

Server Navigation for Clients









To Open Files on the Server

- To Log On to Bookminders' Server, see [Accessing Bookminders' Servers](#) instructions (click the [Help](#) link on our website www.bookminders.com).
- After you Log On to the Server, single-click the **Desktop** icon in your **Applications** window.



- The screen that opens is your Virtual Desktop (similar to the desktop on your local computer).
 - A folder window will also open on your virtual desktop. This is your main (M) drive on the server.
 - Double-click your company folder icon that is showing in the window. Double-click files and folders to navigate to and open your company's files. The application needed to open a file will launch automatically when you double-click a file.
 - QuickBooks files: at the login screen, enter your **QuickBooks** username and password. *Note: Your QuickBooks username and password is different from your server username and password.*

Client folder contents (Note: CC = Client Code)

-  CC Client Name - main folder; contains all files and folders specific to your account.
 -  Client Provided Data - contains files, schedules or supporting information provided to your representative
 -  Client Use CC Client Name - shortcut to your QuickBooks data file
 -  Quality Assurance - contains documents primarily for our Company's QA and Administrative use
 -  QuickBooks - contains your QuickBooks file and additional files used by QuickBooks; All files in this folder are critical to QuickBooks functionality and should not be opened, modified or deleted
 -  Reports - contains reports or schedules prepared for your account.
 -  Service Info - contains reports about your service from our Company, including your monthly estimate and reports of activity processed by your representative on a weekly/per processing basis
 -  CC Executive Summary - describes current issues related to your Client account

Access to Other Resources on the Server

- On your Virtual Desktop screen, you will also see the following shortcuts:
 - Shortcut to Client Use on (M)
 - C\$ on 'Client' (V)
- Shortcut to Client Use on (M) OR Shortcut to Shared Use on (M) - Provides access to your company folders and files, as described in the previous section.
- C\$ on 'Client' (V) - Provides access to your local computer's hard drive; can be used to save files to your computer.

Server Navigation for Clients Continued

Keep your Desktop Window Open

If you plan to work with files or open new files on the server, keep your Desktop window open. You can return to this window by clicking the Desktop icon in your Windows taskbar.

Closing Files and Logging Off

When you are finished using files on the server, please Log Off.

To Log Off: Close all files and programs you have been using.

- Close QuickBooks files: Always close using the File\ Close Company menu. This makes sure the file is completely closed and can be re-opened without problems.
- Close other files and programs (except the Desktop and Application windows): Click the **X** - upper right corner of window.
- After you close all program windows, click the Start icon (in your Virtual desktop taskbar) and click the Log off button.
- You can then log off from the Applications window if it is still active and has not timed out. To do this, click the **Log Off** padlock icon (upper right corner of the Applications window).

Timing Out

If you are not actively working on the server for more than 60 minutes, your session may time out and all files or programs you were using will close.

- Even if you are actively working on the server, your **Applications window** will expire and log off within a few minutes after you log on.
- When this occurs, you can still work in any files or programs that you have open and active, and you can still open other files **if your M:\ window has not been closed**.
- If you have closed your M:\ window, you will need to Log On again to open other files.

If you have any questions or problems using these instructions, please do not hesitate to contact your assigned representative or Manager.