

How to Add Users

PURPOSE

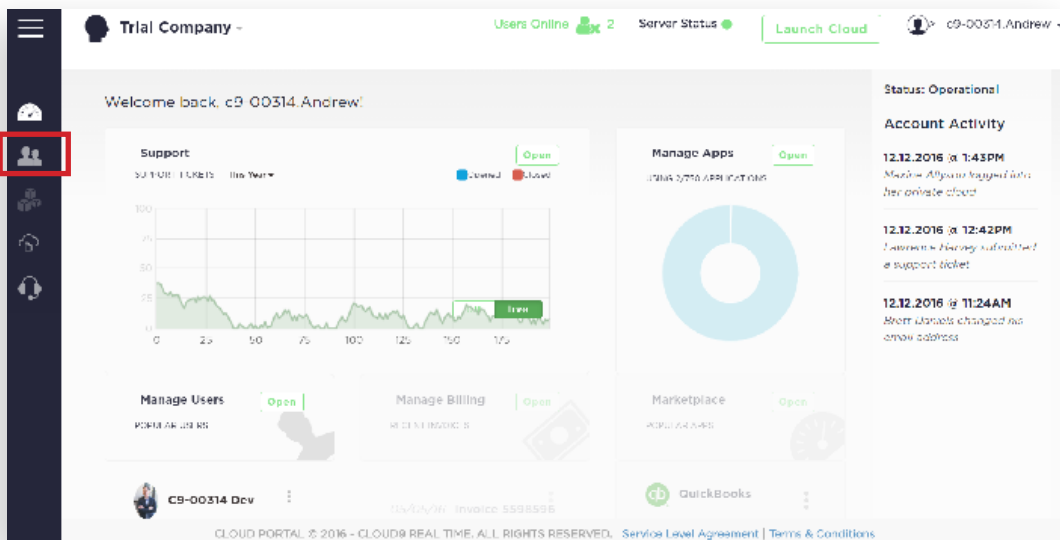
How to add users in the C9 Portal.

STEP 1

Login to the C9 Portal: <https://c9portal.cloud9realtime.com/>

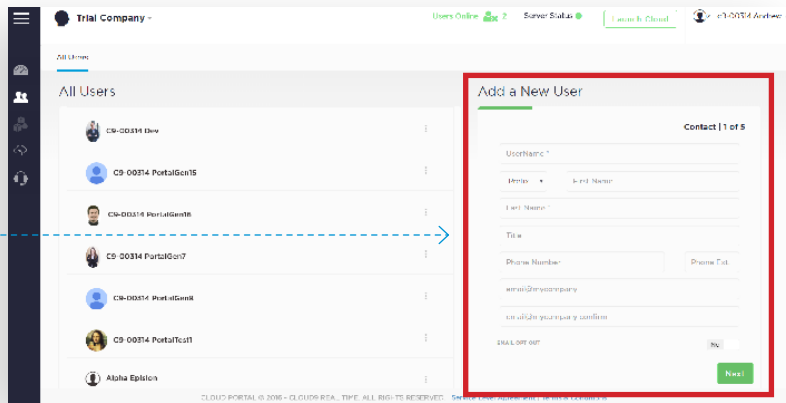
STEP 2

From Dashboard select the Manage Users icon.



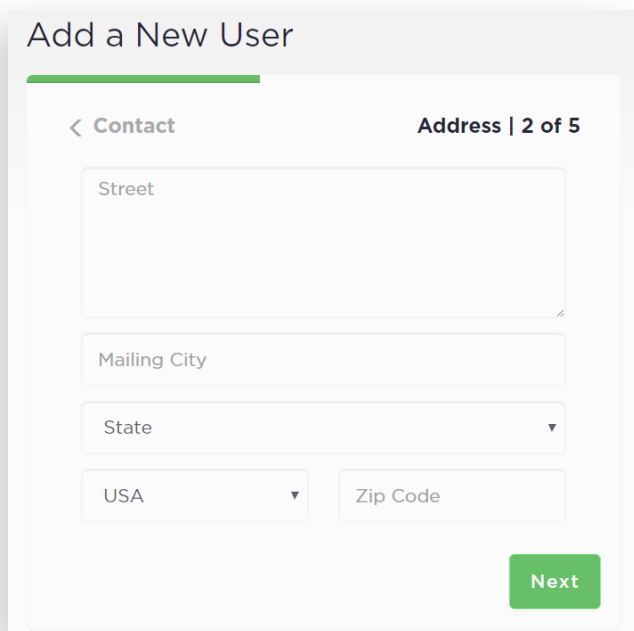
STEP 3

Enter the required user information.



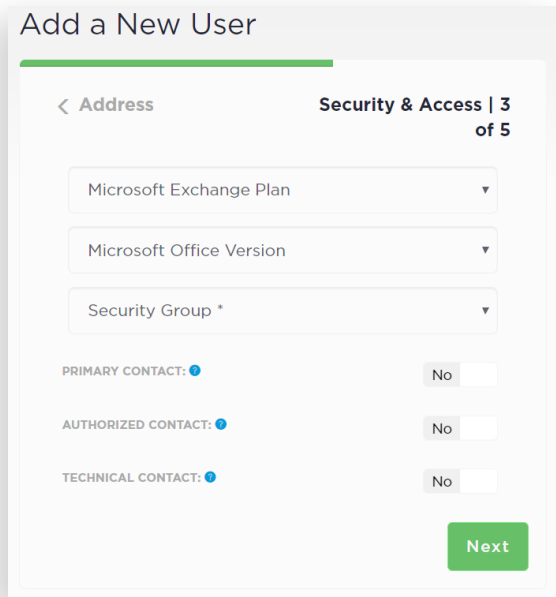
STEP 4

Enter contact information



STEP 5

Select a security group.



Add a New User

< Address **Security & Access | 3 of 5**

Microsoft Exchange Plan ▾

Microsoft Office Version ▾

Security Group * ▾

PRIMARY CONTACT: No

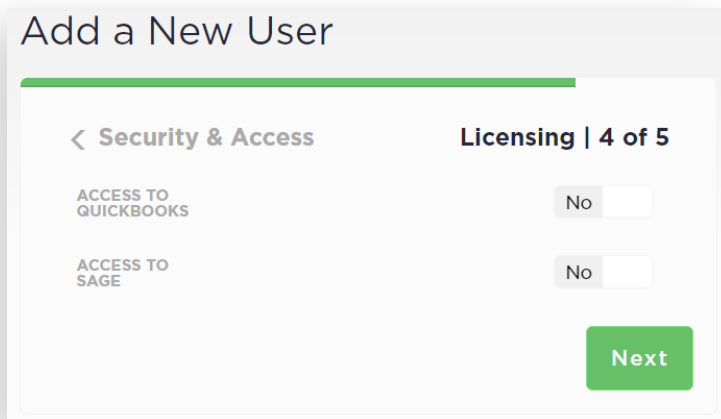
AUTHORIZED CONTACT: No

TECHNICAL CONTACT: No

Next

STEP 6

Assign access to QuickBooks.



Add a New User

< Security & Access **Licensing | 4 of 5**

ACCESS TO QUICKBOOKS No

ACCESS TO SAGE No

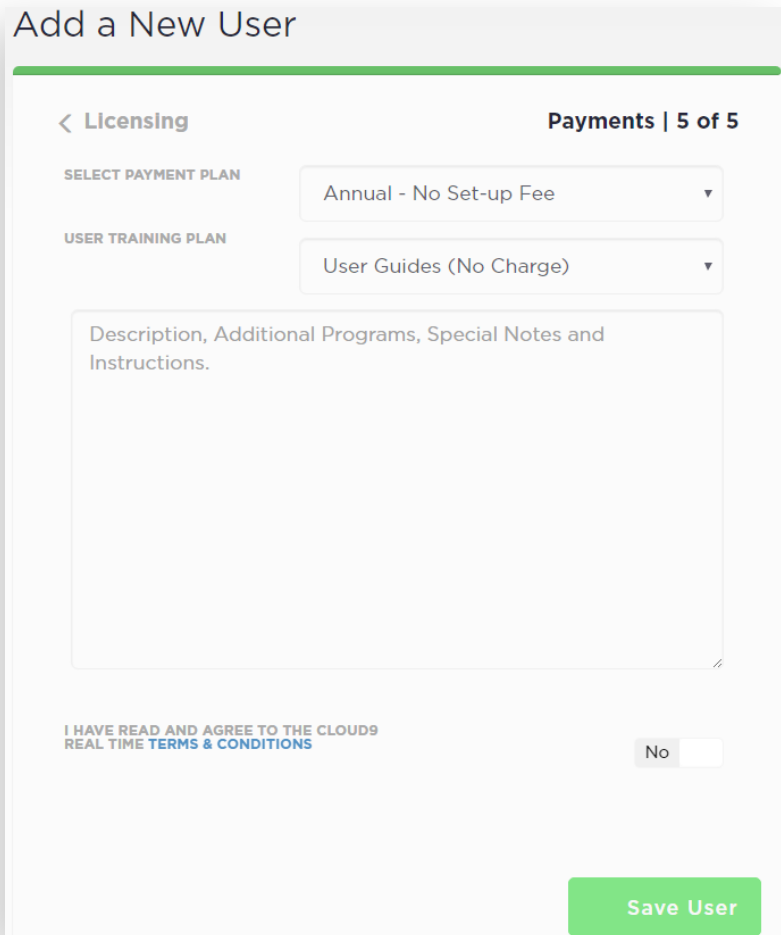
Next



STEP 7

Select payment options.

Add a New User



< Licensing Payments | 5 of 5

SELECT PAYMENT PLAN Annual - No Set-up Fee ▼

USER TRAINING PLAN User Guides (No Charge) ▼

Description, Additional Programs, Special Notes and Instructions.

I HAVE READ AND AGREE TO THE CLOUD9 REAL TIME TERMS & CONDITIONS No

Save User

STEP 8

Click **Save User** to complete the user setup.

