Using Box.com for Membership Information

**View Only:**

* Owner
  + Invite person as collaborator to file or folder. Select their email address that will be used for viewing. Be sure to select “Viewer” in dropdown box.
* Viewer
  + Access Box.com via internet using any browser (Chrome, Firefox, IE, Safari, etc)
  + Select “Create Account”
  + Enter email address and password.
  + Once account information is accepted, go to personal email and open Box invitation.
  + Click on accept invitation to view.
  + Next, access Box.com and log in using your email address and password.
  + Put in a “Bookmark” for Box.com is desired.
  + Download the file named Branch 116 Database.xlsm by right clicking on filename and selecting “Download.” Note: opening the file with the online viewer does not allow you to run reports. You must download the file.
  + Click on various reports to obtain needed data.

**Full Editing Privileges:**

* Owner
  + Invite person as a Collaborator via email address
* Editor
  + Access Box.com via internet using any browser (Chrome, Firefox, IE, Safari, etc)
  + Select “Create Account”
  + Enter email address and password.
  + Once account information is accepted, go to personal email and open Box invitation.
  + Click on accept invitation to gain access.
* Editing Information
  + There are two programs available to edit data in the database, Box Sync and Box Edit. The online viewing functionality built into Box.com will not work. You must open the database in Excel to use the forms and reports.
    - ***Box Sync*** creates a folder on your hard drive that will synchronize with the latest files online. You may view and edit the files stored in the Box Sync folder by opening them in Excel. Any changes made to files in your Box Sync folder will automatically be uploaded to Box.com.  
      * **To Install Box Sync:**
      * Access box.com and sign into your account
      * Click on small down arrow by your account name in upper right hand
      * In dialog box select “Get Box Sync”
      * On next page select “Box Sync” in Window labeled “Get Box Sync for Windows”
      * Install program. Once installed a window should open asking you to log into Box. Enter your email address and password.
      * IMPORTANT: Your BoxSync folder will be installed as C:\User\”your name”\Box Sync. If you wish to move the folder to another location, you only get one chance to move it.
      * When you get the window indicating “Welcome to Box Sync” there will be lettering at the bottom “Customize Folder Location” Click on that to move the folder.
      * When dialog box opens, select your desired folder location.
      * Otherwise click on the “Start Syncing” bar.
      * A folder (really a shortcut) will appear on your desktop named Box Sync. Files in this folder will automatically sync with the online files.
      * To populate the folder, sign into your account at Box.com. Click on the folder to show the files.
      * Click on the tab labeled “more” and select “Sync to computer” A warning message will appear and select “yes”
      * Now the files will be added to your Box Sync folder and synchronized with the latest online files at all times. Changes you make to these files will be reflected in the online versions.
    - **Box Edit** is a program that allows you to open the files online with Excel and make your changes in the cloud.
      * **To Install Box Edit:**
      * Go to <https://cloud.box.com/download-box-edit/>
      * Download and install Box Edit for windows.
      * Access Box.com and *right click* on the desired file.
      * The dialog box should show “open in Excel” as the first option.
      * Select “open in Excel” and generate reports, make changes, etc. Be sure to save the file.
      * All changes will be reflected in the online files.
      * Note: all work is being done in the cloud without any downloads to your computer.