



# Share & Upload Files Securely

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A unique, privacy focused app that combines secure, encrypted portals with integrated contact manager and customer care ticketing

So private not even Dropvault can access your content

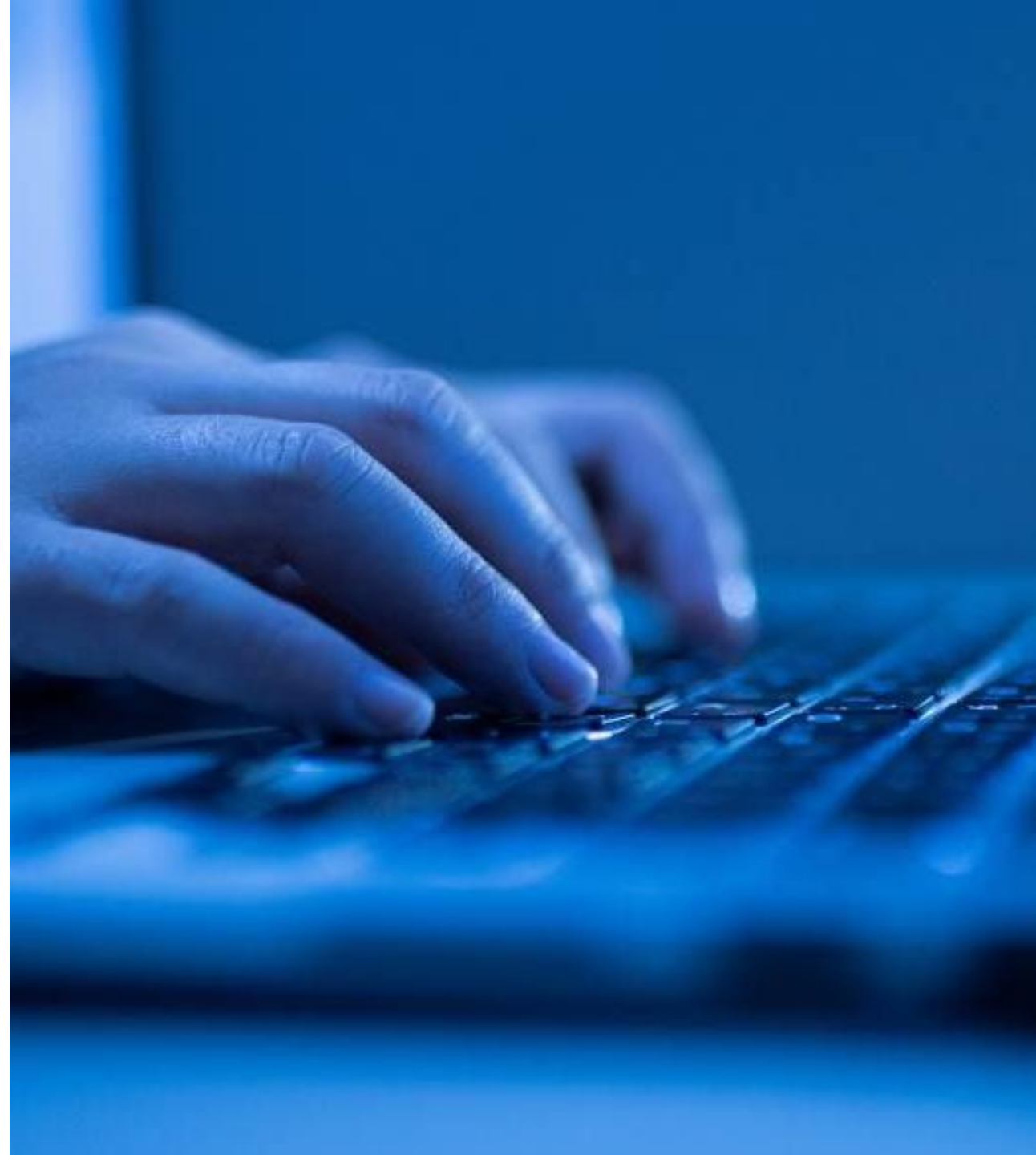
# Why Dropvault?

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Unlike most document sharing apps, Dropvault is conversational – We combine both the documents and the discussions around those documents into a single conversation – And each portal can have unlimited conversations, each encrypted and secured so you have total privacy.

A single portal is a history of all your teams' discussions and sharing with that contact, instead of spread across multiple email inboxes, so making compliance and auditing simpler – And encryption is not optional.

With Dropvault, privacy is our #1 goal.



# 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. Just open a contact and click on Portal to get instant access to the contacts portal.

By linking each portal to a contact, you keep all your teams' conversations and sharing in one place. No duplicates, no CC'ing or forwarding.

## Share notes and updates

The contact notes feature allow you to add and share notes and other updates for your team

The screenshot displays the Contact Manager interface. At the top, a contact profile for Diana Ross is shown with a blue circular avatar, her name, and a heart icon. Below the profile, there are sections for 'Where' (with a location pin icon) and 'How to Contact' (with icons for Mobile/Cell, Work Phone, and E-mail). The E-mail address is listed as Diana@Dropvault.app. Below this is a 'Portal' section with a description: 'A portal is a channel used to send to or share with this contact only. Once created a portal is used for all conversations and documents.' and an 'Open Portal' button.

Below the contact profile is a 'Manage your Contacts' section. It features a '+ New' button, a search bar with 'Find Q', and a 'Tags #' button. A list of contacts is shown, including Diana Ross (Diana@Drop), Elvis Presle (xyz1@drop), Julius Caes (jc@rome.co), and Tom Jones (tomjones@). Each contact entry includes a profile icon, name, email address, and a 'Last seen' indicator.

Below the contact list is a 'What can I do?' section with a gear icon. It contains a description: 'Select from any of the options below. Changes are immediate.' and several action buttons: Delete, Suspend access, TFA/MFA, Fido/Yubikey, Allowed Locations, and Channel list. Below this is a 'Notes' section with a '+ Add' button and a message: 'New and edited notes are encrypted so are safe to store sensitive data'. Below the notes section is a message: 'No Notes have been added for this contact'.

# Portals – One place for all sharing

## Discussions & Documents

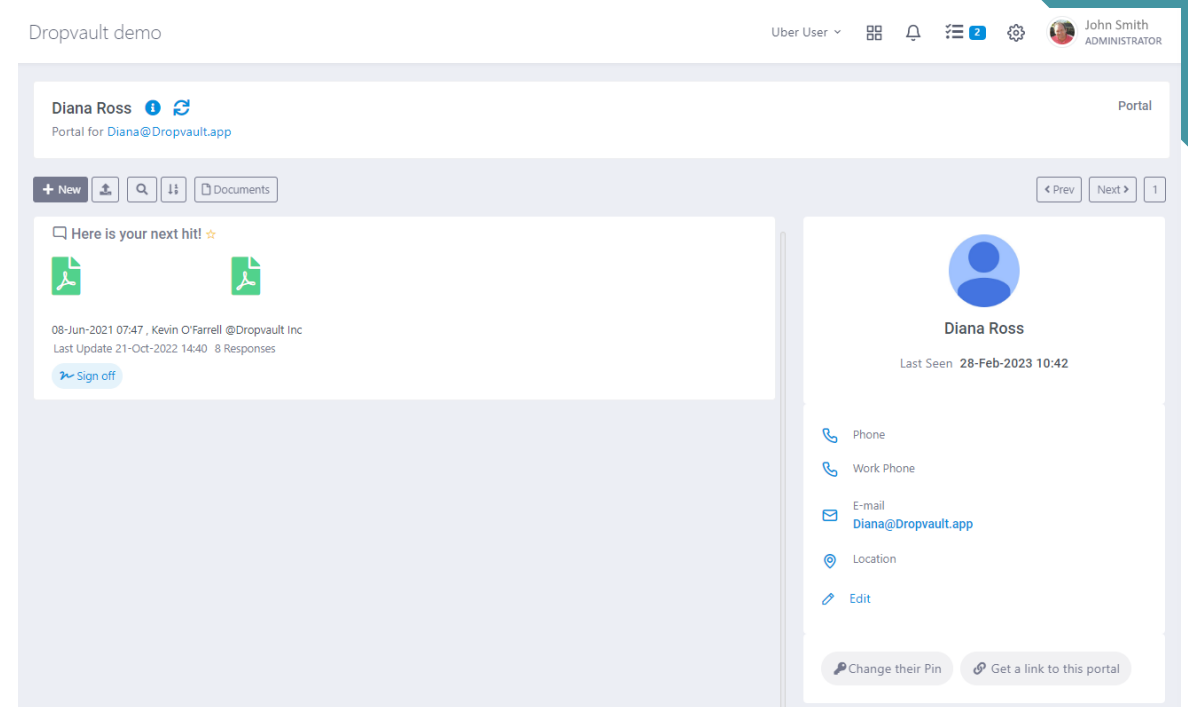
Most than just documents – Our portals are conversational and can be used instead of insecure email. Start a discussion, ask a question or reply to a previous discussion.

## Access at any time from anywhere

Your contacts can access their portal at any time from any device using any web browser. There is nothing to install.

## 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.



# Ticket Manager

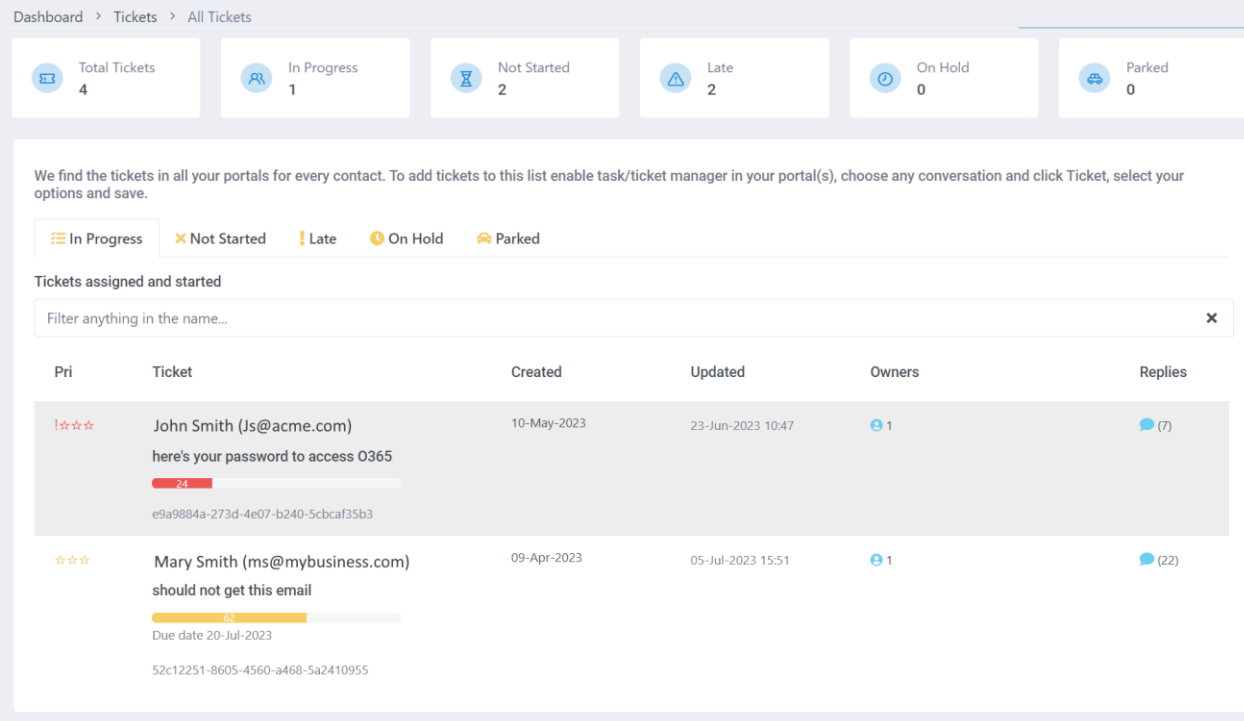
## Keeping track of questions & requests

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

And using our ticket 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 ticket manager allows you to add reminders, assign to team members and track progress and even set target completion dates. All secured and private.



Dashboard > Tickets > All Tickets

Total Tickets: 4 | In Progress: 1 | Not Started: 2 | Late: 2 | On Hold: 0 | Parked: 0

We find the tickets in all your portals for every contact. To add tickets to this list enable task/ticket manager in your portal(s), choose any conversation and click Ticket, select your options and save.

Filters: In Progress, Not Started, Late, On Hold, Parked

Tickets assigned and started

Filter anything in the name...

Pri	Ticket	Created	Updated	Owners	Replies
☆☆☆	John Smith (Js@acme.com) here's your password to access 0365 e9a9884a-273d-4e07-b240-5cbcaf35b3	10-May-2023	23-Jun-2023 10:47	1	(7)
☆☆☆	Mary Smith (ms@mybusiness.com) should not get this email Due date 20-Jul-2023 52c12251-8605-4560-a468-5a2410955	09-Apr-2023	05-Jul-2023 15:51	1	(22)

# 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 your 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
- Request E-Signatures on any discussion or document
- Add Reminders for you or your team members
- Team Calendar for sharing completion dates
- Record time spent on each ticket
- Bookmark any discussion or document
- 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**

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Dropvault

[info@dropvault.app](mailto:info@dropvault.app)

<https://dropvault.app/portals>