In This Document You Will Learn About:

- Moving Documents from Computer to e-Dashboard
- Using the Inbox
- Outsourcing Your Documents
- Saving Word or Excel Documents to e-Dashboard
- Saving Documents to Your Computer
- E-mailing from the e-Dashboard
- Adding a Company File to the e-Dashboard
- Adding a Client or Employee to the e-Dashboard
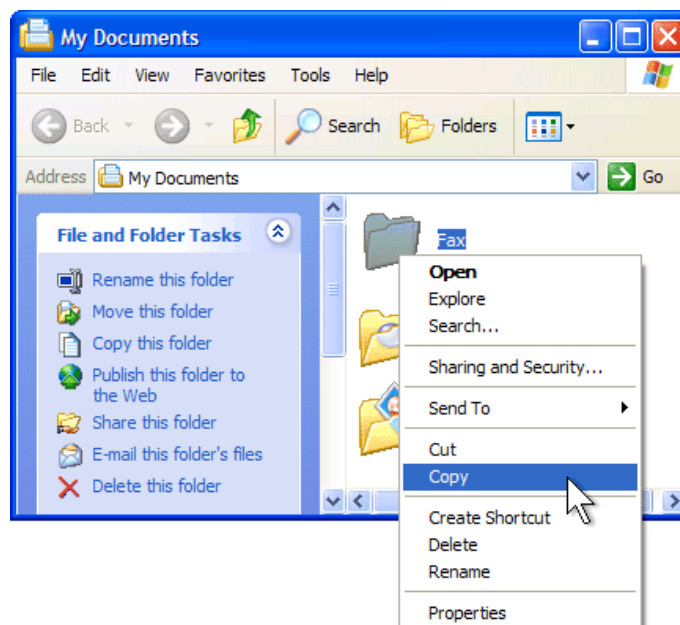- Contact Information

Moving Documents from Your Computer to e-Dashboard

BEFORE YOU BEGIN: Please refer to the **Getting Started Guide** at Cloud9HELP.com.

STEP ONE: Locating Your Documents
Locate which the file you want to move to the **e-Dashboard**. This may be your desktop, or a different folder on your local computer.

Right-Click on the file and select **Copy.**

STEP TWO: Moving the document to the e-Dashboard.

Open the **Cloud Files** icon

Navigate to where you want your document to be stored at by going to the company folder.
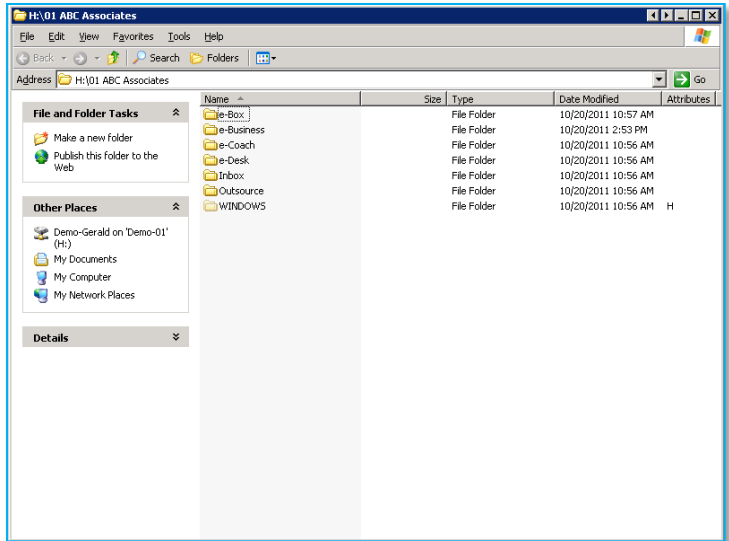
e-Box: for documents you want to be seen inside the e-Box
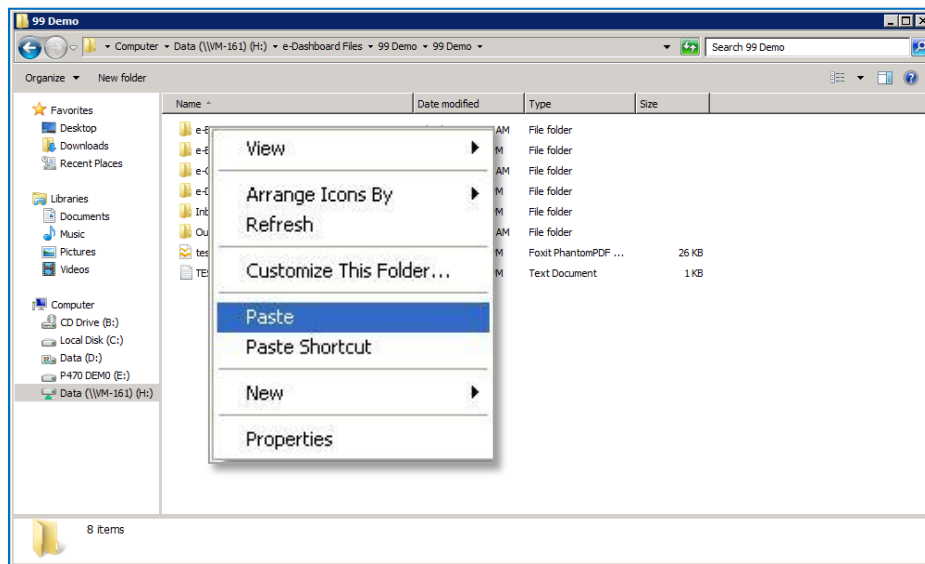**Inbox:** to sort your documents
e-Desk: for Microsoft Word files
e-Coach: for Excel documents
e-Business: for QuickBooks or other business application files

**Right-Click** on the company folder and select **Paste**.

Using the Inbox

BEFORE YOU BEGIN: One of the most crucial aspects of the e-Dashboard is the Inbox feature. The Inbox allows you to use the e-Box to its fullest potential. This feature will allow you to sort your documents by the type of document, the year in which the document came from, and the vendor.

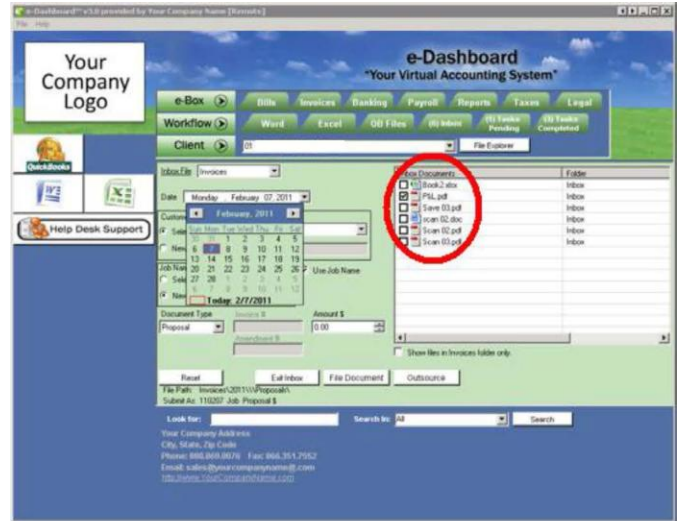**STEP ONE – Selecting your document:**

When inside the e-Dashboard, Select the Inbox tab.
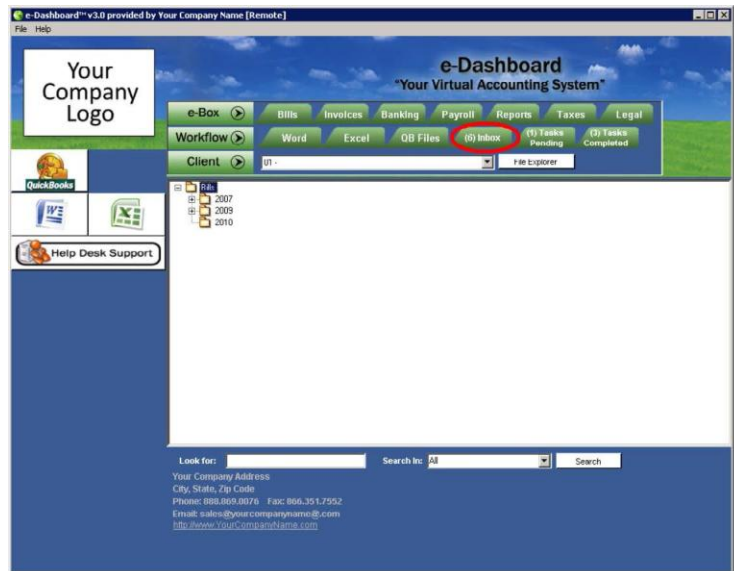
You will be directed to the Inbox section. Next to **Inbox File** is a drop-down menu. Select the type of document
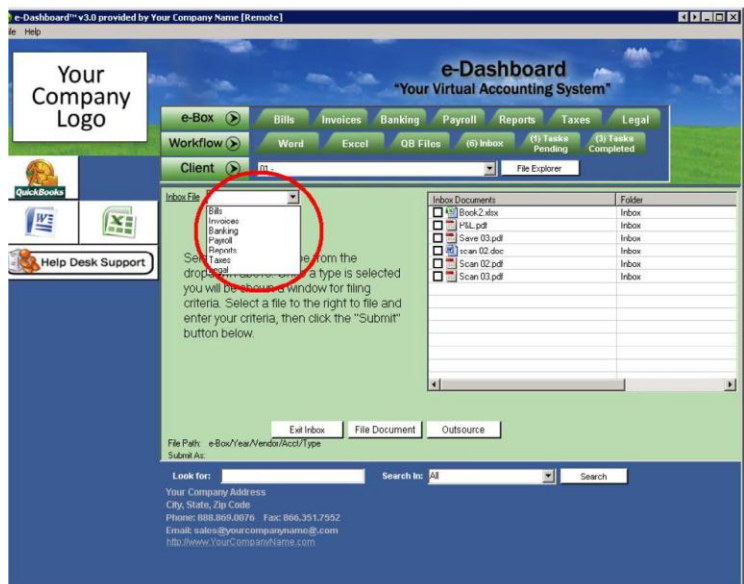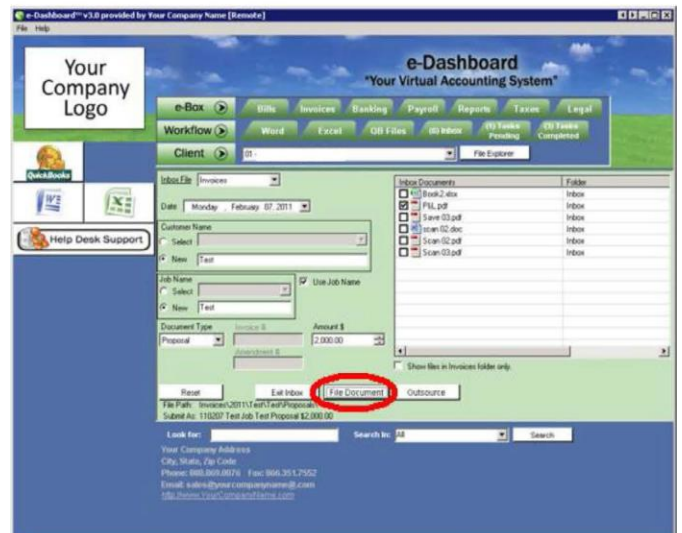
On the right-hand side of the e-Dashboard, select the document you want to sort.

STEP THREE – Naming Your Document

On the left side of the e-Dashboard, you can now name your document to be sorted inside the e-Box. Note that the sorting options are different for each document type.

Once you have filled out all of your information, select **File Document**.

You will be given a box confirming that you want to file your document. If everything is correct, select **Yes.**
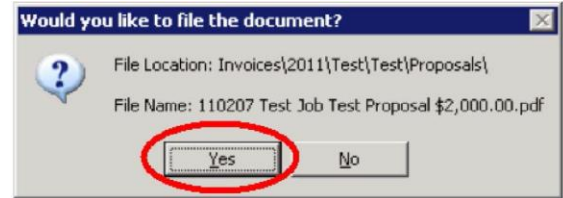
STEP FOUR – Finding your document

You may now click on the e-Box tab in which you filed your document. You can see that the document has been sorted by the year of the document, following by the type of document.
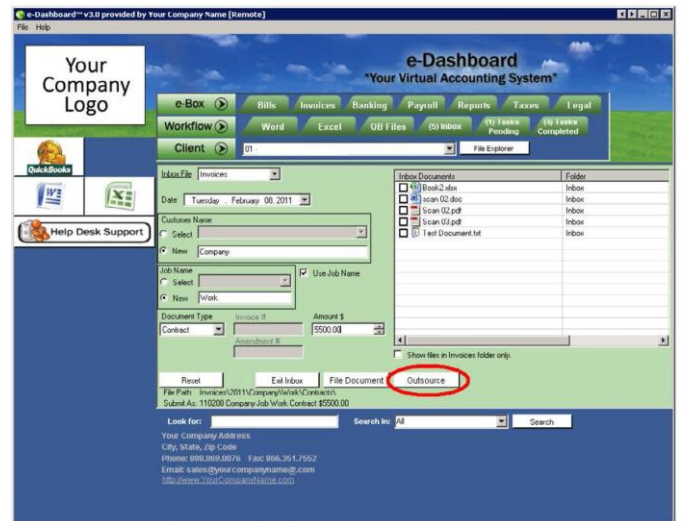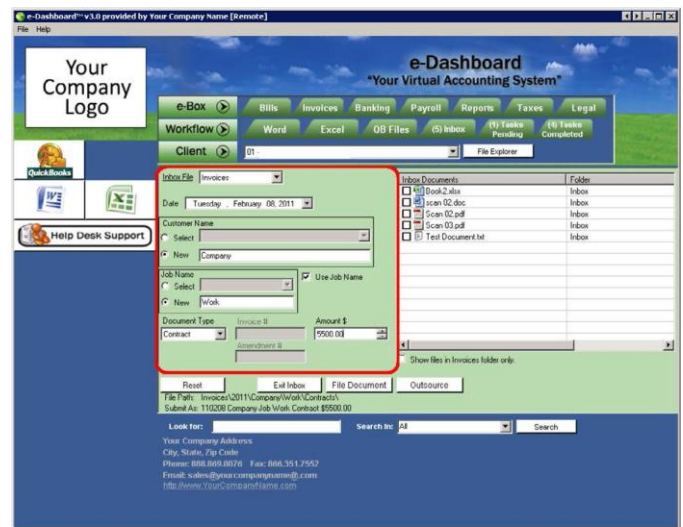
Outsourcing Your Documents

You're on a time crunch and you need documents entered into QuickBooks before your 5 PM deadline. Need help? The e-Dashboard offers outsourcing capabilities not only internally but we offer our own bookkeeping services to you!

STEP ONE – Rename your documents in Inbox

As you would organize your documents using the Inbox feature, you would do the same for outsourcing your documents.

Instead of clicking on "File Document," click on **Outsource.**

STEP TWO – Outsourcing Your Document

You will be prompted with a new window that you may fill out. You will be asked to submit the document to the proper avenue.

In-House Bookkeeper – You would like to outsource your document internally to a bookkeeper or to an outsourcing company elsewhere.

Data entry with new review – You can outsource the document to our back office for low end data entry

Data entry with review by QB Advisor – Low end data entry by our back office and then review by a QB ProAdvisor

All work completed by QB Advisor – Full charge bookkeeping services by a QB ProAdvisor

Once you have decided where you want your document outsourced to, you can let your accountant know that you are outsourcing the document to him/her (if you select In-House Bookkeeper), and you can give special instructions to the account, should you need something specific done with your data.

Once you have made sure all information, click on **OK**. You will be prompted to con firm that data entered you imputed back in the Inbox screen.
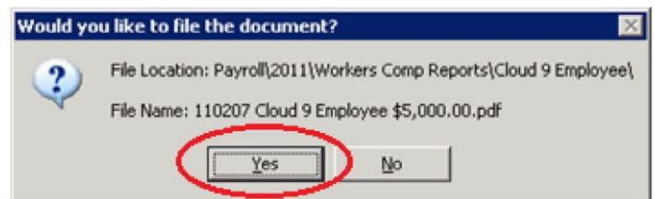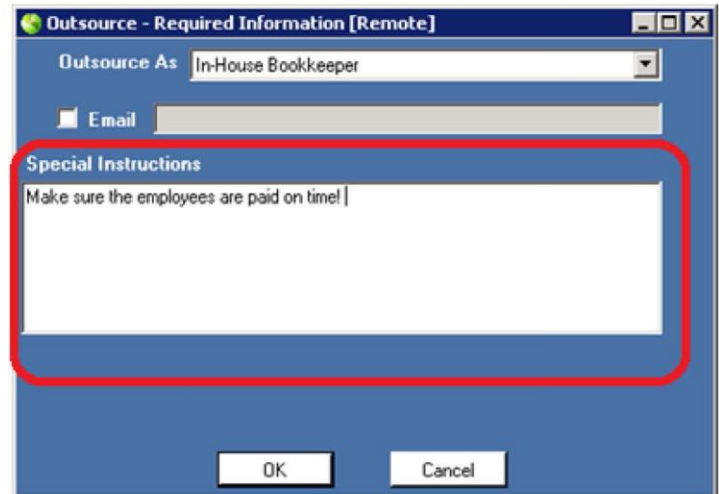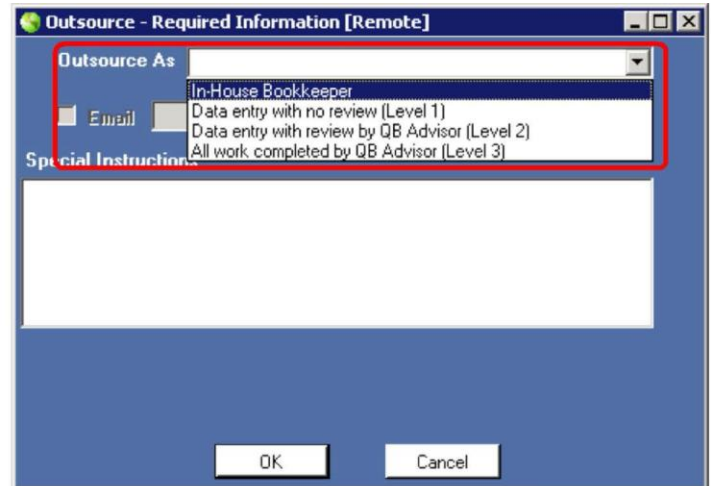
If you see that all information is correct, click **OK.** The document will not only be available for outsourcing, but will also be available inside the e-Box.

If you have outsourced your document(s) to Cloud 9 Real Time's bookkeeping staff, you will be contacted by an Account Executive to get you started on your documents. If you have outsourced your documents internally, your employee will be able to right-click on the document located inside "Tasks Pending".

To move the documents from **Tasks Pending** to **Tasks Completed**, Right- Click on the document, and select **Move to Completed**
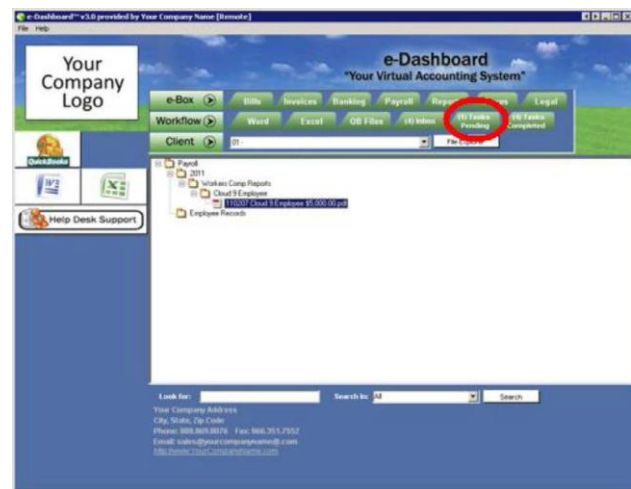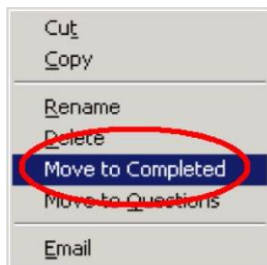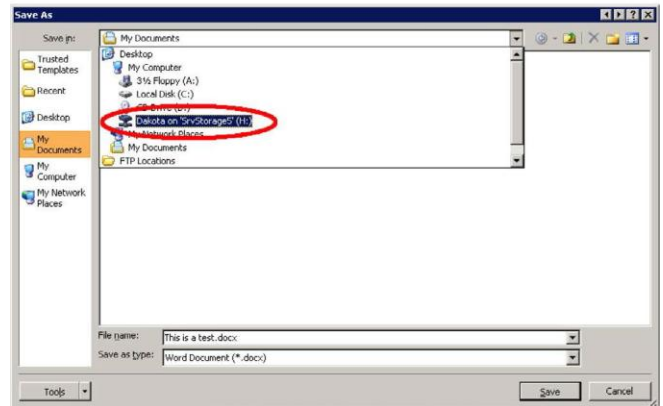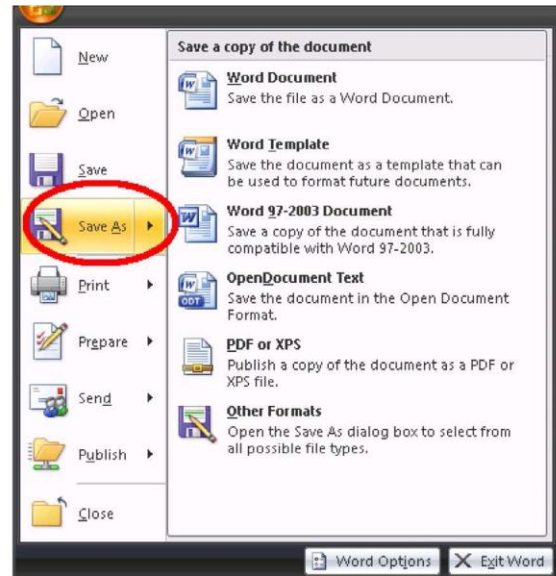
Saving Word or Excel Documents to e-Dashboard

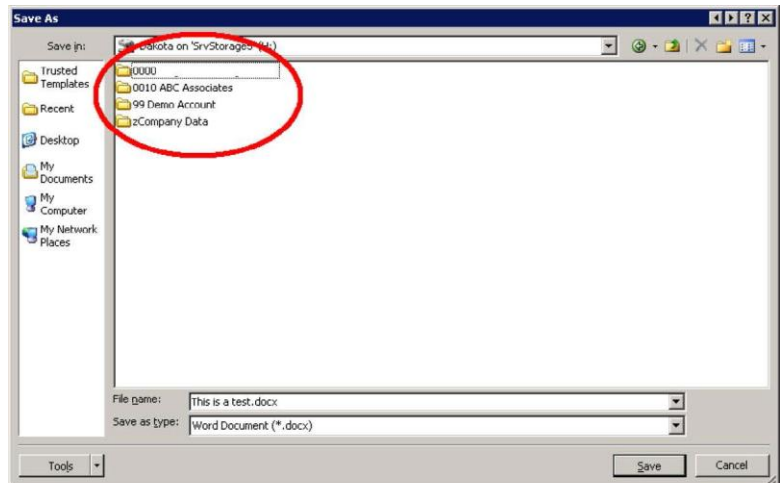**STEP ONE: Saving your document.**

With your Word document open, click on the orb on the top left side of the program. Select **Save As.**

Near the top is a drop-down menu called **Save in.**

At this menu, select (Username) on (Name of the storage server) (H).

Go to the company for which this document is associated with.

Select the **e-Desk folder** if you are saving a Word document, or **e-Coach** if you are saving an Excel document. If this is a document that you wish to be made available inside the **e-Box**, you may select that, and then select the type of document.
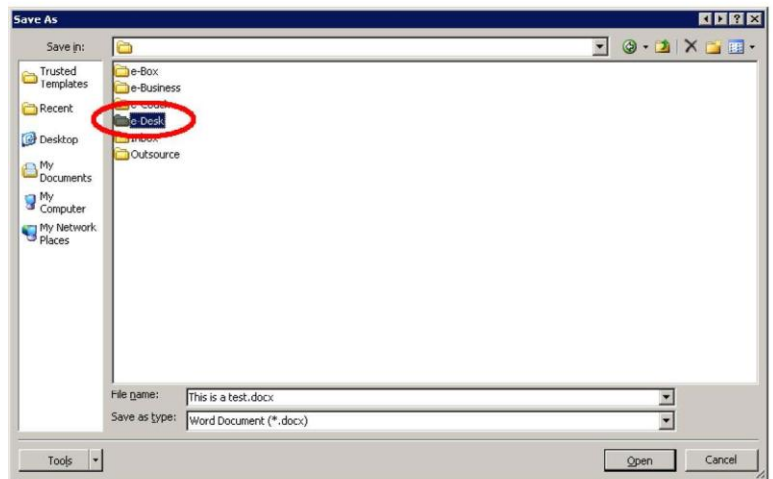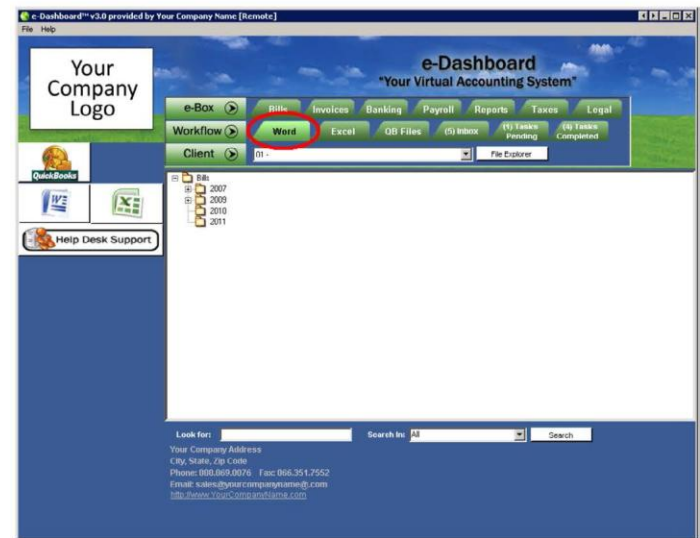
In the **File name** window, type in the name of the file you desire.
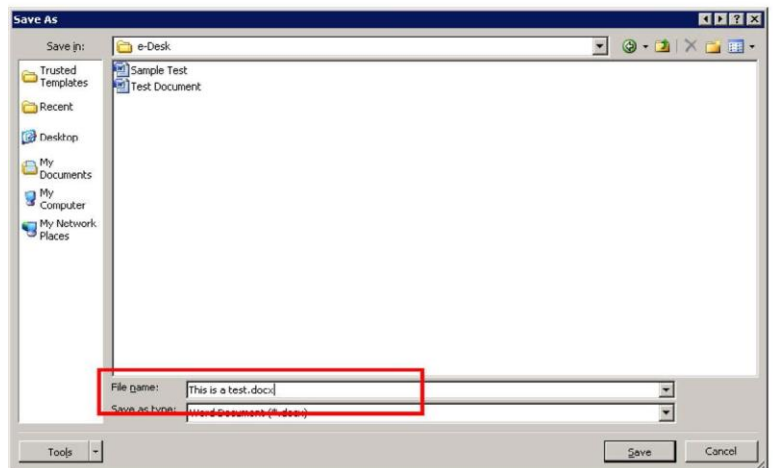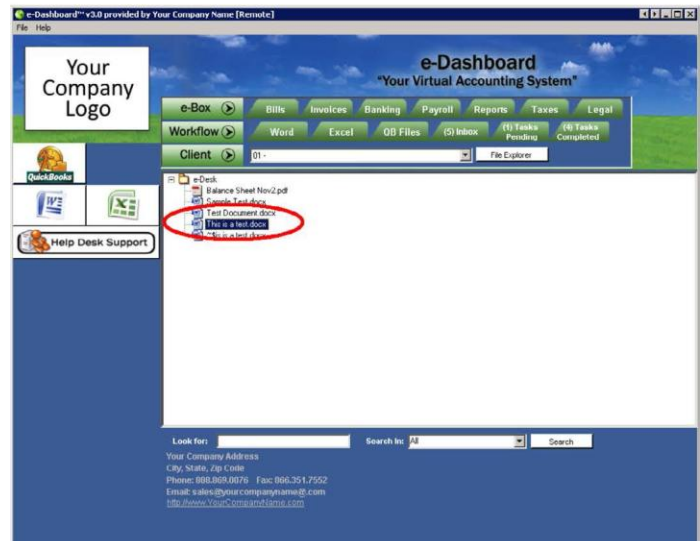
Once you have named your document, select **Save.**
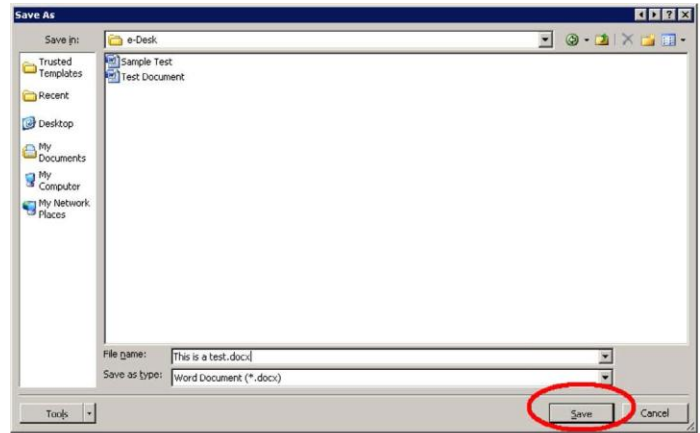
Back inside the e-Dashboard, select the **Word** tab (if you saved a Word document) or the **Excel** tab (if you saved an Excel document) on the Workflow section.

Once you are inside the Word or Excel tab, you can locate the document you saved.

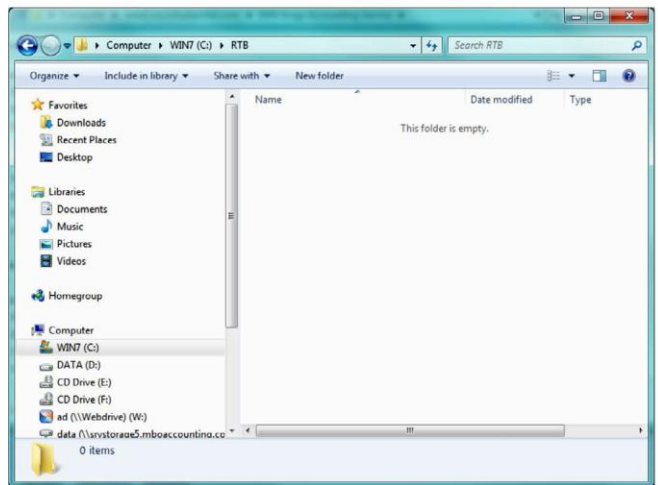## Saving Documents to Your Computer

STEP ONE: Finding your documents on the system

With your Cloud 9 network drive already set up, go to the folder in which the file you want to move to your computer is located.

Next, navigate to where you want the file to be saved at on your local computer.

Once the file has been moved, you will now see your file in its new location on your computer.
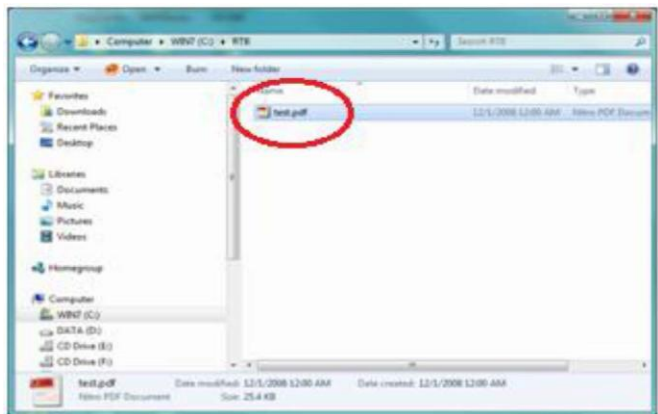
E-mailing Documents in the e-Dashboard.

STEP ONE: Locating the documents to e-mail

Inside the e-Dashboard, locate the document you wish to send out via e-mail.

Right-click on the file and select **Email**.

STEP TWO: E-mailing your document

You will be sent to a new window, allowing you to send documents through the e-Dashboard.
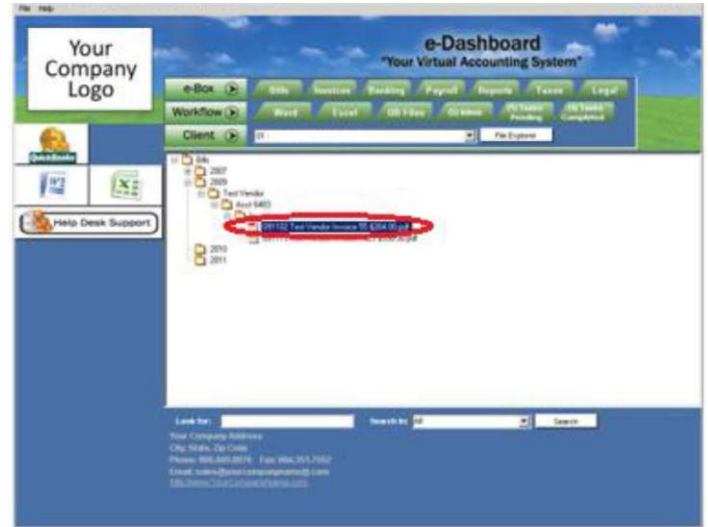
FROM: Put in the e-mail address that you want to send your file to.

TO: Your e-mail address

**CC:** Anyone else you wish to receive the document

Subject: The name of your e-mail

Attachment: The file you are sending through e-mail. There is also a body in which you can type in instructions, or whatever else you wish to note to the client.

Once everything is correct, select **Send.**

When the document has been sent, you will be prompted with a window saying Message Sent! Click **OK.**
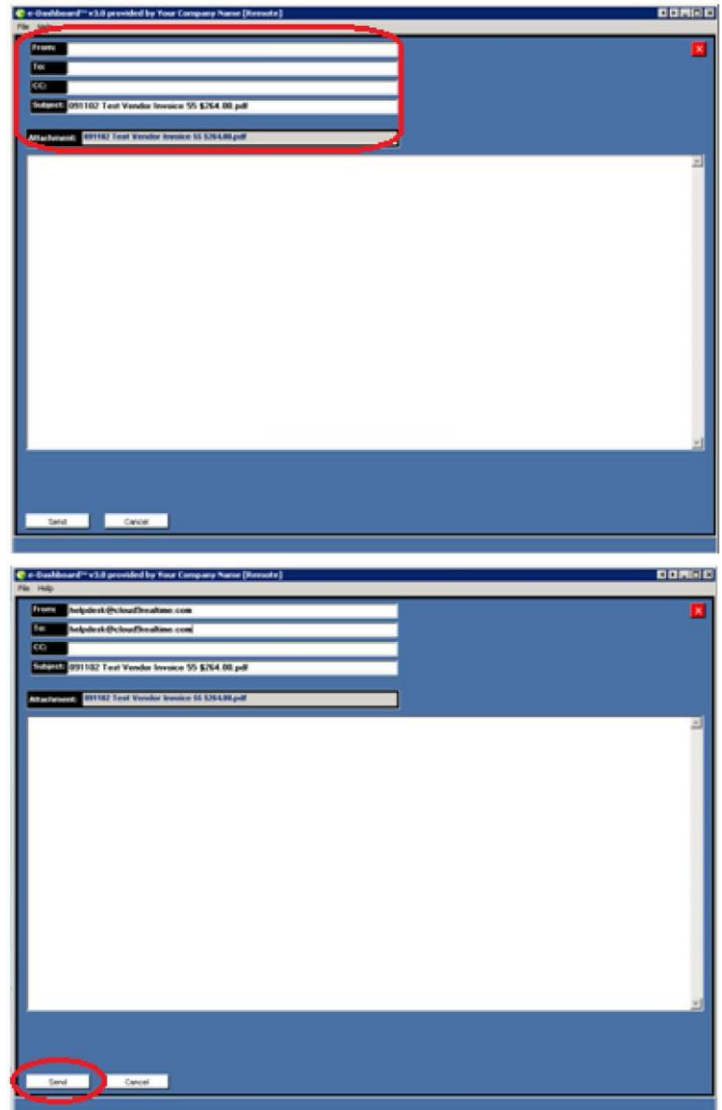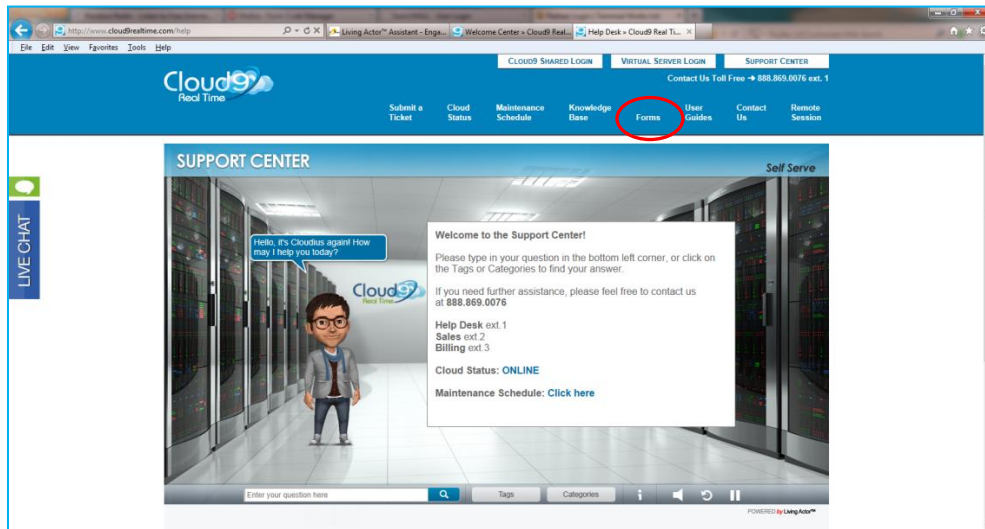
Adding a Company File to the e-Dashboard

BEFORE YOU BEGIN: To add a company to the e-Dashboard that won't be accessing the e-Dashboard, you will want to fill out this form. Only your administrators will be able to access this company.

STEP ONE: Add Company Form

Go to http://www.cloud9help.com.

Click on the **Forms** link on the top of the website.

STEP TWO: Filling out the Add a New Company File Form

A new browser window or tab will open up, taking you to the Add a New Company File form.

For the form, you will want to fill out everything with accuracy to ensure that the setup process is seamless and without delays.

Company Name: The name of your company listed in our record.

Contact Name: Your name.

Cloud 9 Account Number: Your username that you use when logging into the e-Dashboard system.

E-mail Address: Your e-mail address that is in our records.

Phone Number: The main phone number listed for your company in our records.

Company Name: The name of the company you want to add to the e-Dashboard system.

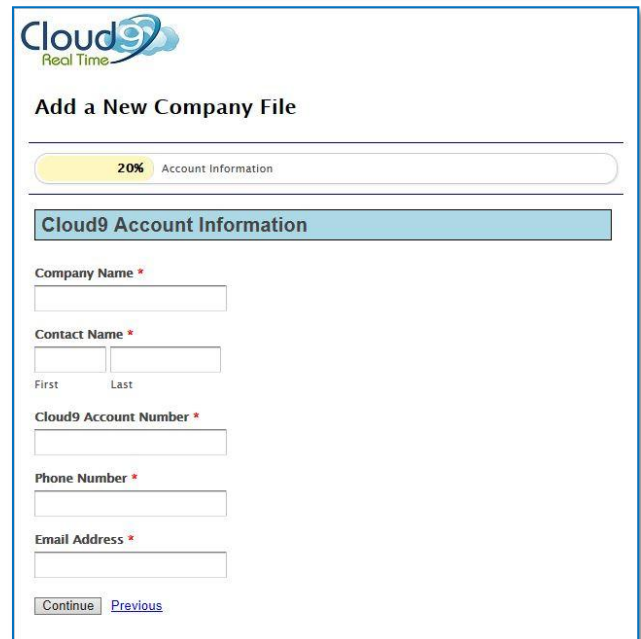**QuickBooks File Name: The EXACT QBW file name** *(differences will prevent e-dashboard launch)*

QuickBooks Year: The year of QuickBooks this file uses.

QuickBooks Version: The version of Quick Books this file uses (Premier, Pro or Enterprise).

ADDITIONAL COMMENTS: Anything further you wish to note in regards to this company.

After you confirm that you agree to the Cloud9 Real Time Terms and Conditions, click on the checkbox. Then when you have made sure all information is correct, click "Submit".

All setups may take 24-48 hours for setup. Once setup is complete, you will receive an e-mailed confirmation, and you can begin working on your company inside the e- Dashboard.
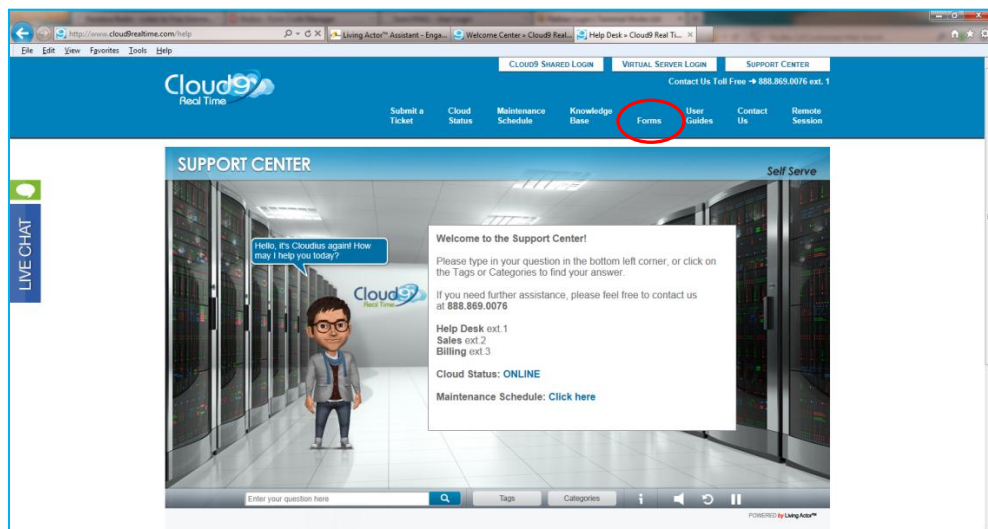
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Adding a Client or Employee to the e-Dashboard

STEP ONE: Add a New User Form

Go to **http://www.cloud9help.com**.

Click on the **Forms** link on the top of the web site.

Click on the **Add a New User** form

STEP TWO: Filling out the Add User Form.

A new browser window or tab will open, bringing you to the Add a New User form.

For the form, you will want to fill out everything with accuracy to ensure that the setup process is seamless and without delays.
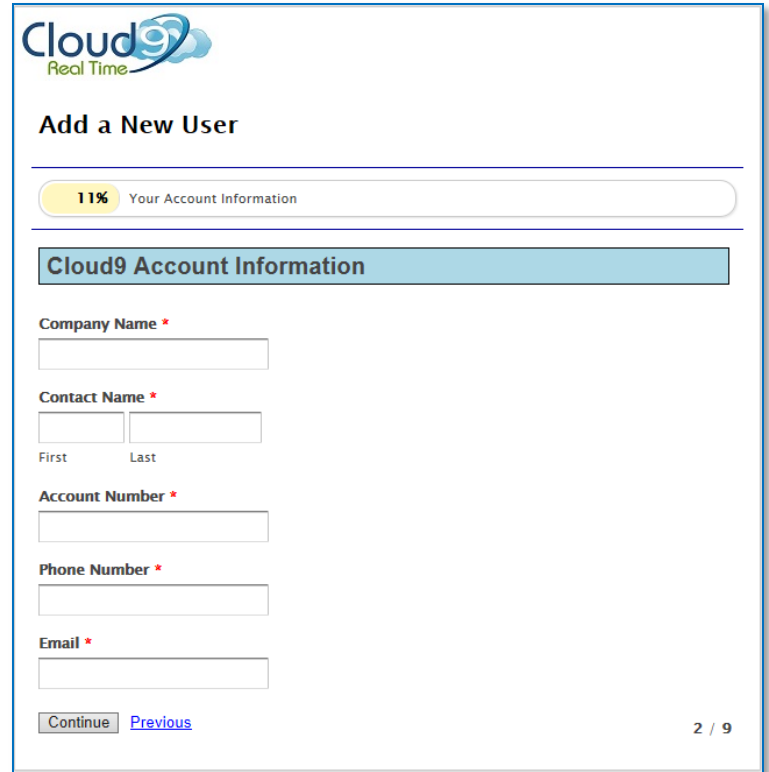
Company Name: The name of your company listed in our record.

Contact Name: Your name.

Cloud 9 Account Number: Your username that you use when logging into the e-Dashboard.

E-mail Address: Your e-mail address that is in our records.

Phone Number: The main phone number listed for your company in our records.

Add a New User

11% Your Account Information

Cloud9 Account Information

Company Name *

Contact Name *

First   Last

Account Number *

Phone Number *

Email *

Continue   Previous   2 / 9

Company Name: The name of company you are adding to the e-Dashboard.

Contact Name: The company's main contact.

E-mail Address: The main contact's e-mail address.

Phone Number: the new users

Address: new user **City**:

new user

State: new user

Zip Code: new user

Type of User: Client Access, Staff Access or Admin Access.

QuickBooks Year: The year of QuickBooks your client's file is in.

QB Version: The version of QuickBooks your file is in.

QuickBooks File Name: The exact QBW file name (any difference whatsoever will prevent the launch of your QuickBooks file)

QuickBooks License Number and Product Key: Each QuickBooks file that is added to our system requires this information due to our licensing agreement with Intuit.

ADDITIONAL COMMENTS: Anything further you wish to note in regards to this company.
After you confirm that you agree to the Cloud9 Real Time Terms and Conditions, click on the checkbox. Then when you have made sure all information is correct, click **Submit.**

All setups may take 24-48 hours for setup. Once setup is complete, you will be e-mailed confirmation, and you can begin working on your company inside the e-Dashboard.

Do You Still Have a Question?

Experiencing an issue with the e-Dashboard?

Our Client Services team is here to help you with anything and everything that goes with the e-Dashboard. Please do not hesitate to contact us at any of the avenues below:

Phone: 888.869.0076

E-mail: Support@cloud9realtime.com

Support Center: www.Cloud9HELP.com