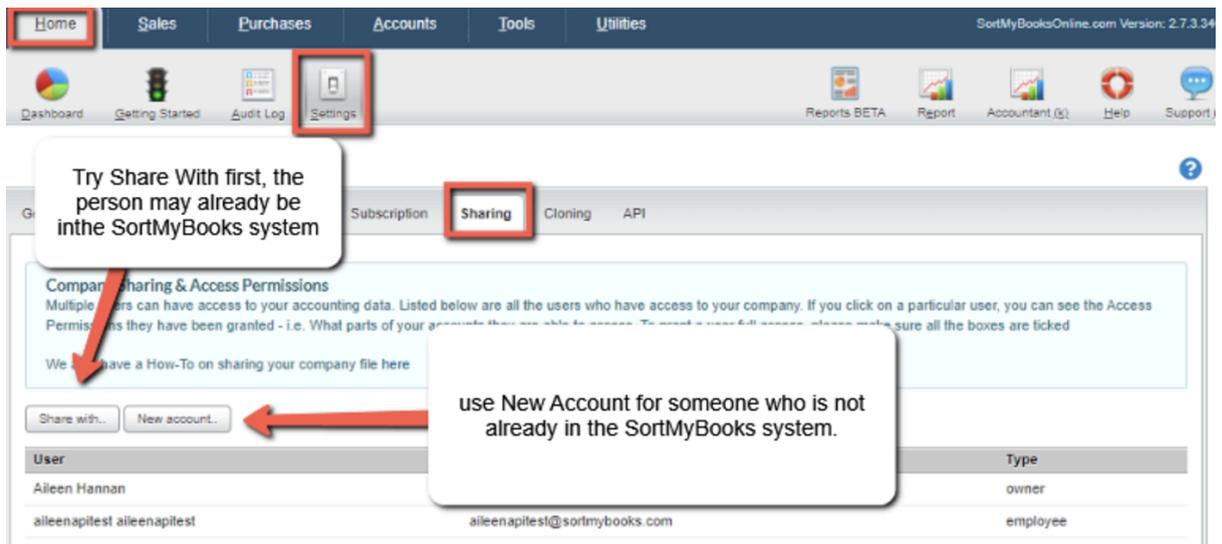


## How to Share a Company File in SortMyBooks

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.



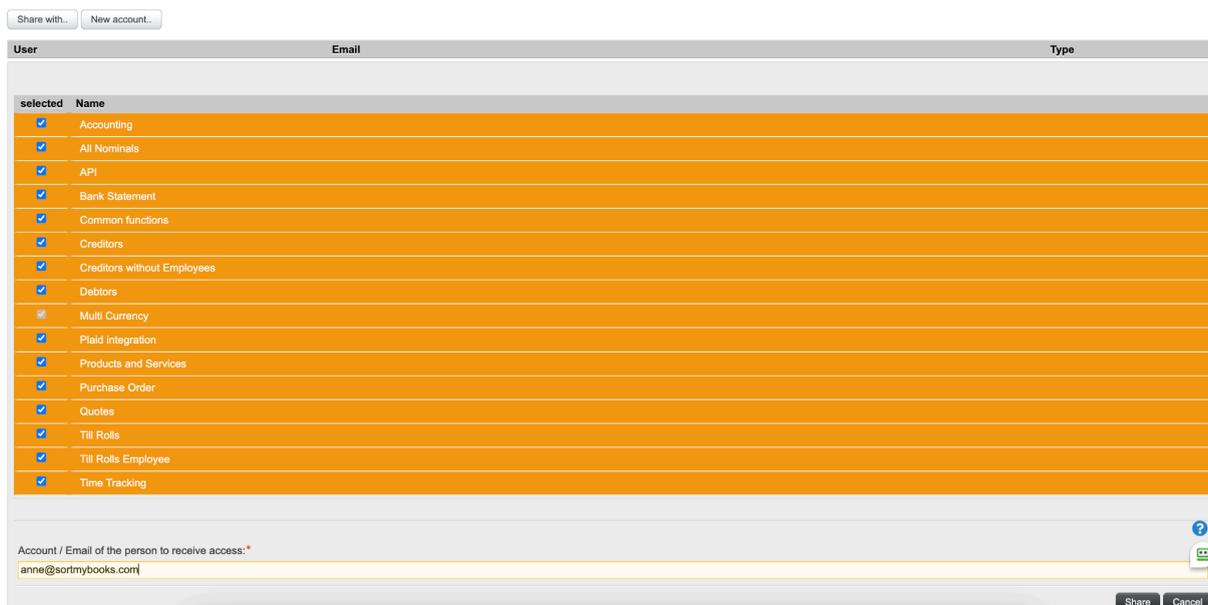
Try Share With first, the person may already be in the SortMyBooks system

use New Account for someone who is not already in the SortMyBooks system.

Share with... New account...

User	Type
Aileen Hannan	owner
aileenapitest aileenapitest	employee

4. **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...

selected	Name
<input checked="" type="checkbox"/>	Accounting
<input checked="" type="checkbox"/>	All Nominals
<input checked="" type="checkbox"/>	API
<input checked="" type="checkbox"/>	Bank Statement
<input checked="" type="checkbox"/>	Common functions
<input checked="" type="checkbox"/>	Creditors
<input checked="" type="checkbox"/>	Creditors without Employees
<input checked="" type="checkbox"/>	Debtors
<input type="checkbox"/>	Multi Currency
<input checked="" type="checkbox"/>	Plaid Integration
<input checked="" type="checkbox"/>	Products and Services
<input checked="" type="checkbox"/>	Purchase Order
<input checked="" type="checkbox"/>	Quotes
<input checked="" type="checkbox"/>	Till Rolls
<input checked="" type="checkbox"/>	Till Rolls Employee
<input checked="" type="checkbox"/>	Time Tracking

Account / Email of the person to receive access:\*

anne@sortmybooks.com

Share Cancel