

How to Share a Company File in SortMyBooks

- 1. Only file owners can share files.
- 2. Go to Home and Settings Navigate to the Sharing tab.
- 3. Click "Share With" This opens the sharing options.

<u>H</u> ome	<u>S</u> ales	Purchases	Accounts	Tools	<u>U</u> tilities			SortMyBooksOnIn	e.com Versi	on: 2.7.3.34
Dashboard	Getting Started	Audit Log	95			Reports BETA	Report	Accountant (<u>K)</u>	O Help	Support
G pe inthe	Share With rson may al SortMyBoo	h first, the Iready be oks system	Subscription	Sharing Clo	ning API	ur company. If you click on	a particular i	user, you can see	the Access	9
We Share with User Aileen Han	have a How-To on	a sharing your compa	ny file here	use New A already	ccount for someo in the SortMyBoo	one who is not oks system.		Type owner		
aileenapite	st aileenapitest			aileenapitest@:	sortmybooks.com			employee		

- Select Access Permissions Choose the recipient's access level by ticking or unticking the items listed.
- 5. Enter the Email Address Input the recipient's email.
- 6. Click "Share" This finalises the file-sharing process.

Share with	New account				
User		Email	Туре		
selected	Name				
Z	Accounting				
2					
Z					
2	Bank Statement				
2					
2	Creditors				
2	Creditors without Employees				
✓	Debtors				
	Multi Currency				
2	Plaid integration				
2	Products and Services				
2	Purchase Order				
2					
2					
2	Till Rolls Employee				
2	Time Tracking				
			0		
Account / Email of the person to receive access:*					
anne@sort	mybooks.com				
			Share Cancel		