How to create a new user to my Book? How to Remove the users from the Book? How to share the book with my accountants/partners?

In Reckon one, adding new user/staff to the book or sharing the book with an accountant, all the user and permission to the books is handled via the Portal.
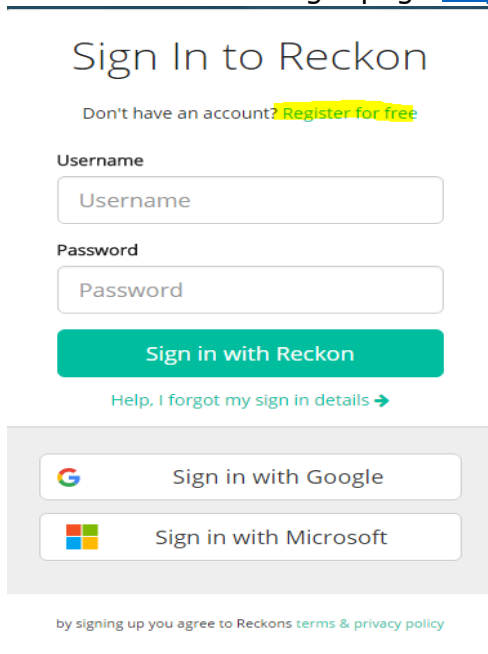
Adding new staff to the book:

Adding a new user to the book as staff is not to be confused with adding employees and payroll process. Adding User/staff is the process of creating a new user to the Reckon One book or Portal so that they can have access to the book and process the transaction etc.

Adding a new user where the user does not have any previous account with Reckon One can be done in below two steps.

1) First, create the Reckon ID via reckon one sign in page. You can use Gmail or MS or sign up new. ***(This Step is performed by the employee, who is being added to the book.)***

   i)   Go to Reckon one login page https://portal.reckon.com

   ii)   Click on **Register for Free**, should you choose to sign up old-school method, creating username password etc or select the option to sign in with Google or Microsoft. This process will let you log in using your Google or Microsoft ID.

2) Second step involves adding this user to the book as staff or share the book with that user as an external non-staff user, e.g. Accountants etc.
   ***(This step is performed by the Administrator/Owner of the book.)***

   i)   Once Reckon Account is created, the administrator is required to link that User to the Book.

   ii)   Login to the Portal as an Administrator.

   iii)   Navigate to **Account** menu and click on **staff.**
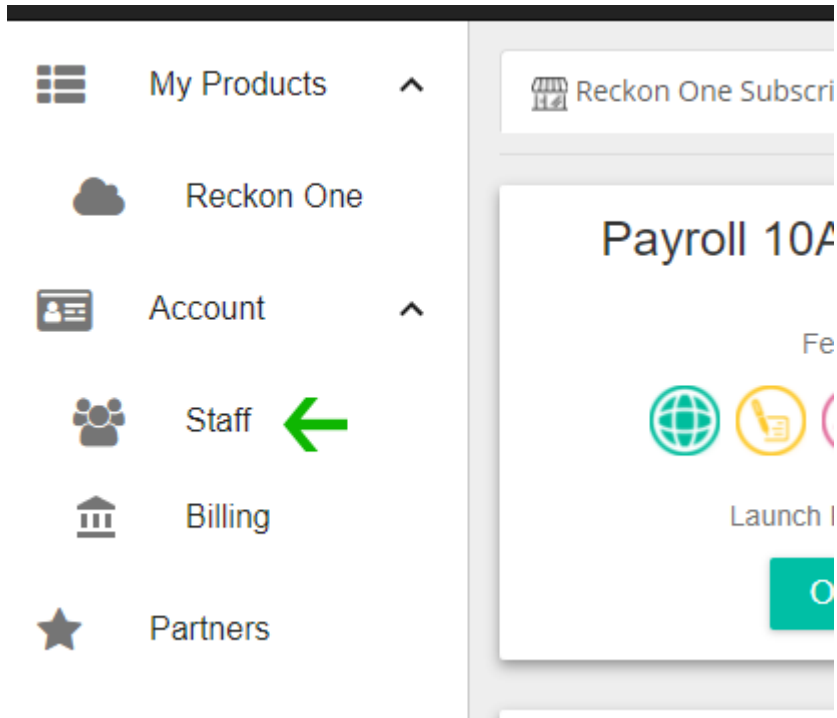
iv) Click on **Add Staff** Button and enter the username or the email ID that was created in step one above. Select the Appropriate Role from under the **Role** menu. (Note this role is related to the access rights for the portal only, not for the book.)
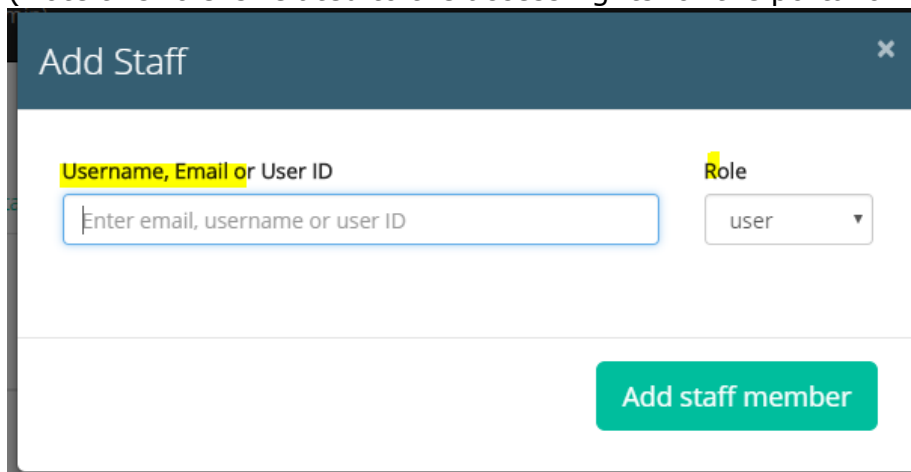
v) Once the user is added, you can now see the users in the list of staffs.

vi) Now that the user account is created, you need to give this user the appropriate access to the book/s.

vii) From the staff menu, click on the vertical ellipses icon to go to more option and select **Application permissions**.
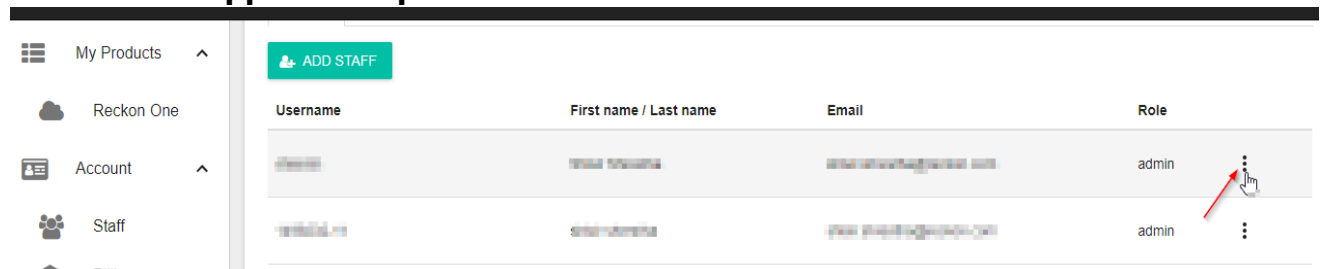
viii) You will get to the user Permissions window.

ix) You will see **Book Name** and **Current Roles.** Click on **pen** Icon next to roles to edit the permission, and select the appropriate roles for the user. against the book, and select the appropriate Roles for the user. Close it.

User Permissions

Set book ▓▓▓ **Book** permissions, for user ▓▓▓▓

- ☑ **Administrator**
  These users have full access to Reckon One including purchasing optional modules. Owners of a book are automatically assigned to this role.

- ☐ **Superuser**
  These users have full access to Reckon One, except they cannot edit other users' personal details.

- ☐ **Limited**
  These users can only view the contents of the book.

BACK

*Note: If you have more than one book, you can choose the permission for each book from here.*

If you do not see the Required roles here, you can create one from within the Book. Login to the book go to Settings, Roles and Add your own customized role from there.

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Adding Non-Staff members to the Book. eg, accountants, bookkeepers etc.:

You can also share the book with your partners or accountants who are not your staff, without having to create them as a staff member. You will need their Reckon ID if they have one and can simply share the access to your book. If they are new to Reckon and do not have Reckon ID, they can simply sign for free from here https://portal.reckon.com.

1) Login to the portal as an administrator.
2) Go to **My products** and **Reckon One**.
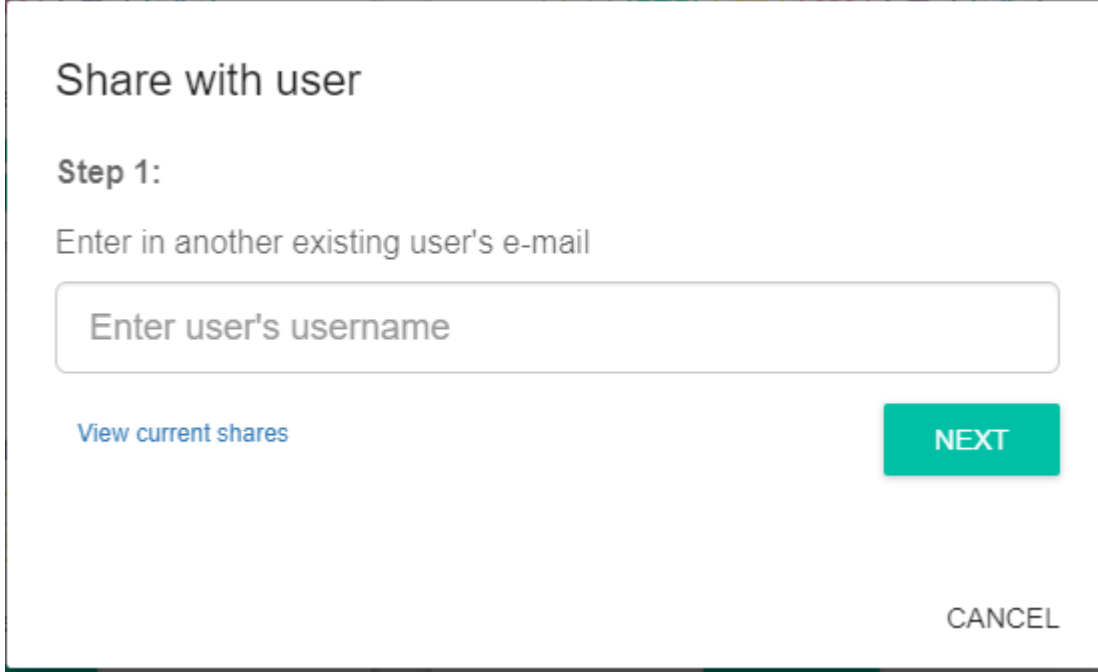3) You will see the Book and Vertical Ellipses icon next to the book name. Click on it, and click on S**hare With**
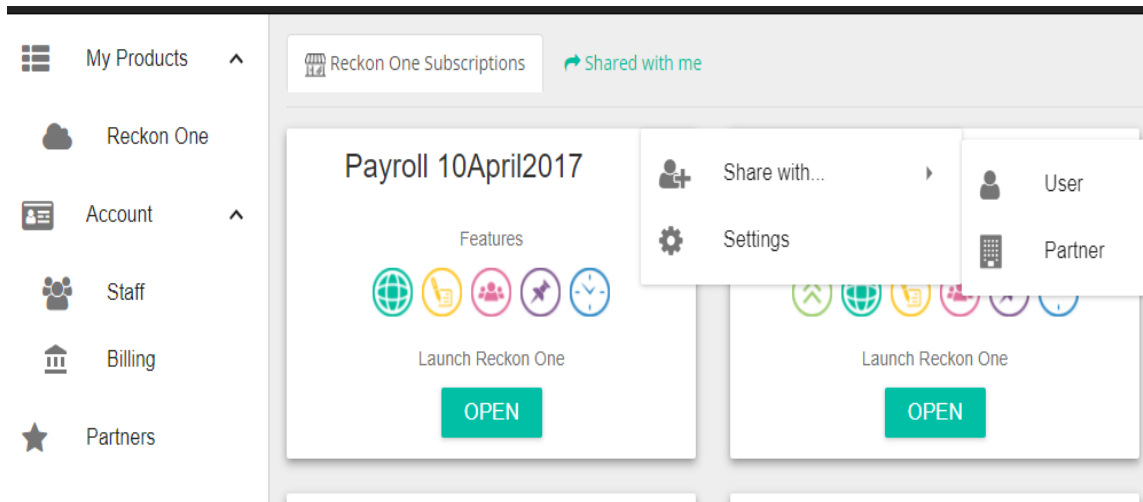
4) Select the appropriate option '**User'** or '**Partner'**
5) Enter the ID/Email address of the user and click on share.
6) You will then get the prompt to select the permissions for this user. Select the appropriate permission and Save.

Note The user will be able to see the book under 'Shared with me' tab, once they login to Portal.

Removing the users from shared Book:

The administrator can remove the users from the book. To remove the user, follow the below steps.

1) Login to the portal and navigate to the **My Products** and **Reckon One**.
2) You will see the Book and Vertical Ellipses icon next to the book name. Click on it, and click on S**hare With**
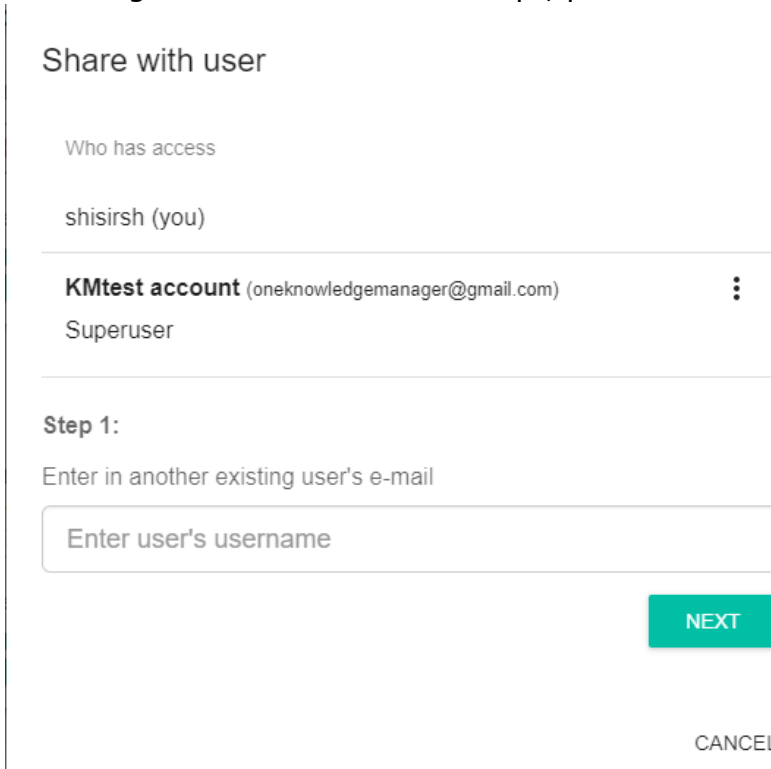3) Click on '**View Current Shares'** to see the current shares.

4)
5) You will see all users that have access to this book, whether it be staff or external users. Click on 'Ellipses' icon again next to the user you wish to unshare the book.
6) Click 'Unshare'.
7) You will get the confirmation Prompt, press OK to confirm or cross to cancel.

Removing the users from the Portal:

If the User is shared with the book as a non-staff member, simply removing the shared access from the book will take the user off. They will not have any access to the Portal.

However, if the user is added as a staff member, the user may still exist in the portal as staff. Although it may not have access to any or some book.

Hence if you do not like the user to have access to the portal you can remove the user from the Portal as below.

1) Login to Portal, go to Company tab and staff.
2) You will see the list of the staff here, navigate to the staff you want to delete
3) Go to the Ellipses icon and select 'Remove' to delete the user.

Note: you should also double check if the user has not been accidentally added to the book as shared user. Follow '**Removing the users from shared Book'** part too to double check the user does not exist there.