Qbox User Manual

Version 7.1

Index

Introduction

What is Qbox?

Qbox is a cloud based collaboration resource that helps Windows PC users share folders and files over the Internet. It consists of two parts: Qbox cloud server and Qbox client running on Windows PC. After installation, Qbox creates a folder named 'Qbox', a Root folder and Sync folders of the account owner. Files in the Sync folders are synced and shared over the Internet.

To share a file, Qbox first syncs the file up to the Qbox cloud server over the Internet and then syncs it down to the Qbox folders on the other user's computer. Thus, Qbox makes sure that all users have identical copies of the file. When a user wants to make changes to a shared file, Qbox acquires a 'File Lock' for the user, so that only his or her changes are synced to the Qbox cloud. Other users can simultaneously view the shared 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. For sharing, files are synced from the cloud server to the shared user computers, over the Internet. The contents of the cloud server can be viewed on the Qbox Web Dashboard, after signing in at the Qbox website.
- Qbox Client program running on the users' computer, which locks and syncs the files from the computer to the Qbox cloud server. The Qbox Client program includes the Qbox Explorer, which is used to view 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 including Windows XP SP3, Windows Vista, Windows 7.X, Windows 8.X, Windows 10.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 from 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 along with the 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 (static 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

Qbox folder

Qbox folder is created when Qbox is setup on each shared user's PC. It is by default created under the 'My Documents' folder and contains Root folders and Sync folders. Users have the option to create the Qbox folder at any location of their choice during setup.

Root folder

Users setting up Qbox account create their own unique 'Root folder'. 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 other users with whom the owner is sharing the folders. Thus a user can be sharing Sync folders from multiple owners without confusion, 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

Qbox account owners can create Sync folders and invite other users to share the folders. When the invited users setup 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. The user who owns a Sync folder can also create additional sub-folders to organize files.

Qbox has two types of Sync folders: Regular Sync and Custom Sync

Files inside **Regular Sync folder**s are synced and shared always, in real time. These folders are used when files need to be changed and shared frequently, for continuous collaboration. They are billed monthly or yearly depending on user preference.

Files inside **Custom Sync folder**s are synced to the Qbox Cloud Server, but they are shared with other users only when sync is enabled. When sync is disabled, only the owner of the file, who first setup the file in the Custom Sync folder, is allowed to acquire lock and sync changes made. Other users will be able to view changes, acquire file lock or sync changes only when sync is enabled. These folders are used for files that need to be accessed by other users infrequently, as and when needed. They are billed only when sync is enabled. Sync can be enabled for 1, 2 or 3 months at a time.

Qbox Explorer

Qbox Explorer is a 'hybrid' display used for displaying the 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 shared files right on their desktop, without the need for logging into the Qbox Website. Folder and file operations done in the Qbox Explorer are reflected concurrently in the Qbox folder as well as the Qbox cloud sever. Files can be opened in their supported application simply by double clicking on the file names. Qbox Explorer is also used to select Qbox configuration options to suit the user's operational needs.

Qbox Icon

Once Qbox is setup, the Qbox Icon with the letter 'Q' inside a small square green box, is displayed on the Windows Task Bar notification area, 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 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://qbox.coraltreetech.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 by other users. Qbox account owners can perform administrative functions including:

- Create folders and send sharing invitations
- Force the release of 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 payment

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 setting up Qbox on their computers. Folders and files can be accessed only by the owner and by the users with whom they are shared.

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 lock, roll back files and pay bills for the owner's account.

Group Folder

Qbox folder can be setup in a 'Private folder' configuration or in a 'Group folder' configuration. In the Private folder configuration, the Qbox folder and its contents on a local or network drive can be accessed only by the user doing the setup. In the Group folder configuration, multiple users can setup a 'common' Qbox folder on a shared network drive. Qbox Explorer of each user in the group will display the contents and status of the same Qbox folder and files. Group folder configuration 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 in the group. It is also required if users need to work in multi-user mode on applications like QuickBooks or Microsoft Access, as each user can access the same file from the Qbox Explorer on their computer.

Set Up Instructions – users creating their own account

1. On your browser, go to the Qbox website at https://qbox.coraltreetech.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 temporary password.
3. Next, click 'Sign In', enter your email address and the temporary password, and then click 'Submit'.
4. On the subsequent screens, read and accept the 'End User License Agreement', create your permanent password, enter your company name and phone number.
5. On the next screen, create your folders:

    a.   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.

    b.   Next, add your Regular Sync folders and invite users to share by entering their email addresses in the boxes provided.

    c.   If required, add your Custom sync folders and invite users to share by entering their email addresses in the boxes provided. If you do not need Custom sync folder, leave the box blank.

6. On the next screen, click "Download" to install the Qbox Client on your computer. Click "Run" when the Windows dialog box appears and then select "Install".

    Notes:

    i.   If Windows only prompts you to 'Save', save the file and run it to initiate installation.

    ii.   Qbox may install Microsoft .NET framework if it is not already installed.

    iii.   If download was not successful, you can download the Qbox Client again from the Admin page on your Qbox Web Dashboard.

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. You can browse and select a different location if needed.

    To setup a 'Group Folder', click the 'Setup Group Folder' option. You can then browse and select a location on a network drive accessible to all users in the group. Enter a name for your group, which will be used for 'Locked by' information for file locks.

9. Qbox will then create the folder named 'Qbox' at the selected location, and create the Root folder, Regular Sync Folder or the Custom Sync Folders you created during setup.

10. You can now logout of the 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 Qbox 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:

–   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 a 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.

–   A small Qbox icon on the Windows System Tray, usually at the lower right on your desktop. It 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.

- 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 users and team members

1. On your browser, go to the Qbox website at https://qbox.coraltreetech.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 temporary password.
2. Click the 'Sign In', enter your email address and the temporary password you received, and click Submit.
3. On the subsequent screens, read and accept the 'End User License Agreement', create your permanent password, enter your company name and phone number.
4. On the next screen, click "Download" to install Qbox on your computer. Click "Run" when the Windows dialog box appears and then select "Install".

    Notes:
    i. If Windows only prompts you to 'Save', save the file and run it to initiate installation.
    ii. Qbox may install Microsoft .NET framework if it is not already installed.
    iii. If download was not successful, you can download the Qbox Client again from the Admin page on your Qbox Web Dashboard.
5. You should then see a Qbox client login prompt on your Windows desktop. Enter your email and the password you created.
6. Next, Qbox will display the default location where the Qbox folder will be created. You can browse and select a different location if needed.

    To setup a 'Group Folder', click the 'Setup Group Folder' option. You can then browse and select a location on a network drive accessible to all users in the group. Enter a name for your group, which will be used for 'Locked by' information for file locks.

    If the Group folder for your group is already setup by another user, Qbox will display the path and group name already created. You can then simply join this folder.
7. Qbox will then create the folder named 'Qbox' at the selected location, and create the Root folder, Regular Sync Folder and the Custom Sync Folders shared with you. If joining a Group folder already setup by another user, Qbox will display the contents of the folders already setup.
8. You can now logout of the Qbox Web Dashboard.

Qbox setup is now complete. If you have the latest files that need to be shared with the other users, these need to be copied to the Qbox 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:

- 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 a 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.
- A small Qbox icon on the Windows System Tray, usually at the lower right on your desktop. It 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.
- A larger 'Qbox Explorer' icon on your task bar. Clicking on this opens 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.

Create Sync folders

Qbox owners or Team admins can create additional Sync folders in the Qbox Explorer or at the Qbox website.
To create a Sync folder in the Qbox Explorer on your PC:

1. In the Qbox Explorer:
   a. On the left hand side bar, select Regular Sync or Custom Sync and select a folder where the new folder needs to be created.
   b. On the right hand side, right click on the empty space and select 'New Folder', enter the folder name, press Enter.
2. To share this folder:
   a. Sign into your account on the Qbox Website https://qbox.coraltreetech.com and access the Qbox Web Dashboard
   b. Select Regular Sync or Custom Sync, and on the left hand side bar, select the folder where the new folder is located.
   c. On the right hand side, click the 'Share' icon for the folder to open dialog box
   d. Enter the email ids of new users you want to invite to share the folder, click 'Send Invitation'

To create a Sync Folder at the Qbox Website:

1. Sign Into your account at the Qbox Website and access the Qbox Web Dashboard.
2. Select the Regular Sync or Custom Sync page:
   a. On the left hand side bar, select your Root folder or subfolder where the new folder will be created.
   b. On the right hand side, click the 'New Folder' button located at top right and enter the folder name in the dialog box. The dialog box also shows the current shared users, if any. Click 'Create'.
3. To share this folder
   a. Click on the 'Share' icon for the folder you created, to open dialog box

b. Enter the email ids of new users you want to invite to share the folder in the boxes provided, click 'Send Invitation'.

Note:

If you do not have your own folders, you can create them by first clicking the 'Create my folder' link on the Admin page. You can then create your own Root Folder, Regular Sync or Custom Sync folders, and send sharing invitations to other users.

Copy files to a Sync folder

Most files can be copied to a Qbox Regular Sync or Custom 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.

Copy QuickBooks Company files to Qbox

In the case of QuickBooks, Qbox syncs both the QBW and TLG files together as a group, so both these files need to be copied to the Qbox Sync folder. This can be done using any of the three 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:
    a. Set Qbox 'Sync Mode' to manual.
    b. 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.
    c. Initiate a restore of the Company file from the backup file you just created.
    d. When QuickBooks prompts you to select a location to save the file, select the Qbox Sync folder, by first selecting the Qbox folder, then the Root folder and finally the Sync folder. The directory path of these folders is displayed in the box at the top of the Qbox Explorer.
    e. Once the file is restored, close the file.
    f. 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.

g. 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.

h. Rename the Company file at the old location so that you will not open that file by mistake in the future.

i. Once the file has synced, start using the Company file that is now located in your Qbox.

2. Use the copy utility

a. On the Qbox Explorer, select 'File' and 'Copy QuickBooks files'

b. Select the drive where the QuickBooks Company file(s) are located and click 'Search'. This will list the QBW files found on the left hand side.

c. Select the files you want to copy by checking the box next to the file(s)

d. Select the Sync folder on the right hand side, by checking the box next to the folder.

e. Select 'Rename source file' option if you want to rename the file in the previous location after the files are copied.

f. Click 'Copy'. This will copy the selected QBW files, along with the TLG files to the selected Sync folder. If copy failed, it may be because the file is still open in QuickBooks - close the file and click Copy again to proceed.

3. Copy and paste files

a. On the left hand side, select the Sync folder where the file(s) need to be copied

b. 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'. On the Qbox Explorer, right click in the empty space on the right hand side, select 'Paste'. Wait for the confirmation message.

c. If Qbox Sync mode is set to 'Auto' the files will sync automatically in a few seconds. If the mode is set to 'Manual', click the 'SYNC NOW' button to initiate sync.

Notes:

I. The TLG file you copied will be visible in the Qbox Explorer only when the 'View shared files only' option is unchecked under Settings/Explorer.

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 'Sync Now' button.

QuickBooks special situations

Online services

If you are using Intuit Sync manager, Web Connector, Intuit Payroll or any other online services like Bill.Com, importing transactions from Banks and Credit Cards, 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 the file lock, will not be synced. For this reason the sync mode for the online service should be set to manual and sync should be 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 accessing the QuickBooks Company file in a multi-user mode can setup Qbox in a 'Group folder' configuration on a network drive. The Qbox Explorers of each user displays the same Sync folders and Company files, which can be opened by multiple users in the group simultaneously. The first user opening the file can lock the file for all users in the group. When all users logoff and exit QuickBooks, Qbox on the computer of the user who locked the file will sync the changes and release file lock.

If Group folder configuration cannot be setup, then 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 of the users logoff and close the file, Qbox on the first user's computer will sync the file and release file lock, so an external user can get the lock to work on the file.

QuickBooks attachments

QuickBooks keeps the documents attached to transactions, in separate folders under a folder named 'Attach'. This folders and all its contents need to be copied to the Qbox folder where the Company file is located, to continue viewing them in QuickBooks. The folder and its contents can be copied using the Windows explorer.

QuickBooks logos

QuickBooks keeps logos in image format, in a separate folder labelled 'Images'. This folder and its contents need to be copied to the Qbox folder where the Company file is located, to continue viewing them in QuickBooks. The folder and its contents can be copied using Windows explorer.

Group folder setup and operation

Qbox Group Folder is a common folder on a network drive which can be accessed by multiple users in the office simultaneously. Group Folder can be setup by:

1. Team owner and Team Members on a Local Area Network (LAN)
2. Users on a Local Area Network (LAN) invited to share the same folders by a single account owner

Note:

1. Group folder can only be setup by users on a private email domain.
2. Group folder option will be disabled if the 'Accept sharing invitations automatically' option is not checked. This option is set at the Qbox Website, on the Admin page, 'Preferences'.

Group Folder can be setup during first time installation, as described under setup instructions. If Qbox is already setup, you can switch to Group folder configuration using steps given below:

Team owner and team members on a Local Area Network

1. First, the Team owner needs to switch to the group folder configuration:
    a. On the Qbox Explorer, go to 'Preferences' and select 'Switch to Group Folder'. On confirmation, Qbox will restart and prompt you to select a location for the folder – select a location on your network drive which can be accessed by other users in the group using identical paths.
    b. Enter a name for your group, keep it short to less than 12 characters. This name is displayed for lock messages. Click Continue.
    c. Qbox will create the folders and sync the files at the new location selected.
2. Next, Team members can switch to the group folder configuration:
    a. On the Qbox Explorer, go to 'Preferences' and select 'Switch to Group Folder'. Qbox will display the folder already setup by the Team owner, and join the folder when you click 'Continue'.
    b. Once setup is completed, Qbox Explorer will display the folders and files already present in the Qbox folder.

Users on a Local Area Network invited to share the same folders by a single owner:

Team owner and team members on a Local Area Network

1. First, one of the invited users needs to switch to the group folder configuration:
    a. On the Qbox Explorer, go to 'Preferences' and select 'Switch to Group Folder'. On confirmation, Qbox will restart and prompt you to select a location for the folder – select a location on your network drive which can be accessed by other users in the group using identical paths.
    b. Enter a name for your group, keep it short to less than 12 characters. This name is displayed for lock messages. Click Continue.
    c. Qbox will create the folders and sync the files at the new location selected.
2. Next, other invited users can switch to the group folder configuration:
    a. On the Qbox Explorer, go to 'Preferences' and select 'Switch to Group Folder'. Qbox will display the folder already setup by the first invited user, and join the folder when you click 'Continue'.
    b. Once setup is completed, Qbox Explorer will display the folders and files already present in the Qbox folder.

Group folder operational details

1. A user in the group can switch back to 'Private folder' configuration, by selecting 'Switch to Private Folder' option under 'Preferences'.
2. As the folders and files in the Qbox folder are accessible by all the users in the group, an external user inviting one of the users to share a folder, will in reality share it with all the users in the group. If sharing has to be done privately, then the specific user will need to switch to a Private Folder.
3. All users need to have the 'Accept sharing invitations automatically' option enabled. This option is set at the Qbox website, on the Admin page, under 'Preferences'.

4. When one user locks a file, the file is locked for the group. Qbox Explorer displays the group name for the 'Locked by' information for easy identification. Group name is created at the time of setup and can be edited at the Qbox Web Dashboard, 'Profiles' page.
5. To sync a file in a 'multi-user' mode, all the users will need to exit the application before Qbox can sync the changes made to the file and release file lock.
6. When one user changes the Qbox Sync mode, it will be changed for all the users in the group.
7. When one user in the group relocates the Group Folder, it will be relocated for all the users in the group.

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, usually at the right hand bottom of your screen. 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:

a. 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.
b. 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 his or her changes.

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 it and selecting 'Lock File'. You can use this feature to edit file types that do not display a prompt for lock when opened. As an example, PDF and PNG files can be manually locked, edited and synced.

Close and sync file

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

a. 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.
b. 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.

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 ask you to close the file. Syncing will be completed within a few seconds after you close the file.

Create a folder

Please refer to section under 'Create Sync folders'

Copy files

Please refer to section under 'Copy files to a Sync folder'

Qbox Administration and Configuration

Invite users to share a folder

To invite users to share a Regular Sync or Custom Sync Folder you have already setup, sign into your account at the Qbox website, and locate the folder. Click the 'Share' icon for the folder. You can view the users who are already sharing the folder and enter the email addresses of additional users in the

boxes provided. You can set the R/O option, if you don't want the user to make changes to the files in the folder.

Delete users from a folder

To delete a user from a folder, sign into your account at the Qbox website, and locate the folder. Click the 'Share' icon for the folder and delete the user by clicking X. Please note that the shared folders and the files in the folder will be deleted on the user's computer. If the user needs the files, they need to copy them out of Qbox folder before you delete them.

Invite Team members

You can invite your company employees, who are on the same private company email domain, as Team Members to provide access to all your Sync folders and files. In addition, you can make them '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 Admin page and click on the 'Manage Team Members' link provided on the side panel. You can invite Team Members by entering their email id. You can set Admin privilege or mark them 'Read only' by checking the boxes provided.

Delete Team members

To delete a Team Member, sign into your account at the Qbox website, go to Admin page and on the side panel, click on 'Manage Team Members'. Delete the Team member. Please note that all folders and files will be deleted from the Team Member's computer.

Release File Lock manually

When a user locks a file, other users will be essentially 'locked out' until the file is synced and the lock is released. To recover from a lock out situation, the file lock can be manually released by the account owner, Team admin or by the user who locked the file.

To release a file lock, sign into your account at the Qbox website and locate the file on the Qbox Web Dashboard. Click the 'Lock Icon' for the file, and select 'Release Lock'. Please note that any changes made to the file by the user who locked the file, will not be synced and can be lost.

Roll back file to a previous version

Qbox maintains 20 versions of a file in the Qbox cloud server. Account owners or Team admins 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 'History' icon 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, go to the Admin page, and click 'Create my folders' link. 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, 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, make sure that the folder or file is displayed on the right hand side, right click on the name, and select delete. If the folder contains files and other folders, delete the contents first and then delete the folder.

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 'Deleted Items' link. Right click on the folder or file you want to restore and select 'Restore'. The folder or file will be restored to all shared user computers.

Change your password

To change your Qbox password, sign into your account at the Qbox website and on the Qbox Web Dashboard, click on 'Admin', which will show you the 'My Settings' page. Click on 'Change Password' to change your password. 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, go to the Admin page 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 setup 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.

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.

View shared files only

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.

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 inadvertently releasing the lock.

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 inadvertently restoring the file.

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 this is a single level recovery: the file in the recovery folder will be replaced if Qbox needs to do a recovery of the same file again. To enable or disable recovery, on the Qbox Explorer, 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 any of 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.

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 rename the previous folder to Qbox_OLD, and prompt you to login again. After you login with your new email address and password, it will create the folders and sync files of the new account to your computer.

Upgrade Qbox Account

Qbox Team and Basic plans can be upgraded to Qbox Plus. Qbox Pro plan can be upgraded to Qbox Team or Qbox Plus. To upgrade, sign into your account at the Qbox Website, go to the Admin page and click the 'Upgrade Account' link. Please note that only the Qbox Plus plan is available to new users signing up for Qbox.

Downgrade Qbox Account

Qbox Team plan can be downgraded to Qbox Pro. Qbox Pro can be downgraded to Qbox Basic. To downgrade, sign into your account at the Qbox Website, go to the Admin page and click the 'Downgrade Account' link.

Billing and Payments

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

To make a payment, sign into your account at the Qbox Website, go to the Admin page and click on 'Billing and Payments'. On this page you can do the following:

1. View Bills

    Click 'View Bills' 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 Regular Sync and Custom Sync folders that are billed. You can change the billing cycle for a Regular Sync folder, to monthly or yearly, simply by clicking on the billing cycle.

2. 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.

3. Setup automatic payments

   To setup automatic monthly or yearly payments, or make a change, click 'Edit' 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. Billing 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. Click the 'Edit' link and enter the email address in the boxes provided.