

# New Summit Hosting Setup Guide (Mac OS X Users)

login.summithosting.ca

We are pleased to announce that your server is now ready for you to begin using.

This guide is to assist you with the process of connecting to your new server. This is the most important guide that we will send so it's **crucial that you read this information**. Most support issues we see can be avoided by following this guide so be sure to **save a copy** of this document and **then forward it to other users** that connect to the server.

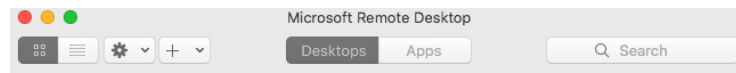
## **Important Links:**

- [Setting up "Remote Desktop Connection" \(RDP\)](#)
- [Knowledgebase](#)
- [Ticket Submission](#) (to submit a support request)
- [YouTube Video "Mac OSx Microsoft Remote Desktop Setup" Demonstration](#)

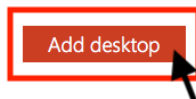
Your server name, usernames and passwords are included on the .PDF file in the "New Hosting Setup" email. To edit your password, press CTRL + ALT + END while in RDP and choose "change a password"

## **Connecting Your Mac To Your Server:**

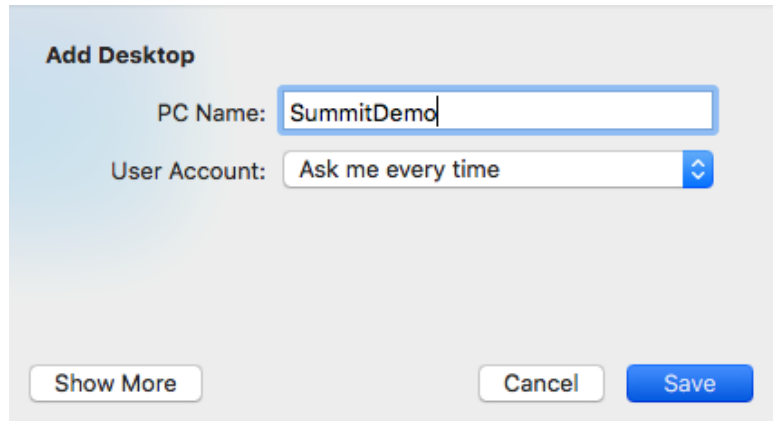
1. Open the App Store on your Mac. Download and install the "Microsoft Remote Desktop 10" App
2. Launch the app and choose "not now"
3. Click "Add desktop"



Add your first desktop connection to get started.



4. PC name is your server name. **\*\*The name of your server should be listed within your Welcome Email and is not the one listed in the screenshot below\*\***



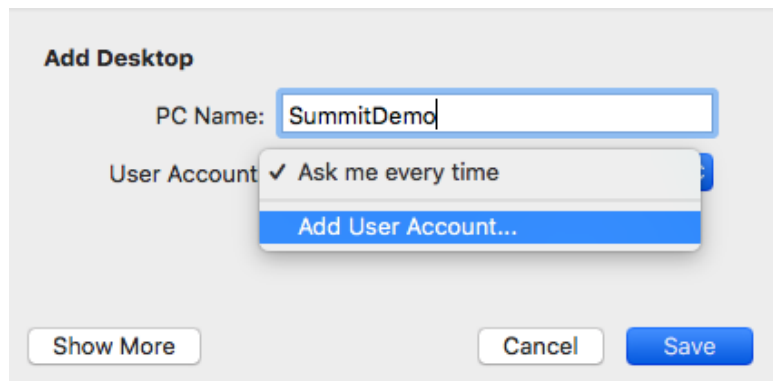
**Add Desktop**

PC Name: SummitDemo

User Account: Ask me every time

Show More Cancel Save

5. Click on User Account / Add User Account



**Add Desktop**

PC Name: SummitDemo

User Account: ✓ Ask me every time  
Add User Account...

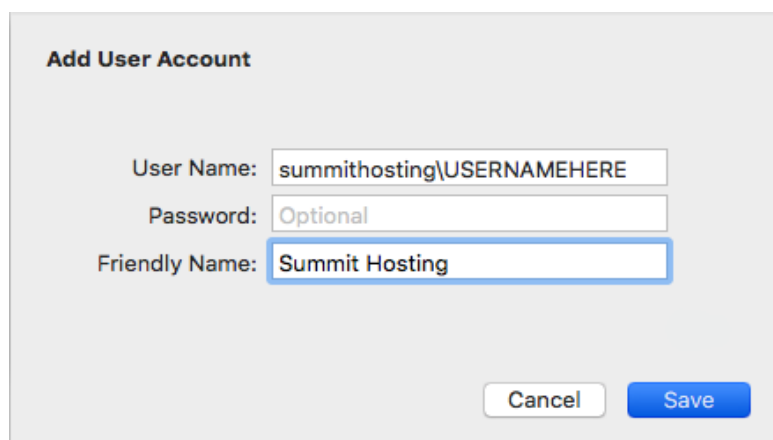
Show More Cancel Save

6. Enter the credentials that have been provided to you in your welcome email:

a. User name: summithosting\USERNAMEHERE

**\*\*Your username is also listed in your welcome email and is not what is listed in the screenshot below\*\***

- b. Password: Enter your password that was provided in the welcome email.
- c. Friendly Name: Summit Hosting (This will be the name that appears in the dropdown menu when selecting your user in later steps)
- d. Save



**Add User Account**

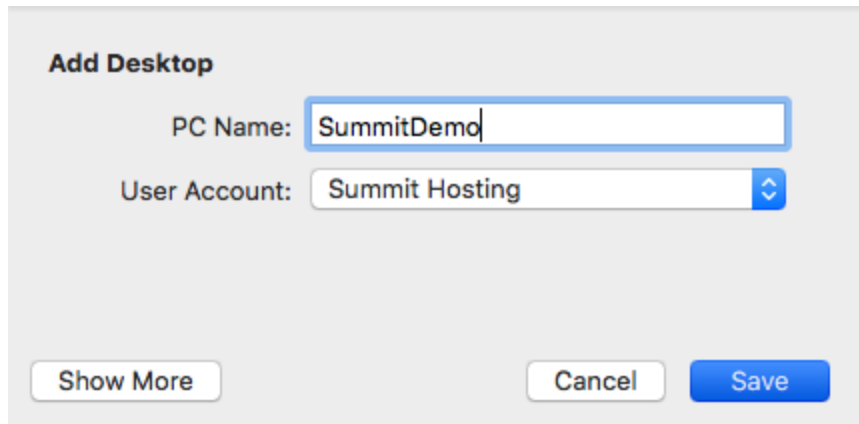
User Name: summithosting\USERNAMEHERE

Password: Optional

Friendly Name: Summit Hosting

Cancel Save

7. Click Show More once you see the screen shown below

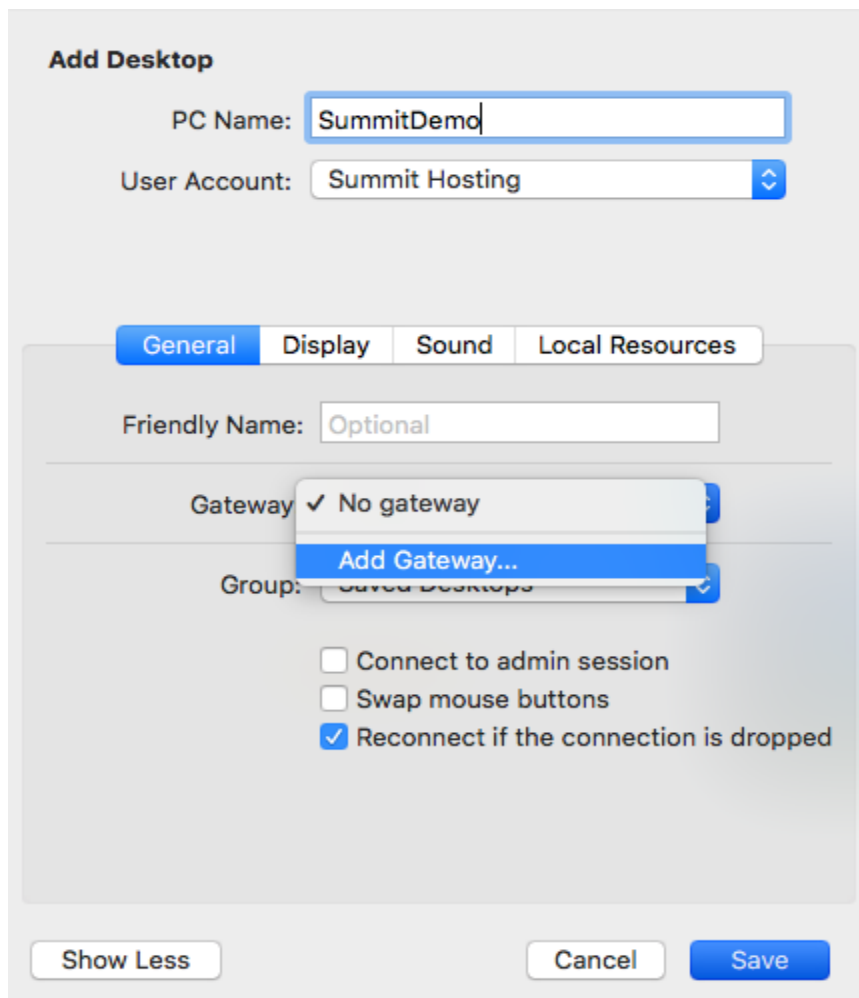


**Add Desktop**

PC Name:

User Account:

8. Click on the Gateway dropdown and select "Add Gateway"



**Add Desktop**

PC Name:

User Account:

Friendly Name:

Gateway:  (dropdown menu open showing "Add Gateway...")

Group:  (dropdown menu open)

Connect to admin session

Swap mouse buttons

Reconnect if the connection is dropped

9. Configure your Gateway Connection:
  - a. Enter the Server Name: [login.summithosting.ca](http://login.summithosting.ca)
  - b. Select Summit Hosting from the user accounts drop down
  - c. Friendly Name: Summit Hosting
  - d. Click Save

The screenshot shows a window titled "Add Gateway" with three input fields and two buttons. The "Server Name" field contains "login.summithosting.ca". The "User Account" dropdown menu is set to "Summit Hosting". The "Friendly Name" field contains "Summit Hosting". At the bottom right, there are "Cancel" and "Save" buttons.

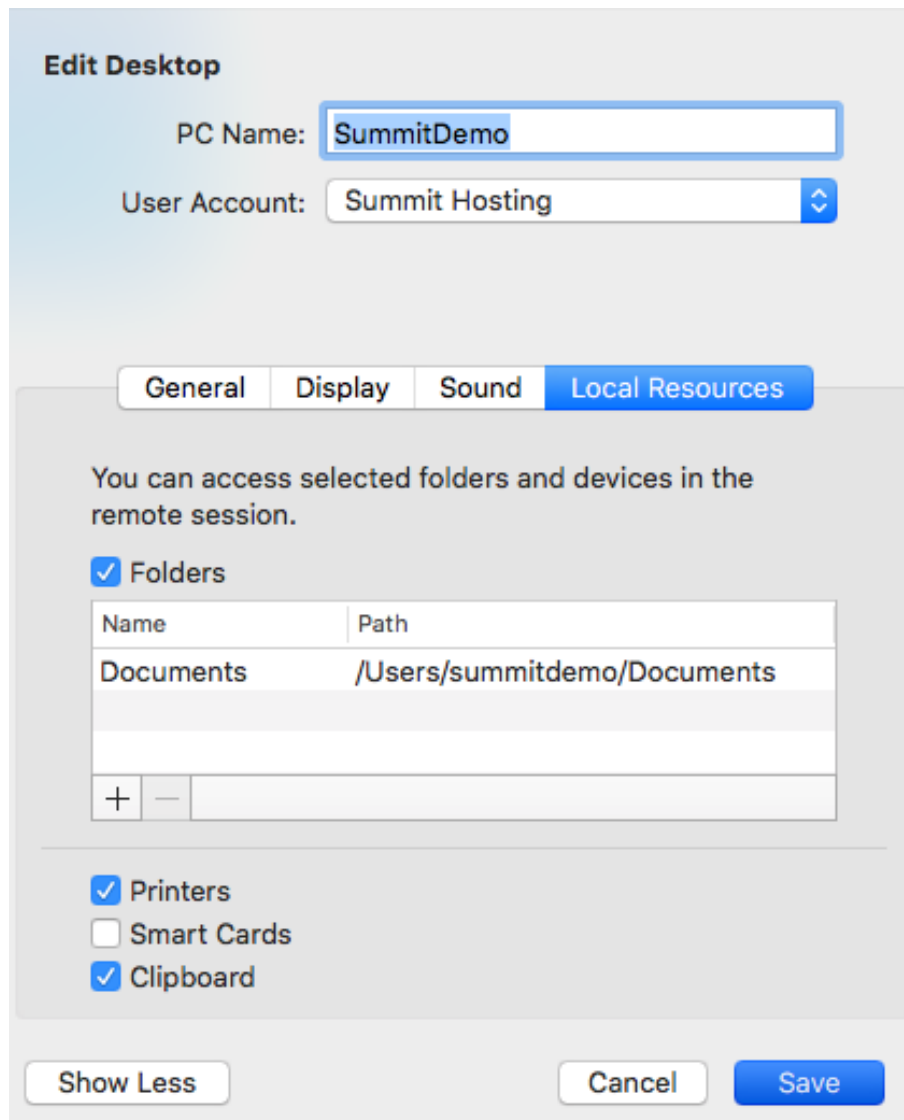
10. Enter [Your Company Name](#) for a Friendly name

The screenshot shows a window titled "Add Desktop" with several fields and options. The "PC Name" field contains "SummitDemo". The "User Account" dropdown menu is set to "Summit Hosting". Below these fields are tabs for "General", "Display", "Sound", and "Local Resources", with "General" selected. The "Friendly Name" field contains "Your Company Name Here". The "Gateway" dropdown menu is set to "Summit Hosting". The "Group" dropdown menu is set to "Saved Desktops". There are three checkboxes: "Connect to admin session" (unchecked), "Swap mouse buttons" (unchecked), and "Reconnect if the connection is dropped" (checked). At the bottom, there are "Show Less", "Cancel", and "Save" buttons.

11. Click on the Local Resources tab
  - a. Check the "Folders" and "Printers" boxes
  - b. Click the "+" in the bottom left corner if you would like to add local folders

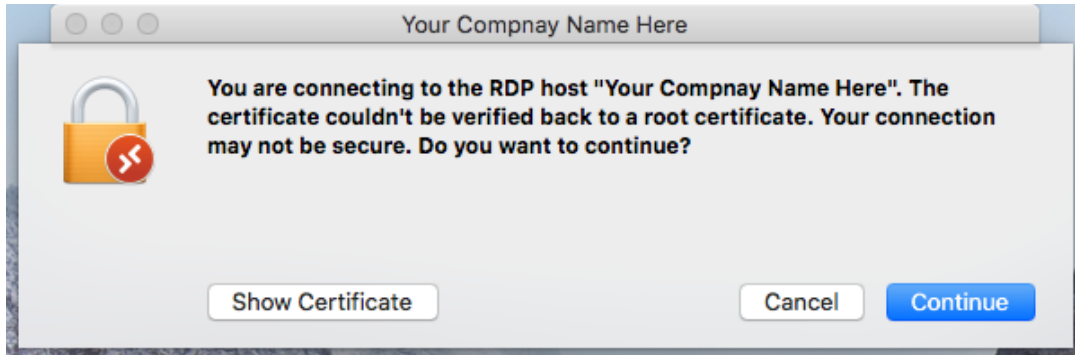
*(These are used if you need to transfer files back and forth from the server to your local computer and vice versa. **You may select any folder you like during this step, it does not need to be the documents folder like shown below.**)*

- c. Select the folder that you would like to add to the server and then click "Open"
- d. Click Save

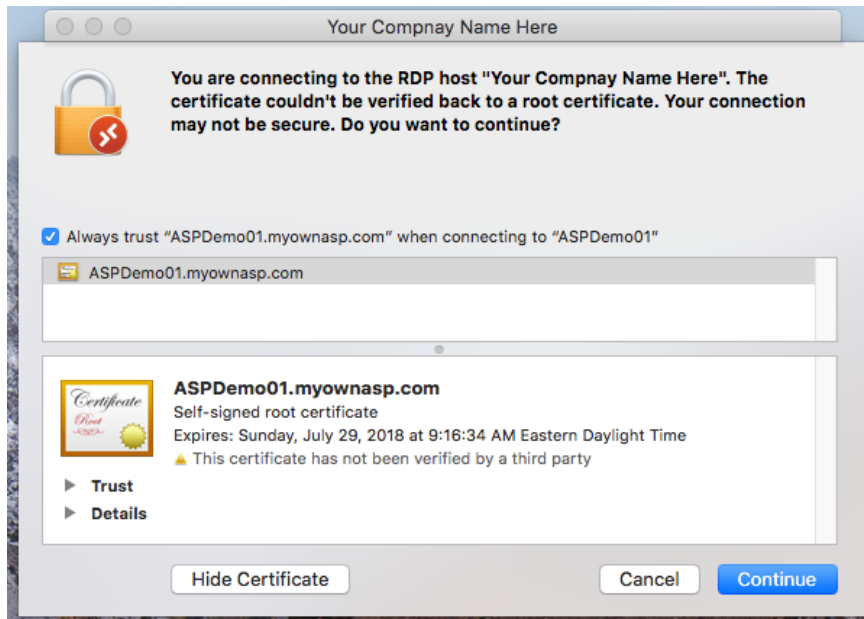


12. Once saved, you should now have an entry for your server. Double-clicking this will launch the process to connect to your server's desktop
13. During the connection process, you may see a "Verify Certificate" window. **\*\*This is not a warning about the security of your server or the information on it. This window is your local computer asking you if it is safe to trust the server you are connecting too, which in every case with Summit Hosting it will be perfectly safe and secure.\*\***

- a. To clear this message click "Show Certificate"

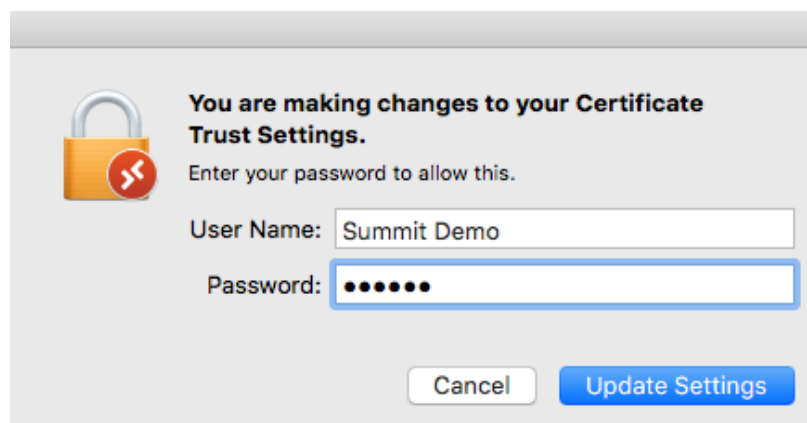


- b. "Always Trust these certificates"



- c. Click Continue

- d. Enter your local Admin password and click "Update Settings"



14. Congratulations! You should now be connected to your server and able to use your applications as needed.

**If you try to connect but receive an error stating "connection reset by peer":**

This is most likely caused by not configuring the app correctly, or by mistyping your password. Please go back over the settings of your Remote Desktop application. If after going over your settings again and making sure your username and password is correct you are still receiving this error, open a ticket with us at [ticket.summithosting.com](https://ticket.summithosting.com) and we will assist you in getting connected.

## **Copying Files To Your New Server (if your files are not already on the server):**

We assume you are familiar with how to create and restore backups within your accounting software. Once you have a backup, you will need to copy it to the server.

Any file on the server can be copied/pasted to your local computer and vice versa if you did not set up a redirected folder in the steps listed above during the initial setup process.

Here are knowledgebase articles on how to create/restore backups for [QuickBooks](#) and [Sage 50](#) if you do not already know this process.

## **Default Company File Locations**

If you are unsure of where to restore your company file, please use the locations below, as these are the default locations that the software uses:

1. **QuickBooks** - C:\Users\Public\Documents\Intuit\QuickBooks\Company Files
2. **Sage 50** - C:\Sage\Peachtree\Company

*\*\*Note: The C drive on the server will be labeled “**SummitHosting (C:)**”, not to be confused with your actual local disk.*

## **\*\*Requesting Support\*\***

We do expect that you will sometimes run into issues not covered in this guide. You are more than welcome to submit a support request via our [ticket website](#). Here are a few simple guidelines that will help you submit a ticket.

Our responses to tickets will come from [support@summithosting.com](mailto:support@summithosting.com). This email is for our ticket system only. **Do not send emails to this address to open a support ticket**. Make sure you add this email address to your email’s safe list to prevent our responses from going to your spam/junk mail.

When submitting a support request, details are extremely important. The more information we have to work with, the faster we can determine the cause of the issue. If you are receiving an error message, please include it verbatim, and also send a screenshot if possible. Also, always include your server username (This is not the username that you use when logging into a specific application such as QuickBooks or Sage, but the username that you log into the server itself with). If you are having printing issues, we will need the exact make/model of your printer when submitting a ticket. This will help us to make sure we have the exact drivers needed on your server in order for your printers to work properly.

## **Items not covered by support:**

1. **Local IT support** – Our support scope is for the Summit Hosting service only. It does not include things like how to use QuickBooks or Sage, maintaining your local computers, removing malware, configuring security, etc. Any issues outside of the Summit Hosting networks or environments are out of our control and need to be handled by either a Local IT department within your organization or your Internet Service Provider.
2. **Network conditions** – A common assumption of problems with connecting to your server is that the network issue is the sole responsibility of the hosting provider (Summit Hosting). This often is **not the case** as most internet connection issues are outside of Summit Hosting networks with Internet Service Providers (Summit Hosting is **not** an ISP) and thus outside our control. To see if your connectivity issues are coming from an Internet Service Provider, please check out our [status page](#) whenever you may be experiencing issues and keep in mind that you may need to contact you ISP in order to resolve them.

3. **Accounting Errors or Procedures** – While we do **host** your accounting software, education in its use is **not part of our support**. We do not support any 3<sup>rd</sup> party applications, we can only support your server and errors that may be caused directly by the server itself. If you are receiving errors that pertain specifically to the application in use, you will need to contact the vendor for support in those programs.

### **Microsoft Office Applications not on your server unless specified:**

In our previous environment (if you migrated over from Citrix), we had Excel running in the background. Per Microsoft's new hosting rules that is no longer available. It is not allowed for any hosting company. You can export to CSV file and run Excel locally, however there **will be a charge** to have it installed on the server. We hate that this is the case but we cannot go against the licensing rules of Microsoft.

If you would like to add anything to your account, please complete the following form:

<https://www.summithosting.com/master-add-form>

If you have questions about the pricing of these products please let us know by submitting a ticket and we would be happy to get you in touch with a member of our sales team.

### **Server Backups**

Please be aware that we utilize a sophisticated backup system that creates a backup of your server every night. Since our backup system works at such a low level of the server, your software will not know it is running and may still want to perform backups on its own. These additional backups are **not necessary**.

While performing your own backups may not be needed, we are in no way telling you that you cannot do them yourself. If you **choose** to perform **your own backups**, we ask that they not be scheduled daily and that they are run as needed.

*To prevent your backups from filling up your server's drive space, they should be moved off the server to your local computer*