Welcome to Bookminders' Cloud Access

The easiest way to access and manage your Bookminders' information

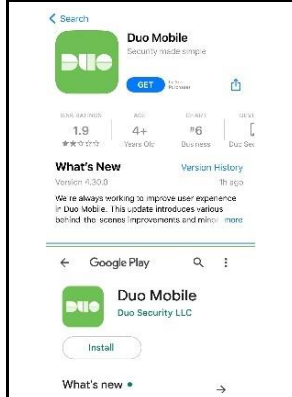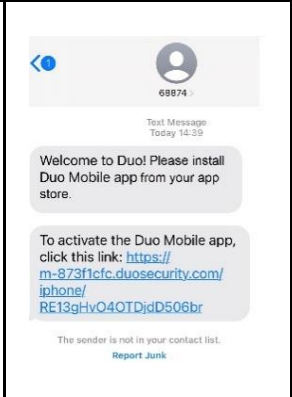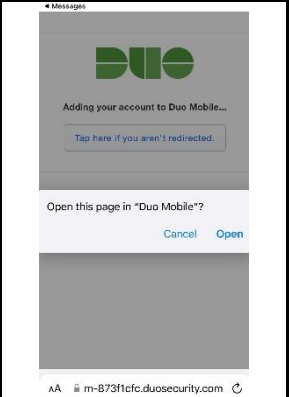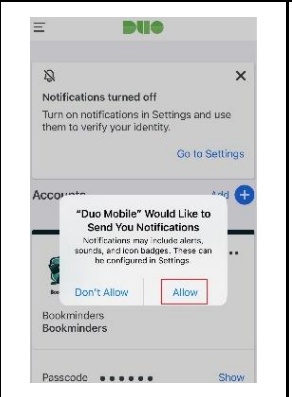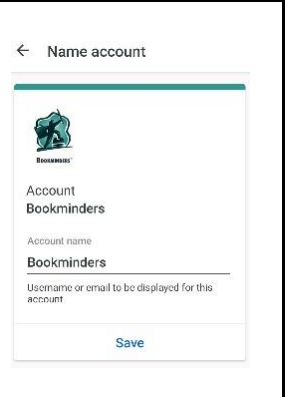*Follow the instructions below to log on, change your password, and access your data.*

Clients accessing the Bookminders Cloud must use the app Duo Mobile for Two-Factor Authentication (2FA). Duo can only be enabled on one device (smartphone) for each user account. Each time a client logs into the Bookminders Cloud, Duo will send a notification to the user's smartphone to request verification. Upon verification, access to the Bookminders Cloud will be granted. If the client does not authenticate, then access to the Bookminders Cloud will be denied.

BEFORE YOUR FIRST LOGIN:

Before you are able to log into the Bookminders Cloud, Bookminders will enroll you in Duo. You must provide Bookminders with the cell phone number for the user that will be accessing the Bookminders Cloud.

Please take the following steps for initial enrollment. *Please note that depending upon the brand and year of your smartphone, the exact screenshots might not match your experience, but they will be similar.*

- INITIAL NOTIFICATION: When Bookminders enrolls your account/cell phone, Duo will send the smartphone two text messages. The first text will instruct you to download the Duo Mobile app from your app store. The second text will contain an embedded link to activate your account. This link will expire after 48-72 hours.
- STEP 1: Download the Duo Mobile app from your app store.
- STEP 2: After the Duo Mobile app has been installed, go back to your text messages, and click on the link in the second text message.
- STEP 3: An internet browser will pop-up asking if you want to "Open this page in Duo Mobile?." Select "Open"
- STEP 4: A pop-up will appear asking for Duo Mobile to send you notifications. Select "Allow"
- STEP 5: Duo will ask you to save the account name (Bookminders). Select "Save"
- You have completed the Duo Enrollment process and are now able to take the steps to log into the Bookminders Cloud. Please follow the instructions starting on page 2. If you have issues with Duo and need assistance, please contact apphelp@bookminders.com.

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5

Welcome to Bookminders Cloud Access

Continued

LOG-ON INSTRUCTIONS:

In your computer's browser, go to https://cloud.bookminders.com.

MAC USERS: If logging in for the first time, please contact Bookminders Support (877-517-2665 and say "technical support" or email support@bookminders.com) for assistance.
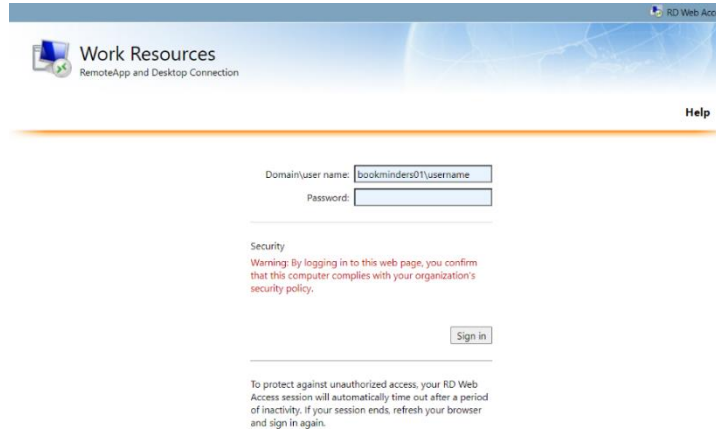

Enter your *username* (preceded by the domain name *bookminders01*) and enter the initial **password** provided by Bookminders**.** Click **OK**. Passwords are case sensitive.

- Security: **ALWAYS** select "This is a public or shared computer"
- Click Sign in.
- If you receive a prompt to save your credentials and/or password, **ALWAYS** decline.
- The launch page (below) will appear.
- To save steps the next time, add the **LOGIN** screen (cloud.bookminders.com) as a Favorite or Shortcut in your web browser *(or set up a shortcut on your desktop by clicking and dragging the web address to your desktop)*.
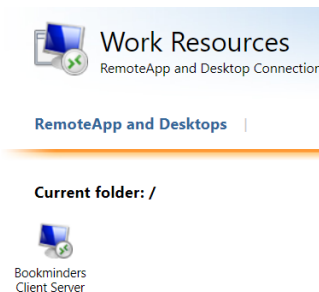
- Click the Bookminders icon. You will see a pop-up asking if you trust the Remote Desktop publisher. Click Connect.
- Depending on your browser settings, you may be prompted to enter credentials again. Your username will have the bookminders01\ domain name prefilled at this point, and you need only need to enter the second portion of your username.
- You may receive a notification that the identity of the remote computer cannot be verified. Confirm the requested remote computer is BMSRDS01.BOOKMINDERS01.ADS and the certificate name from the remote computer is cloud.bookminders.com as in the screenshot below
- Then check the box next to "Don't ask me again for connections to this computer" and click Connect.
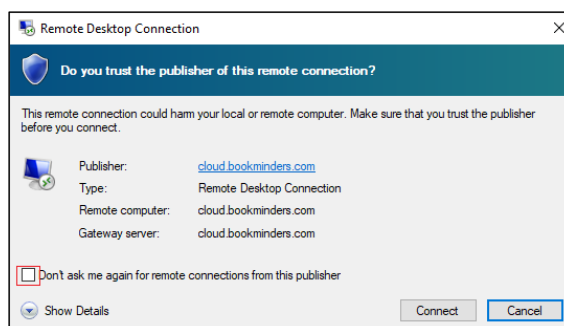
Welcome to Bookminders Cloud Access
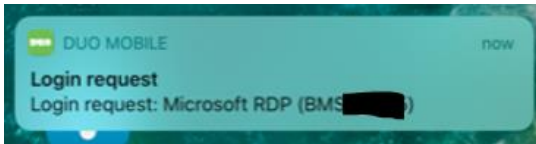
Continued

The Duo app will send a prompt to your mobile phone for your Two-Factor Authentication.

- A Duo notification will pop-up on your computer screen (below).
- By default, Duo will send a "Push" notification to your connected smart phone.
- To verify authentication, click Approve. To deny authentication, click Deny. See screenshots below for examples.
- Once you authenticate, you will have access to the Bookminders Cloud environment.
- If you do not receive a push notification to your mobile phone (the default method), click cancel and verify using one of the other two authentication methods: Call Me or Passcode. See page six for additional details on using the different methods.
- If you have issues with Duo and need assistance, please contact apphelp@bookminders.com.
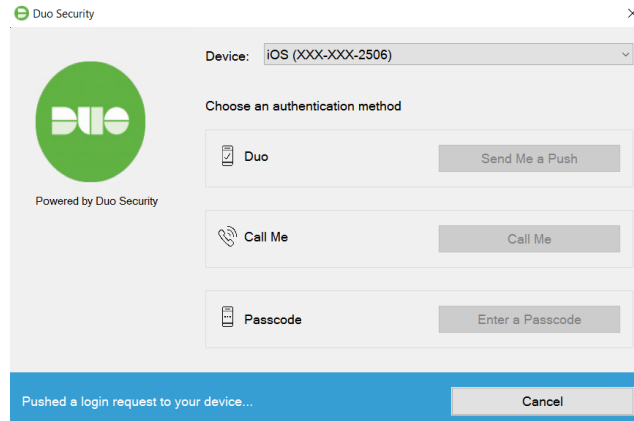
- **Duo Push**: DEFAULT METHOD: This method sends a notification (push) to your cell phone. Example screenshots below.
- Tap on the notification. The second image below will appear on your cell phone. Click Approve if you are logging into the Bookminders Cloud. Click Deny if you are not actively logging into the Bookminders Cloud.
- You now have access to the Bookminders Cloud environment.

For iPhones, the notification will look like this:

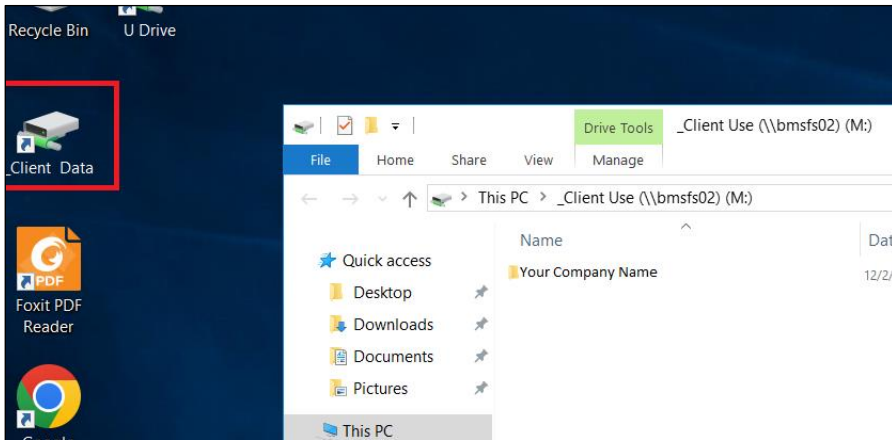**For Android phones, the notification will look like this:**
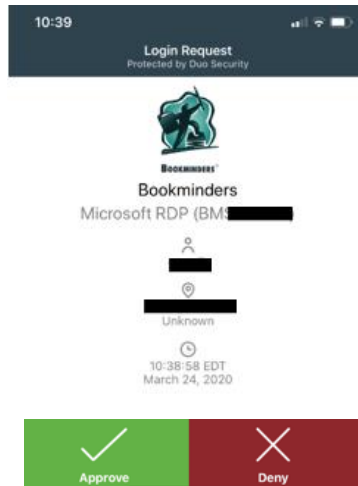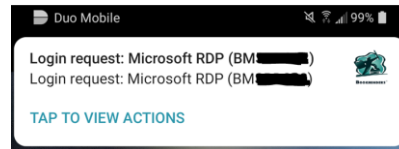
Welcome to Bookminders Cloud Access

Continued

NAVIGATING BOOKMINDERS CLOUD

- This is what the Bookminders Cloud looks like upon log in.
- To access your information, double click on the _Client Data icon.
- Double click on the folder next to your Company Name
- Navigate to QuickBooks by clicking on the QuickBooks folder.
- Open QuickBooks by clicking on the file with the green icon.
- Open any other files by double clicking on them.

Welcome to Bookminders Cloud Access

Continued

Change Password - If you have not already done so, change your password.

- When the Cloud environment has launched, press **CTRL+ALT+END** (or FN+CONTROL+ALT/OPTION+RIGHT ARROW if using a Mac).
- A blue screen will open.
- Click Change a Password. Change your password.
- Passwords must be **> 8** characters and must include 3 of the following: uppercase, lowercase, number and special characters.
- Passwords cannot start with a number and cannot contain user login name or display name (Company name listed above)
- Passwords can only be changed once every 24 hours.

Change your password to something secure and easy to remember. Password hints cannot be provided, but passwords can be reset by Bookminders' Support, if necessary. Please call 877-517-2665 to request a password reset.

Logging Off:

- Open the Start Menu and click on the user/profile icon and click Sign Out **OR** double-click the "logoff" icon on the desktop. Do not click the X in the cloud.bookminders.com taskbar at the top of the screen.
- Timing Out: The system will automatically close after 30 minutes of inactivity. Your desktop will save for one hour. This means, if you are working with multiple programs / files open and walk away from your computer for 30 - 60 minutes, you will need to log in to the Bookminders Cloud again. Upon relaunch, your open programs / files should still be open.

From our website, click the **HELP** link to access additional information about using Bookminders' Cloud.
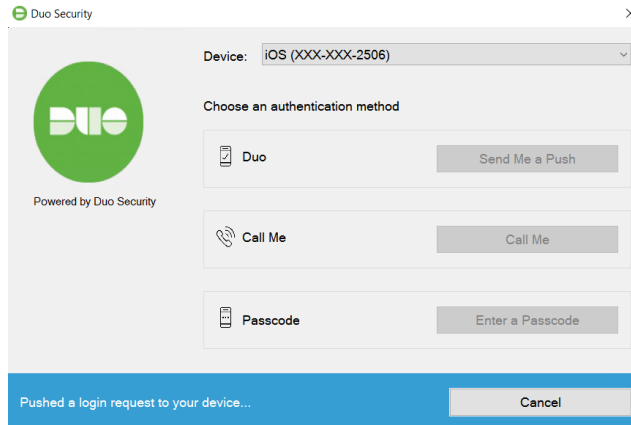
BOOKMINDERS®

ALTERNATIVES TO DUO PUSH

- **Duo Phone Call:** You will receive an automated phone call. On your computer monitor, the Duo Pop-Up Screen will have a blue box stating, "Dialing xxx-xxx-XXXX" (X=the last four digits of your phone number).
- Once the call has connected, you will hear the automated message instructing you to push any key on your phone. This message will also appear at the bottom of the Duo Pop-Up Screen showing on your computer.
- You now have access to the Bookminders Cloud environment.

- **Duo Passcode:** Open your Duo mobile app. A six-digit code will appear.
- Back on your computer, click on "Enter a Passcode". Enter the six-digit code from your Duo mobile app.
- You now have access to the Bookminders Cloud environment.