FilesAnywhere since 1999

# Put your documents to work

CUSTOMER USE CASES / SECURE SHARING • DIGITAL PROCESSES • AI • CONTROL

## A practical guide to better file-based work

When files, forms, and approvals live in separate places, teams spend time chasing information. FilesAnywhere brings these activities into a shared environment so people can exchange documents, capture data, and move work forward with access controls in place.

## Start with the business task


| | | |
|---|---|---|
| 01 | **Exchange client documents**<br>Share deliverables and request files with controlled links. | 2 |
| 02 | **Standardize onboarding**<br>Collect vendor, customer, or employee information with eForms. | 2 |
| 03 | **Move approvals forward**<br>Route requests and document reviews through Workflow. | 3 |
| 04 | **Find answers and capture data**<br>Use FAi to understand, organize, and extract document information. | 3 |
| 05 | **Govern access and retention**<br>Apply account policies and manage the document lifecycle. | 4 |
| 06 | **Build a branded client workspace**<br>Align the experience and storage approach with your business. | 4 |


### How to read this guide

The scenarios are illustrative applications of product capabilities, not customer case studies or measured performance claims. Feature availability depends on the selected plan, deployment, and configuration.

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# Make external work easier

01–02 / DOCUMENT EXCHANGE & INFORMATION COLLECTION

**USE CASE 01 / CLIENT SERVICE • LEGAL • FINANCE**

## Exchange sensitive client documents

The challenge. Attachments scatter documents across inboxes and make it harder to manage ongoing access.

How it works. An accounting team requests client records with FileReceive, organizes them in a client folder, and sends completed reports through FileShare. It adds passwords and expiration dates where appropriate.

> Supporting features
> FileShare and FileReceive • Password protection • Link expiration
> GroupShare folders • Upload and link activity notifications

Business value. Give clients a direct way to send and receive files while your team manages the sharing settings.

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**USE CASE 02 / HR • VENDOR MANAGEMENT • OPERATIONS**

## Bring consistency to onboarding

The challenge. Email requests and paper forms produce inconsistent submissions and repeated follow-up.

How it works. Build an eForm for a new vendor, employee, or customer. Collect the required information and supporting documents, then use Workflow for the review steps your process needs.

> Supporting features
> Drag-and-drop eForms • Conditional logic • File upload fields
> Centralized responses • Workflow routing • Submission notifications

Business value. Create a repeatable intake process that helps reduce paperwork and gives reviewers a more consistent starting point.

Example applications: client document requests, vendor registration, employee intake, and service requests.

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# Turn information into action

03–04 / APPROVALS & AI-ASSISTED DOCUMENT WORK

**USE CASE 03 / OPERATIONS • SALES • DEPARTMENT MANAGERS**

## Keep reviews and approvals moving

The challenge. A request passed from inbox to inbox can lose context and leave the next action unclear.

How it works. Configure a purchase request or contract review process in Workflow. Capture request details, assign review steps, and notify the people responsible for the next action.

> Supporting features
> Workflow Builder • Review and approval routing • Assignment notifications
> eForms • Custom PDF or HTML form layouts

Business value. Structure handoffs so teams can follow a defined review process instead of coordinating each request manually.

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**USE CASE 04 / LEGAL • FINANCE • DOCUMENT-HEAVY TEAMS**

## Find answers and reduce rekeying

The challenge. People spend time reading long documents, searching for details, and copying values into forms.

How it works. Use FAi Chat to ask questions or summarize a document, FAi Tags to suggest useful labels, and FAi Extract to identify key values. Review extracted information before using it to populate an eForm and support a workflow.

> Supporting features
> FAi Chat • AI-assisted search and summaries • FAi Tags
> FAi Extract • eForm population • Existing access controls

Business value. Help staff locate information and reduce repetitive data entry while keeping human review in the process.

AI setup: confirm account enablement and supported provider credentials. Review AI output for accuracy before relying on it.

# Keep control as work grows



**USE CASE 05 / IT • SECURITY • ACCOUNT ADMINISTRATORS**

## Manage access throughout the file lifecycle

The challenge. Access needs change as staff, projects, and outside relationships change. Old files also need a defined retention approach.

How it works. An administrator sets access by role, applies sign-in policies, reviews activity, and configures archive or purge rules to match the organization’s document policies.

> Supporting features
> Administration Console • Role-based access • MFA • Password policies
> Session timeout • IP restrictions • Activity reporting • Retention rules

Business value. Give administrators a consistent way to oversee access and support internal information-handling policies.

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**USE CASE 06 / PROFESSIONAL SERVICES • ENTERPRISE IT**

## Create a familiar client workspace

The challenge. Clients need a familiar sharing experience, while IT needs storage options that fit its infrastructure.

How it works. Brand an eligible private cloud with your logo and dedicated URL. Evaluate Flex Storage Pro when you need supported customer-owned Azure or AWS storage.

> Supporting features
> Branding • Custom homepage • Dedicated URL
> Flex Storage Pro • Azure and AWS storage options

Business value. Align your client experience and storage approach with your business.

### See your process in FilesAnywhere

Bring a sample document or intake process. We’ll help identify the features, configuration, and deployment that fit. Request a tailored demo →

Confirm plan and deployment eligibility with Sales. Branding and integrations may require additional services. Third-party storage fees apply to Flex Storage Pro. Controls support your policies; compliance depends on your implementation.