Send, Share, Message, Discuss or Upload Securely

Share documents or conversations with your contacts or employees securely with encrypted and private portals

Why Dropvault?

Need to send a password, a secure link, sensitive document or a message to a contact? Or do your customers or contacts need to upload a document or have a sensitive discussion with your team?

Dropvault portals are conversational so you can send a message, have a private conversation, or share a document in either direction, are encrypted so anything you or your contact shares is always private and secure.

We then add a great task manager so you can track your conversations and sharing, and an e-signature tool to request sign off or signatures.

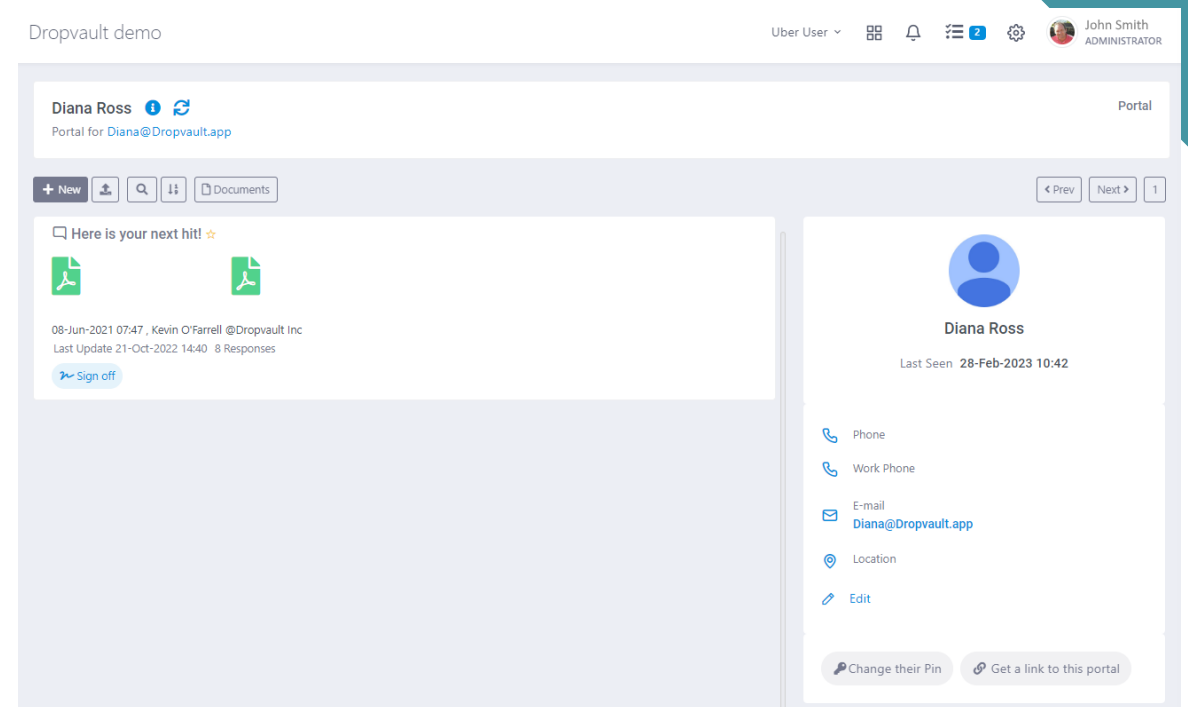# Portals – Messages, Conversations & Documents

Discussions & Documents

Most than just documents – Our portals are conversational and can be used instead of insecure email. Send a message, start a discussion, share a document, ask a question or reply to a previous discussion.

One place for all discussions & documents

Portals are a history of your teams' discussions & sharing to or from your contact – Every message, reply or document shared is always in your portal for easy review.

No more forwarding of emails or cc'ing to include team members – Your team or contact can just open the portal and get access to all previous discussions and documents

E-Signatures
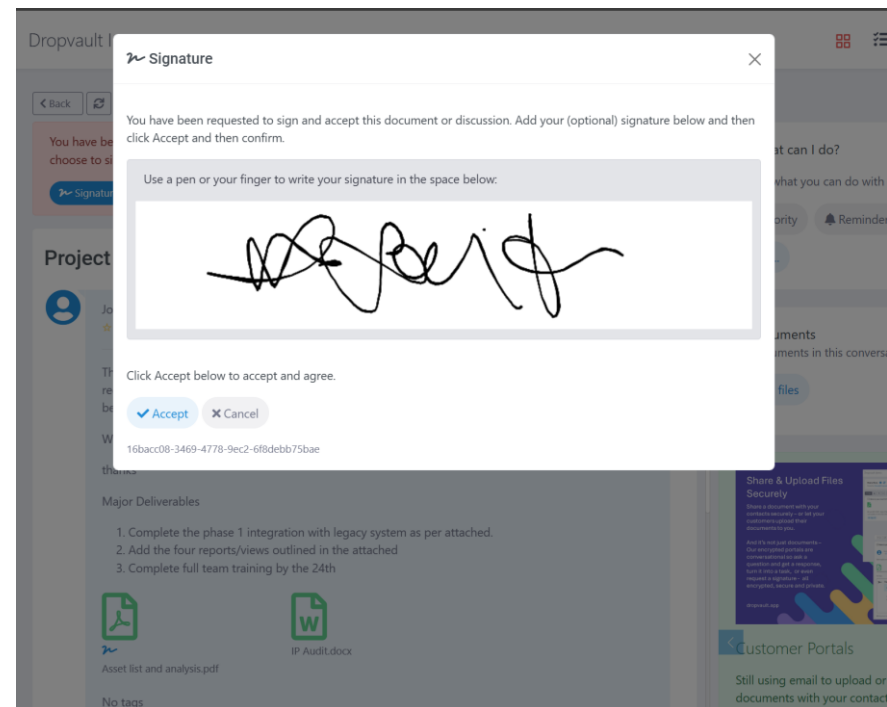
Request a signature on anything

Contracts, employee HR programs, CPAs and lawyers need to request signatures and record for compliance. That's why we've add a powerful e-signature feature into every portal

Signatures on just a message

You can request a signature or sign off on even a single message or comment. Need the ok to start a project, business task or HR change ? Just send your message & ask for a signature.

Or Conversation & Documents

Or for an entire conversation or discussion and all it's documents. No need to summarize into a single document and lose context.
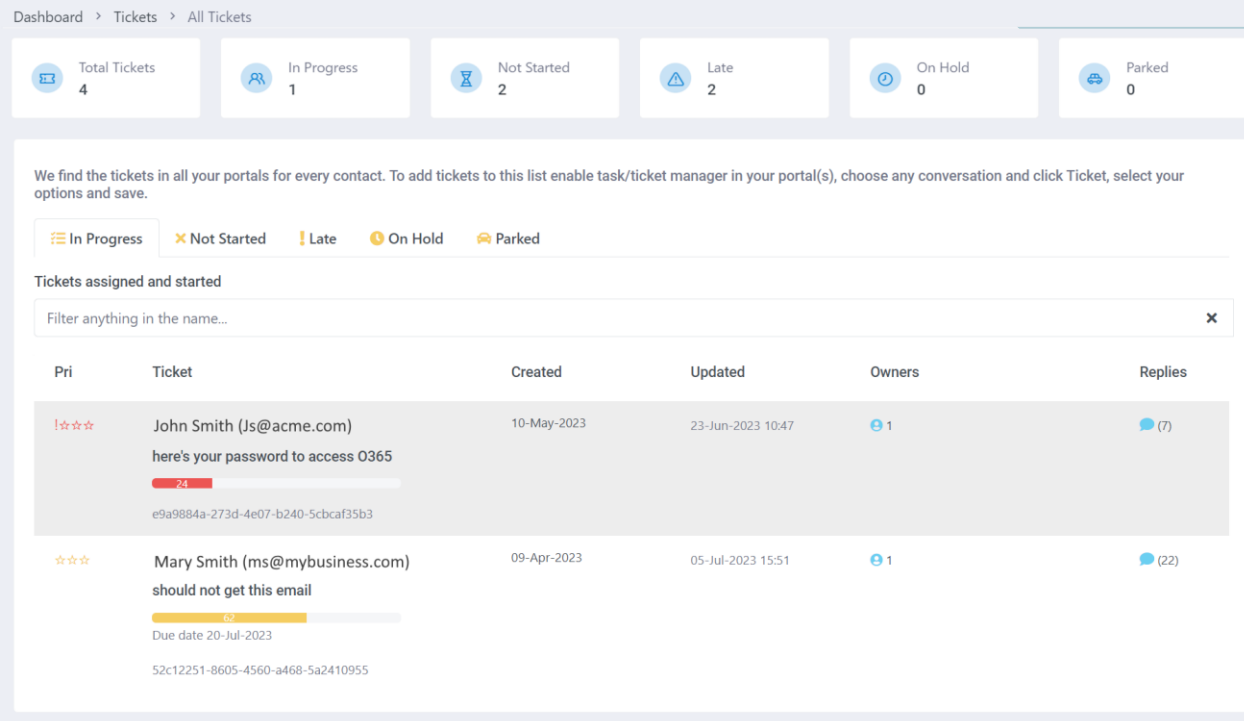
Task Manager

Keeping track of questions & requests

Are the number of portals and contacts grow you need to keep track and manage requests. That's where our built-in task app makes it simple to add any discussion or documents to the task list

And using our task manager ensures your conversations and documents stay private – No need to upload and share with another cloud app.

Assign, track progress and mark complete

The task manager allows you to add reminders, assign to team members and track progress and even set target completion dates.

Contact Manager

Manage and share all contacts with your team

The contact manager is shared with your team so it's easy to create, find and manage any contact – and their portal.

We've included tools to manage and sort your contacts, to view any missed updates and your contacts' access

Easy access to a contacts portal

Just open the contact and click on portal to get immediate access to everything your team or contact has ever shared.

We also show new and unread portal messages on your dashboard or you can pin your favourite contacts for quick access.

And there's more

Features

- Works on any device anywhere. Neither you or your contacts need to install anything

- 5 minutes to set up and start sharing securely. No expensive rollout or implementation project

- Storage and encryption key management included

- Add a My Portal link to your website or email signatures so you contacts can have instant access to their portal

- Dropvault is designed to be simple to use – No training is required for your team or contacts.

Features continued...

- Pin required or pin-less portal access

- Customize your portal with your logo and contact information

- Add Reminders for you or your team members

- Team Calendar for sharing completion dates

- Record time spent on each task

- Bookmark any discussion or document for quick access

- Add & share tags for easy searching and filtering

Portals – Use cases

External

- Accounts/CPA – Sharing tax and compliance documents and discussions

- Law Firms – Private discussions or uploads from your clients

- Real Estate – Upload identity, source of funds and other financial documents

- HR – Private discussions with employees, medical updates

- Recruitment firms – Uploading work permits /I-9/Bank account details

Internal

- HR – Private discussions with employees

- IT – Sharing passwords with employees

- GDPR SAR Requests – Identity confirmation, Subject data

- High Net Worth clients

Dropvault Portals

Dropvault

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