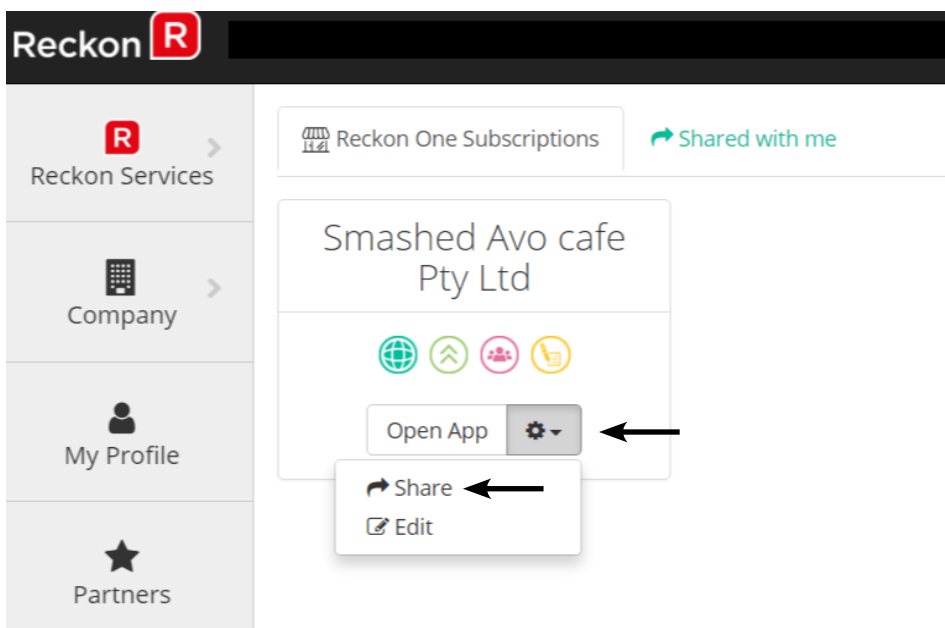


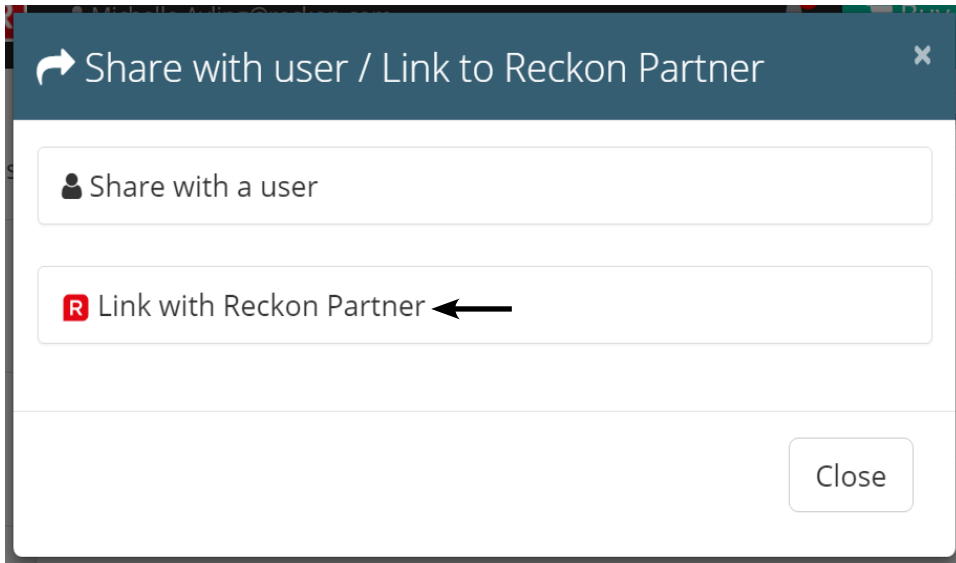
Enter the email address of the third-party user. Hit "Share" to confirm. The user will now appear in the list and you assign their permission level from the drop down box. Remove access to the book easily by selecting the cross in the top right hand corner.



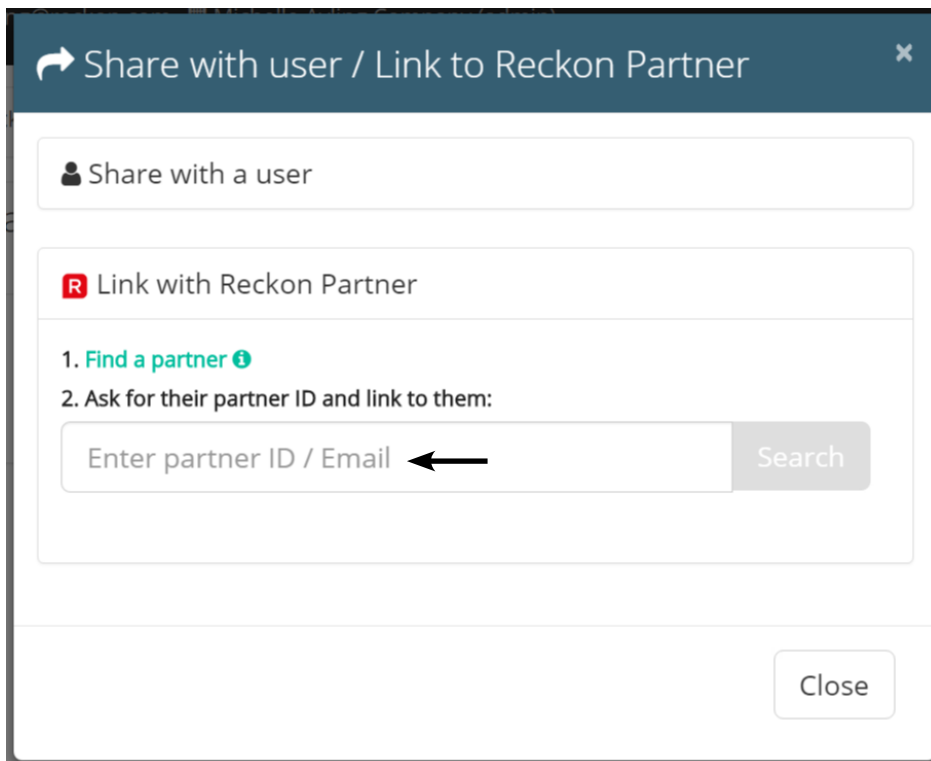
Link with a Reckon Partner

Click the Cog  icon on your book and select "share". Click on "Link with Reckon Partner".





Enter the email address or partner ID of your Reckon Advisor and click "Add".



This will bring up the field "Select Partners Company". Select the company name from drop down field and click "Link with Partner".

The user will now appear in the list for you to assign their permission level from the drop down box. Remove access to the book easily by selecting the cross in the top right hand corner.