

# Quatrix for Outlook

## Overview

This guide contains installation and user guides of Quatrix® for Outlook plug-in.

Quatrix for Outlook provides users the ability to share important data via email in an easy, convenient and secure way. Attachments are automatically uploaded to your Quatrix account and the link to the attachment is sent to the recipient in the body of the email.



## System Requirements

Quatrix for Outlook supports Microsoft Outlook 2013 and 2016.

[Download Quatrix for Outlook pdf](#)

## Prerequisites

Each user can run only one installation of Quatrix for Outlook.

## Installation Guide

To install the latest version:

1. Download Quatrix for Outlook [here](#) or from your Quatrix account.
2. Completely un-zip or extract the downloaded file.
3. Open the extracted folder and double-click the Setup.exe file to begin installation and setup.
4. The **Setup Wizard** dialog box opens.
5. Click **Next** and read the **License Agreement**.
6. Accept our License Agreement and click **Install**.
7. Select the location where the plug-in will be installed on your PC.
8. Click **Next** on the **Confirm installation** dialog box which begins the installation of Quatrix Plug-in.
9. Click **Finish** when the plug-in is installed.
10. To use the updated version of Quatrix for Outlook you should reopen Microsoft Outlook.

## User Guide

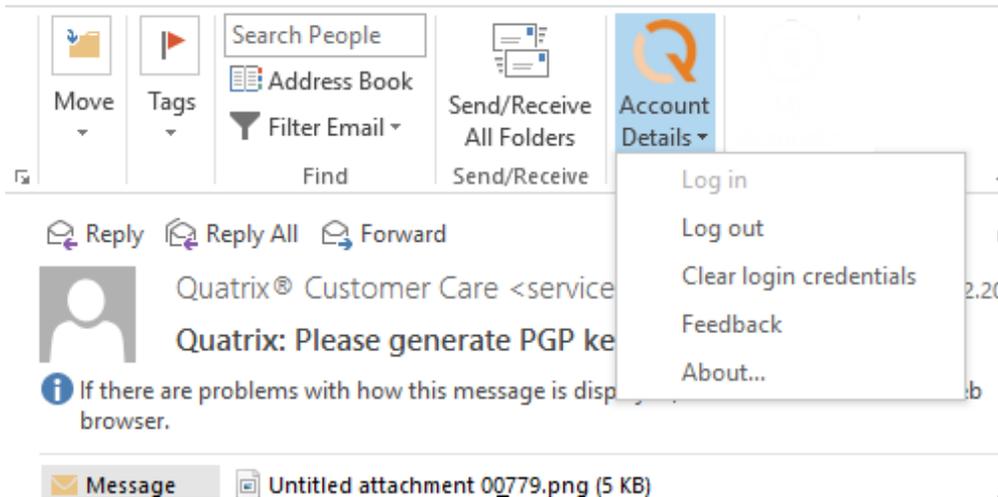
When the plug-in is installed, **Quatrix Account Details** option appears in the Outlook.



To share files or folders using Quatrix plug-in you should be a registered Quatrix user.

**Note:** there may be occasions when Outlook 2013 or 2016 fails to enable the Quatrix plug-in. You should choose "Always Enable this add-on" for the Quatrix for Outlook in your Outlook settings, to prevent the plug-in from being disabled.

After clicking on the **Account Details** the following options appear:

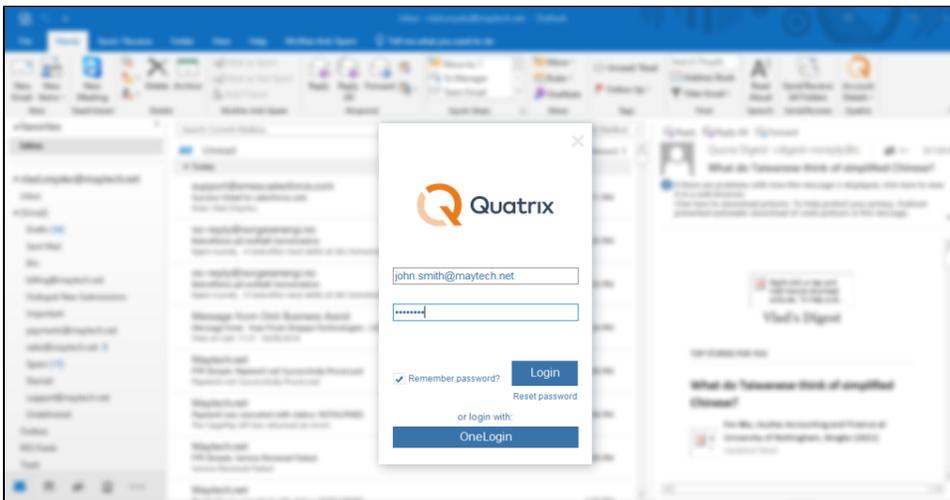


- **Log in** - use this option to log in to your Quatrix account.
- **Log out** - use this option to log out of your Quatrix account.
- **Clear login credentials** - this option is used to delete login credentials which are displayed on the login form.
- **Feedback** - help us improve our service by sending us your suggestions and ideas.
- **About ...** - provides a brief description of Quatrix Outlook Plug-in.

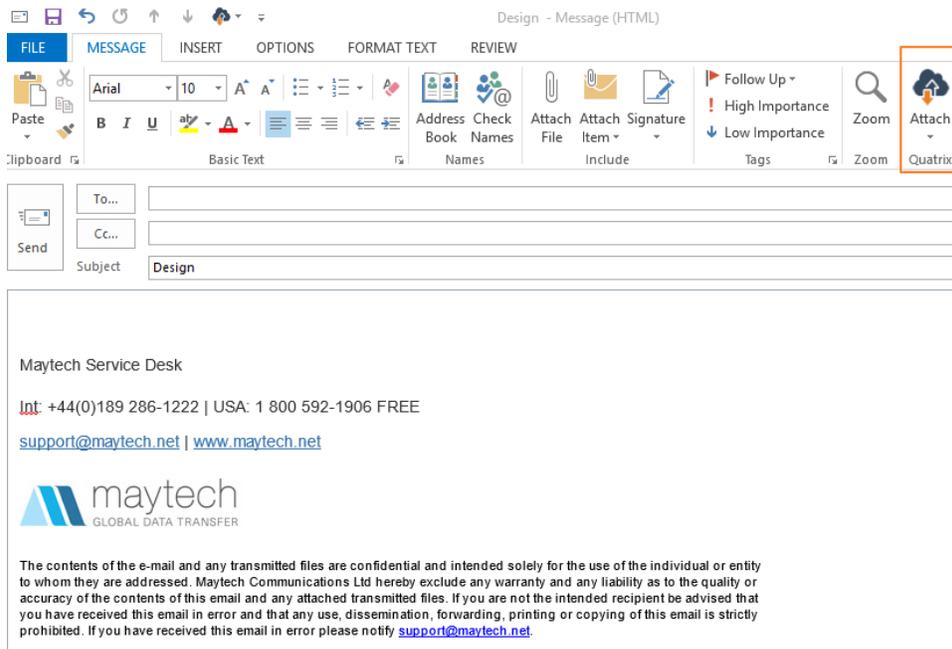
## How to share files or folders using Quatrix for Outlook

You should follow a few simple steps to share Quatrix files or folders in Outlook.

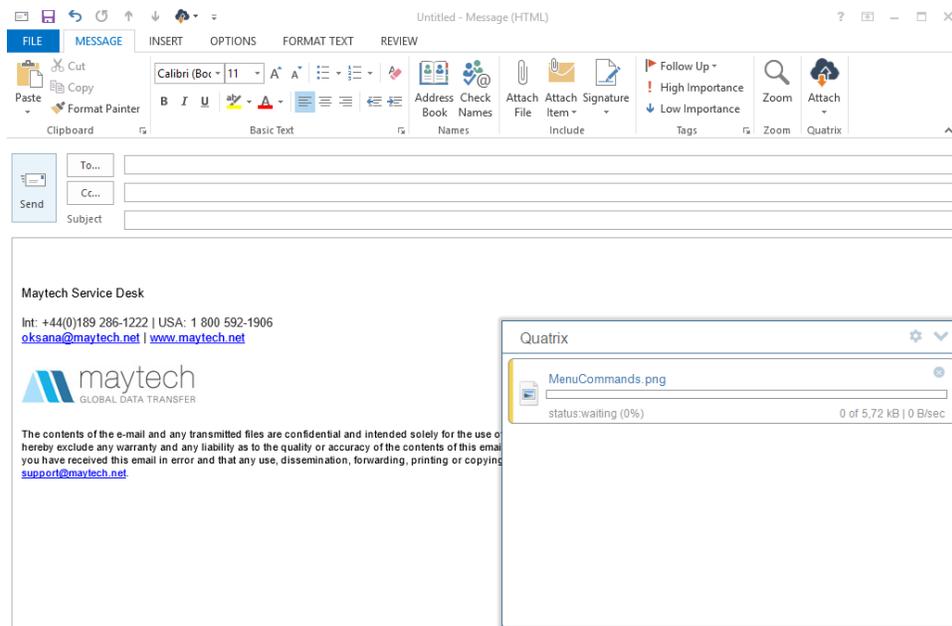
1. Log in to your Quatrix account with your login credentials or via SSO.



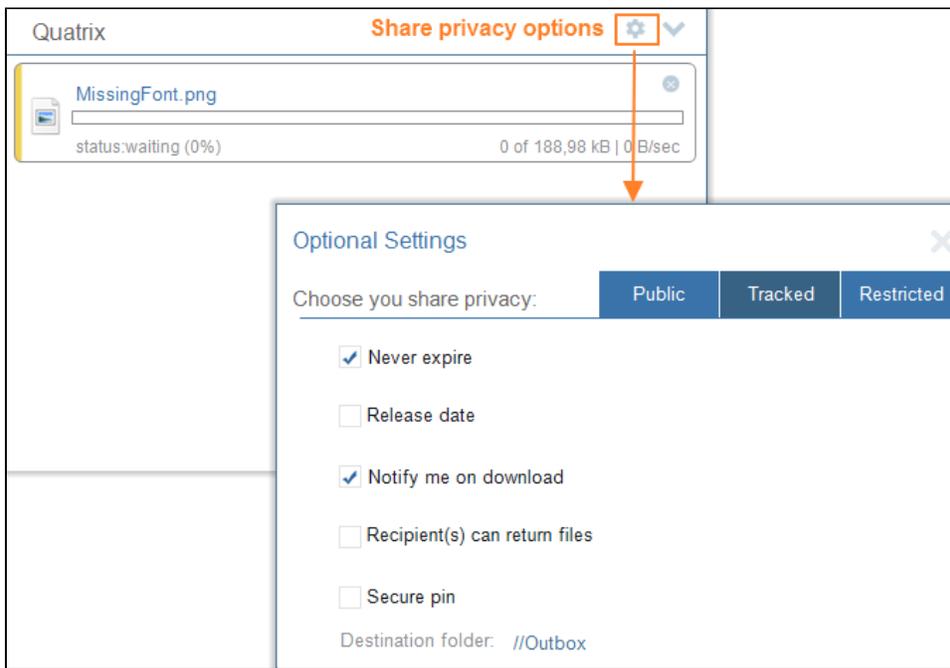
2. Click on the **New email** and select the **Attach** option of Quatrix (see the screenshot below).



3. Select files or folders for upload. Uploading files are shown in the **Quatrix Uploader** window which is displayed in the bottom right corner.



4. You can choose the share privacy level and additional options by clicking the **Settings** icon on the **Quatrix Uploader** window.



Share Privacy Levels:

- **Public** - Anyone can download shared files.
- **Tracked** - Any registered Quatrix users can download. Fully tracked.
- **Restricted** - Only the registered email recipient can download.

You can specify additional options for your share:

- **Expiry date** - share links never expire but to set an expiry date clear the check box, click on the calendar icon and choose an expiry date and time. Download links are permanently inactive when they expire.
- **Release date** - use the same method to set a date and time to release your files. You can upload your files and send out the links but download links are inactive until the chosen time.
- **Notify me on download** - select this check box to receive a notification email when the files are downloaded.
- **Recipient(s) can return files** - if selected, the notification email will contain a link to a page where your contacts or users can send files back to you.
- **PGP encrypt files** is not currently active. It will soon be released.
- **Security PIN** - Optional PIN the user must enter to access shared files. The PIN can be set for Tracked and Restricted shares. In order to protect share with PIN users should select Tracked or Restricted share type from Optional settings and then tick the Security PIN check box (see screenshot attached). System will then generate a random five digit code which can be populated with recipient(s). Please note that the PIN cannot be restored or reset after share is sent.
- **Destination Folder** - shows the path to the uploaded files.

5. Click on the **Send** button and your files are automatically uploaded and sent. Your shared files/folders are displayed in the **Sent** items folder of Outlook and in the **chosen** folder of your Quatrix account.

Note, that multiple incorrect login attempts may trigger a lockout and Outlook plugin will be locked too. Enter the captcha code to unlock. Also, you can set up 2FA as a part of the Outlook plugin.