









# Bookminders Cloud Navigation for Clients

## To Open Files on Bookminders Cloud

To Log in to Bookminders Cloud - Follow the steps per the [Welcome to Bookminders Cloud Access - Clients](#) instructions provided. (Also available by clicking the [Help](#) link on our website [www.bookminders.com](http://www.bookminders.com).)

- The screen that opens is your Virtual Desktop (similar to the desktop on your local computer).
- Your Virtual Desktop will have a shortcut to QuickBooks and shortcuts to [Client Data](#) and [U drive](#) folders which contain files accessible to you on Bookminders Cloud. There will also be a Logoff shortcut.

## 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 Bookminders 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](#) - documents current issues related to your Client account

## Saving Files to your Local Computer

- You can temporarily save files on Bookminders Cloud, but when you logoff, the files may be deleted. To save files longer, you must copy or save them to your local computer.
- Open a File Explorer window by double clicking your [Client Data](#) or [U drive](#) shortcut on the Virtual Desktop.
- From the left side of the File Explorer window, look for a location that begins with "C on" and ends with the name of the computer you are using. Double click on this location.
- This opens the C drive on your local computer. From this location, you can navigate to a folder on your local computer where you can save files from Bookminders Cloud.

## Closing Files and Logging Off

When you are finished using files on Bookminders Cloud, please close all files and programs you have been using and then Log off:

- [Close QuickBooks files](#): using the [File| Close Company](#) menu. This ensures the file is completely closed so you can re-open it without problems.
- [Close other files and programs](#) by clicking the **X** - upper right corner of window.
- After you close all program windows, double-click the **Logoff** icon on your desktop.

## Timing Out

If you are not actively working on the Cloud for more than 30 minutes, your session may time 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 Cloud again. Upon relaunch, your open programs / files should still be open.

If you have questions or problems using these instructions, please contact your bookminder or Client Relations Manager.