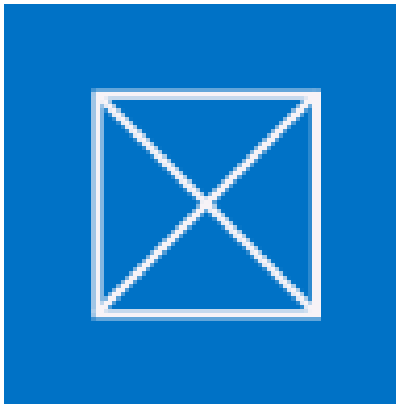




**Solutions for information workers**

## **SendMail 365 Add-in for SharePoint Online**



## **Administrator & User Guide**

Server v. 1.0.x, client v.4.9.8



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# Overview

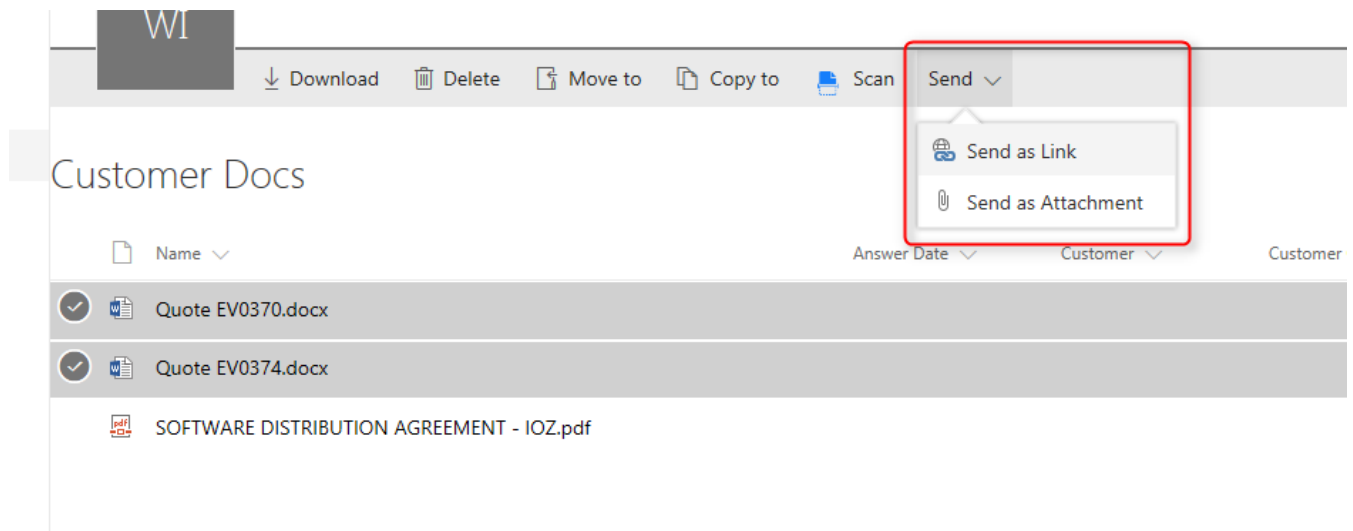
The Add-in is a useful tool for sending documents as attachments or hyperlinks from SharePoint libraries.

The feature adds two new options to the document library menu:

1. Send as an Attachment
2. Send as a Link

You can send single document or multiple documents together.

### *Send multiple documents as attachments*

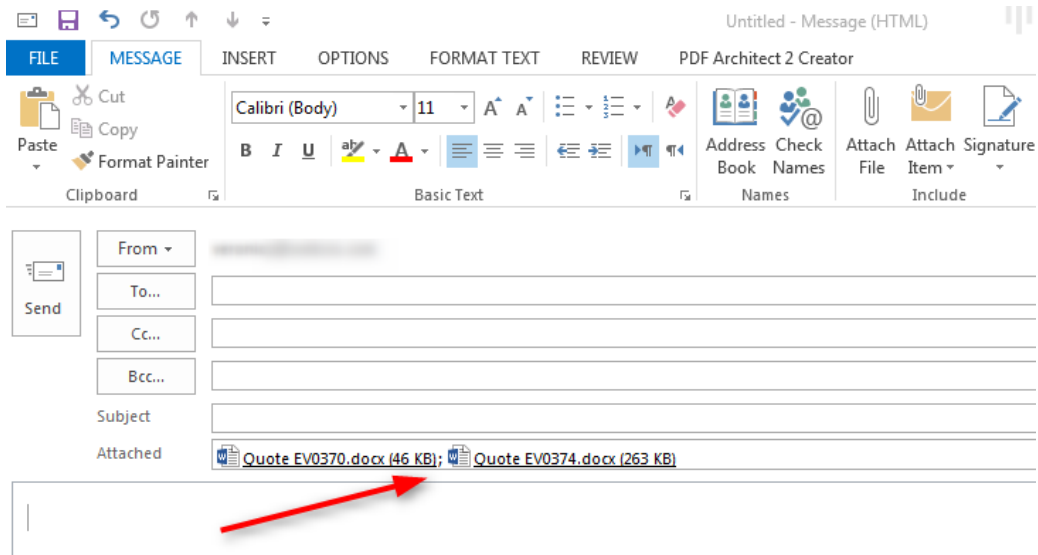


1. Select menu option "Send as Attachment"



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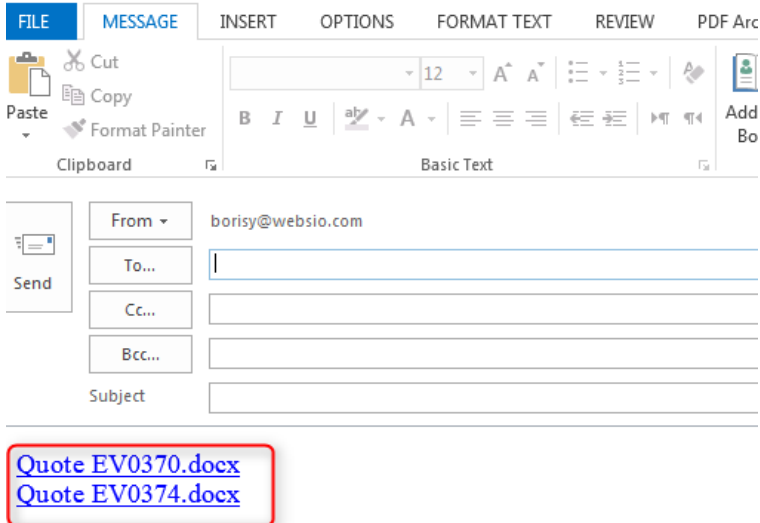
### Result:



### Send multiple documents as links

1. Select menu option "Send as Attachment"

### Result:

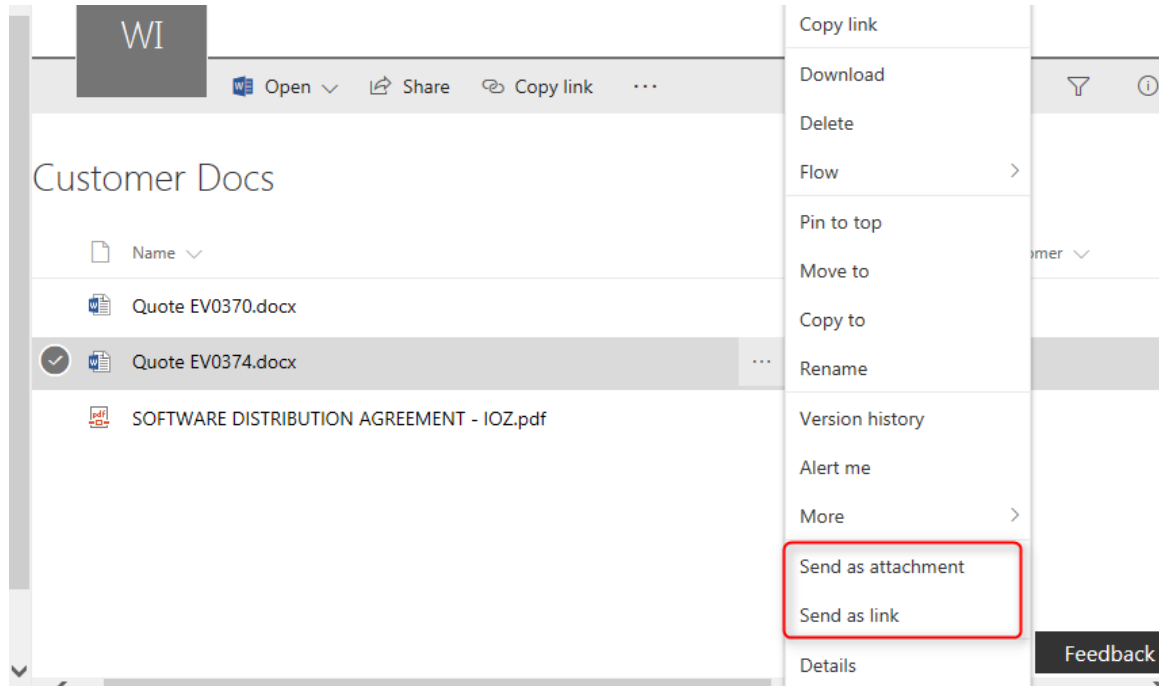




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### *Send current document as an attachment or as a link*

Select "Send as attachment" or "Send as link" from the document menu





# Software Requirements

### Server Requirements

- Microsoft SharePoint Online

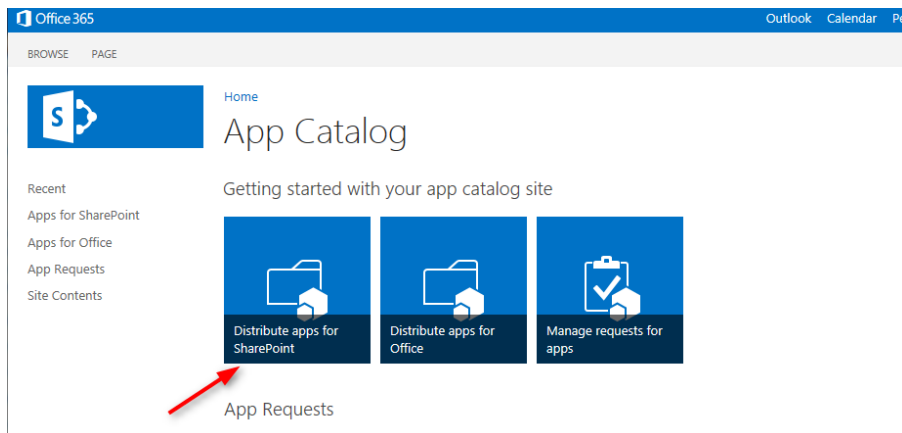
### Client Requirements

- Windows 7 / 8 / 10
- Internet Explorer / Microsoft Edge / Chrome / Firefox
- Microsoft Office Outlook 2010/2013/2016

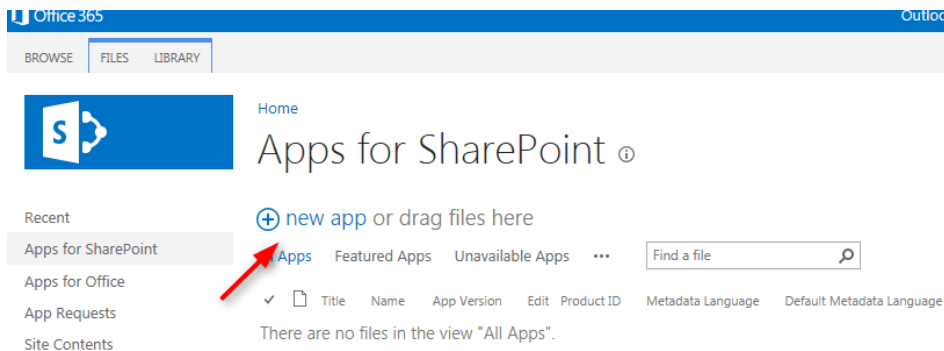
# Installation

### App installation

1. Unzip "SendMail365.app" from directory "app"
2. Open your App Catalog site. If you didn't create App Catalog site yet, please follow instructions from the Appendix A "[Create App Catalog site](#)"
3. Click on the "Distribute apps for SharePoint"

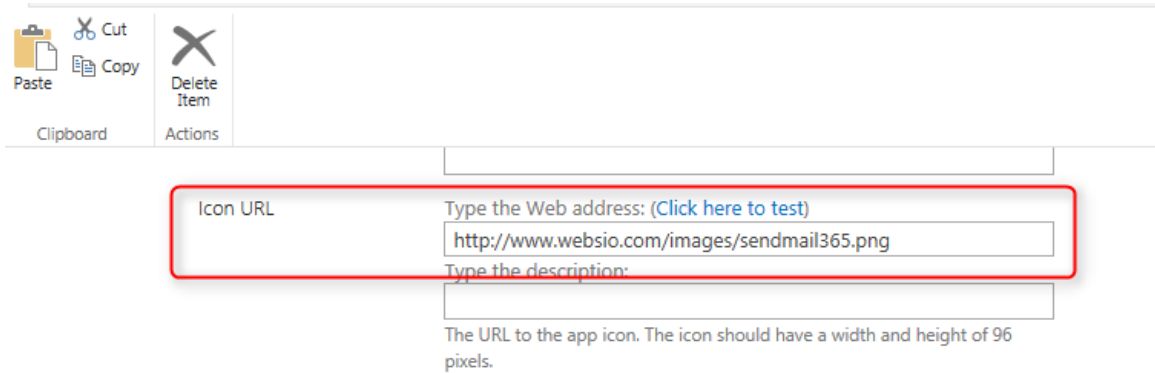


4. Upload SendMail365.app



5. Open SendMail365.app properties

6. Set “Icon URL” value to <http://www.websio.com/images/sendmail365.png>



Clipboard Actions

Paste Cut Copy Delete Item

Icon URL

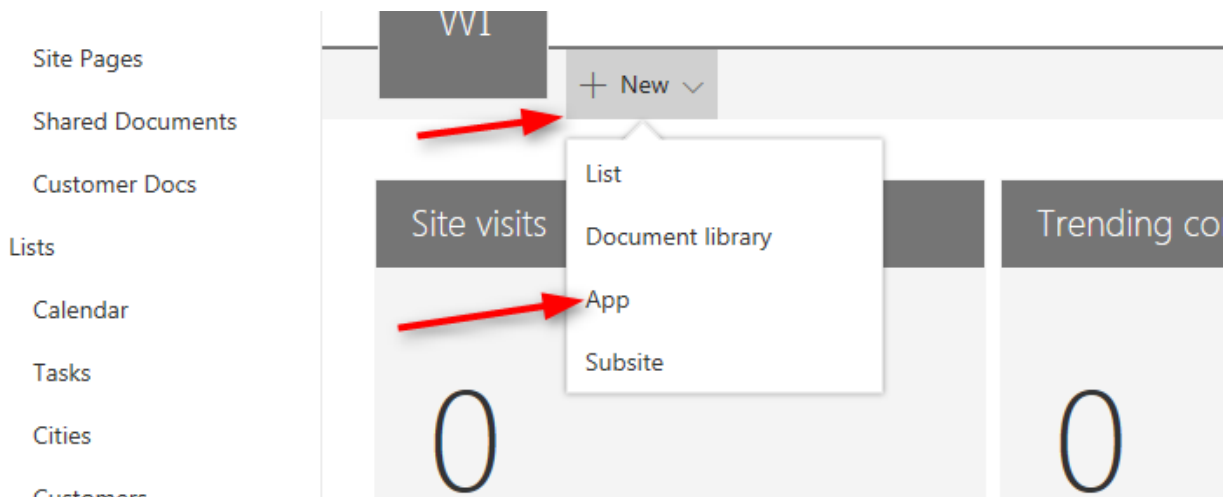
Type the Web address: (Click here to test)

<http://www.websio.com/images/sendmail365.png>

Type the description:

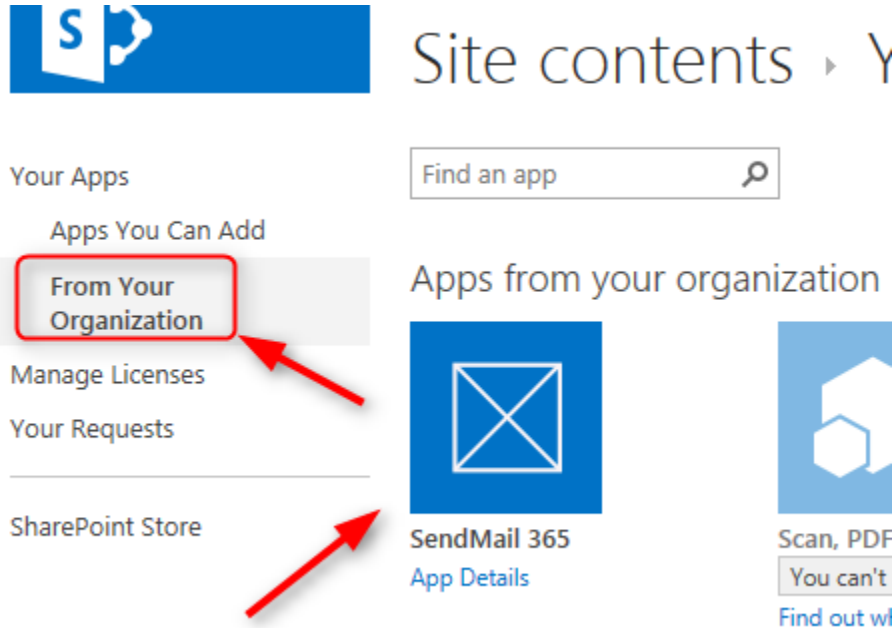
The URL to the app icon. The icon should have a width and height of 96 pixels.

7. Open site where you want to use the Add-in, open “Site Contents” and add App





8. Select "SendMail 365" from Your Organization Apps



9. App installation is completed.

If you want the app to be available for use without the need for site users to install it (steps 7-8 above), you can deploy it. See Appendix B "[Centralized Apps Deployment](#)"

### *Client-side installation*

Thin client "eDocClient" is required. It is technically impossible to communicate with Outlook from major browsers without this component.

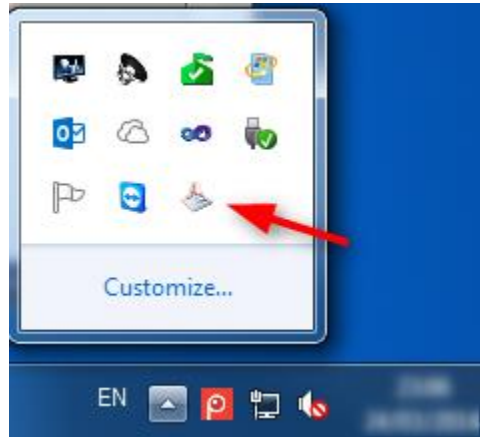
1. Unzip directory "client" from the SendMail365.zip file on your client machine
2. **Important!** Right-click the "setup.exe" and select "Run as Administrator" in order to begin the installation.
3. Windows Firewall alert may appear during installation. Approve network access for eDocLoader.exe. The client does not access any external internet resource. It is responsible for communication with SharePoint only.
4. **Important!** Restart workstation



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When the installation has been completed successfully:

1. Icon of the eDocClient appears in the system tray of the client workstations:



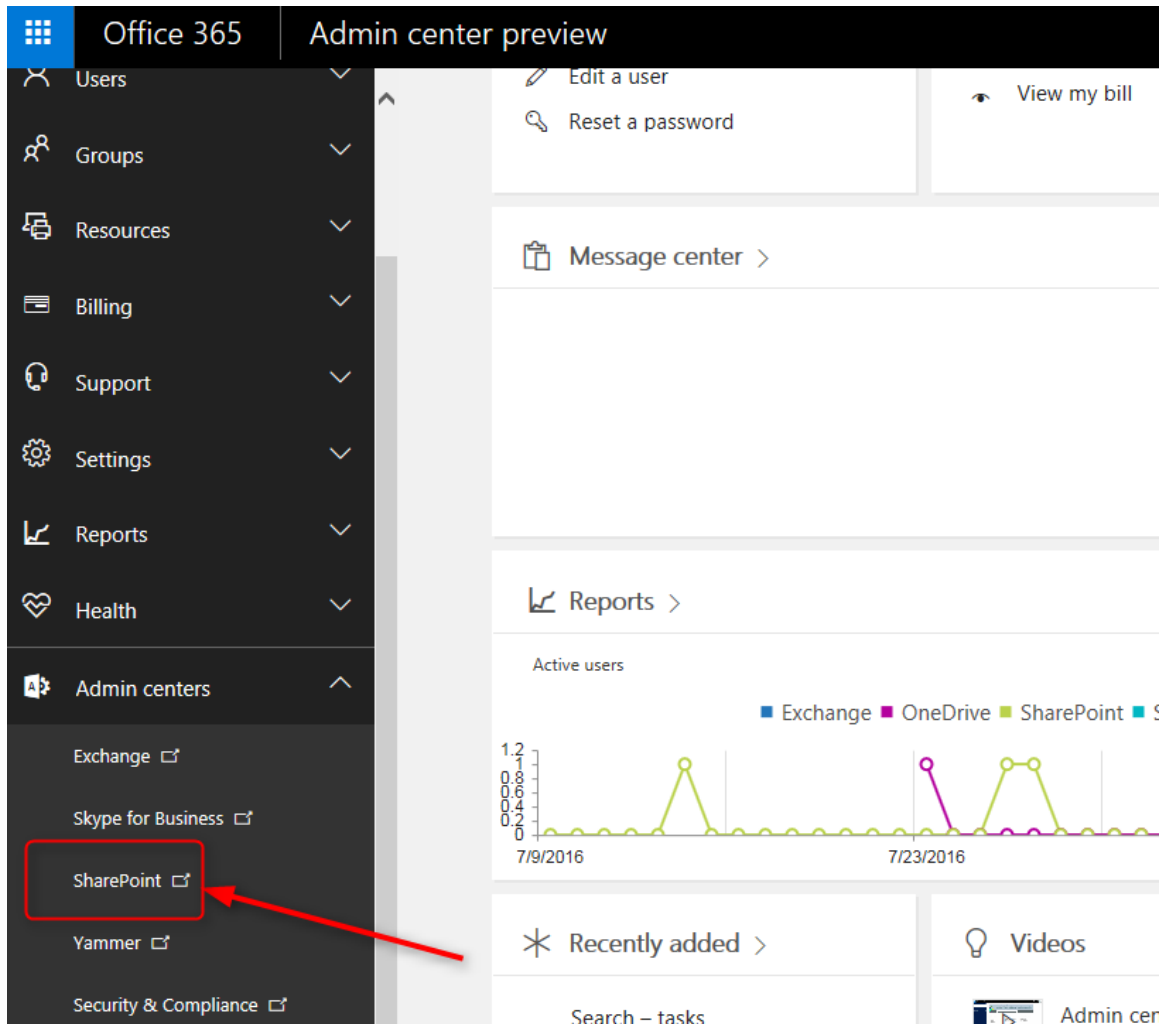
Please, do not close the eDocClient. This program is responsible for communication between client part of the feature and SharePoint.

### Appendix A. Create App Catalog site

Source: [Microsoft Office Site](#)

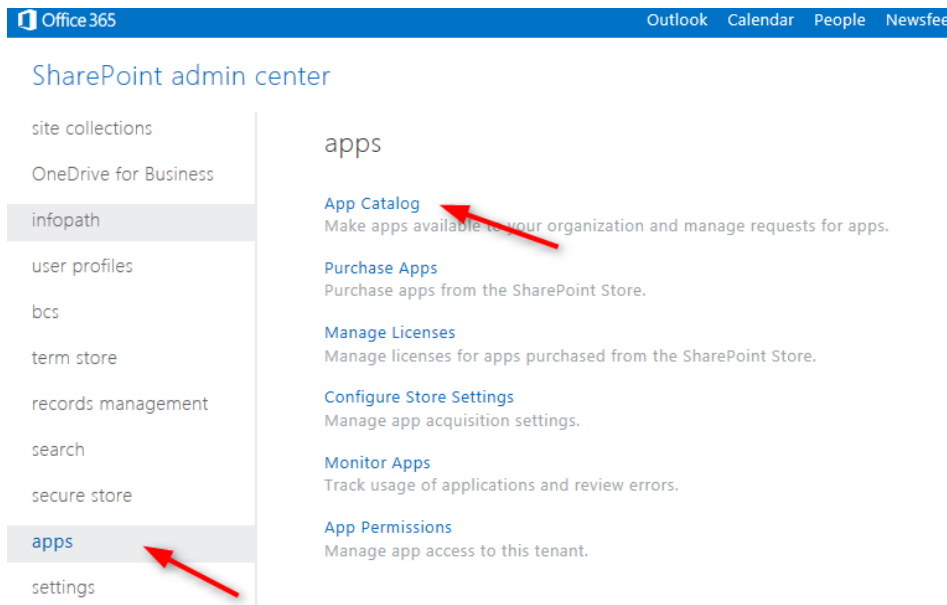
Creating an App Catalog site is the first step in managing apps for your SharePoint Online environment. Even if you do not plan to make internal custom apps available, you will not be able to do things like change the purchase settings for the SharePoint Store until you create an App Catalog site. You can have only one App Catalog site per SharePoint Online tenant.

1. Sign in to the Office 365 admin center with your SharePoint Online admin user name and password.
2. Go to Admin > SharePoint.



The screenshot shows the Office 365 Admin center interface. The left-hand navigation pane is open, displaying a list of admin center categories. The 'Admin centers' category is expanded, and the 'SharePoint' link is highlighted with a red box and a red arrow pointing to it. The main content area shows the 'Admin center preview' with options like 'Edit a user', 'Reset a password', and 'View my bill'. Below these are sections for 'Message center', 'Reports' (including an 'Active users' chart), 'Recently added', and 'Videos'. The 'Active users' chart shows data for Exchange, OneDrive, and SharePoint over time.

3. Click Apps on the left, and then click App Catalog.



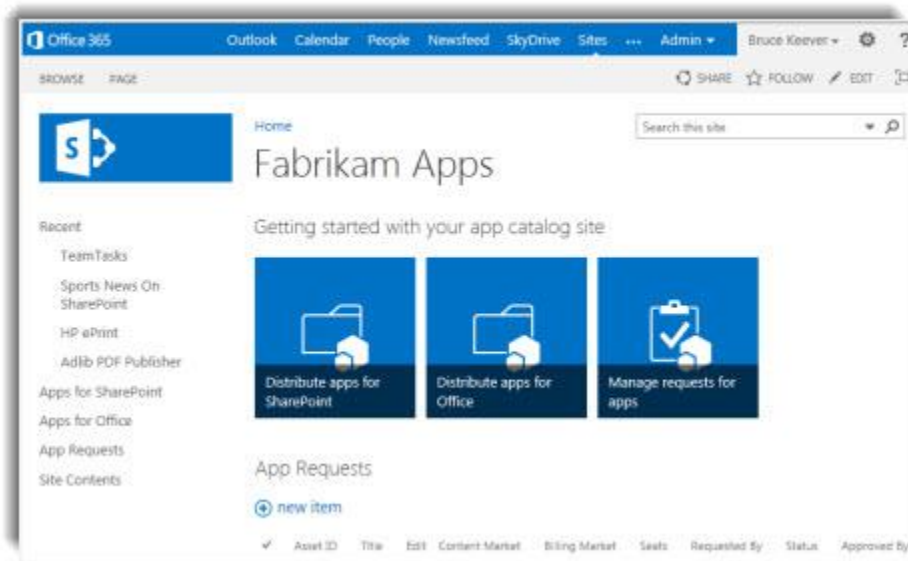
4. Select Create a new app catalog site, and then click OK.
5. On the Create App Catalog Site Collection page, enter the required information, and then click OK.

After the App Catalog site is created, you can navigate to it within the SharePoint admin center by clicking Apps > App Catalog. The App Catalog site will have a document library for Apps for Office and a document library for Apps for SharePoint, as well as a list that tracks App Requests from site users.

Screenshot of the home page of an App Catalog site.



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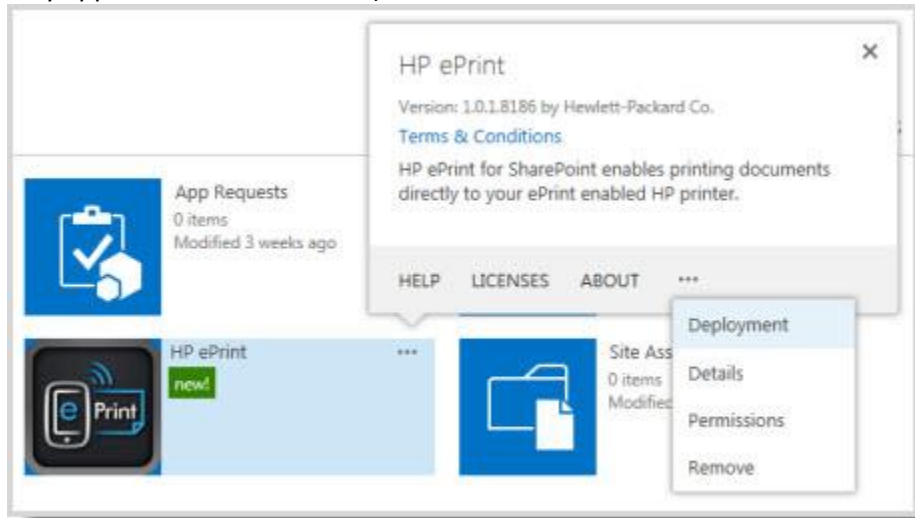
Do not forget to allow access to the App Catalog site for Site Administrators to allow them to add apps from the catalog.

### Appendix B. Centralized Apps Deployment

Source: [Microsoft Office Site](#)

If you upload an app to the App Catalog, it is automatically available for users to install when they browse apps under **From Your Organization**. If you want the app to be available for use without the need for site users to install it, you can deploy it.

1. After you have uploaded the app, you then must add it as an app to the App Catalog site so that it appears on the Site Contents page for the App Catalog itself. On the App Catalog site, go to Settings  > Add an app.
2. Click the app you want to add, and click **Trust It** when prompted.
3. On the Site Contents page, find the app you want to deploy.
4. Click the ellipses  next to the app, click the ellipses  again in the callout to view the menu, and then click **Deployment**. (for some apps the **Deployment** command may appear on the first callout).



5. On the **Manage App Deployments** page, type the URL for each site collections to which you want to deploy the app, and then click **Add** to add it to the list.
6. In the Managed Paths section use the **Add** button to specify which managed paths should have this app available.
7. In the Site Templates section, use the **Add** button to specify which site templates should have this app available.
8. Click **OK**.
9. If you are prompted to Trust the app, click **Trust It**.