New Summit Hosting Setup Guide (Windows Users)

login.summithosting.ca

Hello and welcome to Summit Hosting! We are pleased to announce that your new server is ready for use!

This guide is to assist you with the process of connecting to your 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 you **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
- Submit A Support Request
- YouTube Video "Windows Remote Desktop (RDP) Setup" Demonstration

Included in your welcome email should be all the information and credentials that you need in order to connect to your new server.

Your "Welcome Email" should include the following:

1. Server Name
2. Username(s)
3. Temporary Password
4. RDP file to be saved to your local desktop

Note - Because Microsoft has discontinued support for Windows XP and Vista, we do not support these operating systems and you may not be able to properly connect to your new server if you are still running one of these on your local machine.

Connecting Your PC To Your Server

Included in your initial Welcome email is a .RDP file that should have been sent to you as an attachment along with 2 separate PDF files. Please copy the RDP file to your local desktop and then follow these steps to connect to your server:

    a. Double click your RDP Icon that you just saved to your local desktop from the email
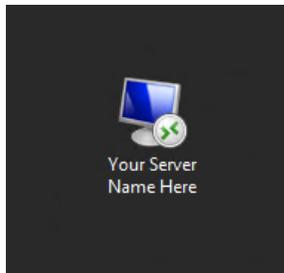
    b. If prompted with a Security Certificate window, check the box that states "Don't ask me again for connections to this computer" and then click continue/connect.
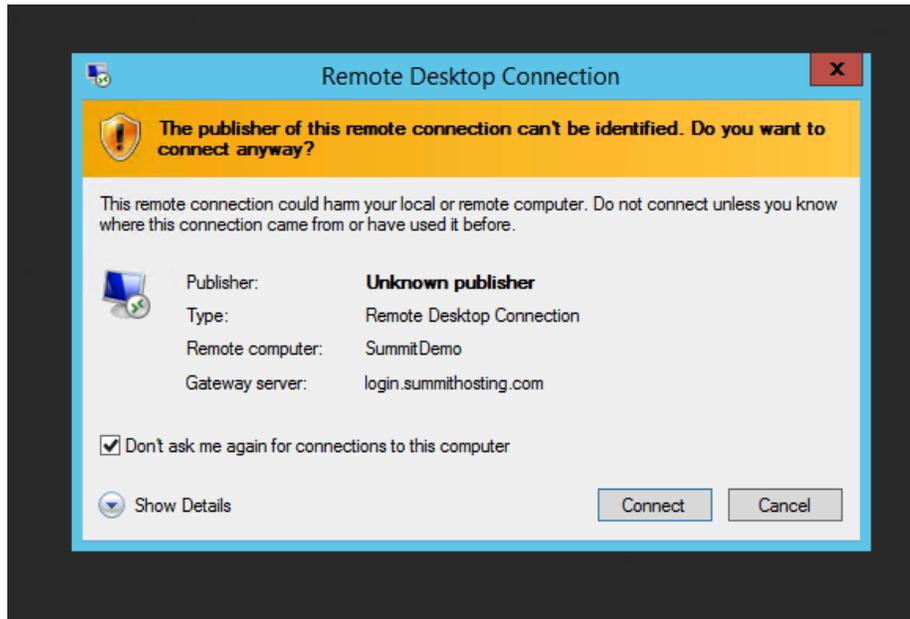
c. Enter your username and temporary password that was given to you in your welcome email
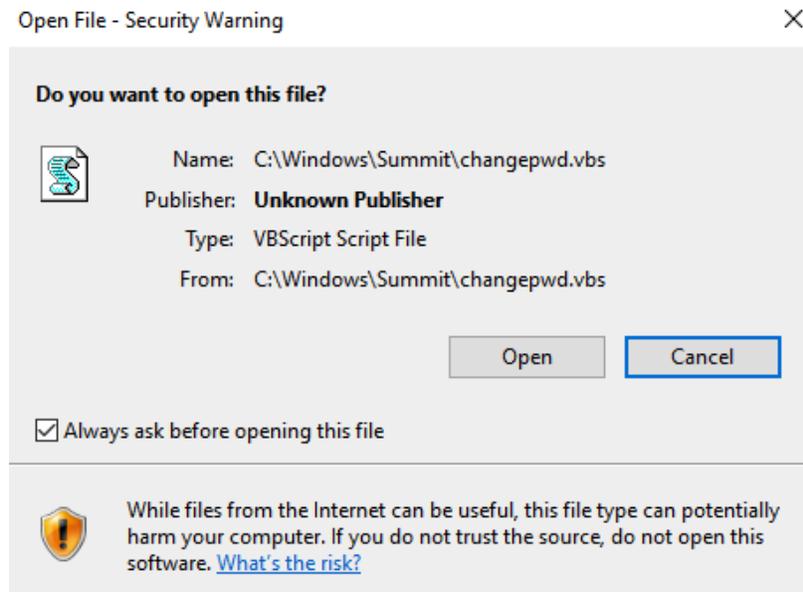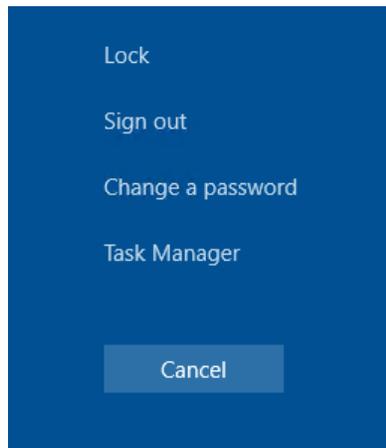

d. Do **NOT** check the "Remember Me" box and click connect *(You will need to change your password once logged into the server, so you do not need to check the remember me box just yet)*

e. Once connected to the server, double click the "Change Password" icon located on your server desktop
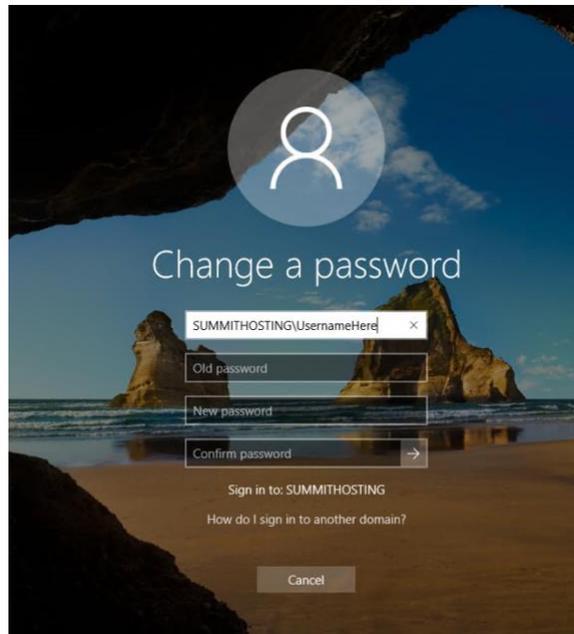
i. click "Open"

ii. Select "Change a password"

iii. Enter the password from your welcome email in the "Old Password" dialog box then enter the password you would like to use moving forward in the two boxes below

iv. Click the right face facing arrow when finished typing in your new password

f. Once the password has been successfully changed, double click the "Logoff Windows" icon on your server desktop to log out of the server

g. Once logged out, double click on your RDP connection on your local computer desktop (same as step A) to connect to the server again
h. When prompted, enter your new password that you just created
i. Check the box stating "Remember Me" and then click connect

j. You should now be connected to your server and moving forward all you have to do to connect is simply double click your RDP file on your local computer desktop.

Detailed steps for connecting to your server can also be found in this knowledgebase article.
*** We strongly recommend that you only use the .RDP that we emailed you, or from the above knowledgebase article. Do <u>not</u> use the file that can be downloaded from the login.summithosting.com/.ca websites ***

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**. 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 3rd 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