

Qbox MU for Multi-User QuickBooks

Users in an office working on QuickBooks company files in multi-user mode, can use Qbox to share the file with users who work at remote locations, like their accountants or employees who work from home. Users in the office need to setup Qbox MU configuration, while users at remote location can setup the Qbox SU configuration, which is the default.

Please note that, to use QuickBooks in multi-user mode, the company file needs to be located on a Windows server or a peer computer. The QuickBooks database manager needs to be running on the server or the peer computer hosting the file. The company file should not be located on a shared network drive (NAS), which cannot run the QuickBooks database manager, and will cause errors. Each user has QuickBooks desktop software installed on their work station, and have concurrent access to the company file, which is configured for multi-user access. If the file is hosted on the server, QuickBooks running on the individual workstations should not host the multi-user access. If the file is hosted on a peer computer, QuickBooks running on that computer should be set to host the multi-user access. Please refer to Intuit documentation for additional details on QuickBooks multi-user configuration.

Qbox MU configuration is designed strictly to conform to this requirement, so users can lock and work on the file concurrently, without any change in the way QuickBooks works.

Each user sets up Qbox on their work station in the MU configuration. Their Qbox Explorers point to the common sync folders on the server or peer computer. Company files in the sync folders can now be accessed by the users in MU concurrently, for multi-user access in QuickBooks. When one user locks the file, it is in effect locked for all the users in MU. When all the MU users logoff and close the company file, Qbox will sync the file to the cloud and to the remoter users. A remote user can then lock to work on the file, during which time the users in the office cannot work on the file. When the remote user closes the file, Qbox will sync their changes to the Sync folder in the office and release the lock. The MU users in the office can now lock and work on the file.

The following sections provide instructions for setting up Qbox MU configuration in the office. Qbox MU can be setup during first time installation. If Qbox has been installed already, the users can 'switch' to Qbox MU for multi-user access.

Create a folder for hosting the Qbox folders and files

Host on a Windows server

If you want to host Qbox folders on a Windows server, create a folder on the server, in a directory where all users have full access permission. If other multi-user company files are already hosted on the server, you could consider creating this folder in the same directory.

Please note that the server storage needs to be mapped to a drive letter like 'S:'. UNC mapping like [\\server1\](#) is not supported in Qbox. If the server has a UNC path, the folder you created on the server needs to be mapped to the same drive letter on each user work station. This can be done using the Windows drive mapping function available on the Windows Explorer.

Host on a peer computer

If you want to host Qbox on a peer computer, first decide which computer will be used. This computer needs to be running in the office for everyone to work on the files. Create a folder on this computer, under the user's Documents folder, and give it a name like "Qbox MU folder". Right click on the folder, select Properties, select Sharing, and add Everyone to the list. Select R/W permission for everyone.

Now this folder needs to be mapped to a drive letter like S:, on all the work stations. Before you begin, make sure that the drive letter you selected is available on the work stations. On the Windows Explorer, select "This PC" (or My PC) and click on the "Map network drive". Select a drive letter like S:, then browse and select, first the host computer on the network, and then the folder 'Qbox MU folder'. If prompted, enter the password for the user on the host computer. Check the box 'Reconnect at sign-in' and click Finish. Now you should see a drive with label S: on the work station. Repeat this mapping on each work station where Qbox MU will be installed.

Install Qbox MU

Qbox MU can be setup by the following types of users:

- a. An account owner and team members who are on the office network. All users need to be on the same private email domain.
- b. Users on an office network, invited to share the same folders by an account owner. These users need to be on a private email domain, which can be different from that of the account owner.

New installation – account owner and team members

Account owner

- Go to www.qboxplus.com, select Sign Up, enter your email and name. Enter an Associate code if you have one, and click continue to receive a temporary password sent to your email.
- Sign In again with your temporary password. In the next pages, agree to the End User License Agreement and change your password.
- Create your Root folder and Sync folders, enter email addresses of the users sharing the folder (do not enter team member emails here).
- Download Qbox Client, and run the Setup.exe file.
- Login when prompted with your email and password you created.
- Qbox will prompt you to select a location for the folder. Click the "Set up Qbox MU" link.

- Browse and select the folder on the server (Qbox MU folder) or the mapped drive (S:) you created on your work station in the previous section.
- Qbox will create your Root folder and Sync folders in the selected location.
- Qbox Explorer will display (MU) next to the Qbox Explorer title.
- At the Qbox Web Dashboard, click on Admin, and then Manage Team Members.
- Enter the first part of the email of your team members and click "Send Invitation".
- The team members will get email invitations to setup their accounts. Go to the next section for setting up the team members.

Team members

- Go to www.qboxplus.com, select Sign Up, enter your email and name, and click continue to receive a temporary password sent to your email.
- Sign In again with your temporary password. In the next pages, agree to the End User License Agreement and change your password.
- Download Qbox Client, and run the Setup.exe file.
- Login when prompted with your email and password you created.
- Qbox will prompt you to select a location for the folder. Click the "Set up Qbox MU" link.
- Qbox will display the folder path already created by the account owner. Click continue to join the folder.
- Qbox Explorer will display (MU) next to the Qbox Explorer title.

Qbox MU installation is now completed. You can copy the QuickBooks Company file into the Sync folder at any of the work stations. After the file syncs, open the file, lock it and configure the file for multi-user access, so the other users in the MU group can work on the file concurrently.

New installation – users invited to share a folder

First user

- Go to www.qboxplus.com, select Sign Up, enter your email and name. Enter an Associate code if you have one, and click continue to receive a temporary password sent to your email.
- Sign In again with your temporary password. In the next pages, agree to the End User License Agreement and change your password.
- Download Qbox Client, and run the Setup.exe file.
- Login when prompted with your email and password you created.
- Qbox will prompt you to select a location for the folder. Click the "Set up Qbox MU" link.
- Browse and select the folder on the server (Qbox MU folder) or the mapped drive (S:) you created on your work station in the previous section.
- Qbox will create your Root folder and Sync folders in the selected location.
- Qbox Explorer will display (MU) next to the Qbox Explorer title.

Other users

- Go to www.qboxplus.com, select Sign Up, enter your email and name, and click continue to receive a temporary password sent to your email.
- Sign In again with your temporary password. In the next pages, agree to the End User License Agreement and change your password.
- Download Qbox Client, and run the Setup.exe file.
- Login when prompted with your email and password you created.
- Qbox will prompt you to select a location for the folder. Click the "Set up Qbox MU" link.
- Qbox will display the folder path already created by the first user. Click continue to join the folder.
- Qbox Explorer will display (MU) next to the Qbox Explorer title.

Qbox MU installation is now completed. You can copy the QuickBooks Company file into the Sync folder at any of the work stations. After the file syncs, open the file, lock it and configure the file for multi-user access, so the other users in the MU group can work on the file concurrently.

Switch existing users to Qbox MU

If you have already installed Qbox, you can switch the users to Qbox MU to be able to get multi-user access to QuickBooks files. As mentioned before, the users need to be on the same private email domain to be able to switch to Qbox MU.

First user

- Make sure that any file locked by you has synced to avoid inadvertent data loss. It is ok to switch to MU if any file is locked by a user who is not going to be part of the MU group.
- On the Qbox Explorer, select Preferences and click Switch to Qbox MU.
- Browse and select the folder on the server (Qbox MU folder) or the mapped drive (S:) you created on your work station in the previous section.
- Qbox will restart and create your folders and sync the files in the selected location.
- Qbox Explorer will display (MU) next to the Qbox Explorer title.

Other users

- Make sure that any file locked by you has synced to avoid inadvertent data loss. It is ok to switch to MU if any file is locked by a user who is not going to be part of the MU group.
- On the Qbox Explorer, select Preferences and click Switch to Qbox MU.
- Qbox will display the folder path already created by the first user. Click continue to join the folder.
- Qbox Explorer will display (MU) next to the Qbox Explorer title.

Switching to Qbox MU is now completed. You can open a file, lock it and configure the file for multi-user access, so the other users in the MU group can work on the file concurrently.