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## Introduction

### What is Qbox?

Qbox is a cloud enabled collaboration software that helps Windows PC users share files over the Internet. During the installation process, Qbox creates 'Sync folders' on the Windows PCs of the account owner and the shared users. Files copied into the sync folders are shared over the Internet and replicated in the sync folders of shared users.

To set up Qbox, the owner first signs up for a Qbox account at the Qbox website [www.qboxplus.com](http://www.qboxplus.com), creates Sync folders, and installs Qbox client on his or her Windows PC. After installation, the Sync folders are created on a selected directory. The owner can invite other users to share the folder, who can then sign up for their Qbox accounts, and install Qbox client, after which the Sync folders are created on their Windows PCs. The file to be shared is copied into the Sync folder by one of the users. Qbox first syncs the file up to the Qbox cloud server over the Internet and then syncs it down to the Sync folders on the shared user computers. This sync-up and sync-down process makes sure that all users have identical copies of the file.

When a user opens a file in Qbox to make changes, Qbox acquires a 'File Lock' for the user, so that only his or her changes are synced to the Qbox cloud server. Other users can simultaneously view the file on their desktops, but any changes made by them will not be synced. Qbox assures coherent file updates by issuing File Lock to only one user at a time.

## **Qbox Structure**

Qbox consists of two parts which are setup during installation:

- Users' account at the Qbox cloud server, where their folders and files are stored securely. The contents of the cloud server can be viewed on the Qbox Web Dashboard, which is shown after signing in at the Qbox website, [www.qboxplus.com](http://www.qboxplus.com).
- Qbox Client program running on the users' Windows PC, which locks and syncs the files from the computer to the Qbox cloud server. The Qbox Client program includes the Qbox Explorer, which displays the folders and files in Qbox, and their status.

## **Qbox is for Microsoft Windows**

Qbox runs on Desktop, Laptop, or Tablets computers running any of the versions of Microsoft Windows Vista, Windows 7.X, Windows 8.X, Windows 10.X, Windows 11.X, and Windows Servers. It also runs on Virtual Desktops and Terminal Servers running Windows. Qbox is not supported on Apple Mac or iPad at this time.

## **Applications and File Types**

Qbox can lock and sync files of supported applications only. The following file types can be locked when they are opened in their supported application, and synced when the file is closed. Locking and syncing work-flow allows for real time collaboration with shared users:

Application	File Extension
Intuit QuickBooks desktop, Pro, Premier, Enterprise versions 2008 or later. US and all international versions of QuickBooks are supported.	QBW and TLG (TLG file is synced and shared in lock step with QBW files as recommended by Intuit)
Microsoft Word 2007 or later	DOC, DOCX
Microsoft Excel 2007 or later	XLS, XLSX
Microsoft PowerPoint 2007 or later	PPT, PPTX
Microsoft Access	ACCDB, MDB

The following file types can be synced (one time sync) and shared with other users. These cannot be locked when opened so they cannot be edited. However, the files can be replaced using copy/paste operation to sync a new version:

Application	File Extension
Adobe Acrobat	PDF
Image files	JPG, JPEG, PNG, GIF, TIFF, BMP

## **Qbox Folder**

Qbox folder is created when Qbox is setup on the owner and shared user's PCs. It is by default created under the 'My Documents' folder and contains Root folders and Sync folders. During installation, users have the option to create the Qbox folder at any location of their choice.

## **Root Folder**

Users setting up a Qbox account can create their own 'Root folder'. The name of the Root folder is unique across the Qbox system. Qbox creates the 'Root folder' of the owner and creates the 'Sync folders' as subfolders on the owner's computer as well as on the computers of the users with whom the owner is sharing the folders. A user can be sharing Sync folders from multiple owners without any conflict, as each Sync folder is created inside the respective owner's Root folder. A Qbox owner can also be sharing Sync folders of other owners, as these are created in separate Root folders.

## **Sync Folders**

Sync folders contain files that are synced to the users sharing the folder. Qbox account owners create Sync folders and invite other users to share the folders. When the invited users set up their account, Qbox creates the owner's Root folder and then creates their Sync folders as subfolders on their computers. Users only see the Sync folders they own and those shared with them by other owners. Users can add files to any Sync folder, owned or shared. Files of supported applications inside Sync folders are locked when opened by the application and synced when closed. These folders are used for real-time collaboration between multiple users sharing and working on the files. Sync folders are designed to sync only the files required for collaboration and disregard various sub-folders and files created by these applications. Sub-folders created by the applications in the Sync folder need to be shared manually if required for sharing.

The user who owns a Sync folder can create additional sub-folders to organize files. Sub folders can also be created by Team members and Shared users with admin permission.

## **Qbox Explorer**

Qbox Explorer on the desktop displays the folders and files in the Qbox folder, as well as their status as maintained on the Qbox cloud server. Users can view lock status and sync status of

the files right on their desktop, without the need for logging into the Qbox Website. Folder and file operations done in the Qbox Explorer get updated concurrently in the Qbox folder as well as the Qbox cloud server. Files can be opened in their supported application simply by double clicking on the file names. Qbox Explorer also has controls to configure Qbox options to suit the user's operational needs.

## **Qbox Icon**

Once Qbox is installed, the Qbox Icon with the letter 'Q' inside a small green box, is displayed on the Windows System Tray area just to the left of the clock, usually at the lower right of the Windows desktop. This icon can be viewed or accessed for Qbox operation as described below:

- Double clicking on the icon launches the Qbox Explorer described above.
- Right clicking on the icon opens the Qbox menu showing additional links.
- The icon turns orange or green with a circular arrow during sync, and green with a check mark when all files are in sync. The icon turns orange with a red exclamation if an error is encountered and gray if the Internet is not available.
- File sync status information is displayed in a bubble message above the icon.

## **Qbox Web Dashboard**

Qbox Web Dashboard is accessed after signing in at the Qbox Website <https://www.qboxplus.com> with the user's email and password. Users can view sync status, lock status and history of files in the Sync Folders they own as well as those shared with them by other users. Qbox account owners can perform administrative functions including:

- Create folders and send sharing invitations
- Manually release a file lock
- Roll back a file to a previous version
- Reset password
- Download Qbox client to install Qbox on a new computer
- View bills, make a payments

## **Shared Users**

Qbox account owners can share their folders with other users simply by sending an invitation to their email addresses at the Web Dashboard. Invited users, who do not already have a Qbox account, get an email with a link for setting up Qbox on their computers. They can access the folders and files after installing Qbox on their computers. Folders and files can be accessed only by the owner and by the users with whom they are shared.

Shared users can be given admin permission for the folder being shared with them. They can then create, rename or delete sub-folders, delete files, release lock and roll back files. Shared users are not allowed to send sharing invitations, even if they are given admin permission for a folder.

## **Team Members**

Qbox account owners can invite other employees, who are on the same private email domain, as Team members. Team members have automatic access to all the folders and files created under the owner's account. There is no need to invite them to share individual folders. In addition, a Team member can be given admin privilege so they can perform administrative tasks like create Sync folders, send sharing invitations, release locks, roll back files and pay bills for the owner's account.

## **Qbox Multi-User (MU)**

Users in an office location can set up 'Qbox MU' for multi-user access on a local network, and also share the folders with remote users. Qbox folder is set up on a server or network drive or a server. Qbox Explorers on individual Windows PCs on the local network access the same folders and files. Qbox MU can be used to reduce storage space and Internet bandwidth used to sync files, as only one copy of each file is required for all the users on the local network. It is also required for setting up multi-user access for applications like QuickBooks or Microsoft Access for the users in the office. When all the users in the office close and exit the application, Qbox will sync the file to the remote users, who can then open and lock the file to work on the file.

## **Setup Instructions – Users Creating Own Account**

1. On your browser, go to the Qbox website at <https://www.qboxplus.com>, click 'Sign Up', and enter your email address and name, then click 'Submit'.
2. On the next screen, enter the 'Associate code', if you have one, and click 'Continue'. Qbox will send you an email with a link to reset your password.
3. Click the link to create your password, and then click 'Submit'.
4. On the subsequent screens, read and accept the 'End User License Agreement', enter your company name and phone number.
5. On the next screen, create your folders:
  - i. Review your Root Folder name. Root Folder is where all your Sync Folders will be created. Qbox will use your Company name as default. If you make a change, Qbox will check for uniqueness and may suggest a different name.
  - ii. Create your Sync folders (create at least one sync folder) and invite users to share by entering their email addresses in the boxes provided.
6. On the next screen, click "Download" to install the Qbox Client on your computer. Click "Run" when prompted to run the Setup.Exe file, and then select "Install".
7. You should then see a Qbox client login prompt on your Windows desktop. Enter your email and the password you created.
8. Qbox will display the default location where the Qbox folder will be created:
  - To set up Qbox SU, click Continue to select the default location or browse and select a different location, and click Continue.
  - To set up Qbox MU, click the 'Setup Qbox MU' option. You can then browse and select a location on a network drive or server, accessible to other MU users in the office. To set

up the MU folder on a peer computer, first map a Windows folder on the computer to a drive letter (S) on all computers on the network and select the mapped drive (S) to create the Qbox folder. If you do not see the 'Setup Qbox MU' option, it may be because you are not using a private email domain. Please see the 'Qbox MU' section on this manual.

9. Qbox will create the folder named 'Qbox' at the selected location, then create the Root folder and Sync Folders as subfolders of the Qbox folder.
10. Qbox Explorer will come up and display these folders. The directory path of the folders is displayed in the box at the top of the Qbox Explorer.
11. You can now logout of the Qbox Web Dashboard.

Notes for step 6:

- If Windows only prompts you to 'Save', save the Setup.Exe file and run it to initiate installation.
- Qbox may install Microsoft .NET framework if it is not already installed.
- If the download was not successful or cancelled, you can download the Qbox Client again from the Admin page on your Qbox Web Dashboard.

Qbox setup is now complete. If you have the files that need to be shared with the other users, copy them to the Sync folders following instructions under 'Copying files to a Sync Folder'. Going forward, you need to be working on the files in the Qbox Sync folders only, so the edits you make are shared with the other users.

Notes:

After setup, you will see three Qbox icons on your computer:

1. A large 'Qbox Client' icon on your Desktop: this is the shortcut to run Qbox client software. Qbox starts automatically when your computer starts or restores from sleep mode, so normally there should be no need for you to click on this icon. If you exited the program manually, you can start it again by double clicking on this icon.
2. A small Qbox icon on the Windows System Tray, in the area next to the clock. This icon could be hidden by Windows, and you can drag it to the task bar to make it visible always. This is the Qbox 'process' icon, indicating that the Qbox client is running. Double clicking on this icon opens the Qbox Explorer.
3. A larger 'Qbox Explorer' icon on your Windows Task Bar. Clicking on this displays or hides the Qbox Explorer. This icon is always visible, unless you change the setting to close the Explorer. Do not pin this icon to the task bar, as this action pins the Qbox client, not the Explorer.

## **Setup Instructions – Invited/Shared Users and Team Members**

1. On your browser, go to the Qbox website at <https://www.qboxplus.com>, click 'Sign Up'. Enter the email address that you were invited on, and name. Click 'Submit'. Qbox will send you an email with a link to reset your password.
2. Click the link to create your password, and click Submit.

3. On the subsequent screens, read and accept the 'End User License Agreement', enter your company name and phone number.
4. On the next screen, click "Download" to install the Qbox Client on your computer. Click "Run" when prompted to run the Setup.Exe file, and then select "Install".
5. You should then see a Qbox client login prompt on your Windows desktop. Enter your email and the password you created.
6. Qbox will display the default location where the Qbox folder will be created:
  - To set up Qbox SU, click Continue to select the default location or browse and select a different location, and click Continue.
  - To set up Qbox MU, click the 'Setup Qbox MU' option. You can then browse and select a location on a network drive or server accessible to other MU users. To set up the MU folder on a peer computer, first map a Windows folder on the computer to a drive letter (S) on all computers on the network and select the mapped drive (S) to create the Qbox folder.
  - If another user has already set up Qbox MU, Qbox will display the location and will simply join the folder when you click Continue.
  - If you do not see the 'Setup Qbox MU' option, it may be because you are not using a private email domain. Please also see the 'Qbox MU' section on this manual.
7. Qbox will create the folder named 'Qbox' at the selected location, then create the Root folder and Sync Folders as subfolders of the Qbox folder.
8. Qbox Explorer will come up and display these folders. The directory path of the folders is displayed in the box at the top of the Qbox Explorer.
9. You can now logout of the Qbox Web Dashboard.

Notes for step 4:

- If Windows only prompts you to 'Save', save the Setup.Exe file and run it to initiate installation.
- Qbox may install Microsoft .NET framework if it is not already installed.
- If the download was not successful or cancelled, you can download the Qbox Client again from the Admin page on your Qbox Web Dashboard.

Qbox setup is now complete. If you have the files that need to be shared with the other users, copy them to the Sync folders following instructions under 'Copying files to a Sync Folder'. Going forward, you need to be working on the files in the Qbox Sync folders only, so the edits you make are shared with the other users.

Notes:

After setup, you will see three Qbox icons on your computer:

1. A large 'Qbox Client' icon on your Desktop: this is the shortcut to run Qbox client software. Qbox starts automatically when your computer starts or restores from sleep mode, so normally there should be no need for you to click on this icon. If you exited the program manually, you can start it again by double clicking on this icon.
2. A small Qbox icon on the Windows System Tray, in the area next to the clock. This icon could be hidden by Windows, and you can drag it to the task bar to make it visible always. This is the Qbox 'process' icon, indicating that the Qbox client is running. Double clicking on this icon

opens the Qbox Explorer.

3. A larger 'Qbox Explorer' icon on your Windows Task Bar. Clicking on this displays or hides the Qbox Explorer. This icon is always visible, unless you change the setting to close the Explorer. Do not pin this icon to the task bar, as this action pins the Qbox client, not the Explorer.

## **Qbox Multi-User (MU)**

Qbox MU is used to create a common folder on a network drive or server for users on a local network. This configuration is required when users want to work on QuickBooks company files in multi-user mode. Qbox MU can be setup by:

1. Team owner and Team members on a local network. All users need to be on a private email domain. The Read-Only Role for Team members should not be used.
2. Users on a local network, invited to share the same folders by a single account owner. All shared users need to be on a private email domain. The Read-Only Role for Team members should not be used.
3. Qbox MU folder can be located on a shared network drive or a server.
4. Qbox MU folder can be set up on the computer of one of the users (peer), by creating a shared folder on the computer and mapping it to a drive letter (e.g. S) on all the computers where setup is required. This will make the directory path from all computers the same, which is a requirement for Qbox MU.
5. Qbox MU can be set up during first time installation, as described under setup instructions. If Qbox is already set up, it can be switched to MU by selecting the 'Switch to Qbox MU' option under 'Preferences' on the Qbox Explorer. One of the users can switch to MU and select a location on a server or a mapped drive. The other users can then switch to MU and join the folder created for the first user.

## **Qbox MU Operational Details**

1. When one user in the MU group locks a file, the file is locked for all the MU users. Qbox Explorer displays the user's email followed by (MU) to indicate MU configuration. Another user in the MU group can open the same file and work in multi-user configuration.
2. To sync multi-user files, all users will need to exit the application before Qbox can sync the changes made to the file and release file lock. A remote user can then lock and work on the file.
3. When one user changes the Qbox Sync mode to Auto or Manual, it will be changed for all the MU users.
4. When one user relocates the folder, it will be relocated for all the MU users.
5. A MU user can switch back to Qbox SU by selecting 'Switch to Qbox SU' option under 'Preferences'.
6. As the folders and files are accessible to all the MU users, an external user inviting one of the users to share a folder, will in reality share it with all the users. If sharing has to be done privately, the specific user will need to switch to Qbox SU.



## Create Sync Folders

Qbox owners or Team members with admin permission can create Sync folders on the Qbox Explorer or at the Qbox Web Dashboard. Shared users with admin permission can create subfolders inside the Sync folder shared with them using the steps outlined below.

1. To create a Sync folder on the Qbox Explorer, select the Root folder or a Sync folder, and simply right click on the empty space. Select 'New folder' from the menu that pops up. Rename the folder and push enter on the keyboard to create the folder.
2. To create a Sync folder at the Web Dashboard, sign into your account at the Qbox Website [www.coraltreotech.com/qbox](http://www.coraltreotech.com/qbox). Select the Root folder or a Sync folder, click on the 'Actions' Menu, and click the 'New Folder' button to create the folder. If you do not have your own folders, you can go back to the landing page, by clicking the 'Qbox' logo in the top left and then clicking the '+Add' button to the right.
3. To share the folder created by any of the methods listed above, click the 3-dot 'Actions' menu for the folder and then select the 'Share' option for the folder at the Web Dashboard. Enter the emails of the users with whom the folder needs to be shared, and click 'Send invitation'. The folder will be added to the shared users' Qbox if they already have an account, or they will receive an email with a link to set up a new Qbox account.

## Copy Files to a Sync Folder

Most files can be copied to a Qbox Sync folder, simply by a Copy and Paste operation:

1. Open the Windows folder where the file is located
2. Copy the file by right clicking on it and selecting 'Copy'
3. On the Qbox Explorer, select the Sync Folder on the left hand side bar
4. Right click in the empty space on the right hand side, select 'Paste'

In the Auto Sync mode, the files will be synced automatically. If Qbox is set to Manual Sync, click on the 'Sync Now' button to initiate sync.

Note: you can copy and replace an existing file with a new version of the same file. Qbox will automatically lock the file, provided the file is not locked by another user. It will sync the file automatically or when you click on 'SYNC NOW' if set to manual sync.

## Using QuickBooks with Qbox

### Copy QuickBooks Files to Qbox Sync Folder

In the case of QuickBooks, Qbox syncs both the QBW and TLG files together in lock-step, so both these files need to be copied to the Qbox Sync folder. This can be done using any of the methods given below:

1. Backup and Restore – use this method if there are any online services like Web Connector, Intuit Sync Manager, etc., setup with QuickBooks:
  1. Set Qbox 'Sync Mode' to manual.
  2. Open the Company file in QuickBooks and create a backup at the usual location or somewhere you can easily find it (for example, the desktop). Close the Company file.
  3. Initiate a restore of the Company file from the backup file you just created.
  4. When QuickBooks prompts you to select a location to save the file, navigate to the Qbox directory and select the Sync folder. The directory path of the folder is displayed in the box at the top of the Qbox Explorer.
  5. Once the file is restored, close the file.
  6. You should now see the file in the Sync folder on the Qbox Explorer. If not, refresh the Qbox Explorer by clicking the circular arrow next to the directory box.
  7. Change Sync mode to 'Auto' or Initiate sync by clicking the 'Sync Now' button. Qbox will sync the files, you can see the progress at the bottom of the Qbox Explorer.
  8. Rename the Company file at the old location so that you will not open that file by mistake in the future.
  9. Once the file has synced, start using the Company file that is now located in your Qbox.
2. Use the Copy Utility
  1. We recommend that you make a backup of the Company files in QuickBooks before copying them to Qbox. Save the back up on a network or external drive.
  2. On the Qbox Explorer, select 'File' and 'Copy QuickBooks files'
  3. Select the drive where the QuickBooks Company file(s) are located and click 'Search'. This will list the QBW files found on the selected drive. Select the files you want to copy by checking the box next to the file(s)
  4. Or browse and select a file from the Windows folder where it is located.
  5. Select the Sync folder on the right-hand side, by checking the box next to the folder.
  6. Click 'Copy'. This will copy the selected QBW files, along with the TLG files, to the selected Sync folder.
  7. If the copy failed, it may be because the file is still open in QuickBooks - close the file and click Copy again to proceed.
  8. Select 'Rename source file' option if you want to rename the file in the previous location after the files are copied. The file names will be changed to start with 'Old'.
  9. Click Continue to exit the File copy utility.
3. Copy and Paste Files
  1. Make a backup of the Company files in QuickBooks before copying them. Save the backup on an external or network drive.
  2. Set Qbox 'Sync Mode' to manual.

3. On the Windows Explorer, hold the Ctrl key down and select both the QBW file and the TLG file; right click on the file name and select 'Copy'. Please do not copy the backup file (QBB) as Qbox will not sync these files.
4. On the Qbox Explorer, select the Sync folder where the file needs to be copied, right click in the empty space on the right hand side, select 'Paste'. Wait for the confirmation message.
5. Change Qbox Sync Mode to Auto – syncing will start in a few seconds. If the Sync Mode is set to 'Manual', click the 'SYNC NOW' button to initiate sync.

#### Notes:

I. After copying a new file, wait for the files to sync and lock to release. Open the file from Qbox by double clicking on the file name in the Qbox Explorer, login and lock the file when prompted. Do not use the file from the old location as changes made to this file are not being synced and shared with other users. Use the file in Qbox only, going forward.

II. You can copy and replace existing QBW and TLG files with new versions of the files, provided the file is not locked by another user. Qbox will automatically lock the files and initiate sync when you change the Sync Mode to 'Auto' or when you click the 'Sync Now' button.

III. The TLG file you copied will be visible in the Qbox Explorer only when the 'Hide items not shared' option is unchecked under Settings/Explorer.

### **QuickBooks with Online Services**

If you are using Intuit Sync manager, Web Connector, Intuit Payroll, POS, Bill.com, import transactions from Banks and Credit Cards, or any other online services, please read the following important information:

1. To sync transactions from online services, first open the Company file in QuickBooks, lock the file and then manually sync with the online service.
2. Changes made to the Company file by the online service, without file lock, will not be synced. For this reason syncing with the online service should be done manually and initiated after the file is opened in QuickBooks and locked.
3. Online services integrated with QuickBooks may stop working when the Company file is moved to the Qbox Sync folder, and will need to be reconfigured to select the file in the new directory path.

### **QuickBooks Company Files in Multi-User Mode**

Users on a local network who need multi-user access to QuickBooks Company files, and also have a need to share the file with remote users, can set up Qbox MU on a Server or Peer computer. Qbox Explorers of each user display the same Sync folders and Company files, and users can open and work on the files concurrently in multi-user mode. The first user opening the file locks the file for the other MU users. When all users exit QuickBooks, Qbox on the computer of the user who locked the file will sync the changes and release file lock, so that remote users can lock and work on the file.

If Qbox MU cannot be setup, Qbox should be setup by one user only, who needs to first open and lock the file. Other users can then open the file directly from Windows. When all users logoff and close the file, Qbox on the first user's computer will sync the file and release file lock, so a remote user can get the lock to work on the file.

## **QuickBooks Attachments**

QuickBooks keeps the documents attached to transactions, in a specific folder structure, under a folder named 'Attach'. If you have been using attachments before setting up Qbox, this 'Attach' folder and all its contents need to be copied to the Qbox Sync folder where the Company file is now located. Copying needs to be done on the Windows explorer. If other shared users also need access to the attachments, this 'Attach' folder needs to be shared and enabled on Qbox. This can be done by Account owner or Team admins only, using the steps given below:

1. If there are existing attachments in QuickBooks, the Attach folder is already created:
  1. First make a copy of the 'Attach' folder and its contents to keep a backup, as a precaution.
  2. On the Qbox Explorer, under 'Settings', uncheck the box for 'Hide Items not shared', to make the Attach folder visible. Right click on the folder, select 'Share on Qbox' to add it to Qbox. Check the 'Hide items not shared' box.
  3. Sign into your account at the Qbox website <https://www.qboxplus.com> to access the Web Dashboard, and locate the Sync folder where the Attach folder has been added. On the three-dot Actions button for the associated 'Attach' folder, select 'Enable attachments'.
  4. Go to step 3.
2. If there are no existing attachments:
  1. Sign into your account at the Qbox website <https://www.qboxplus.com> to access the Web Dashboard, and locate the Sync folder where the QuickBooks company file is present. Create a new folder named 'Attach'.
  2. On the three-dot Actions button for the associated 'Attach' folder, select 'Enable attachments'.
3. If a shared user needs to add attachments, the user needs to be given Admin permission: click the 3-dot action menu for the folder. Then select the 'Share' option. Click the 3-dot action menu for the specific user to modify roles.
4. The Attach folder is by default shared with all the users who have access to the Sync folder. If a user needs access only to the contents of the Sync folder, and does not need access to the Attachments, they can be deleted only from the Attach folder. Click the 3-dot action menu for the folder. Then select the 'Share' option for the Attach folder, and delete the shared users who do not need access to attachments.
5. Restart Qbox Client to sync attachments to Qbox.
6. If the Shared user has existing attachments, the Attach folder in their Qbox folder will be renamed to 'Conflicted copy', when Qbox creates the Attach folder on their computer. They need to copy the attachments from the 'Conflicted copy' folder into the newly created Attach folder. This needs to be done on the Windows Explorer.

7. After the folders are copied, restart Qbox Client to sync the attachments to Qbox.

#### Notes:

- You will need one 'Attach' folder only for all the Company files in the same Sync folder, as QuickBooks keeps attachments for each Company file in separate folders, with the same name as the Company file, inside the Attach folder.
- Please be aware of the folder structure while copying attachments – QuickBooks will not display the attachments unless a specific structure is maintained under the 'Attach' folder.
- In the Auto sync mode, the attachments will sync immediately to other users, but these will not appear in their QuickBooks until the Company file is synced.
- In the Manual sync mode, the Company file and attachments will sync only when the 'Sync Now' button on the Qbox Explorer is clicked.

### QuickBooks Logos & Tax Forms

QuickBooks keeps logos and tax forms in a separate folder labeled '\*\*\*\*\*images' or '\*\*\*\*\*tax forms'. These folders along with their contents need to be copied to the Qbox folder where the Company file is located, to continue viewing them in QuickBooks. These folders and contents can be copied using File Explorer on the Windows side. They can also be shared with other users in Qbox by sharing them manually after enabling the hidden items.

## Qbox Operation

### Qbox Client

When you turn on your computer, Qbox client starts automatically and logs into the Qbox Cloud Server. You should see a green Qbox icon on your Windows System Tray, in the area next to the clock. You will also see the Qbox Explorer that displays the contents of the Qbox folder. If Qbox is not running, you can start it by double clicking on the large Qbox Client icon on your desktop, or by launching the Qbox application from the Windows Start menu.

### Open and Lock File

You can open a file in its supporting application simply by double clicking on the file in Qbox Explorer. The file can be displayed on the right hand side, by selecting the containing folder on the left hand side. When the file is opened, if no one else has locked the file:

- In the 'Manual Lock' mode, Qbox will prompt you to lock the file. If you plan to make changes to the file, select 'Yes' to lock the file. If you want to only view the file, select 'No' to decline file lock.
- In the 'Auto Lock' mode, Qbox will automatically lock the file, so you can make changes.

If another user has the file lock, Qbox will not let you lock the file. Changes you make to the file will be synced only if you have the file lock. If you make changes without the lock, these can be overwritten and lost when another user who has the lock syncs the file.

To view and change the Qbox Lock mode, go to 'Settings' on the Qbox Explorer, select 'Lock Mode' and select 'Auto' or 'Manual'.

Notes:

- i. In the case of QuickBooks, Qbox will prompt for lock only after you login to QuickBooks.
- ii. In the 'Manual Sync' mode, you can lock the file without opening it, by right clicking on the file and selecting 'Lock File'. You can use this feature if you have a need to lock and sync the version of the file on your Qbox without opening it.

## **Close and Sync File**

After you lock the file and make changes in its supporting application, close the file:

- In the Auto Sync mode, Qbox will initiate sync automatically and sync the changes made to the file. It will release the File Lock automatically when sync is completed.
- In the Manual Sync mode, click the 'Sync Now' button on the Qbox Explorer, to initiate sync of the changes made to the file.

To view and change the Qbox Sync mode, click 'Settings' on the Qbox Explorer and select 'Auto' or 'Manual'.

During the sync process, Qbox icon will first turn orange and then green with a circular arrow. File Lock will be released automatically when syncing is completed.

Notes:

- I. In the Manual Sync mode, when you initiate sync, all the files that are locked and closed, will be synced one by one.
- II. After syncing starts and the Qbox icon changes from orange to green, you can open the same file again and acquire file lock to continue working on it. Syncing of the previous version will continue in the background. Do not open the same file when the icon is orange as this may interrupt the syncing process.

## **Receive Changes Made to a File by Another User**

Changes made to a file by another user will be synced to your computer automatically. The file cannot be locked until sync to your computer is completed. If the file is open, Qbox cannot complete the sync, and will display a message informing you that new updates are available and asking you to close the file. Syncing will be completed within a few seconds after you close the file.

## **Create a Folder**

Please refer to the section under 'Create Sync Folders.'

## **Copy Files**

Please refer to the section under 'Copy Files to a Sync Folder.'

## **Qbox Administration and Configuration**

### **Invite Users to Share a Folder**

Account owners and Team members with admin permission can invite users to share Sync folders. Sign into your account at the Qbox website to access the Web Dashboard. Locate the folder and click the 3-dot action menu for the folder. Then select the 'Share' option. You can view the users who are already sharing the folder and enter the email addresses of additional users by clicking the '+Add' button. Set the Read-Only Role, if you don't want the user to make changes to the files in the folder. Set the 'Admin' Role to provide Admin privileges to the user for the shared folder. Admin users can create, rename, delete sub-folders, delete files, release file lock and roll back files in the shared folder. Admin option is not required for the users to make edits to the files.

### **Delete Users from a Folder**

To delete a user from a folder, sign into your account at the Qbox website to access the Web Dashboard. Locate the folder, click the 3-dot action menu for the folder. Then select the 'Share' option for the folder. Find the user and select the 3-dot action menu for that user and choose 'Unshare this folder'. Please note that the shared folders and files in the folder will be deleted on the user's computer. Files that have not synced to Qbox will also be deleted. If the user needs the files, make sure that they have made a copy of the files and saved them outside of Qbox folder before you delete them.

### **Leave (Stop Accessing) a Folder Shared with You**

To leave a folder, sign into your account at the Qbox website to access the Web Dashboard. Locate the folder, and click the 3-dot action menu for the folder. Then select the 'Share' option for the folder. Find your username and select the 3-dot action menu for that user and choose 'Leave this folder'. Please note that the shared folders and files in the folder will be deleted on your computer. Files that have not synced to Qbox will also be deleted. If you need the files, please make a copy outside of the Qbox folder before you delete your sharing.

### **Invite Team Members**

Account owners can invite company employees, who are on the same private email domain, as Team Members to provide access to all Sync folders and files. In addition, Team members can be made 'Admin' so they can perform administrative tasks like create folders, send invitations, release locks manually, roll back file and pay Qbox bills.

To invite or manage Team Members, sign into your account at the Qbox website, go to the 'People' tab at the top of the page. You can view current Team members and invite additional

Team Members by clicking on the '+Add' button and entering their email. You can set Admin Roles or make them 'Read-only'. Team members marked Read-only will not be able to make changes to any of the files shared with them.

### **Delete Team Members**

To delete a Team Member, sign into your account at the Qbox website, go to the 'People' tab at the top and locate the user. Click on the user's 3-dot action menu and choose the 'Delete' option. Please note that all folders and files will be deleted from the Team Member's computer.

### **Roll Back File to a Previous Version**

Qbox maintains 20 versions of a file in the Qbox cloud server. Account owners, Team members and Shared users with admin permission, can roll the file back to any previous version. When rolled back, Qbox will release any file lock that may be active and download the selected version of the file to the computers of all shared users.

To do a Roll back, sign into your account at the Qbox website, and on the Web Dashboard, locate the file. Click the file's 3-dot action menu and choose 'History' which will show the previous 20 versions of the file available in the cloud server. Select a version and click 'Roll Back' which will initiate the sync of the selected version.

### **Create Own Folders**

If you are sharing folders from another owner, you can create your own folders and send sharing invitations to users with whom you need to collaborate. Your Qbox Explorer will display the folders you are sharing from the other owner as well as your own folders, under different Root Folders.

To create your own folders, sign into your account at the Qbox website ([www.qboxplus.com](http://www.qboxplus.com)), on the landing page, click the '+Add' button in the upper right. You can then create your Root Folder, Regular Sync or Custom Sync Folders, and send sharing invitations to other users.

### **Enable Sync for Custom Sync Folder**

Qbox account owner or Team admin can enable sync for a Custom sync folder. To enable, sign into your account at the Qbox website ([www.coralteetech.com/qbox](http://www.coralteetech.com/qbox)), and go to the Custom Sync folders page. Locate the folder and click the Sync Enable box. Sync can be enabled for 1, 2 or 3 months. Or the Custom Sync folder can be upgraded to a Regular Sync folder.

### **Delete Files and Folders**

Files and folders can be deleted by the owner or Team admin on the Qbox Explorer or at the Qbox Web Dashboard after signing in at the Qbox website. To delete, find the folder or file and click on its 3-dot action menu, and select delete. Please note that the folder or file will be



deleted on all shared user computers. Use caution while deleting a folder, as the contents of the folder, including items that have not synced to Qbox, will be deleted.

### **Rename Folders**

Folders can be renamed by the owner or Team admin on the Qbox Explorer or at the Qbox Web Dashboard after signing in at the Qbox website. To rename, find the folder or file and click on its 3-dot action menu, and select rename. Enter the new folder name and click Update.

### **Restore Deleted Folders and Files**

Deleted folders and files are stored in the Qbox cloud server for 30 days from the date they are deleted, and can be restored during this 30 day period. To restore, sign into your account at the Qbox website, select the folder where the deleted folder or file was present and click on the 'Actions' menu in the upper right. Then select the 'Deleted Items' option. Find the folder or file you want to restore and select 'Restore'. The folder or file will be restored to all shared user computers. When a folder is restored, the contents of the folder will need to be restored again by following the steps given above.

### **Change Your Password**

To change your Qbox password, sign into your account at the Qbox website and on the Qbox Web Dashboard, click on your initials in the top-right and select 'Profile'. Click on the edit icon next to your password to change and save. Please note that when you change your password, Qbox Client running on your Windows desktop will restart and prompt you to login again with the new password.

### **Reinstall Qbox**

If your PC has been restored or if you have a new computer, you can reinstall the Qbox Client, and restore all your folders and files from the Qbox cloud server. Sign into your account at the Qbox website, click on your initials in the top-right, and select 'Download Qbox Client'. Run 'Setup.exe' and Install the client when prompted. Login with your email and password, and then select a location to create your Qbox folder. Qbox will then create the folders and sync your files from the cloud server.

If Qbox is already installed on your computer, downloading the Qbox client again will result in an error. First uninstall Qbox Client using the Windows Control panel, restart the computer, and install Qbox again following the steps mentioned above.

### **Setup Qbox on a Second Computer for the Same User**

Qbox needs to be set up with a unique email address on each Windows PC. If you want to access your Qbox folders and files from a second computer, you will need to use another email address for that computer. If you are the owner of the Qbox account, you can send an invitation

to your second email address from your account. If you are sharing a folder, the owner needs to send you another sharing invitation to the second email.

### **Auto or Manual Sync**

To configure Qbox to Auto or Manual Sync, select 'Settings' on the Qbox Explorer and select the desired Sync Mode. In the 'Auto Sync' mode, Qbox will sync a new file or a locked file automatically once the file is closed. In the 'Manual Sync' mode, the file will be synced only when the 'Sync Now' button is clicked. Use the 'Manual Sync' mode if you need the flexibility to initiate file sync only when you are ready. Please note that the lock will be released only after the file has been synced.

### **Pause Sync**

To pause all syncs, go to Settings and check the box named 'Pause' under Sync Mode. You can still open and lock files to work on, but sync will not start when you close the file. Use this option to save Internet data usage, as an example, when you are using a mobile hotspot. You can enable sync again when you are on a wired or wireless Internet, by unchecking the box.

### **Fast Sync**

If you have good Internet speed (more than 5mbps up and down) and a multi-core processor based computer, you can enable Fast Sync to increase sync speeds 2 to 4 times. To enable, select Settings on the Qbox Explorer, and check the box for the 'Fast Sync' option listed under the Advanced section.

### **Auto or Manual Lock**

To configure Qbox to Auto or Manual Lock, select 'Settings' on the Qbox Explorer and select the desired Lock Mode. In the Auto Lock mode, Qbox will lock the file automatically, when you open the file, provided no other user has locked the file. In the Manual Lock mode, Qbox will display a prompt for lock giving you the option to lock or not lock the file. Use the Manual Lock mode if you need the flexibility to just 'view' the file sometimes, without locking it. When you lock a file, Qbox will always sync the file after you close it, and release the lock only when sync is completed.

### **Qbox Messages**

To show or hide Qbox messages (bubble messages shown above the Qbox icon), select 'Settings' on the Qbox Explorer, and under 'Messages' check or uncheck 'Qbox Sync Messages'.

To show or hide Qbox tips (like QuickBooks company file back-up reminders), select 'Settings' on the Qbox Explorer, and under 'Messages' check or uncheck 'Qbox Tips'.

### **Qbox Explorer Auto Start**

Qbox Explorer starts automatically by default. To disable, select 'Settings', and under 'Explorer' uncheck 'Auto Start'. You can start Qbox Explorer manually when needed by double clicking on the Qbox icon on the Windows taskbar system tray, or by selecting 'Open Qbox Explorer' from the right-click context menu.

### **View or Hide Files Not Shared on Qbox**

Qbox explorer is by default set to show only the main shared files. This is particularly convenient for applications like QuickBooks which creates several files for each company. To show all the files and folders that are not shared, select 'Settings' on the Qbox Explorer, and under 'Explorer' uncheck 'Hide items not shared' option.

### **Keep Explorer Minimized**

Qbox Explorer can be minimized and not closed for easy access. To enable this feature, select 'Settings' on the Qbox Explorer, and under 'Explorer' check the 'Do not close' option. Uncheck this option to close the Explorer when 'X' is clicked. You can start the Explorer by double clicking on the small Qbox icon on the Windows taskbar system tray, or by selecting 'Open Qbox Explorer' from the right-click context menu.

### **Release File Lock Without Syncing Changes**

If you locked a file, made changes and do not want to sync the file, you can release the file lock and restore the last synced version of the file: on the Qbox Explorer, select 'Settings', and under 'Advanced' uncheck 'Hide advanced commands'. Right click on the locked file and select 'Releases Lock'. Qbox will release the file lock and restore the file to the last synced version. Keep the Advanced commands hidden by checking the box to avoid releasing the file lock inadvertently.

### **Restore File to Last Synced Version**

If you made changes without locking the file, you can restore the file to the last synced version: on the Qbox Explorer, select 'Settings', and under 'Advanced' uncheck 'Hide advanced commands'. Right click on the file and select 'Restore file'. Qbox will restore the file to the last synced version. Keep the Advanced commands hidden by checking the box to avoid doing a file restore inadvertently.

### **Qbox Recovery**

If you worked on a file in Qbox without locking it, and another user locked and synced the file, Qbox will copy the file on your computer first to the 'Qbox recovery' folder and then sync down the changes made by the other user. If you prefer to use the file you worked on, and not the one synced by the other user, you can recover the file from the Qbox recovery folder and replace the file in Qbox. The recovery folder, named 'Qbox Recovery' is located in the same directory as the 'Qbox' folder. Please note that Qbox maintains a maximum of two recovered files named copy 1

(most recent) and copy 2. If either of these files is the one you need, you can rename the file back to the original, and copy the files back into the Qbox Explorer to replace the file in Qbox.

Qbox recovery process does take additional storage space on your disk. To enable or disable recovery, select 'Settings' and under 'Advanced' check or un-check the box for 'Enable recovery'.

### **Move Qbox Location**

To move Qbox location, select 'Preferences' on the Qbox Explorer and select 'Move Qbox Location'. Qbox will prompt you to select the new location. Please make sure that there is no folder named 'Qbox' at the new location. After you confirm, Qbox will restart, create the Qbox folder at the new location and sync all the files from the cloud server. Please note that Qbox will not copy the folders or files that are not synced to the cloud server.

You can move the Qbox location only if none of the files are locked by you. If you have any locked files, first sync the files to release the lock, and then move the location.

If you have set up Qbox MU, the Move Qbox Location command will move the location for all the MU users, and after the move all the Qbox Explorers will point to the same Qbox folder again.

### **Change Qbox Account**

To change the email account used for Qbox on your computer, select 'Preferences' on the Qbox Explorer and select 'Change Qbox Account'. Qbox will delete the account setup on the computer, rename the Qbox folder to Qbox\_OLD, and prompt you to login again. After you login with your new email address and password, it will create the new account and sync the folders and files from the account to your computer.

### **Qbox Collaboration Suite (CS) Features**

Qbox also offers a host of online-only collaboration features that you can use with your clients, your internal teams, or both. These features will need to be manually enabled on your account to use.

These features include:

Client Portal:

- Clients can log in to the portal to view files, sign documents, and chat
- Edit documents from your browser
- Secure storage for client data

Signatures:

- Unlimited eSignatures for team members, clients, and partners
- Drag-and-drop editor to prepare documents for signature

- Audit trail for all signatures
- Only Account Owners and Team Admins can initiate eSignatures

#### Tasks:

- Assign tasks to team members and clients
- View task status in a Kanban board
- All team members can use Tasks

#### Chat:

- Securely chat with team members
- Chat one-to-one or in groups

#### Invoicing:

- Collect payments from clients using Stripe
- Use your own Stripe account
- View the history of payments requested and collected
- Invoicing is for Clients, so you can enable this only if the Client Portal is enabled
- Invoices can only be created by Account Owners and Team Admins

Collaboration features can be enabled by Qbox Account Owners by going to the Qbox web dashboard ([qboxplus.coraltreotech.com/manage\\_collaborations](https://qboxplus.coraltreotech.com/manage_collaborations)) and clicking '+Add Features' at the top-right.

Please note: You will only be able to add these features if you are currently paying for or have previously paid for your Qbox account.

For more, please see our guide here: [Enabling Collaboration Features.](#)

You can access guides on how to utilize each of these features here: [Qbox Collaboration Features](#)

## **Qbox CS AI Copilot Features**

### **AI Copilots**

Qbox AI Copilots enable users of Qbox CS Features to complete tasks faster and more efficiently, directly within the Qbox online platform.

### **Privacy**

Qbox utilizes a paid business license for ChatGPT, ensuring that all queries are processed under OpenAI's enterprise-grade privacy and data protection policies. All data sent during AI operations remains protected within each user's Qbox account.

### **Current AI Copilot Capabilities**

As of now, Qbox AI Copilots support the following key workflows:

- Smart Signature Placement - Automatically identify and insert e-signature fields at appropriate locations in eSign PDF documents.

Additional AI Copilots are under development and will be included in future releases.

## How AI Usage is Tracked

AI Copilot operations consume AI units (also referred to as credits), which are required for each AI-powered task. The number of AI units used is displayed at the end of every operation and automatically deducted from the user's available balance.

If there are no remaining credits, you will be prompted to purchase additional storage from the Storage page. Alternatively, you can wait for the end of the monthly billing cycle for more Credits to be added to your account.

To track how many remaining AI Credits you have, click your initials icon on the top-right of the Qbox website and select 'Qbox AI Credits - Complimentary'.

## AI Unit Allocation

Qbox provides AI units at no extra charge to paying customers, based on the following monthly entitlements:

<u>Trigger</u>	<u>Monthly AI Units Granted</u>
Each billable Folder (Sync Folder)	100,000 AI units
Each billable CS User	100,000 AI units
Every 10GB of additional storage	100,000 AI units

## Important Notes

- AI credits reset monthly — Unused credits expire at the end of each monthly billing cycle.
- New credits are credited on the 1st day of each monthly billing cycle.
- Non-transferable — AI units cannot be transferred, resold, or converted into cash.
- AI units are only usable for Copilot features within Qbox.

## Billing and Payments

Qbox account owners are billed for the number of Sync folders that have been shared, and the number of Attach folders created. Billing is done monthly, on the 'billing date', which is the date on which your account was created. Payment is due in 10 days from the date of billing. When a bill becomes due, Qbox will send an email notifying that payment is due.

Qbox uses the cloud to store copies of your synced files and recently synced versions of these files to facilitate file sharing with your users. Doing so uses storage space in the cloud. Each billable Sync folder is allotted 10GB of storage space in the cloud. If you go over your allotted storage space, you will be automatically enrolled in additional storage pools to make up for the difference between what you are allocated and what you are currently using. To see the current pricing for these storage pools, please see: <https://www.coraltreotech.com/qbox-pricing>

To make a payment, sign into your account at the Qbox Website, click on your initials in the top-right, and click on 'Billing and Payments'. On this page you can do the following:

1. **Pay bill**

To pay your bill that has become due, click 'Pay Bill' and make a payment by entering your credit card details. Qbox uses BrainTree to process your credit card payments.

2. **View Bills and Payments**

Click 'View Bills and Payments' and view your past bills, current bill if it is due, and the next bill. To view details of a bill, click 'View' for that bill. You can then view the Sync folders and Attach folders that are billed. You can change the billing cycle for a Sync or Attach folder, to monthly or yearly, by clicking on the billing cycle.

3. **Setup Autopay**

To setup automatic monthly or yearly payments, or change the credit card stored for automatic payments, click 'Setup Autopay' or 'Modify Autopay' and enter your credit card details. Your credit card details are stored in the BrainTree payment gateway, and will be charged on the date the bill becomes due.

4. **Setup Notifications**

Billing notifications including payment due and confirmation emails, are sent to the account owner's email address. Account owners can enter up to two additional email addresses, who need not be Qbox users, to receive these notifications as well. Enter the email addresses in the boxes provided and click 'Submit' to store activate alternate emails.

## **Close Account**

If you want to stop using Qbox and close your account, please follow the steps given below:

1. Exit the Qbox Client running on your computer and uninstall using Windows Control Panel.
2. Rename the Qbox folder – choose a different name so Qbox will not delete the files in the folders if it is started inadvertently.
3. Sign into your account at the website [www.qboxplus.com](http://www.qboxplus.com), click on your initials in the top-right, choose the 'Profile' option, and then click Close Account at the bottom.
4. Check the box to close shared user accounts. Shared user accounts will be closed if they are only sharing the folders you created.
5. On the next screen please provide a reason why you are closing your account. This will be very helpful for us to improve the Qbox product. Click Submit.

Your account will get suspended immediately, and syncing for the shared folders will be disabled. CoralTree Support will review your request and close the account within the next 48 hours.