# Right Networks®

My Account 2.0 – User Guide

# Table of Contents

Welcome to My Account 2.0, a role based portal for managing your Right Networks cloud subscription. In this first section, we want to provide a technical overview of each module, along with the expected core functionality. To review other available training material, please visit [www.rightnetworks.com/support](www.rightnetworks.com/support).

# Technical Overview

## Info Tab

Info is the default view in My Account 2.0. This tab displays a basic set of information regarding the selected organization. The information displayed is *Account Owner*, *Active Users, Account Creation Date, Status and User Count.*

> **Success Tip**
>
> *From the Info tab, you can easily create a sub (client) organization for your business by clicking "Create Client Organization." Once you have created that new organization and selected it on the left pane, any users created will see only data folders associated with that organization.*

## Users Tab

The Users tab is the section to manage all of the contacts and user accounts under your subscription. You can create a basic contact that has no cloud access, or assign packages to your contacts to give them cloud access. Once you have added a user and confirmed the right access, you will have multiple options for sending the invite to your user and will also see their "Activation Status".

> **Success Tip**
>
> *Clicking on a user in this list will take you to their information page, where you can view user details, add applications, change their role, manage folder access, and more.*

## Licenses Tab

The Licenses tab is your place to manage the QuickBooks licenses for your cloud. You can enter QuickBooks licenses using license information that you already own, or even purchase or lease QuickBooks directly from Right Networks from this portal. By clicking on a license, you can assign it to specific users, and remove or edit the license as needed. Please note that adding a license to a user unlocks the ability for you or your users to add the QuickBooks applications to them under "Apps you can install"

## Access Management Tab

The Access Management tab is where you manage the access to all the data in your cloud. Here, you can set permissions so that some users are restricted from seeing certain data locations.

For example, if you have an intern who needs a folder to collaborate with staff, but should be restricted from seeing the QuickBooks file, this tab can be used to configure it.

## Packages Tab

By assigning a package to your users, you are granting them access to the Right Networks cloud, and an application catalog from which you or they can deploy applications to their Desktop.

Any users that require access to the Right Networks cloud will need a package assigned to them. If you require more packages or if you would like to change the packages available to you, you may edit using the "Change Package Mix" button. Removing packages from your subscription will remove the associated fees from your bill. Increasing your packages will increase your bill.

## Billing Tab

The Billing tab is the hub of your billing information. From the Billing tab, you can easily update your credit card, view the billing information we currently have on file, look at your estimated bill for this month, view your bill date, and download a copy of your detailed invoice for the month (past invoices coming soon).

## Events Tab

The Events tab is the best way to audit activity on your account. It contains a list of any changes that are made to your account or users, such as a password reset, QuickBooks license change, application adds/removal, and much more! You can easily filter for events by using either the drop-down menu or typing a phrase or keyword in the "Filter for events" bar. You can also restrict the dates you're viewing, so you can analyze changes that were only made recently or go all the way back to the beginning when your account was created.

Events will be tracked and displayed for changes made by members of your organization, as well as for changes made by Right Networks. We urge you to report any activity posted to your Events that seems suspicious or invalid.

# Technical How-To's

In this section, we will guide you through some common worflows within each section of My Account 2.0. If you require different training materials, please visit www.rightnetworks.com/support.

## User Management

### *Adding a User*
1. Click on the tab labeled "**Users**".
2. Click on the "**Add User**" button and enter the requested information (first/last name, email address, confirm email, and role).
3. Once all information is completed, click the "**Next**" button.
4. On the next page, select a cloud package for the new user (Application Cloud, Business Cloud, QuickBooks Cloud, or No Package). If the new user does not require access to the hosted desktop, select "**No Package**".
   *Note: If you assign a package and do not have any available, an additional package will be purchased for your account.*
5. Once you assign a package, click "**Add User**." The new user will automatically receive an activation email.

### *Removing a User*
1. Click on the tab labeled "**Users**".
2. Click on the check-box to the left of a user.
3. Click the "**Delete User(s)**" button along the top. A confirmation message will appear stating that the user has been deleted, but you can undo the action if it was a mistake.

### *Editing a User*
1. Click on the tab labeled "**Users**".

2. Click on the name or email address of the user you wish to edit.
3. To edit their name, email address, or role, click on the appropriate information section on the left-most box where this information is listed.
4. To change their package, click the "**Change Package**" button near the top of the webpage.
5. To edit which folders they have access to, click the "**Edit client access**" button near the top; check and un-check boxes next to the folders they need/don't need access to.

## Package Management

### *Adding/Removing Packages*
1. Click the tab labeled **"Packages"**.
2. Click on the "**Change Package Mix**" button.
3. Use the "+" and "-" signs at the top of each package container to remove or add packages to your account.
   *Note: You cannot remove more packages than you have assigned.*
4. Once you have finished adding or removing packages, scroll down to the bottom of the page (if applicable) and click **"Save Changes".**
5. You should now be able to assign packages from the **"Packages"** tab.

### *Assigning Packages*
1. Click on the tab labeled "**Packages**".
2. Click on the package you want to add to the user
3. Click on the "**Assign package to user(s)**" button.
4. Click on the check box next to the user(s) you want to add the package to.
5. Click "**Assign**".

### *Removing Packages*
1. Click on the tab labeled "**Packages**".
2. Click on the package you wish to remove a user from.
3. Click on the check-box next to the user you wish to remove the package from.
4. Click "**Remove packages from user(s)**".
5. To remove the package from billing, follow the instructions in the "**Adding/Removing Packages**" section.

### *Installing Applications*
1. Select the "**Users**" tab along the top.
2. Click on the specific user you wish to add applications to. It should take you to a webpage with information about that user.
3. Click on the tab "**Apps you can install**".
   *Note: You can click "Hide QuickBooks" to ensure you are only looking at supplemental applications that you can add.*

4. Click on the application you wish to install from the list.
5. A pop-up should open with a brief description of the application. Click "**Install App**."

### *Installing Applications (for a Standard User)*

1. Select the "**Apps you can install**" tab.
2. Use the search bar to find the application you need to install and click on the app.
3. Click "**Install App**" in the upper right-hand corner of the pop-up.

***Note****: If you are logged into the Right Networks Remote Desktop while the application is being installed, you may need to cycle your session (Start > Log Off, then log back in) before you can successfully use the application.*

## Access Management

### *Granting a User Access*

1. Select the "**Access Management**" tab.
2. Select the folder you are looking to give someone access to from the section to the left.
3. Select "**Grant Access**".
4. Search for the user you would like to give access, by either first or last name.
5. Select the user from the list.
6. Once the user shows up in the listing, click the Assign button. You can add multiple users to the list before clicking assign.
7. Click the "**Assign**" button.
    *Note: If the user is logged into the Right Networks Remote Desktop while access is granted they may need to cycle their session (Start > Log Off, then log back in) before they can successfully see the folder.*

Once you have completed granting the user folder access the user should be able to collaborate with any users that also have access to that folder within the Right Networks environment.

### *Revoking Access from a User*

1. Select the "**Access Management**" tab.
2. Select the folder you are looking to revoke the user's access from in the section to the left.
3. Select the check box next to the user's name
4. Click "**Revoke Access**".
    *Note: If the user is logged into the Right Networks Remote Desktop while access is revoked they may need to cycle their session (Start > Log Off, then log back in) before they will no longer see the folder.*

Once you have completed revoking the user's folder access the user will no longer have access to the chosen folder within the Right Networks environment.

### *Adding a Folder*

1. Select the "**Access Management**" tab.
2. Select the parent or client organization you would like to create the folder for.
3. Click the icon of the folder with a "+" sign.
4. Type in the name of the folder and click the "**Add Folder**" button.

## License Management

### *Adding a License to the License Pool*

1. Click on the folder, company, or sub-division that corresponds with the user you wish to add the license to. If there is only one company listed in the folders list, click on that one.
2. Click on the tab labeled "**Licenses**" on the right.
3. To buy or lease a QuickBooks license, click the button labeled "**Buy & Lease Licenses**" and then fill out the information associated with the QuickBooks license you wish to purchase.
4. To add a license you have already purchased and/or own, click "**Add License**".
    *Note: The check box related to automatically assigning the license does not install QuickBooks on a newly created user's desktop. It assigns the license to the license pool, making it visible in the list of applicable QB products for your users.*
5. Once all information is filled in, click "**Add License**."
6. If you did not check off the box to automatically assign licenses to users when they install QuickBooks, you will need to add the license to a user's license pool. Start by clicking on the license string as it appears in the list. This will bring you to a new page.
7. Click on the button that reads, "**Associate user(s) to license**."
8. Click the check-boxes next to any users needing access to this license. You can also use the search bar to search for any users that you do not see.
9. Click "**Assign**" to apply the license. You will then need to add the QuickBooks application to the user's desktop, which is documented below.

### *Installing QuickBooks on the Hosted Desktop*

1. Select the "**Users**" tab.
2. Click on the specific user you wish to apply the license to.
    *Note: The user must have a package associated with them to allow the addition of applications.*
3. Within the specific user page, click on the middle "**Apps you can install**".
    *Note: All QuickBooks versions will be listed here, you can use the search bar to quickly find the version for which you own a license.*
4. Click on the appropriate QuickBooks version and then click "**Install App**" in the pop-up that follows.

***Installing QuickBooks on the Hosted Desktop – Standard User***
1. Select "**Apps you can install**" tab.
2. Use the search bar to find the QuickBooks version you need to install and click on the app.
3. Click "**Install App**" in the upper right-hand corner of the pop-up.

# Glossary

In this section, we will guide you through some common terminology used within each section of My Account 2.0 and to better prepare you for interactions with our technical support team. If you require different training materials, please visit [www.rightnetworks.com/support](www.rightnetworks.com/support).

- **Account Admin** - serves as backup to the Account Owner. Admins can add or remove users, purchase or lease QuickBooks licenses, or complete tasks on behalf of the Account Owner.
- **Account Owner** - has master control over the account. This user can modify all aspects of the account. As the master user, the Account Owner is the only user who can cancel the account or assign another user as the Account Owner. The Account Owner can also delegate tasks to other users such as an Account Admin or Billing Admin.
- **Activation Status** – indicates whether that user has logged in and created a password for My Account. A user cannot login to the hosted environment until they have activated their account.
  - o **Activation Link** – the hyperlink containing a unique URL that is sent when a new user is created. The link is sent via a Welcome Email, which includes information about the user's login. Clicking on this link "activates" the account, meaning it is now eligible for login and the link auto-directs the user to a webpage where they set a password. In the event the user cannot receive their Welcome Email, you can use the "Copy Activation Link" button on the Users tab to copy and then paste the link, allowing you to send it however works best.
- **Billing Admin** - manages hosting packages, QuickBooks licensing, and can also update billing information for the account.
- **Packages** – A package needs to be assigned to a user before they can get access to the hosted desktop where QuickBooks resides. QuickBooks Cloud is the base package – it gives you access to QuickBooks, printing utilities, a PDF editor, and a web browser. Business Cloud is the next package tier up and includes all the benefits of QuickBooks Cloud as well as access to the applications Microsoft Excel, TSheets, Bill.com, and Expensify. Application Cloud is the final package tier and allows you access to any application we currently have available for hosting, except

for Transaction Pro products, which are purchased under the Packages tab. You can find a list of available applications [here](#).

- **Permissions** – When we talk about permissions, we are referring to a standard Right Networks user's ability to see certain folders and files within the cloud. Every time you create a folder in My Account 2.0, you create a connection path to that folder. If you create a folder and only want a couple select users to have access, we call this a permissions change. There are two types of permissions changes: (1) creating a folder under the main drive and granting/restricting access for all users on the account, or (2) creating a client sub-account.
  - **Client Sub-Account** – A client sub-account is any account that is setup to have restricted access as described above. A client sub-account is slightly different from a user with modified or restricted access to certain folders. The primary difference is that client sub-accounts oftentimes have their own company name and users. Additionally, client sub-accounts can be modified within My Account 2.0 to have their own billing relationship and Account Owner, while still being nested under a Master Account. This can lower the monthly bill for a CPA while still ensuring the CPA has access to their client's company files.
- **Support contacts** - manage basic tasks on behalf of users. Support contacts have visibility to all users on the account and can reset passwords, resend activation emails, and unlock a user's account if they get locked out from too many bad password attempts.
- **User (catalog) and User (no catalog)** - users are standard users with no special permissions. A User (catalog) can add QuickBooks* to their desktop if they have a package attached.  Users (no catalog) cannot add their own applications and must have applications added by the Account Owner or an Account Admin.
  - If the attached hosting package includes third party applications, only applications included in that specific package can be added.

## My Account 1.0 Transition

Let's take a brief look at how the changes in My Account 2.0 will change how account requests are handled.

| Request/Action | My Account 1.0 | My Account 2.0 |
|---|---|---|
| Adding new users | Email Account Services/use portal | My Account 2.0 |
| Adding a contact | Email Account Services | My Account 2.0 |
| Changing a username | Email Account Services | My Account 2.0 |
| Changing an Account Owner | Email Account Services | My Account 2.0 |
| Resending Welcome Email | Call/Email Support | My Account 2.0 |

| | | |
|---|---|---|
| Adding applications | Call/Email Account Services | My Account 2.0 (some apps still require special install) |
| Removing applications | Call/Email Account Services | My Account 2.0 |
| Removing/changing packages | Call/Email Product Sales | My Account 2.0 |
| Removing a user | Email Account Services | My Account 2.0 |
| Changing user access levels | Email Account Services | My Account 2.0 |
| Resetting a password | Call/Email Support | My Account 2.0 |
| Adding a QuickBooks license | Call/Email Account Services | My Account 2.0 |
| Billing/account separation (client sub-account) | Call/Email Account Services | My Account 2.0 |
| QuickBooks Lease downgrade/upgrade | Call/Email Account Services | My Account 2.0 |