# Shelter ® ZOOM





Document GPS

Encrypt, track and recall your email attachments.

This document is designed to help you install and make the most of our features.

Features & Key Benefits: visit <u>shelterzoom.com/document-gps</u>

Please choose the appropriate link below based on your email platform:

# **Installation Process**

- <u>Gmail</u>
- Outlook for Individual Users (<u>Web App</u>, on <u>Mac OS</u>, on <u>Windows</u>)
- Enterprise: Admin Panel
- Enterprise: <u>Outlook Admin Users</u>

You can also download the Document GPS app on your mobile device.

- <u>App Store</u>
- <u>Google Play Store</u>



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**Installation Process for Gmail** 

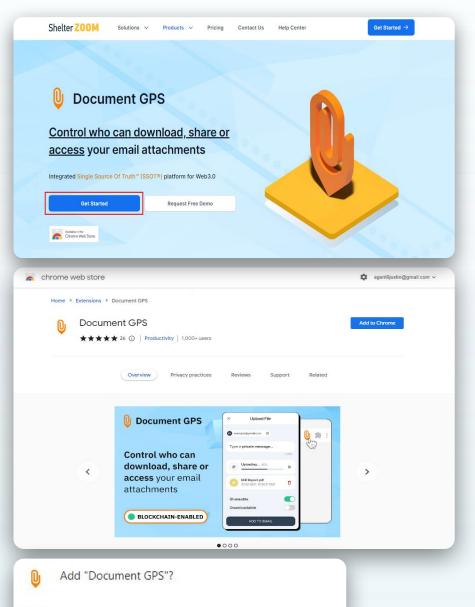
- An updated Google Chrome. To check your version of Chrome ٠
  - On your computer, open Chrome •
  - At the top right, look at the three (3) vertical dots ٠
  - Click Help > About Google Chrome ٠
  - It should show a message that "Chrome is up to date" ٠
- An active Gmail account ٠

# How to Install:

Go to Chrome Web Store. 1.







- 3. In the dialogue box that says "Add Document GPS" click on Add extension
- After installation a confirmation screen shows 4. "Document GPS has been added to Chrome".
- Go back to Gmail and refresh your screen. 5.

	Add extension Cancel
Q	Document GPS has been added to Chrome
	Manage your extensions by clicking Extensions in the Tools menu.
To get y	rour extensions on all your computers, turn on sync



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#### It can:

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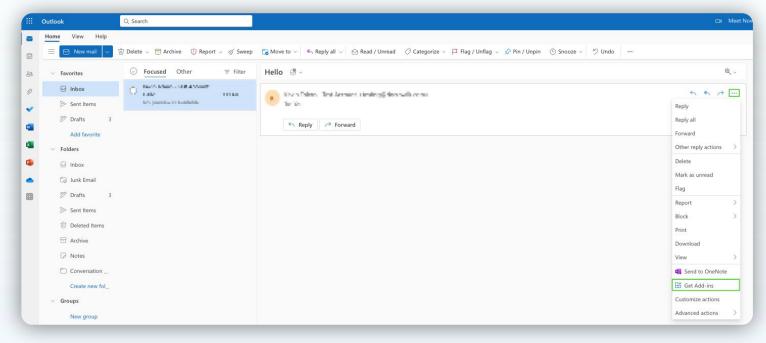
Installation Process for Outlook Web App (Individual Users)

To be able to use Document GPS:

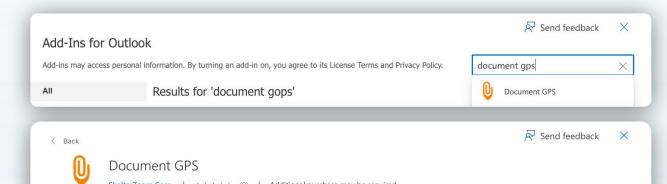
- An active Microsoft 365 account (Outlook)
- The add-in can be accessed either through:
  - Outlook on the Web app (<u>https://outlook.live.com/mail/0/</u>)
  - Microsoft Outlook Desktop (on Windows or in Mac OS)



- 1. Go to <a href="https://outlook.live.com/mail/">https://outlook.live.com/mail/</a> and Sign In
- 2. Click on any email on your Inbox. Click on the three dots, then Get Add-ins



3. Search for "Document GPS" and click on Add.

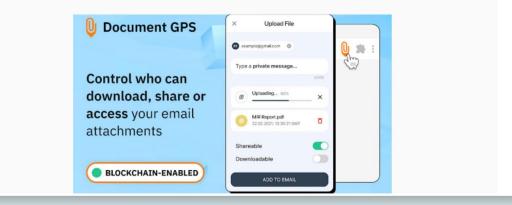




ShelterZoom Corp. | ☆☆☆☆☆ (0) | Additional purchase may be required

By clicking on add, you agree to the add-in's License terms and Privacy policy

#### Add



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**RETURN TO** 

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**Document GPS** Encrypt, track and recall your email attachments.

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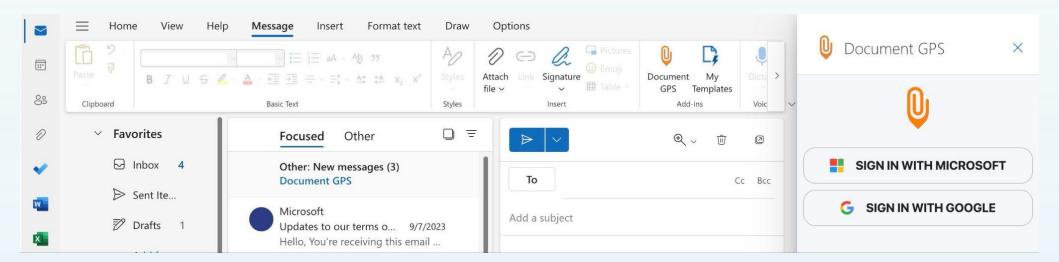
Installation Process for Outlook Web App (Individual Users)

If the Document GPS icon does not readily appear in the ribbon, some Outlook settings may be changed:

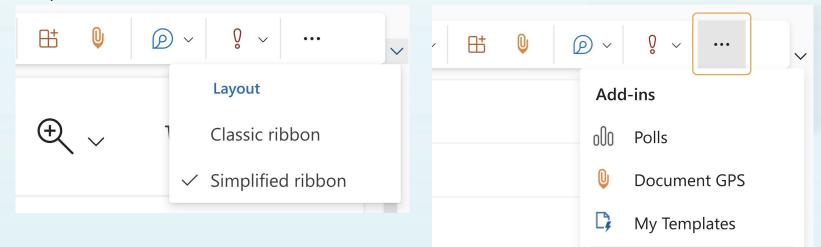
- 1. Click the gear icon (upper right-hand corner) for Outlook Settings > View all Outlook settings
- 2. Choose Mail > Customize actions > Toolbar. Tick 🔽 Doc GPS. Save changes and reload the page.

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- 3. Document GPS will be visible in the ribbon when **creating New Mail** 
  - Classic ribbon



• Simplified



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Installation Process for Outlook on Mac OS (Individual Users)

## NOTE:

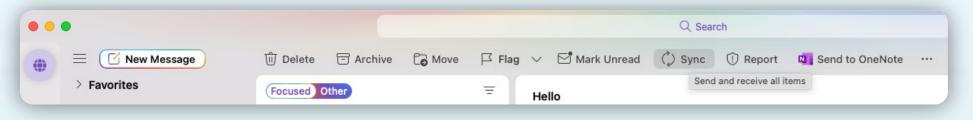
- If you have installed the add-in on your Outlook for Web, it will automatically be installed on your Outlook Desktop, provided that both are associated with the same email account.
- The interface may vary depending on the layout and version of your Outlook.
- 1. Go to **Applications** and look for **Microsoft Outlook**.
- 2. Once it's opened, click on "New Message," then click on the three dots and select "Get Add-ins."



3. Search for "Document GPS" and Click on "Add."

•	Office Add-ins	
ADD-INS FOR	OUTLOOK	
Add-ins may a	access personal information. By turning an add-in on, you agree to its License Terms and Privacy Policy.	document gps $ imes$
All	Editor's Choice	Document GPS
My add-ins	We recommend this great collection of add-ins for you to get started.	
		Show all results
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U	Document GPS <u>ShelterZoom Corp.</u>   ***** (0)   Additional purchase may be required	
	By clicking on add, you agree to the add-in's <u>License terms</u> and <u>Privacy policy</u>	
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	Document GPS × Upload File	
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	attachments	

If the add-in was installed on your Outlook for Web, the add-in will automatically be installed on your Outlook Desktop. If not, on the top screen click on "Sync."



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Installation Process for Outlook on Windows (Individual Users)

## NOTE:

- If you have installed the add-in on your Outlook for Web, it will automatically be installed on your Outlook Desktop, provided that both are associated with the same email account.
- The interface may vary depending on the layout and version of your Outlook.
- 1. Open Microsoft Outlook
- 2. Once opened, select any message on the inbox. Click on the three dots, then choose Get Add-ins.

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Conversation Hist	Document GPS	The following SECURE attachment(s) have been shared with you.	Download
C RSS Feeds	Justin Lopez has invited yo Tue 1:42 AM The following SECURE attachment(s) have b		View
Create new folder V 83 Groups		Click to access.	
New group	May		Send to OneNote
add account	Justin Lopez Bulk Send 2023-05-26 Gartner Hype Cyde for Web3.0 and Blockch	DOCX.docx(5MB)	🗄 Get Add-ins
Upgrade to Microsoft	Justin Lopez 18 recipients 2023-05-02 Gartner Hype Cycle for Web3.0 and Blockch		Customize actions
365 with premium Outlook features	April		Advanced actions

3. Search and select **Document GPS.** Click on **Add.** 

Add-Ins for Outl	ook		🛜 Send feedback	×		< Back			
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All	Editor's Choice		Document GPS		*		By clicking on	add, you agree to the add-in's <u>Licen</u>	nse terms and Privacy policy
My add-ins	We recommend this great colle	Show all results				Auu			
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	Always stay on top of your inbox Snooze emails and turn them into tasks.	Create and prioritize tasks from email. Access contextually relevant items. Free to use in Outlook.	#1 Salesforce integration solution that actually works. Salesforce Inbox alternative					Control who can	Type a private message
	Additional purchase may be required	Additional purchase may be required	Additional nurchase may be required						

Tasks in a Box for Outlook	Priority Matrix: Turn emails into tasks	Revenue Grid for Salesforce CRM
Always stay on top of your inbox. Snooze emails and turn them into tasks.	Create and prioritize tasks from email. Access contextually relevant items. Free to use in Outlook.	#1 Salesforce integration solution the actually works. Salesforce Inbox alternative
Additional purchase may be required	Additional purchase may be required	Additional purchase may be required
Add Trustifi for Outlook – Secure and Productive	Add Leave Request for Outlook	Add
Get true email power with encryption, controlling, tracking and certified email.	Request, track, approve and manage the requested. Easy to use, configured, and very flexible	
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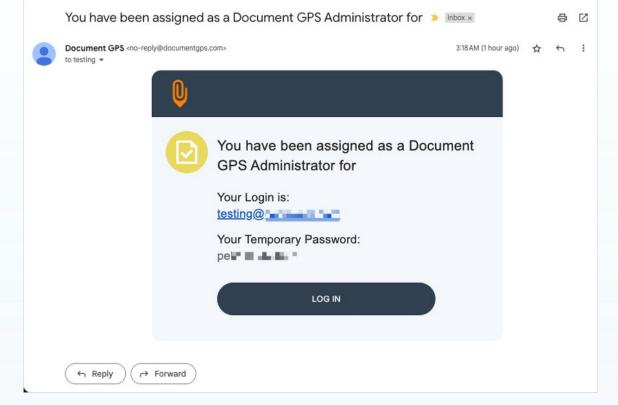




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Admin Panel for Enterprise

1. The assigned admin for the Enterprise account will receive an email with a link to log in to the Document GPS Admin Panel. Click on the link to be taken to the login page.



- 2. Enter the email address and temporary password provided in the email.
- 3. Once logged in, you will be prompted to change your password. Enter your desired password and click Change Password.
- 4. You will now be taken to the main interface. On the right side of the screen, you will see two icons: **Add User** and **Upload Users**.
  - Add User allows you to add a new user by entering their first name, last name, and email address. The phone number is optional.
  - **Upload Users** using CSV allows you to import a list of users from a CSV file. Click <u>here</u> for more instructions.
- 5. Once you have added a user, they will appear in the list. See the screenshot below for an example.

First Name 🛧	Last Name	Email Address	Status	Phone Number	Storage Used	
Hello	Test	hello@test.com	Active	+1 (234) 567-8900	0.0 GB 🖍	

- 6. To edit the information of the user, click on the pencil icon on the right side.
- 7. To disable the user, toggle the Status from Active to Inactive.

First Name 🛧	Last Name	Email Address	Status	Phone Number	Storage Used
Hello	Test	hello@test.com	Inactive	+1 (234) 567-8900	0.0 GB

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Select add-in

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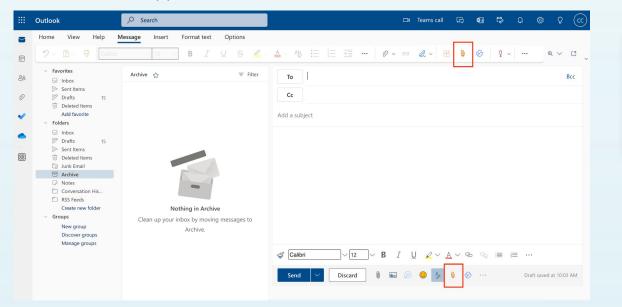
Installation Process for Outlook Admin Users (Enterprise)

- 1. Sign in with your Microsoft account. Note that, the admin should be the one logged in. <u>https://outlook.live.com/mail/0/</u>
- On the top left corner, you will see a square with 9 dots. Choose Admin. 2. .... ::: Microsoft 365  $\rightarrow$ Outlook The next screen shows the Microsoft 365 Admin Center. 3. Apps Outlook OneDrive Click the Navigation menu on the upper left corner of the Admin Center. 4. Word X Excel .... Microsoft 365 admin center N OneNote PowerPoint Navigation menu m Corp.  $\equiv$ Teams SharePoint A Admin Go to Settings > Integrated Apps. In the Integrated apps screen, click Add-ins. Bookings 5. 慾 Settings  $\wedge$ Domains Search & intelligence Deploy a new add-in Org settings Integrated apps Deploy from the Store Get solutions tailored to your industry that work with the products you already use Choose from the Store On the next screen, click Deploy Add-in > Next. Choose from the Store. 6.
- 7. On the Search box, type in Document GPS. Click on Add, then Continue.

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Configure Add-in screen > Choose User Assignment (Everyone, Specific Users) > choose Deployment Method (Fixed, Available, or

- Optional) > hit Deploy at the bottom > Next > Close
- 9. After a few hours or the next day, check Outlook Mail for successful installation. Some settings need to be configured to make the Document GPS appear in the ribbon, as shown below.





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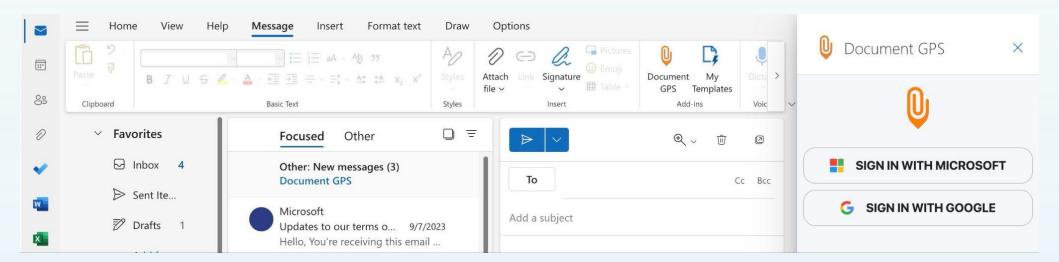
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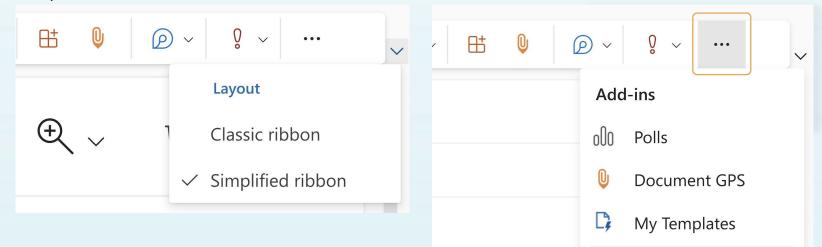
- 1. Click the gear icon (upper right-hand corner) for Outlook Settings > View all Outlook settings
- 2. Choose Mail > Customize actions > Toolbar. Tick 🔽 Doc GPS. Save changes and reload the page.

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