



8 Steps to Getting Started on the Cloud9 Portal

Let's get started!

Learn how to easily administer your trading environment through the Cloud9 portal.



1 Access Granted

Login with your Cloud9 username and password. You will also be required to enter a six-digit number that is automatically sent to your mobile device as part of the two-factor authentication process.



4 New Traders on the Block

Add, edit, and delete users as well as their portal and administrative privileges on the **Users** tab. To update a user's settings, select their name and click on the appropriate tab. You can also delete users, establish privacy settings, IP restrictions, voice recording, and global mute on the **User** tab.



5 Making A Connection

Click **Add Connection** to add connections for your firm and select the desired settings. To assign a user to this connection, go back to the Users tab, select a user to assign it to.



8 Sending Out an SOS

If you need further assistance with navigating the portal, visit the portal help section and select **Portal Documentation**. Contact our support department by emailing support@c9tec.com.



2 Establishing Your (Wall) Street Cred

- > In the **Firms** tab, you can update and manage information related to your organization. Select your firm and click "edit firm" –to view and edit your firm's billing information, select your firm's visibility status in the community directory, and restrict IP access.



3 Managing Groups

- < To add a group, go to the **Groups** tab and click **Add Group**. Here you can establish the name of the Group, contact information, company information, and set the Group's visibility in the Cloud9 Community.



6 Playback Time

- > To view a recording, select a user and the recording file will appear at the top of the page. You can then use the playback buttons to play the recording. To download multiple recordings, click the check boxes then select **Download Recordings**. You can also review call quality on this page.



7 Don't Miss a Thing

- < The **View Logs** section shows all actions taken by your firm's portal users. You can filter by user name and a specific date range, and you can also export these files for further analysis.

Congratulations!

You're a master of the Cloud9 Portal!