

Hybrid Cloud Apps Onboarding Guide

Prerequisites

Before you proceed with obtaining cloud app subscriptions, we request that customers reach out to Support. Minor preparation must occur in order to establish your cloud applications and connect to your database that resides at your office.

1) External static IP address is *Highly Recommended*. The cloud apps will point directly to your specific external (WAN) IP address. A dynamic IP address (non-static) is subject to change by your ISP at various intervals. When this change does occur, the cloud apps will no longer locate your database until we can get them reconfigured with the updated IP address information. Having a static IP address eliminates this situation completely.

If you aren't sure your office location has an external static IP address, please reach out to your ISP to verify and if needed, request a static IP from them. This is usually a simple & quick process. Most ISP's do charge a minor fee for this service.

Once you have this IP information, please send it to Technical Support so we can begin your cloud app configuration and you can continue along with the remaining steps.

2) Next, you'll want to establish firewall rules on your server machine to allow incoming & outgoing TCP/IP connections to the SAP SQL Anywhere Database Server application. By default, the database server utilizes port 2638.

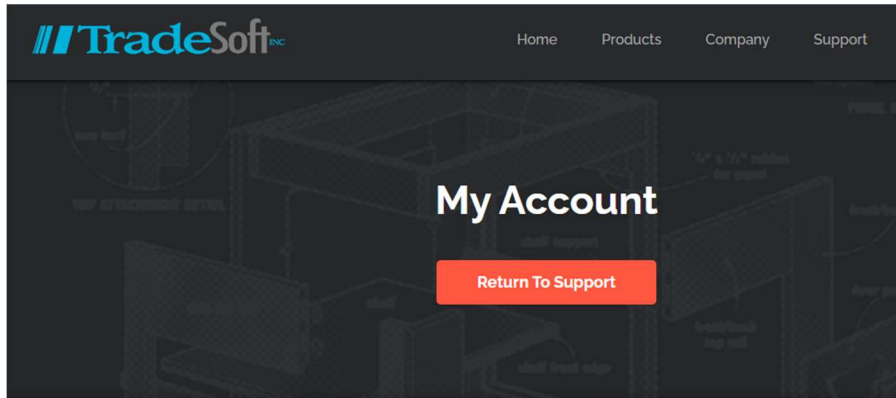
You'll then proceed with establishing the appropriate port forwarding rule(s) within your network router. Same concept applies here; allow incoming/outgoing connections to the server machine through port 2638. If you are not familiar with this setting within your router, please reach out to your IT personnel or ISP for further assistance.

3) After this initial setup is complete, please contact Technical Support and they will assist with the last step required to finalize the server-side preparations.

During this time, your cloud app configuration is underway. This process can take up to 72 hours depending on certain conditions. We expect the timeframe to be well under this for most customers. Once this is complete, you will be informed that your cloud app(s) is now available for use.

My Account Overview

Access your account details through the links provided on the Cloud Apps & Support Tickets tabs.



The Subscriptions area is where you purchase subscriptions or view your existing subscription details.

[Subscriptions](#) [Edit Profile](#) [Payments & Invoices](#) [Company Info](#) [Logout](#)

You do not have any subscriptions attached to your account.

To purchase a subscription, you can [click here](#).

Subscription Plan	ShopPAK
Status	Active
Start Date	August 26, 2020
Expiration Date	September 25, 2020
Actions	Cancel Abandon

Subscription Plan	ProjectPAK
Status	Active
Start Date	August 26, 2020
Expiration Date	September 25, 2020
Actions	Cancel Abandon

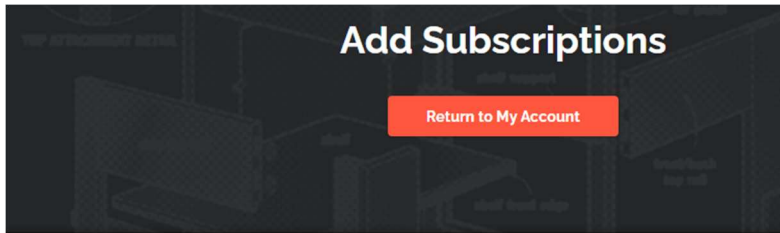
Subscription Plan	Scoreboard (Annual)
Status	Active
Start Date	August 25, 2020
Expiration Date	August 25, 2021
Actions	Upgrade Cancel Abandon

Our standard subscriptions are purchased and managed per-user account. We do offer group-based subscriptions for companies that prefer to purchase X number of seats upfront for a particular cloud app and have one user in charge of managing these subscriptions.

For customers who are interested in group-based subscriptions, please contact Support for further details.

We offer both monthly & annual subscriptions. *Customers will receive a 10% discount for annual subscriptions.* We also provide the option for automatic subscription renewals. This eliminates the need to manually handle subscription payments, whether they be on a monthly or annual basis.

Regardless of which approach you prefer, you will always receive an email notification whenever you initially add a subscription to your account, 7 days till expiration or auto-renewal, and once a subscription has expired.



- ☒ ProjectPAK - \$80 / 30 Days
- ☐ ProjectPAK (Annual) - \$864 / 1 Year
Save 10% with annual subscription!
- ☐ Scoreboard - \$70 / 30 Days
- ☐ Scoreboard (Annual) - \$756 / 1 Year
Save 10% with annual subscription!
- ☐ ShopPAK - \$110 / 30 Days
- ☐ ShopPAK (Annual) - \$1,188 / 1 Year
Save 10% with annual subscription!
- ☐ Automatically renew subscription

BILLING DETAILS

Billing First Name *

Subscription payments are handled through PayPal. You can choose to pay directly with a debit or credit card, or through your PayPal account. The latter offers additional payment methods within an established account, such as a linked checking account for example.

Edit Profile is where your individual account & billing details are stored. Access this area if you need to update your existing information or provide additional details.

[Subscriptions](#) [Edit Profile](#) [Payments & Invoices](#) [Company Info](#) [Logout](#)

Username *

E-mail *

First Name

Last Name

Password

Repeat Password

BILLING DETAILS

BILLING DETAILS

Billing First Name *

Test

Billing Last Name *

Buyerg

Billing Email *

jeritreale-buyerg@gmail.com

Billing Company

Test Company A

If entered, this will appear on the invoice, replacing the First and Last Name.

Billing Address *

This field is required.

Billing City *

This field is required.

Billing Zip / Postal Code

Billing Country *

Select an option

This field is required.

Billing State / Province

Edit Profile

Payments & Invoices provides a historical account of your subscription payments. You can view, download, or print a copy of the invoices as well.

[Subscriptions](#) [Edit Profile](#) [Payments & Invoices](#) [Company Info](#) [Logout](#)

ID	AMOUNT	DATE / TIME	STATUS	INVOICE
#70	\$80	15 August, 2020 13:29	Completed	Download Invoice
#60	\$80	16 July, 2020 14:32	Completed	Download Invoice
#56	\$80	16 June, 2020 11:25	Completed	Download Invoice
#41	\$80	17 May, 2020 19:11	Completed	Download Invoice

Company Info houses specific details that are shared across all associated users of a company. This includes the company's name as listed within our website records, the assigned Company ID (also referred to as Customer Number), and the current overall subscription seat counts for said company.

[Subscriptions](#) [Edit Profile](#) [Payments & Invoices](#) [Company Info](#) [Logout](#)

Company Info

Company Name: Test Company A

Company ID: 1111

ProjectPAK Subscriptions: 2

ShopPAK Subscriptions: 2

Scoreboard Subscriptions: 1

Cloud App Access

You can access your cloud apps through a number of ways:

The My Apps button located on the Support landing page.

<https://tradesoftinc.com/support/>

ONLINE RESOURCES



Product Insight

Explore our knowledge base, video tutorials, user guides, and other miscellaneous resources to help you get the most out of your TradeSoft applications.

[Browse Resources](#)



Support

Connect with our enhanced Support system or download the latest versions of our software, along with release notes.
Requires a current support contract to access.

[Access Support](#)

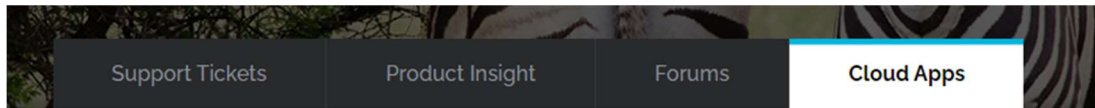


Cloud Apps

Access your client applications from any device, anytime, and anywhere!
Requires active monthly subscription to access.

[My Apps](#)

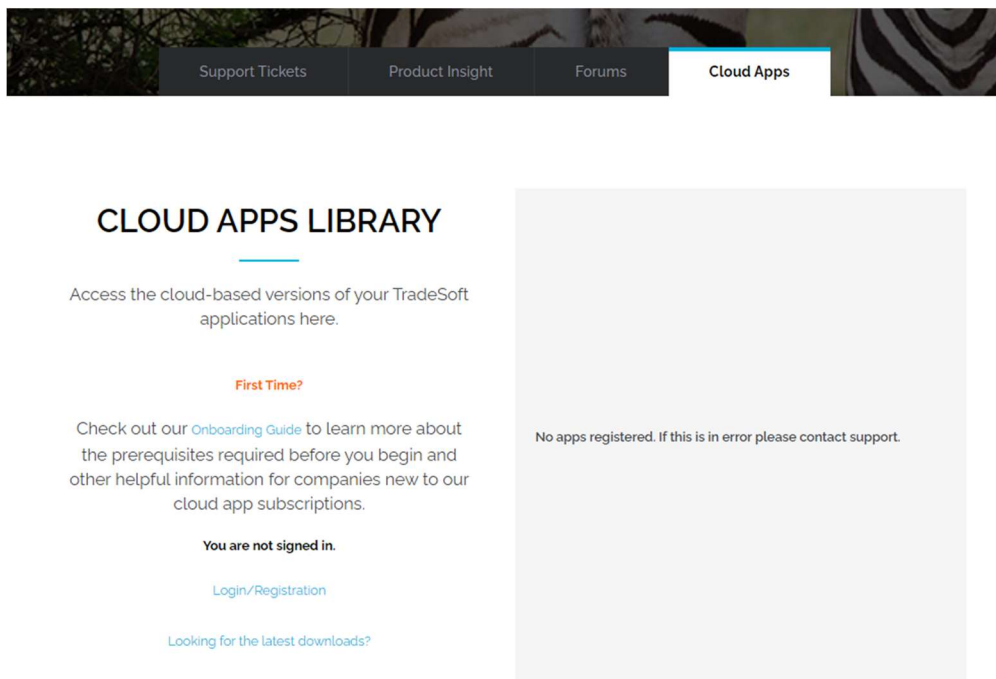
Selecting the Cloud Apps tab if you are already inside the main Support area.



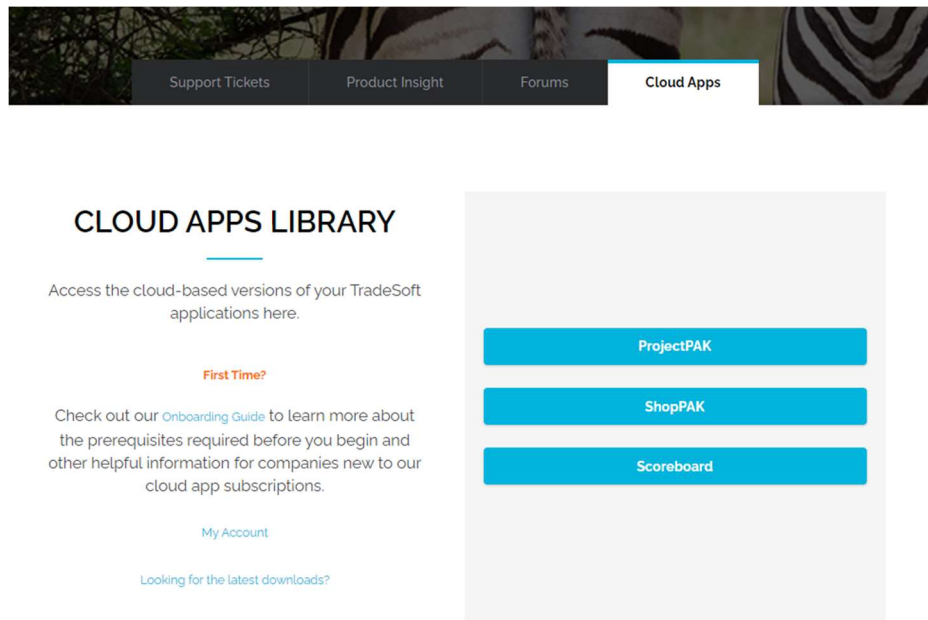
Or directly via the Cloud Apps url.

<https://tradesoftinc.com/support/cloud-apps/>

If you are not signed into your website account or haven't yet registered for an account, you'll be greeted with this version of the page.



For existing subscribers, you'll be presented with your specific version of the page that lists the applicable cloud app buttons.



Cloud Apps Usage

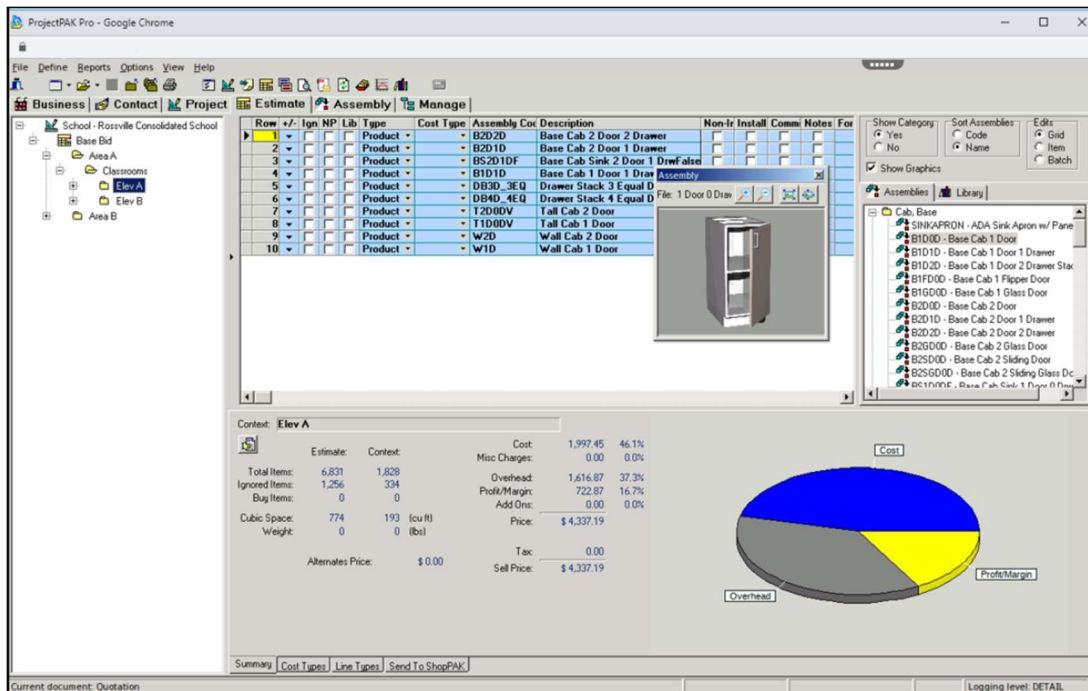
APPLICATION DIFFERENCES:

Because cloud seats run outside of your facility, we don't have access to your email, nor do we have access to files that reside on your networked computers. Thus, we disable email buttons and access to the document management facility when running ProjectPAK or ShopPAK in the cloud.

Cloud seats do not have direct access to 3rd party application databases, and thus, cloud seats cannot be used in conjunction with our PlanSwift Plugin, Microvellum Engineering Link, Cabinet Vision Engineering Link, or the QuickBooks integrated accounting link. However, cloud seats can create and read import and export files just like on premise seats.

PERFORMANCE DIFFERENCES:

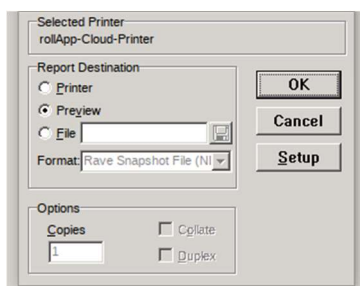
We've benchmarked cloud and desktop versions extensively. For the vast majority of functions, cloud seat performance is comparable to desktop. However, functions that process a lot of data take longer in the cloud. But the delay is negligible. The only significant performance delay we've found is in ProjectPAK when setting up job specifications or copying big assemblies into an estimate. Your cloud seat experience will vary somewhat depending on several factors including the shop's and remote user's internet speed, local server's performance, proximity to your region's cloud seat server, and how you use our applications.



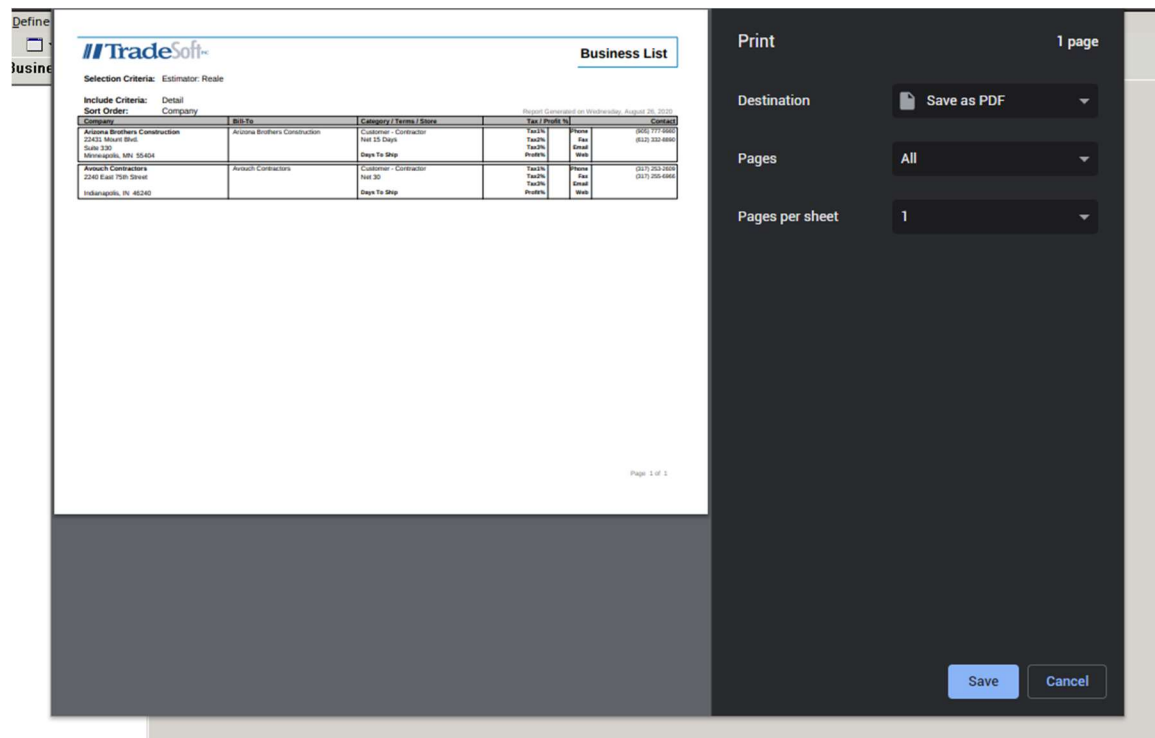
The dotted bar that appears in the upper right of the cloud app window indicates your current connection conditions. Less bars means you currently have a weaker signal coming from either the client-side or server-side connection. The cloud apps are designed to launch from the nearest server farm available based on the user's current location. In our personal experience, performance did not degrade significantly until 1 bar or less. However, results may vary. If you see a continual low connection indicator and experience actual sluggishness in performance, we recommend to first assess the user's client-side connection and then move to assessing the server-side connection if necessary. If you are still unable to detect the source of your connection performance, please reach out to Support.



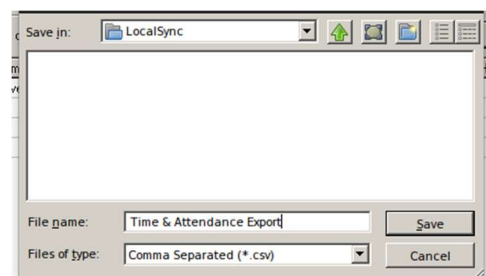
As stated previously, there are only a few exceptions in regards to shared functionality across cloud and desktop versions. Reports & documents can be printed and/or saved as PDF's via the cloud printer.



Your browser's print dialog will appear and you can choose to either save off a copy or select a local printer detected by the browser.



For saving an export or similar files, you'll be presented with a Save As dialog very similar to the type you would see inside a desktop environment. Make sure LocalSync is selected in the upper Save In field, enter the filename you wish to save it as, and click Save.



A separate browser pop-up window will appear and you should automatically be prompted for a Save As location on your local machine.

Downloading file **Time & Attendance Export .csv**. If the download does not start automatically, click [here](#).

Close this window

ProjectPAK Usage Tip:

We highly recommend you bring in new assemblies into estimates by the batch and wait till you have built out the complete estimate, or close to it, before assigning & applying job specs. For customers who are on lower connections or older sever machines, this will help reduce timeframes vs. per-individual actions.

