


## Bookminders

### Accessing Bookminders' Server

Bookminders' server can be accessed from any computer with an internet connection. With your Web Access login, you will have secure access to your company information, along with access to Bookminders' Client resources.

This page contains basic instructions for logging in to the server, changing your password and opening data files. You may wish to print a copy of these instructions to keep handy if you ever need to log in from a different computer. Instructions and other Help documents are also available on Bookminders' website ([www.bookminders.com](http://www.bookminders.com)) by clicking the **Help** link (see  on picture below)

#### Logging In to Bookminders' Server

- Open your web browser.
- Go to [www.bookminders.com](http://www.bookminders.com) and click **Log In** on the main page.



- **Hint:** To save steps the next time you log in, add the Log In screen as a *Favorite* or *shortcut* in your web browser. You may also want to set up a shortcut to the Log In screen on your desktop. You can do this by clicking and dragging the web address to your desktop.
- Enter the username and password (*provided by your bookminder*) and click the **Log In** button.

#### Detecting, Downloading and Installing the Citrix Client

***If this computer has not been used to access Bookminders' server before, the Client Detection and Download screen will appear.*** You must download and install a Citrix Client applet to gain access to Bookminders' server. This must be done for each computer you use to access the server.

- Click the **Detect Clients** button.
- Click the **Download** button.
- Click **Run** to begin the download.
- Click **Run** again to begin installation. Be patient, it can take several seconds before the Citrix Presentation Server Client Setup Screen appears.
- Follow the default prompts to install the Citrix Client.
- When the installation is completed, return to the Client Detection webpage, and click **Successful**.

#### Verify your Default Printer before Logging In

- When you log in to Bookminders' server, you will only be able to print using the printer that is set as your default printer on your local computer.
- If you want to use a different printer, change your default printer before logging in to the server.



## Accessing Bookminders' Server Continued

### Application Set Window

After you log in (and install the Citrix Client, if applicable - 1<sup>st</sup> login only), you will see a window with a box labeled **Applications**.

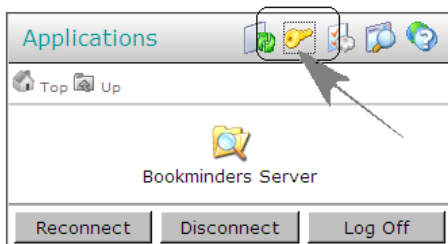
- You will use this Application Set window to access your files on Bookminders' server.
- You can also change your password from this window.

### Change Your Password

**If you have not already done so, you should change your password.** (Note: Change only your assigned Client password. Do not change temporary passwords assigned for Client training sessions.)

You can change your password once every 24 hours and you can re-use the same password **every other time** you change your password. Change your password to something easy to remember because there are no capabilities to provide password "hints".


To change your password:

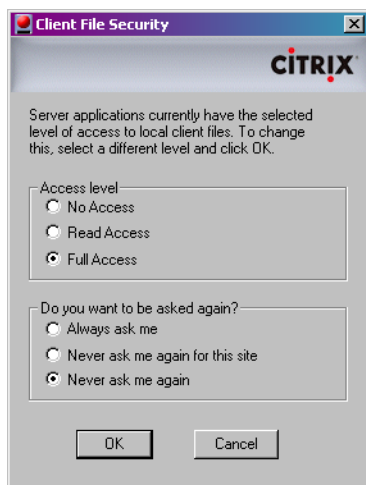


- Click the yellow key icon (circled on picture).
- Type your existing (old) password and then type the new password you want to use.
- Passwords must be at least 7 places using letters, numbers, and special characters (like \$).

### File Access and Client File Security Window

Use the following instructions to make sure you can access local computer files.


For Citrix Client Versions prior to 12.0 (i.e., Citrix icon looks like  )



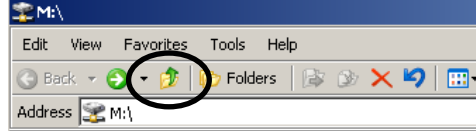
- Click on the **Bookminders Server** icon in the Application Set window.
- In the **Bookminders Server (M:)** window that opens, click the **Up Folder** icon.
- When you do this, a **Client File Security** window (see picture) will open.
- Select: **Full Access** and **Never ask me again for this site**
- You must select Full Access to be able to save files from the server to your local computer.




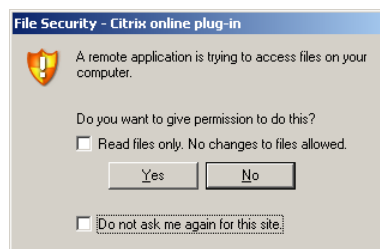
## Accessing Bookminders' Server Continued

For Citrix Client Version 12.0 (i.e., Citrix icon looks like  )

- Click the **Bookminders Server** icon in the Application Set window.
  1. In the **Bookminders Server (M:\)** window that opens, click the **Up Folder** icon.




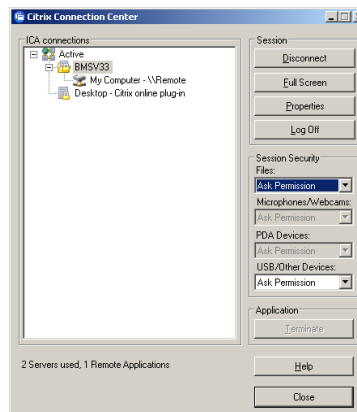
2. Double-click the **C\$ on 'Client' (V:)** icon. 
3. If the **File Security - Citrix online plug-in** window opens, click the box for **Do not ask me again for this site**. Click **Yes**.



**Note:** If you see a message indicating that: **V:\ is not accessible**, click **OK** and perform the steps below first.



- From your local computer task bar, double-click the Citrix icon (*lower right corner of system tray*)  to open the **Citrix Connection Center** window.



- On the right side of the **Citrix Connection Center** window, select "**Ask Permission**" under **Session Security / Files**. Click **Close**.
- Go back to your **Bookminders Server (M:\)** window and perform steps 1, 2 and 3 (above).



## Accessing Bookminders' Server Continued

Refer to the following pages for additional information about using Bookminders' Server:

- [Client Navigation](#)
- [Exporting from QuickBooks to Excel](#)
- [Saving Files](#)
- [Support and Maintenance](#)



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