



# Welcome Kit

**Thank You for Choosing Cloud9 Real Time  
as Your Partner in the Cloud!**



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## Getting Started (Quick Guide)

### To Get Started:

1. Visit our **Welcome Center** at [www.cloud9realtime.com/welcome](http://www.cloud9realtime.com/welcome)

2. Please note our **Minimum System Requirements**:

**Broadband Internet Connection** with at least 3 MBPS download and 512 KBPS upload speeds.

#### Macintosh:

- OS of 10.6 or above
- You must download and install remote desktop software to connect to service. (*free*)
- Processor: 2.8 GHZ Intel Core 2 Duo
- Memory: 4 GB 667 MHZ DDR2 SDRAM
- Note: Cloud9 does not host the Macintosh version of Quickbooks, all files are Windows version.

#### Windows PC:

- Windows XP SP#, Windows Vista SP2 or Windows 7
- Remote Desktop Protocol (connection) 7.0 or above
- 150 MB hard drive space
- 2 GB RAM
- 1024 x 768 monitor resolution

- if you have additional questions please download the **Minimum System Requirements User Guide** on our help page at [www.Cloud9Help.com](http://www.Cloud9Help.com).

If you are a PC user there is no other setup necessary. If you are a Mac user, login via RDP. Please see the Mac Setup Guid on our help page at [www.Cloud9Help.com](http://www.Cloud9Help.com).

**To add users** or QB files to the system you will need to submit an add user form at [www.cloud9help.com](http://www.cloud9help.com). There are 3 different types of licenses for the eDashboard:

1. Admin License – this is what you and any of your employees use. Gives access to all company and client files.
2. Client License – this is when you add a client to the system and they need access as well.
3. Company File – when you add a company to the system (client or otherwise) but are not adding an additional user. The file will be added to your Admin licenses and we will add it to their dashboard.

### You can have your clients login directly from your website!

Have your webmaster embed the following code:

```
<!-- Start Cloud9RealTime.com Login --> <div class="central-1"><iframe class="border" src="https://login.cloud-9realtime.com/RDWeb/Pages/en-US/login_iframe.aspx?bgcolor=%23ffffff" width="250" height="210" frameborder="0" scrolling="no" align="left" name="myInlineFrame"></iframe></div>
<!-- End -->
```

**Please Note** - We have multiple ways for you and your users to get assistance:

- Become familiar with [www.cloud9help.com](http://www.cloud9help.com) and register so you have faster assistance in the future!
- Live Chat with a representative at [www.cloud9help.com](http://www.cloud9help.com)
- Call **(888) 869-0076** for technical support or billing questions
- If you would like to private label your e-Dashboard, email your logo to [logo@cloud9realtime.com](mailto:logo@cloud9realtime.com)

## About Cloud9 Security

Cloud9 Real Time has partnered with the World Class Data Center AIS to provide clients with the highest level of security and access available. The Lightwave data center is an 80,000 square-foot purpose built data-center located in the San Diego Spectrum area of Clairemont Mesa, California. Originally designed to support the colocation for a large defense contractor, Lightwave is a SOC2/SSAE16 compliant data center that features 12+ Megawatts of power, N+1 / 2N or better redundancy on all data center systems and security protocols required by leading businesses in the most stringent verticals. Lightwave is well positioned in the fiber rich area of Clairemont Mesa offering direct carrier-neutral access to many of the leading carriers and network internet service providers. In addition to carrier-neutral access, AIS colocation networking services include performance routed IP and seamless private layer 2 transport to any remote AIS data center, out-of-state disaster recovery has never been easier.

### U.S. BASED

All of our servers, backups, data centers and tech support are based in the United States. None of our IT or engineering is outsourced or sent overseas, Ever. Automatic off site backups are done nightly and kept for a minimum of 30 days.

### ENCRYPTED

Each time any user logs into the system to access data it is thru 256 bit encryption offering you peace of mind in the security of your transfer. With the same security as Online Banking, your data couldn't be safer.

### CERTIFIED SOC2/SSAE16 Certified DATA CENTER

Our 57,000 square foot data center is state of the art and features:

- 12+ Megawatts of uninterrupted power
- Cisco Firewalls and Routers
- Mirror Disk Imaging
- RAID implementation
- N+1/2N or better Redundancy
- Biometric hand scanner
- CCTV Digital Surveillance
- Motion Detection on all data center floors
- Seamless private Layer 2 transport
- 24/7/365 Onsite Monitoring

## Guides and Client Resources

Cloud9 Real Time has an array of different Guides & Manuals to help you and your users maximize your online virtual office. Due to regular updates, the guides are not included in this Welcome Kit but you can access the latest guides by visiting [www.cloud9help.com](http://www.cloud9help.com) and click on “Guides”

You will also find Client Resources such as downloads, login link, ticketing system, live chat, training opportunities and maintenance schedules. Again the website is [www.cloud9help.com](http://www.cloud9help.com)

We encourage all clients to stay up to date on the latest news, developments and Cloud9 community by following us on Twitter, Linked In, Facebook and the Cloud9 blog. You can access any of these links by visiting our homepage [www.cloud9realtime.com](http://www.cloud9realtime.com) and clicking on the corresponding icon in the upper right hand corner.

Please visit our Welcome Center at [www.cloud9realtime.com/welcome](http://www.cloud9realtime.com/welcome) for more information.

## Annual Cloud Summit User Conference

Our annual Cloud Summit is the exclusive cloud computing conference for professional practices and small businesses offering 18 CPE credits, an all-star lineup of cloud implementation educators and one on one user trainings for the top-rated cloud computing solutions.

Held at a private 44-acre island in beautiful San Diego, California, this 3 day event is not to be missed, with content focused tracks for accounting professionals, CPAs and business owners alike. Join us as we explore all things Cloud and teach you how to implement and maximize your cloud computing solutions!

For information on this year’s Cloud summit please visit [www.CloudSummit2013.com](http://www.CloudSummit2013.com) or call 888.869.0076

- Tour a SOC2/SSAE16 Certified Data Center
- Expert Educators & Panelists on Cloud Implementation
- Best Practices for Local IT Needs
- One-on-One User Trainings
- Practice Evaluations
- Focused Courses on Turnkey Solutions
- Client Workflow and Security Management
- Step by Step Client Hosted Trainings with Checklists
- Marketing Courses to Grow Your Firm

## What's Included/What's Available

### The QuickBooks hosting service includes:

- Privately labeled portal (the e-Dashboard)
- Microsoft Word 2010
- Microsoft Excel 2010
- QuickBooks hosting
- Foxit PDF Reader/Writer
- Document Management and Storage System
- Technical Support
- Backup and Storage
- Self-Service help desk [www.cloud9help.com](http://www.cloud9help.com)

### The following products/services are available:

- Scanning directly into the e-Dashboard (free – must register Scanner with technical support)
- Fax directly into the e-Dashboard (\$99 Individual Line, \$249 Global Line – 1 Time Setup Fee of \$49)
- Email directly into the e-Dashboard (\$99 Individual Line, \$249 Global Line – 1 Time Setup Fee of \$49)
- Cloud9 Elite Membership plan – visit [www.cloud9elite.com](http://www.cloud9elite.com)
- Customized Marketing Materials
- Customized Virtual Server
- Cloud Summit & User Conference
- In-Depth training opportunities
- Privately labeled demo video
- Branding support
- 3rd Party Application hosting: on the shared servers you can add Bill.com, SmartVault, Spring Ahead or Sage50 to any users for an additional fee
- Lease QuickBooks

If you are interested in any of the additional products/services available please contact your Sales Associate or email [sales@cloud9realtime.com](mailto:sales@cloud9realtime.com)

## Adding Users and/or Company Files

To add users or QB files to the system you will need to submit an add form at [www.cloud9help.com](http://www.cloud9help.com) (click on Order). There are 3 different types of licenses:

1. **Admin License** – this is what you and any of your employees use. Gives access to all company and client files. Click on Add a User to submit this form. Indicate Admin on the license type
2. **Client License** – this is when you add a client to the system and they need access as well. Click on Add a User to submit this form. Indicate Client on the license type
3. **Company File** – this is when you add a company to the system (client or otherwise) but are not adding an additional user. So the file will be added to your Admin licenses and if it is an additional file for a client we will add it to their dashboard. Click on Add a Company File to submit this form.

All user licenses are customized to the individual user. If you have specific permission settings you would like established, please indicate on the Add User form in the Notes section at the bottom.

Technical Support will add your new company and/or user within 24-48 hours of the time received. You will receive an email notifying you of completion and if you added a user, you will receive the new login credentials. At that time you can login add the QuickBooks file to the e-Business folder of the corresponding company to make the file “live.”

If you need the user setup expedited, there is a \$50 for 4 hour turnaround or a \$25 fee for 24 hour turnaround.



## Training

Cloud9 Real Time is a Windows based system and very user-friendly.

- You can see a demo video at [www.edashboarddemo.com](http://www.edashboarddemo.com)
- You can download guides at [www.cloud9help.com](http://www.cloud9help.com)
- You can also get assistance at our Welcome Center [www.cloud9realtime.com/welcome](http://www.cloud9realtime.com/welcome)
- **One-on-One User Trainings and Workshops at the Annual Cloud Summit User Conference**

In-Depth training opportunities are available for an additional fee and are hosted by CEO, Robert Chandler. These events are held quarterly and can be online, on-site or in person at our Data Center. If you would like to attend an upcoming training session or schedule an on-site training, please contact [sales@cloud9realtime.com](mailto:sales@cloud9realtime.com)

If you need assistance or have a question, please contact Technical Support at (888) 869-0076.

Most questions can be answered by accessing the Knowledgebase at [www.cloud9help.com](http://www.cloud9help.com) or users familiarizing themselves with the system through the How To Guide.





## Technical Assistance

Cloud9 Real Time offers regular business hours of 6:00am – 6:00pm Pacific Standard Time. Any of the following modes can be utilized to attain Technical Assistance within that time frame:

- Self Service Help Desk [www.cloud9help.com](http://www.cloud9help.com)
- Telephone (888) 869-0076
- Submit a ticket at [www.cloud9help.com](http://www.cloud9help.com)
- Email [support@cloud9realtime.com](mailto:support@cloud9realtime.com)
- Live Chat with our technical support at [Cloud9Help.com](http://Cloud9Help.com)

After-hours emergency support is available via telephone at **(888) 869-0076** by pressing 4 to be connected to a Customer Service representative. Emergency support is intended for users that cannot login or access data.

A self-service help desk is available at [www.cloud9help.com](http://www.cloud9help.com) that allows users to access a Knowledgebase, Downloads, Guides, Login, and register for upcoming events.



## Billing and Renewals

All user licenses will automatically renew if client does not provide Cloud9 with prior written notice. The credit card on file will be automatically billed and the user license renewal date reset. If you do not want to renew a user license, please email [accountmanager@cloud9realtime.com](mailto:accountmanager@cloud9realtime.com) with user license ID information and instructions. There is also a Deactivation form at [www.cloud9help.com](http://www.cloud9help.com) that will need to be submitted.

A monthly recurring Intuit commercial host fee of \$5 per month per user will be charged to clients credit card on file for every active user on the system that has access to QuickBooks.

At time of signup and each time a client adds a user to the system, the client will indicate the billing option they would like to select. Annual, Quarterly or Monthly payment options are available and will be setup accordingly.

There is a one time setup fee of \$50 for all Quarterly or Monthly billing options.

There are no monthly storage fees with Cloud9.

There is no charge to private label the e-Dashboard.

There are no IT or Maintenance fees with Cloud9 to support or for hosting services. An additional fee may apply if client needs additional support outside the Cloud9 services to include support of 3rd party applications, scanner setup, customization and/or physical data backup to USB or disks. If a user breaks the system then technical support fees will apply.



## Changes to Your Account

**Change Theme:** to change the theme of your e-Dashboard, please submit a ticket at [www.cloud9help.com](http://www.cloud9help.com) and indicate your RTB account number, the theme you would like to switch to and a technical service representative will update your e-Dashboard account to reflect the request.

**Add Logo:** to add a logo to your e-Dashboard, please send your logo to: [logo@cloud9realtime.com](mailto:logo@cloud9realtime.com)

**Edit Contact Info:** If you would like to change the contact information on your e-Dashboard, please submit a ticket at [www.cloud9help.com](http://www.cloud9help.com) and indicate your RTB account number, the information you would like changed and a technical service representative will update your e-Dashboard account to reflect the request.

**Edit Credit Card:** If you would like to change the credit card on file, please email [accountmanager@cloud9realtime.com](mailto:accountmanager@cloud9realtime.com) for instructions.

**Transfer a License:** If you would like to transfer a user license to a new user, please submit a deactivate user form and an Add User form at [www.cloud9help.com](http://www.cloud9help.com) and indicate in the notes section that you would like to replace the cancelled user.

**Deactivate a User:** to deactivate a user license, please submit the deactivate user form at [www.cloud9help.com](http://www.cloud9help.com).

**Upgrade QuickBooks:** to upgrade to a different version of QuickBooks, please submit the appropriate form [www.cloud9help.com](http://www.cloud9help.com)

**Lease QuickBooks:** To lease QuickBooks for a user please indicate the preference on the Add User form. If it is an already setup user license, please submit the appropriate form at [www.cloud9help.com](http://www.cloud9help.com).

**Add 3rd Party Software:** To add a 3rd party application to a user, please indicate the request in the additional comments section of the Add User form. Please be sure to indicate all license information to help expedite the process. If you are wanting to add a 3rd party application to the existing server, please submit the add 3rd party app form at [www.cloud9help.com](http://www.cloud9help.com).

**Request Backup:** please submit a ticket at [www.cloud9help.com](http://www.cloud9help.com) and indicate your RTB account number, the name of the file and the date to be restored.

## Cloud9 Real Time Glossary

There are many terms used in materials or by Cloud9 staff that you may not be familiar with, here is a brief overview of commonly used Cloud9 words:

- **e-Dashboard:** the Cloud9 proprietary system, your online virtual office
- **e-Box:** your Document Management & Storage system
- **Inbox:** where you and your clients can scan, save, fax or email documents into the system
- **e-Coach:** folder in the e-Dashboard to store exported Excel files
- **e-Desk:** folder in the e-Dashboard to store exported Word files
- **R Drive:** the server drive name that is created after FTP or Webdrive is setup on your local computer. Allows you to drag & drop documents and/or files into the system
- **H Drive:** accessible through the File Explorer feature in the e-Dashboard, refers to your company folders on the Cloud9 servers
- **e-Business:** folder where QuickBooks files should be saved
- **FTP:** Setup on any computer that user wishes to transfer documents into the system from
- **TSScan:** 3rd party software that installs a letter drive on your computer for scanning capabilities
- **Cloud9 Help:** a website for Cloud9 Clients and their users that provides accessibility to resources
- **RTB:** Refers to the parent company RTB Global, Inc. and the subsidiary Cloud9 Real Time
- **Cloud9 Elite:** a membership program that provides training, sales & marketing support
- **Cloud9 Growth Principles:** on-site or online extensive 2 day training hosted by CEO Robert Chandler
- **Mikogo Session:** When you need technical assistance, the help desk team member may need to access your computer and will ask you to join a session via [login.mikogo.com](http://login.mikogo.com)
- **Virtual Server:** Clients that purchase a virtual server solution are segregated from the server farm that hosts the QuickBooks hosting clients and allows for more freedom and flexibility
- **Server Farm:** the infrastructure that hosts our shared server clients
- **3rd Party Applications:** Any application other than those included in the regular hosting service
- **Load Balancer:** monitors the server farm and sends users to the least busy server
- **Data Center:** the AIS collocation facility
- **MSI:** Microsoft installer that gives users desktop shortcuts to their cloud applications and files.
- **RAM:** virtual memory