Document GPS

USER GUIDE

Email extension that gives senders the power to stop recipients from downloading or sharing attachments even after they have been sent. This lets you revoke sent attachments and see each time someone opens, downloads or shares your attachments with real time reporting.

Every attachment is automatically tokenized and encrypted with enhanced security.

In the lower right corner of each slide, you'll find the following feature:
Simply click on it, and you'll be seamlessly redirected back to this page!
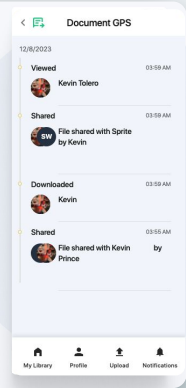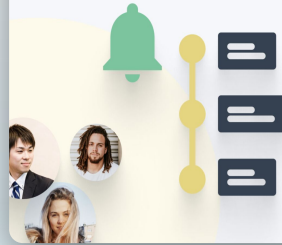
Document GPS is an email extension that enables senders to track, modify or delete already sent email attachments, even if they have been opened by the recipient.
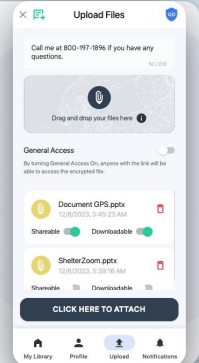
Manage, track and gather analytics in your Attachments Library

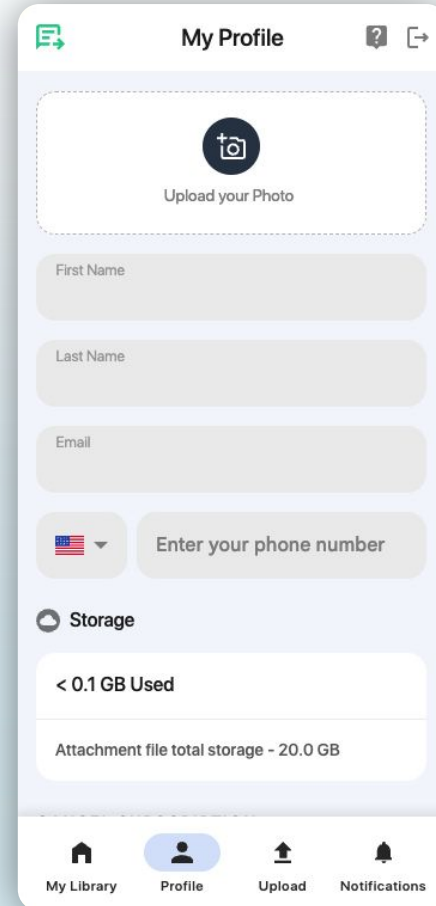My Library

Search

Documents | Envelopes

DATE CREATED ↓

Document GPS.pptx

Document GPS

Download

Request Access

Request Add User

Manage eTags / Envelopes

Manage Recipient

Delete from my library
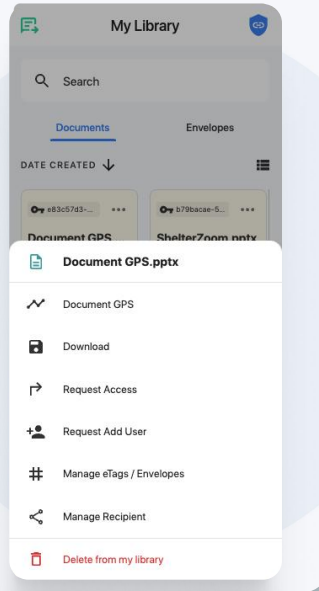
See who has downloaded and shared your attachments in real time

Document GPS
12/8/2023
Viewed 03:59 AM
Kevin Tolero
Shared 03:59 AM
File shared with Sprite by Kevin
Downloaded 03:59 AM
Kevin
Shared 03:55 AM
File shared with Kevin by Prince

My Library | Profile | Upload | Notifications

Control who can download and share your attachments

XLS GIF PNG
JPG PPT DOC

Upload Files

Call me at 800-197-1896 if you have any questions.

Drag and drop your files here

General Access

By turning General Access On, anyone with the link will be able to access the encrypted file.

Document GPS.pptx
12/8/2023, 3:49:23 AM
Shareable   Downloadable

ShelterZoom.pptx
12/8/2023, 3:39:16 AM
Shareable   Downloadable

CLICK HERE TO ATTACH

My Library | Profile | Upload | Notifications

Shelter **ZOOM**

- At the bottom of the application, click on ⊙ to pull-up **My Profile** screen

- Click 📷 to upload profile avatar.

- First Name, Last Name, Email and Phone Number will be shown here.

- File size allocation and limit is shown in **Storage**

👆 User can only upload pictures up to 2MB

My Profile

📷
Upload your Photo

First Name

Last Name

Email

🇺🇸 ▾   Enter your phone number

☁ Storage

< 0.1 GB Used

Attachment file total storage - 20.0 GB

🏠 My Library   👤 Profile   ⬆ Upload   🔔 Notifications

Shelter ZOOM

To open the **Document GPS extension:**

1 On Gmail, click **"Compose"**.
On Outlook, click on "**New Mail**"

2 Gmail – the Document GPS icon is beside the Send button.
Outlook - the Document GPS icon is on the Add-ins

ShelterZOOM
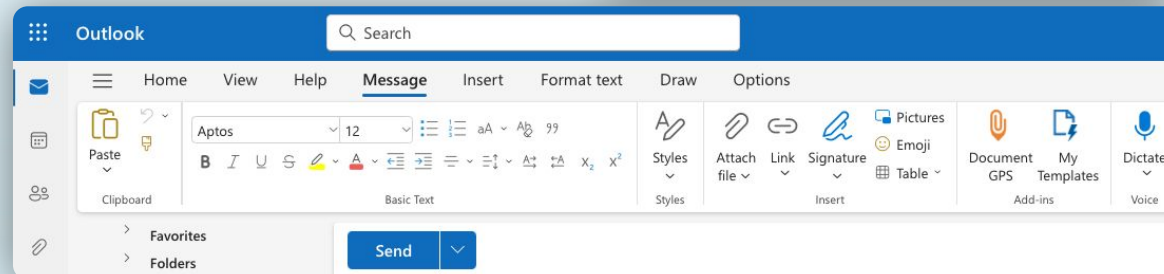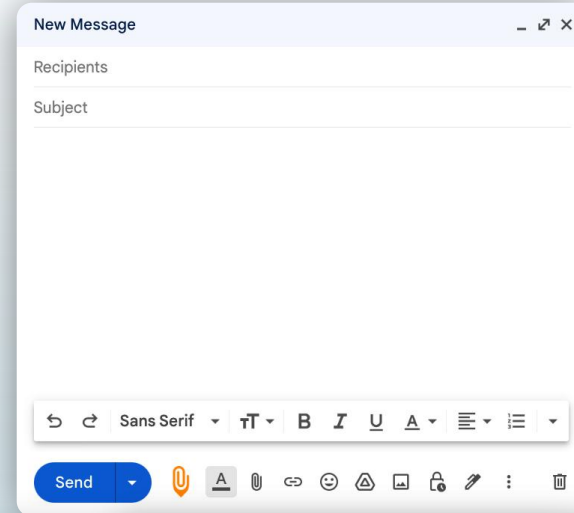
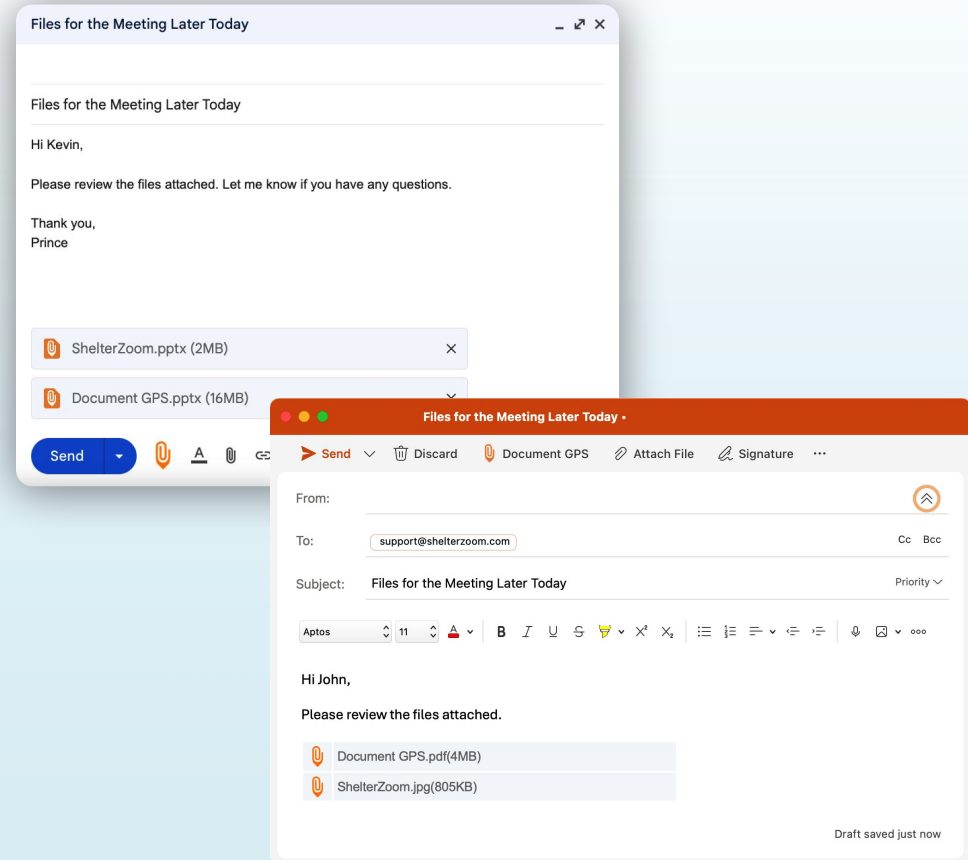To attach a file in the email:

1 On the **Upload File** box, choose a file(s); or click and drag the file(s) to upload.

2 The user has the option to add a private message

3 Turn on or off toggle option for General Access.
This allows anyone with the link to view file(s) without signing into the account.

4 Turn on or off toggle options for permissions (Shareable/Downloadable)

**5** Finalize the attachment by clicking   CLICK HERE TO ATTACH
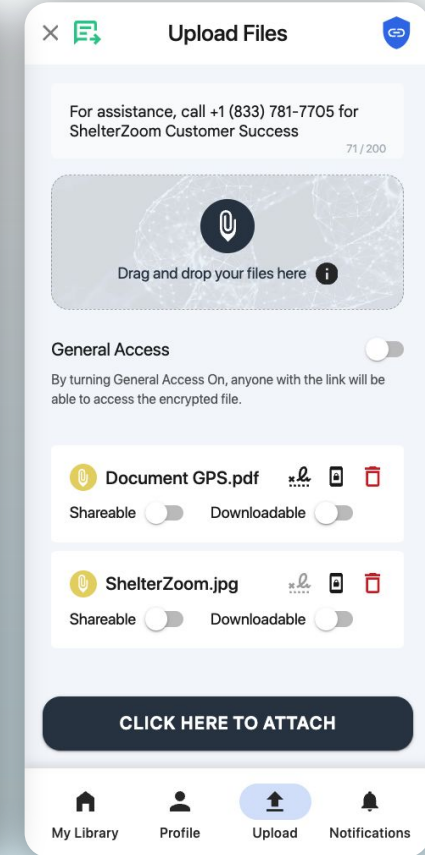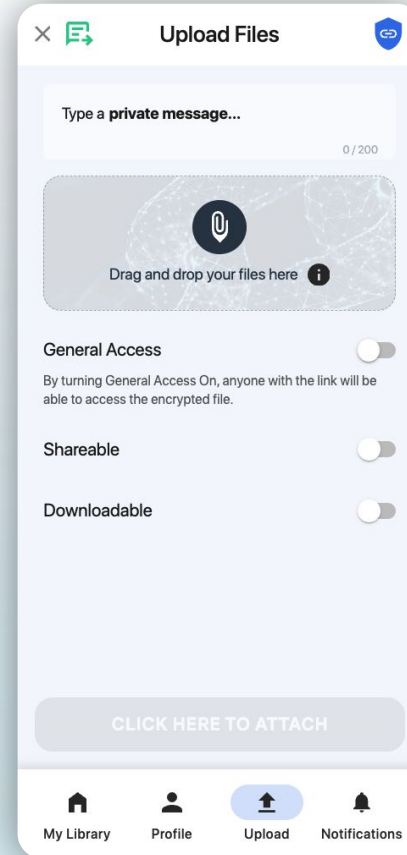
To send the attachment(s):

1 Once the file(s) are uploaded, enter the email address of the recipients (either in To, CC or BCC) and the email subject.

2 Click the **Send** button.

- The user can upload up to 30 files at once
- Maximum file size for uploading is 65 mb
- Attachment files can be sent and viewed by non-Gmail and Outlook email domains

Files for the Meeting Later Today

Files for the Meeting Later Today

Hi Kevin,

Please review the files attached. Let me know if you have any questions.

Thank you,
Prince

📎 ShelterZoom.pptx (2MB)   ✕

📎 Document GPS.pptx (16MB)

Send

Files for the Meeting Later Today •

➤ Send   ∨   🗑 Discard   📄 Document GPS   🔗 Attach File   ✎ Signature   ⋯

From:

To: support@shelterzoom.com   Cc   Bcc

Subject: Files for the Meeting Later Today   Priority ∨

Aptos   11   A   B I U S ⌇ ☰ ⌐ ⌐ 🎤 🖼

Hi John,

Please review the files attached.

📎 Document GPS.pdf(4MB)
📎 ShelterZoom.jpg(805KB)

Draft saved just now

- Files that were created, sent, and received will appear in **Documents**.

- **Date Created** view option enable users to sort documents by date created.

- Sent and received attachments will appear in My Library as document cards.
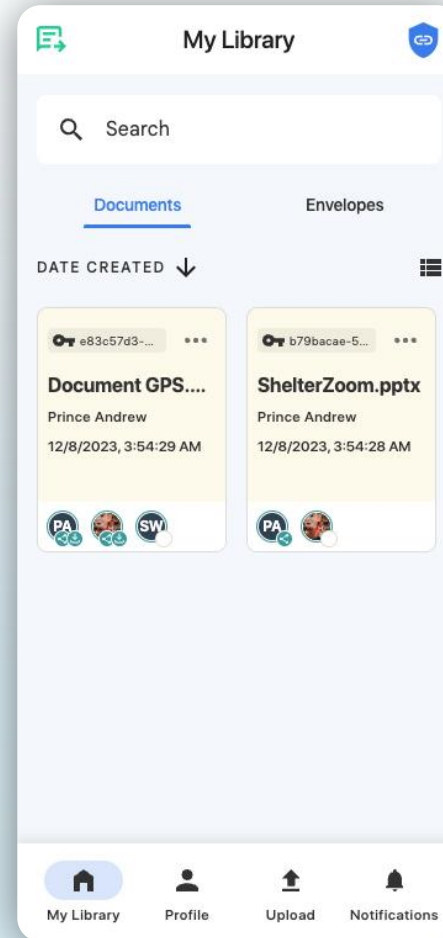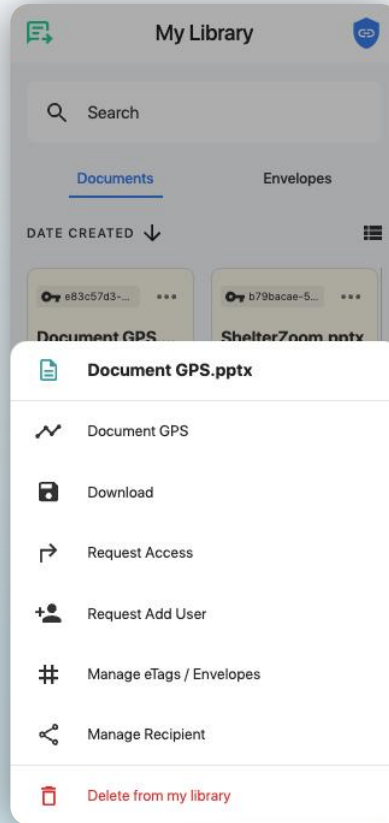

- Fill-in the name of the file to search.

- Envelopes are organized folders based on the eTags added to the document.

- Users can choose between **Grid** and **List view** by clicking this icon.

- Users can use various Document GPS functions by clicking on the **Three-dots** found on the upper-right portion of the file card.

Shelter ZOOM
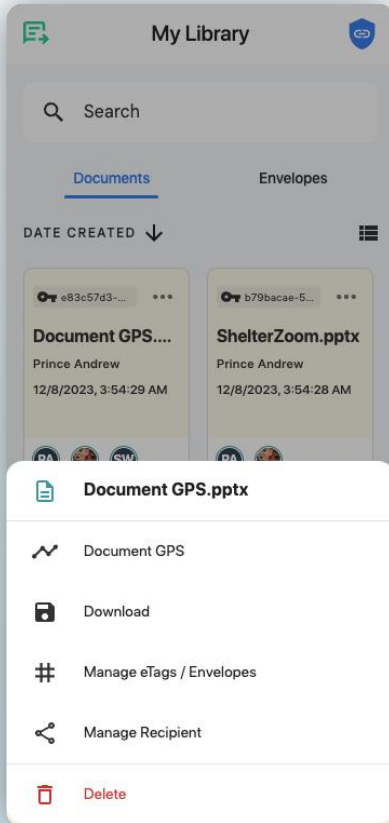
Sender's view

Recipient's view

1 Click the ⬤⬤⬤ icon, located at the upper right corner of the Document card to open the menu

2 Menu options will be presented as:

- **Document GPS** Tracks files and users' activity.

- **Download** Enables users to download files, if permission is granted.

- **Request Access** This option lets recipients request for share and download access.

- **Request Add User** Allows recipients to add participants in the file, if granted.

- **Manage eTags/Envelopes** Sorts files into one folder by using a unique tag.

- **Manage Recipient** Enable users to share files, if permission is granted

- **Delete** Lets the user remove the document from "My Library"

To set up user-permissions:

- **Upload Files**
    - **Shareable -** Allows the receiver to share the file
    - **Downloadable** - Gives the recipient the permission to download the file.

- **File is Sent and Modify User Permissions**
    - Go to My Library, look for the document card and click the three dots located at the upper-right corner.
    - Click on Manage Recipient
    - Look for the recipient that needs modifying permissions and click on the three dots
    - Toggle either Shareable, Downloadable or both depending on your preference
    - Hit Update
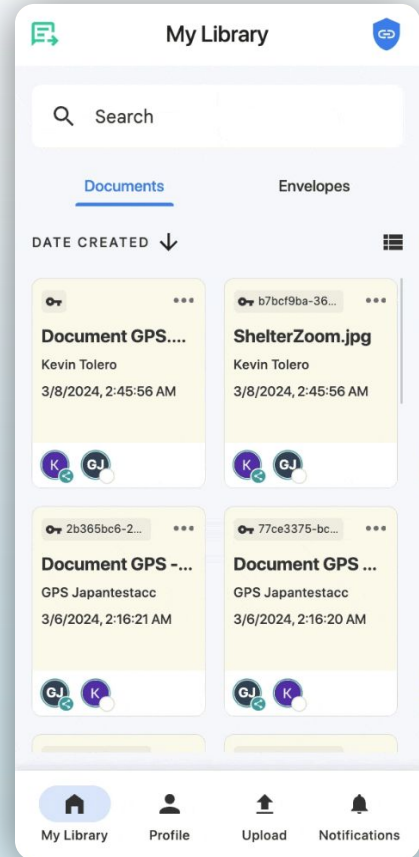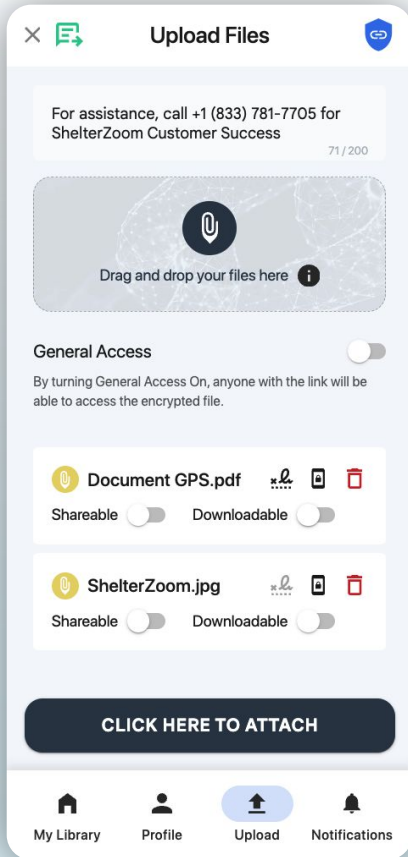
Avatar Status indicators shows the actions made by the recipients that were added; if the file was viewed, downloaded or shared.
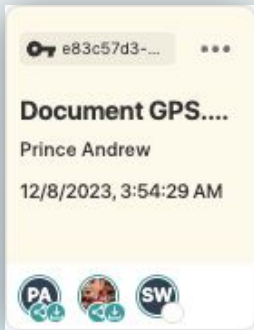
Shared

Viewed

Downloaded

Avatar Status sometimes shows 2 indicators if the user made multiple activities on the file

White avatar badge connotes the file hasn't been viewed

Document GPS....

Prince Andrew

12/8/2023, 3:54:29 AM
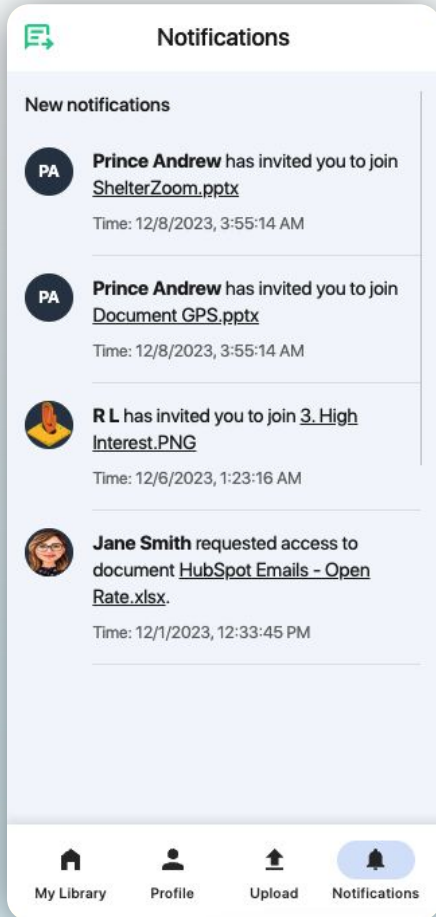
The user can modify the document card display by clicking or located at the right hand side of the widget.

Maximum of 4 avatars will be displayed

Maximum of 8 avatars will be displayed
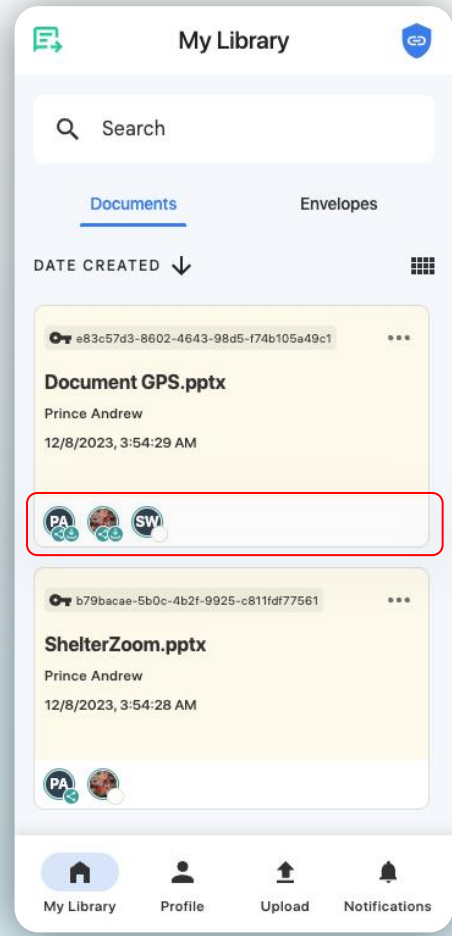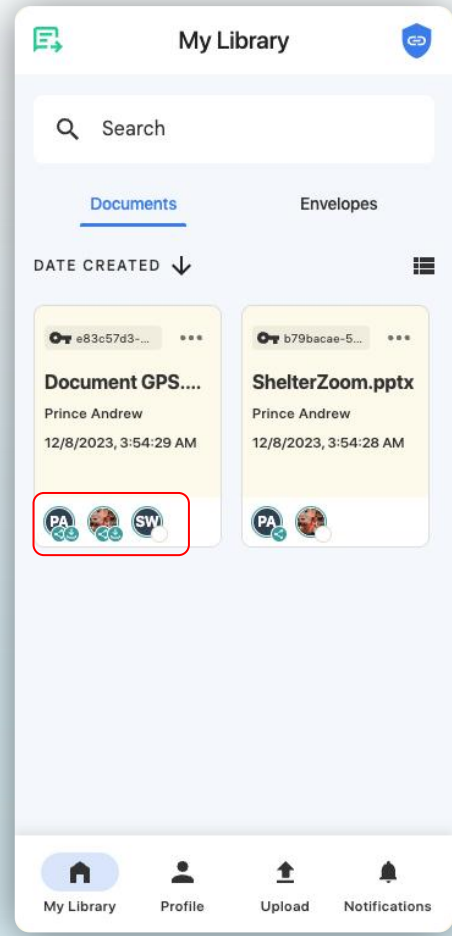
- The Notifications Panel alerts you to important events that take place in your account, including when you have had a file shared with you or when your permissions status changes.

- This also gives the owner and the recipient **Real Time** alerts on every activity that was made on their Document GPS account.

- Users will be able to click on the underlined activity to be routed directly to the attached file.

Shelter **ZOOM**

- Document GPS allows you to to know where your document has travelled (**Created, Viewed, Downloaded, Shared)** in real time

- Document owners can view all events related to the document

- Non-document owners can only view activities of their invited users

- For documents with General Access, it will show on the owner's end as **Anonymous**.

Shelter ZOOM
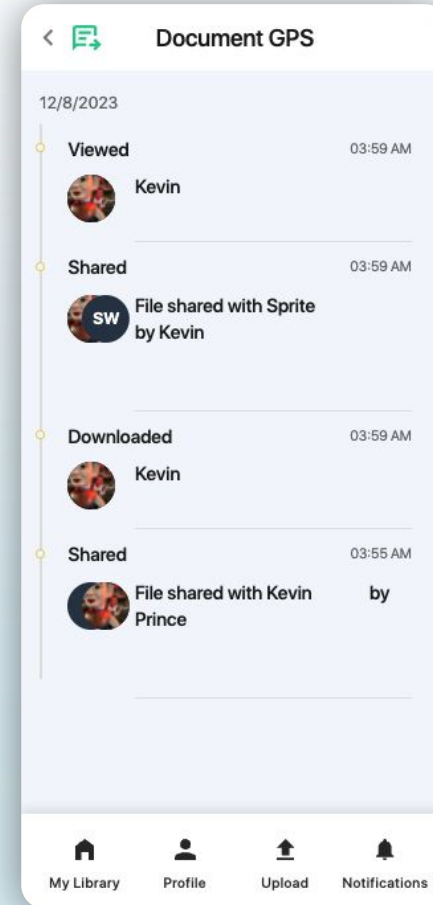
To share or add a new recipient to the file:

- Click on the **three-dots**, located at the upper right corner of the document card or inside the file itself.

- Click on **Manage Recipient.**

- Click the **Add Recipient** tab.

- Key-in email address.

- Toggle options for permissions.

- Click **Send Invite**
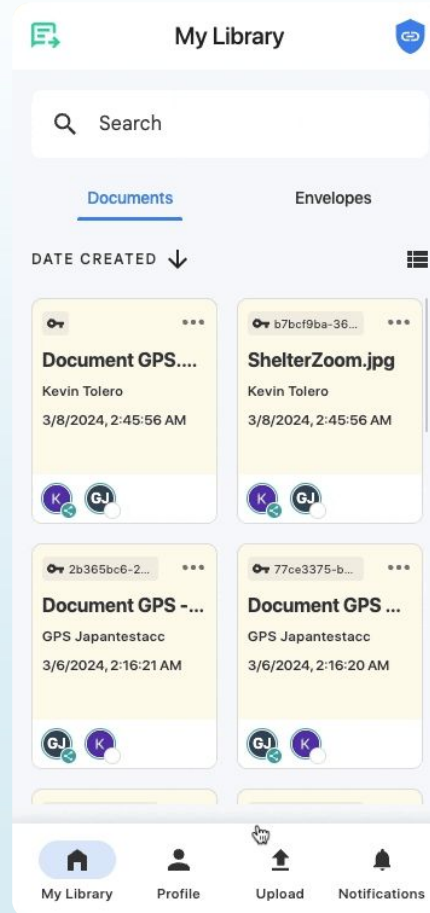
To edit the permissions of the user:

- Click on the **three-dots**, located at the upper right corner of the document card or inside the file itself.

- Click on **Manage Recipient.**

- Click the **three dots** beside the email address

- Toggle options for permissions.

- Click **Send Invite**

Shelter ZOOM
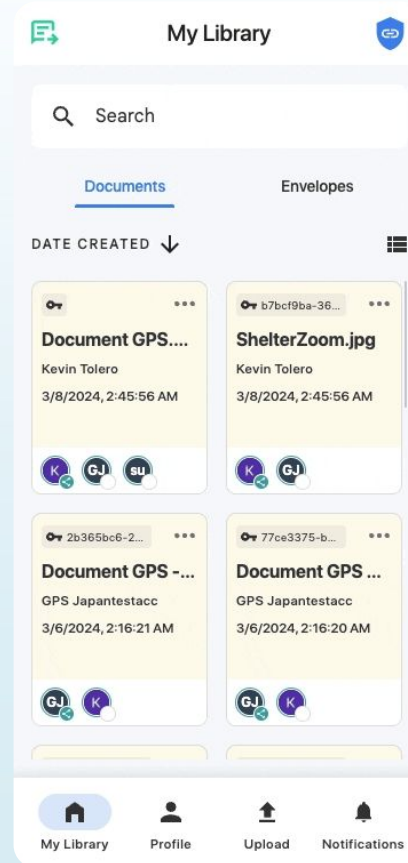
Manage your files, documents and attachment through a virtual folder using e-Tags and Envelopes
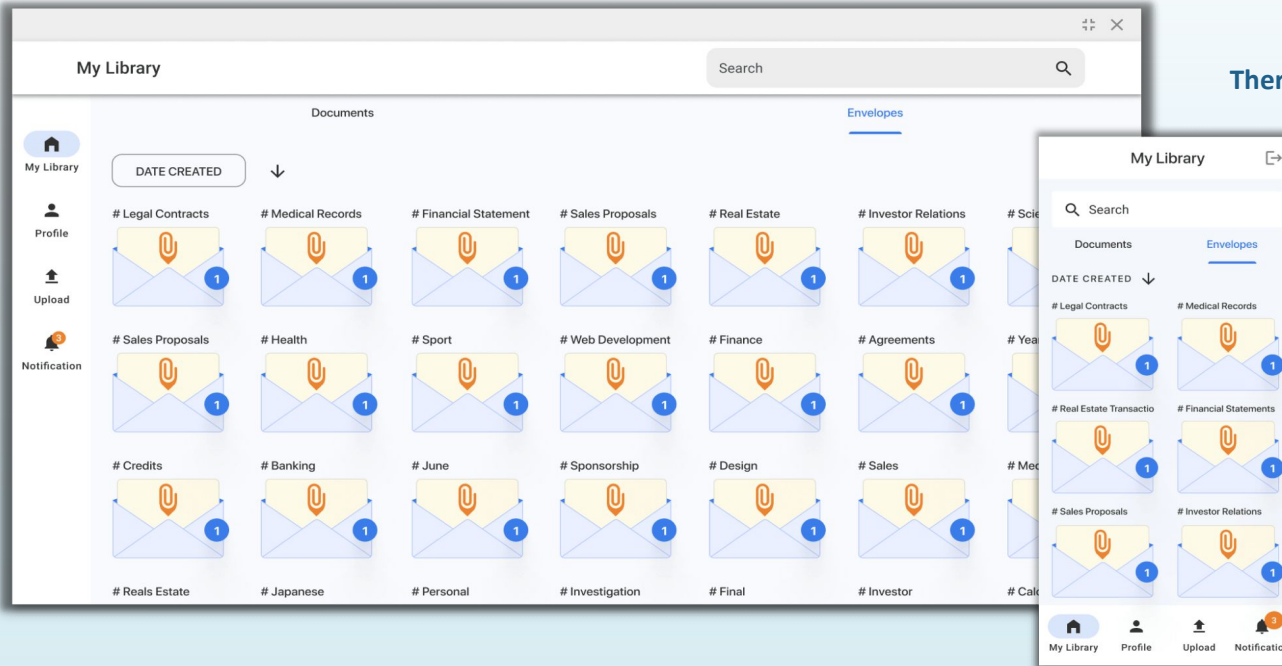
There is a range of functions available as follows:

Search box - you can search e-Tag by keying in the e-Tag name or partial name
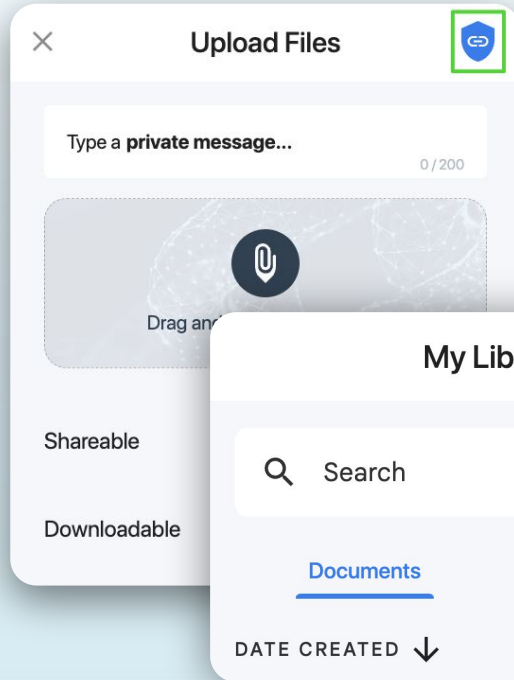
Sort By - you can sort your e-Tags by Date Created or alphabetically by Title

File Count - The number on the right side of the envelope indicates how many files are saved
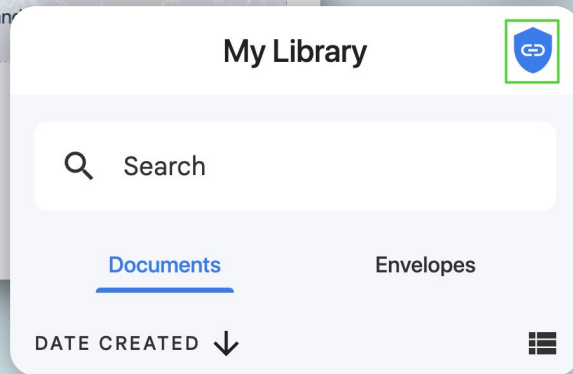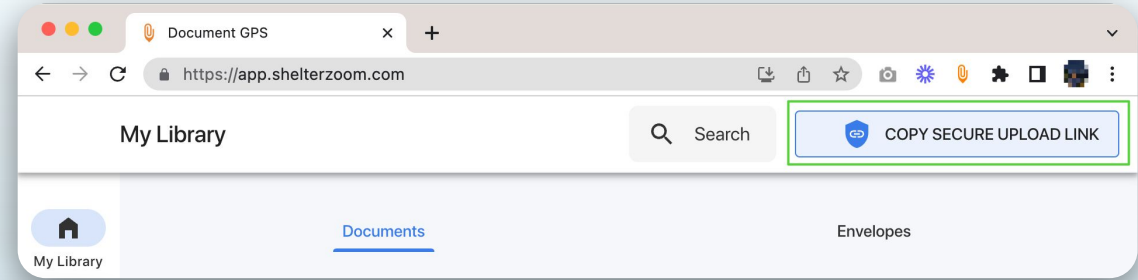
The **Secure Upload Link** gives the Document GPS user the ability to provide a special link that allows the recipient to upload a document securely and send it back to the sender.
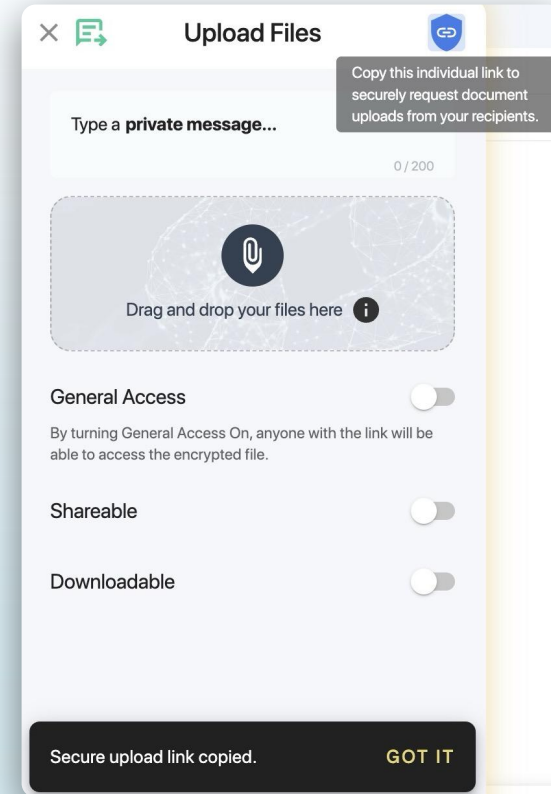
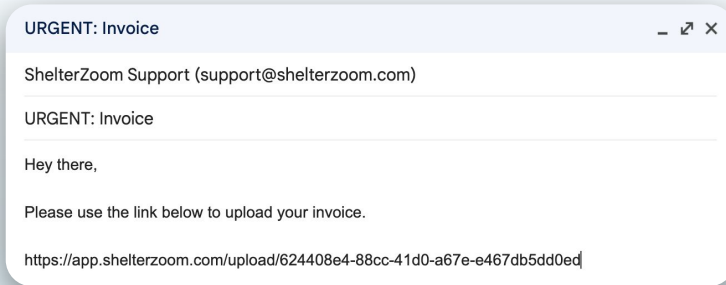On the email extension

On the Web application

Shelter **ZOOM**

To create your own secure upload link:

- Click on the "Compose email" button on Gmail
- Click on the "Document GPS" icon in the email toolbar.
- The Secure Upload Link is visible on the My Library and Upload Files screens.
- Clicking the Secure Upload File icon copies the link to the clipboard
- A success message will appear below the extension, saying "*Secure upload link copied.*"
- The link can now be sent to anyone via email, chat, text message etc.

Upload Files

Copy this individual link to securely request document uploads from your recipients.

Type a **private message...**

0 / 200

Drag and drop your files here

General Access

By turning General Access On, anyone with the link will be able to access the encrypted file.

Shareable

Downloadable

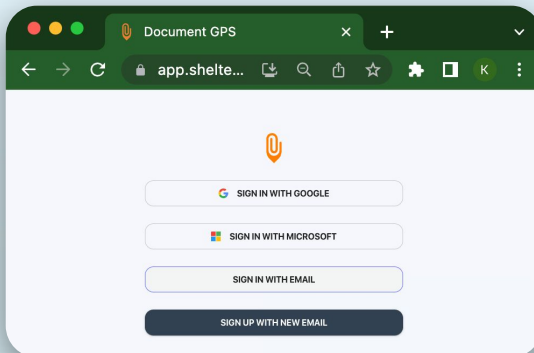Secure upload link copied.   GOT IT

Here's an example of the Secure Upload Link added onto an email.

- Email is sent as normal after entering the recipient's email address, subject, and adding some text.

URGENT: Invoice

ShelterZoom Support (support@shelterzoom.com)

URGENT: Invoice

Hey there,

Please use the link below to upload your invoice.

https://app.shelterzoom.com/upload/624408e4-88cc-41d0-a67e-e467db5dd0ed

- The recipient clicks the GPS attachment in the email notification received. A new tab opens and the sign-in screen is displayed. The recipient signs in to the website.

Document GPS

app.shelte...

SIGN IN WITH GOOGLE

SIGN IN WITH MICROSOFT

SIGN IN WITH EMAIL

SIGN UP WITH NEW EMAIL

- The recipient is taken to the Upload Files screen. The sender's email address is auto-populated, with options to add more recipients and include a private message. The recipients' permissions can be controlled with the Shareable and Downloadable toggles.
- The recipient can drag and drop files on the designated box or click on the Select Files button.

- The recipient clicks the Upload and Share button to send the file/s to the sender and added recipients, if any.
- A success message will show as *"Your file is being processed. It will be available shortly."*

Upload Files

Securely upload files to 👤 Kevin Tolero

| kevin.tolero@shelterzoom.com | Add more recipients here |

Please review the following files.

34 / 200

Shareable ⚪ Downloadable ⚪

➕ Drop your files here or **ADD FILES**

📎 Invoice.jpg   Shareable 🟢 Downloadable 🟢 🗑

📎 GPS Enterprise.pdf   Shareable ⚪ Downloadable 🟢 🗑

📎 GPS Enterprise.pptx   Shareable 🟢 Downloadable ⚪ 🗑

UPLOAD AND SHARE

- On the recipients side, it will show that the files were uploaded and now showing on their My Library. It also shows that the file/s were shared to the sender of the Secure Link.
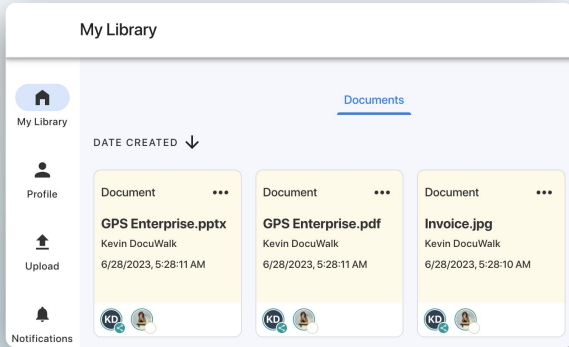
- On the sender's side, they will receive an email notifying them that files were shared to them.
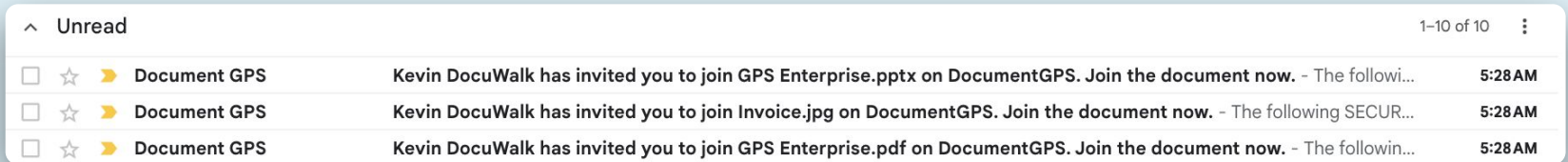
The General Access toggle on the Upload File screen

If you have **turned General Access On**, which allows recipients to access your files without signing in to their email account, you can now see each event that takes place even though their name isn't registered.

You can still see if someone has downloaded, shared or viewed your files right inside the same tracking log that tracks everyone else.

This will allow anyone with the link to view the file(s) without signing into their account. The tracking log will be disabled. You can change this at any time by turning General Access Off. Are you sure you want to continue?

CANCEL   CONFIRM

Upload Files

Type a **private message...**

0 / 200

Drag and drop your files here ⓘ

General Access

By turning General Access On, anyone with the link will be able to access the encrypted file.

Shareable

Downloadable

CLICK HERE TO ATTACH

My Library   Profile   Upload   Notifications

The eSignature is the first of its kind for several groundbreaking reasons: you are signing directly within your email attachment and signing on a document token for greater security using our integration.

Check out our video walk through **here**.

Note: ***Anyone in the 'To' field of this email will be able to sign this document.*** *Recipients in the CC or BCC fields won't have a signature option pop up.*

Upload Files

Type a **private message...**

0 / 200

Drag and drop your files here

General Access

By turning General Access On, anyone with the link will be able to access the encrypted file.

Dental Health History - ...

Make document signable
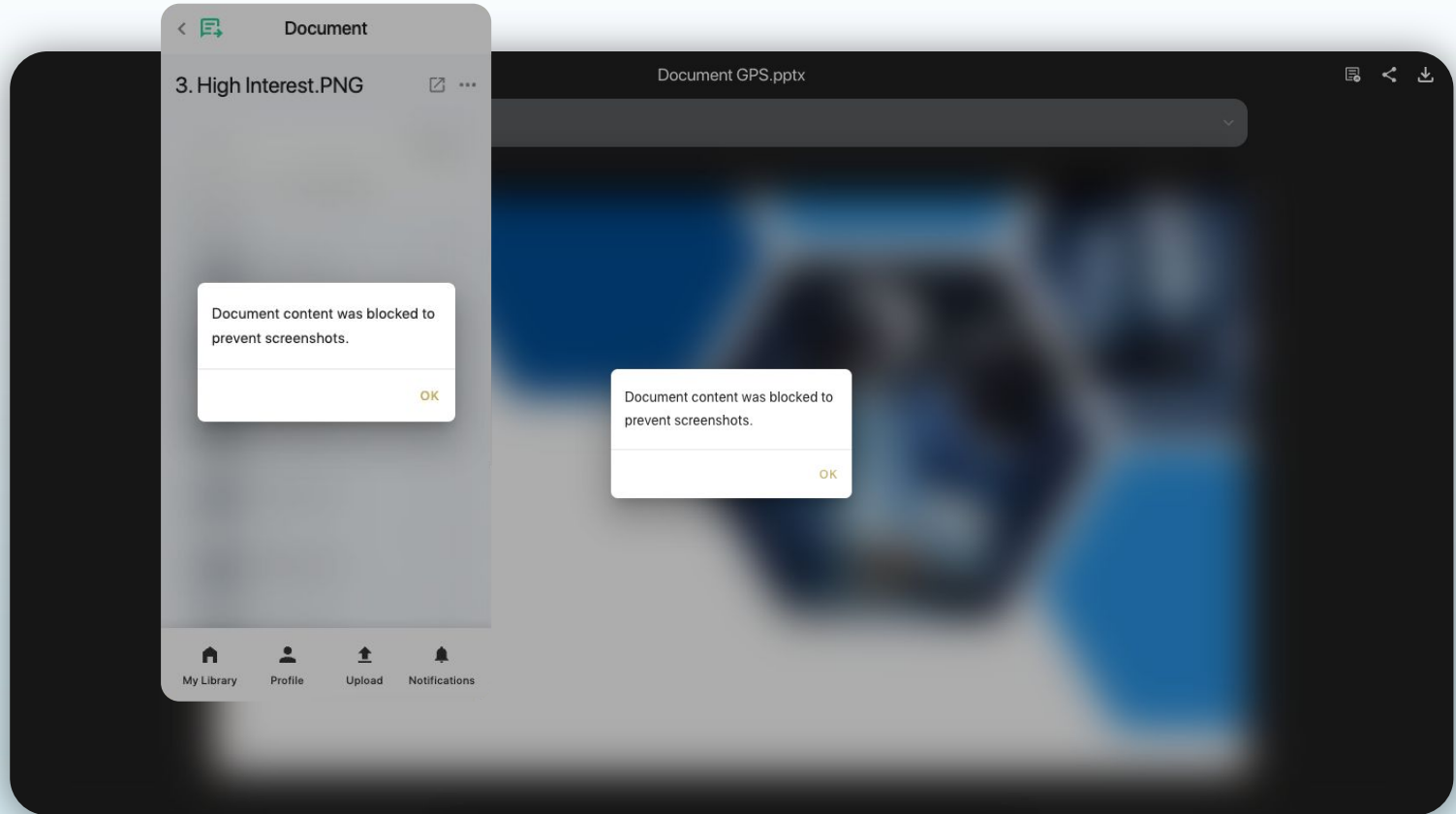
Shareable   Downloadable

CLICK HERE TO ATTACH

the link will be

Shareable   Downloadable

ADD SIGNATURE FIELDS

CLICK HERE TO ATTACH

Dental Health History - Sample.pdf

Add signature field

Add text field

Add date field

COMPLETE

The **screenshot block** prevents copying or sharing of documents outside of Document GPS access features. This gives the document owner the ability to block taking screenshots of the document.

Document

3. High Interest.PNG

Document content was blocked to prevent screenshots.

OK

My Library   Profile   Upload   Notifications

Document GPS.pptx

Document content was blocked to prevent screenshots.

OK

Shelter ZOOM

Confidentiality and NDA.pdf

The document owner has blocked the possibility of content copying for this document. To view the document, please confirm that you will not be taking screenshots, photos or any other copies of document content

BACK   I CONSENT

The **advanced screenshot** feature completely discourages recipients from doing screenshots.

What's included in the advanced screenshot block?

Acceptance of terms by the viewer: If enforced by the document owner, the viewer needs to accept the terms of not taking a screenshot before viewing the document. The evidence of acceptance is recorded in the audit log.
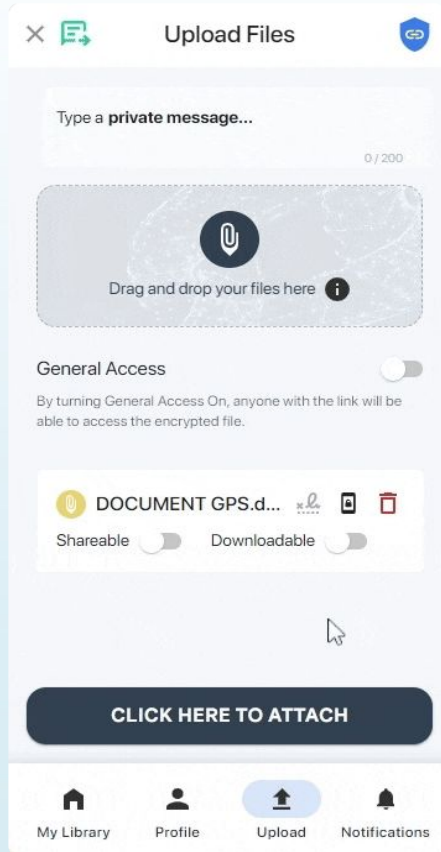
Blocking with Visible Watermark: The sender can add an additional preventative measure by enforcing watermark display across the document. This watermark reveals the viewer's name and email address (account email), and their acceptance of not taking a screenshot. Additionally, downloading is disabled for all participants
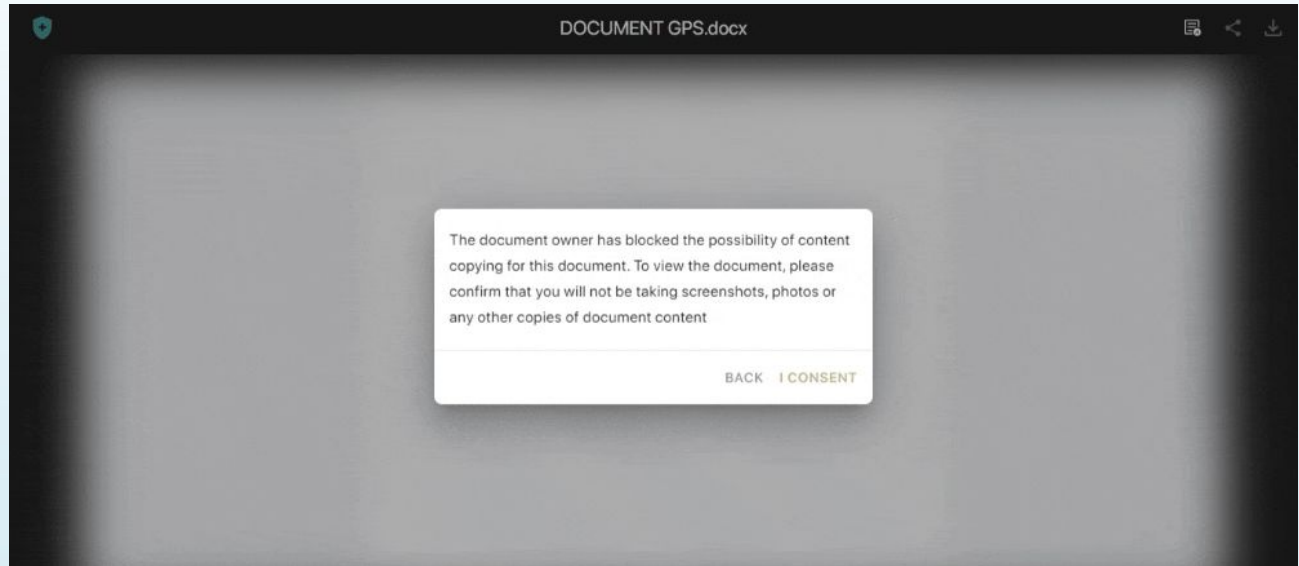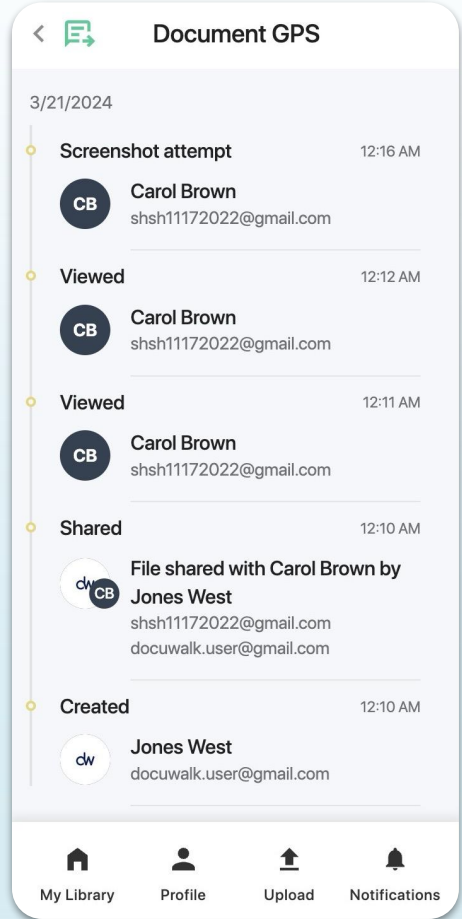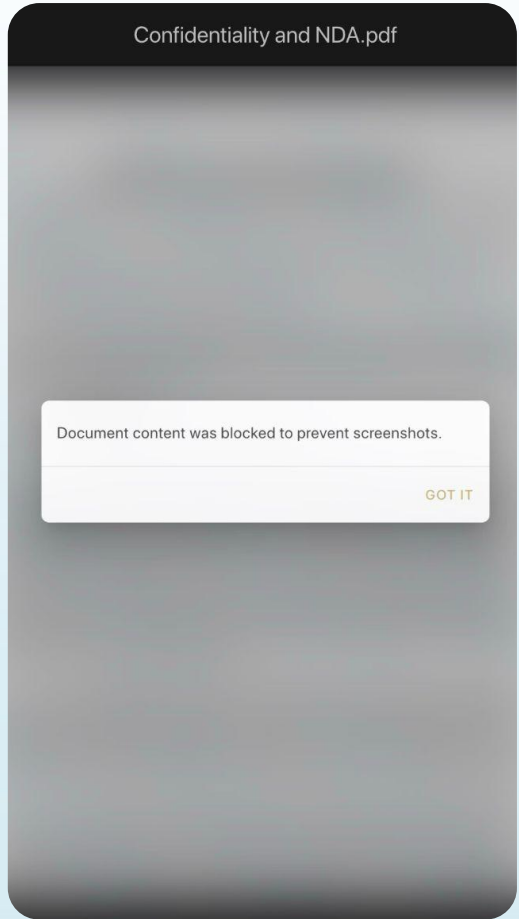
The document owner will see in the Document GPS tracking screen if a viewer attempts to do a screenshot.
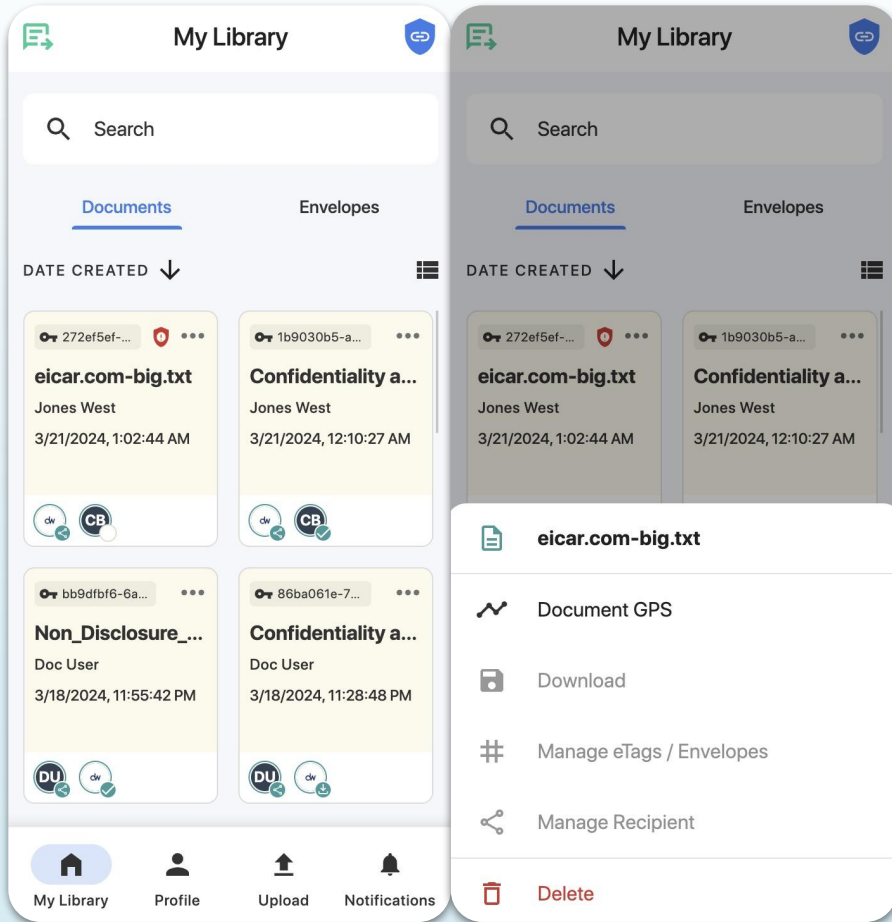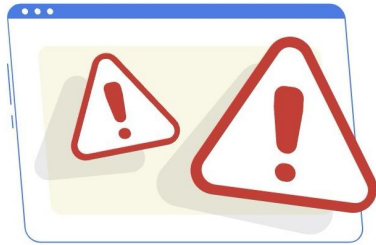
Uploaded documents are scanned for viruses. The infected file will have a **red shield icon** indicating that it is infected and the owner will only have **Delete** as an option.

When scanning finds the file to be dangerous, a system email is sent to the document owner as a notification.

Attention!

Document GPS <no-reply@documentgps.com>
to me
1:02AM (0 minutes ago)

Document GPS
Open secure attachments with confidence

Attention! While scanning your attachments, virus has been found.

eicar.com-big.txt 30 MiB

Ready to protect and control your email attachments?
Try for free and say goodbye to the old attachment paperclip forever.

We scanned this document and found malicious content. The document was taken down to protect you. If you are interested in its content, please contact the document owner.

The recipient will not be able to open the infected file and instead will see a warning message.

We value your opinions! With our new feedback button, you can now share your thoughts and suggestions from within the app.
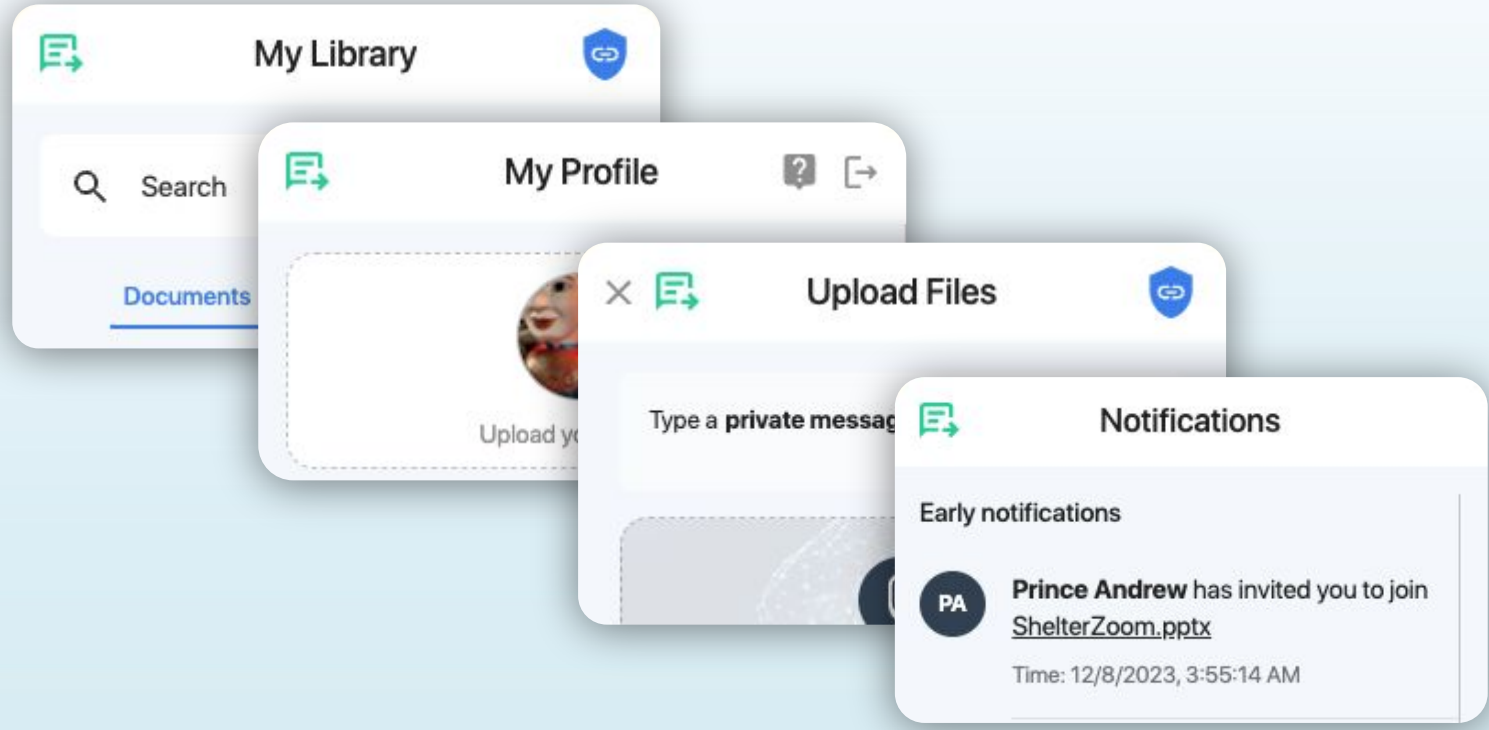
TOP RIGHT OF THE EXTENSION

- **Move -** The 6-dotted icon allows users to drag the extension horizontally and position it in a different part of the screen
  Note: This feature is not available for Microsoft Outlook Mail

- **Close -** Closes the extension by clicking the "X" icon at the upper right corner of the widget

- **Expand -** Allows the extension to be viewed in full screen mode by clicking the square shaped expand icon located at the upper right part of the widget

Web Viewer - Expand 🔲 to open the file in a new tab
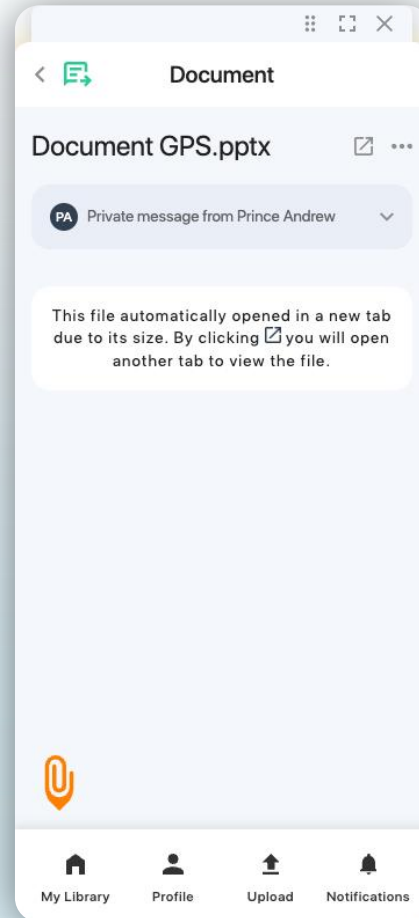
Contact ShelterZoom via Phone or Email

To reach a support representative by email: support@shelterzoom.com

To reach a support representative by phone, please use the following phone numbers:
- +1 (833) 781-7705 (US & Canada Only - Toll Free)
- +1 (646) 435-4459 (International)

Contact ShelterZoom Sales

To reach a ShelterZoom sales representative by email: sales@shelterzoom.com
- +1 (833) 781-8660 (US & Canada Only - Toll Free)
- +1 (646) 924-1769 (International)