

11 tools to optimize your business

Tool #6: Secure Document Vault



advantages of XIRA's secure document vault

1. helps you stay organized
2. provide a safe and secure alternative for sharing documents with clients
3. promotes collaboration and sharing
4. keeps track of the latest version of your documents
5. files becomes portable and is accessible from anywhere
6. eco-friendly solution uses less paper, reducing paper costs

There's simply no comparison between storing your files in a metal or wood cabinet and storing them in a digital repository. The right document management system makes it easy to quickly share and exchange files between you and your clients and enables efficient collaboration in a secure digital environment. Being a solo or small firm practitioner, you need a cost-effective, secure, redundant way to manage, and access documents online.

XIRA's secure document vault

XIRA's secure, cloud-based platform contains an integrated, document vault that enables attorneys to easily upload, manage, store, and access files in one secure location.

Our secure document vault provides solo-small law practitioners with:

- ability to store work product documents and templates in a private folder not accessible to clients
- flexibility to create subfolders for better organization
- drag and drop capability
- an intuitive client portal enabling easy access for new or existing clients to upload and view documents only in the secure folder you've designated for them for their specific case
- capability to set up notification preferences to inform you whenever clients upload new documents.

how to upgrade to Premium Plan

1. go to "settings" icon (gear wheel)
2. select "secure vault"
3. In upper, right-hand corner of screen, select orange "UPGRADE" button
4. a pop-up box appears, select the orange "CONTINUE" button in the Premium Plan box
5. the "UPGRADE" button in the top of the screen changes to gray with "PREMIUM" displayed
6. billing for Premium Plan will start at the end of the month
7. you can revert back to the free plan at any time by selecting "FREE PLAN" in the drop down menu. Keep in mind, you must delete files to get under the 2GB storage limit. Otherwise, you and your clients will not be able to upload new documents

PREMIUM PLAN ✓

FREE PLAN

PREMIUM PLAN

100+ GB

rates per month

up to 100 GB **\$10**

beyond 100+ GB **\$10 + \$0.10 per GB**

complementary 2GB of storage

With GAVEL's integrated document vault, you get 2GB of storage space **free** of charge.

increasing your data storage

Once you've used your 2GB storage limit, you can easily upgrade to the Premium Plan, so you and your clients can continue to upload and share documents. Or, if the free plan works best for your practice, simply delete files (including emptying files in the trash) to maintain your 2GB storage limit. We put the power of choice and convenience in your hands.

With a simple click of a button (see side bar), you have the flexibility to get additional secure storage only when you need it, enabling you to better control and minimize your document management system costs. An additional 100GB of space may be purchased through the Premium Plan when needed at \$10/month. Storage over 100Gb is charged based on usage at \$0.10 for each additional GB to help you maximize your savings. You can change from the free 2GB plan to the Premium Plan and revert back to the free plan at any time.



attorney document vault upgrade storage view

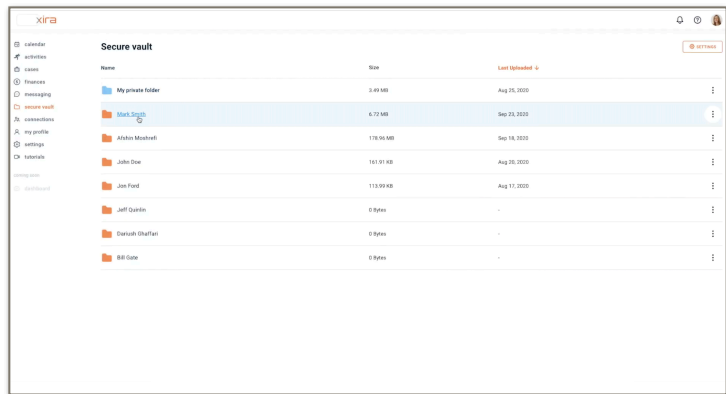
how it works (attorneys)

We've made it easy for you to quickly upload and manage your files by providing access to the secure document vault on XIRA's browser (or mobile app) from multiple areas:

- secure vault
- calendar view
- activities
- cases
- connections

secure vault

1. log in and select "secure vault" tab (folder icon).
2. click on a client folder.
3. you will be taken to all the files in the document vault for that client's case.



attorney secure vault view

my private folder

From the "secure vault" tab you will see a blue "My private folder". This is your personal work product folder to maintain documents, files, templates, etc., you want to use with your clients. This folder is **not** viewable or accessible to clients.

client folders

You can directly access any client's folders from the "secure vault" tab to maintain or upload new documents. If your client has multiple cases with you, you will have a document folder for each case. Any time you upload a document to a client's folder, the document becomes available for your client to view as well. They will not be able to see or access any other client's case folder but their own.

Clients that are connected with you on XIRA will be able to upload documents to their respective case folder. They can also view, download, and print any documents. However, clients will not be able to create subfolders or rename, move, copy, or delete any files.

all folders

You can create as many subfolders as you wish by selecting the orange "CREATE FOLDER" button in the upper-right-hand corner of the screen. You can also upload files to your private folder, client folders, or any subfolders by selecting the orange "UPLOAD FILES" button in the upper right-hand corner, or buy using the drag-and-drop feature.

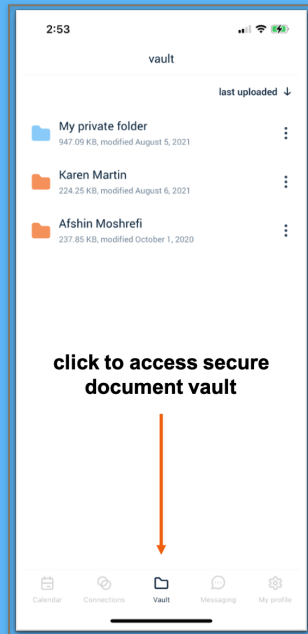
You can also download, print, rename, move, delete, or copy files by selecting the three ellipses to the right of the folder/document.

document log

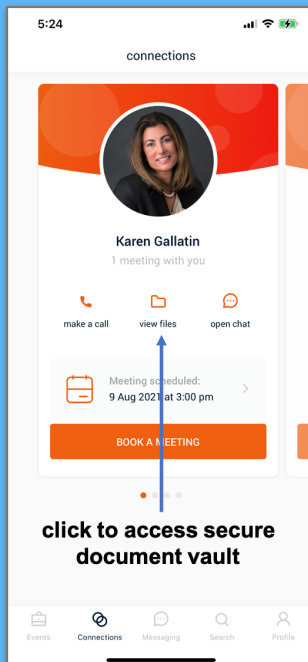
XIRA captures the history for any actions/changes made in the secure document vault by either you or your clients in a detailed log file. The log files can be accessed by first selecting a specific folder in the vault you want to view and then selecting the "log" icon. The most recent change appears first.

mobile views

The document vault is also available on XIRA's mobile app.



attorney mobile view



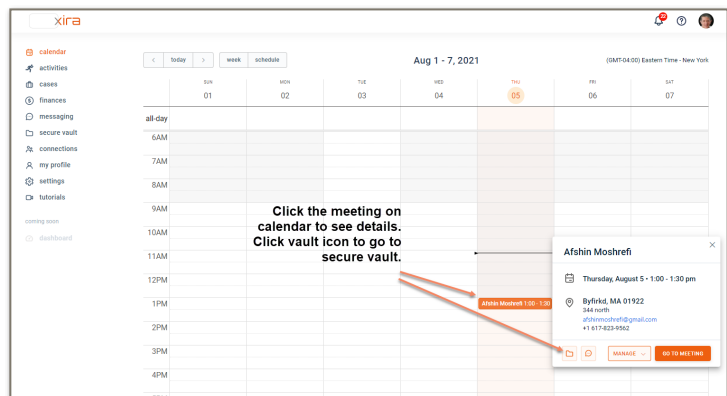
client mobile view

trash

Deleted documents are moved to the "trash" folder. Once the trash is emptied, the files are permanently removed. The trash files can be accessed by first selecting a specific folder in the vault you want to view and then selecting the "trash" icon. Regularly emptying your trash also maintains your storage limit.

calendar view

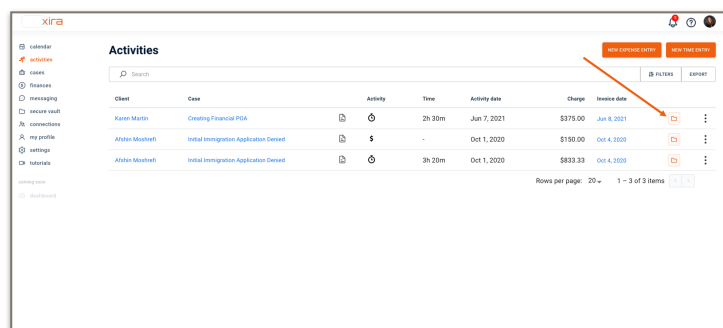
1. log in and select "calendar" tab (calendar icon). Select a specific client meeting in your calendar to see the meeting details.
2. select the orange folder icon.
3. you will be taken to the document vault for that client's specific case.



attorney calendar view

activities

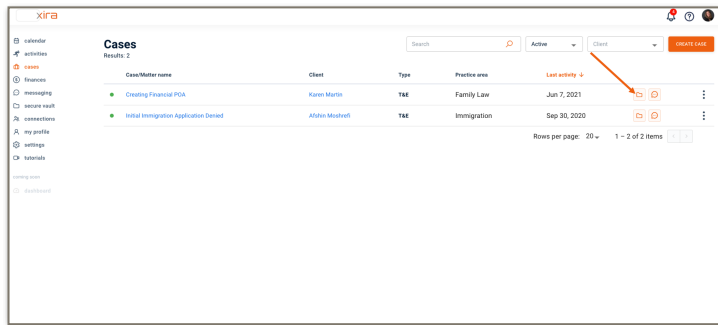
1. log in and select "activities" tab (person running icon). Highlight a specific client's case.
2. select the orange folder icon to the left of the three ellipses.
3. you will be taken to the document vault for that client's specific case.



attorney activity view

cases

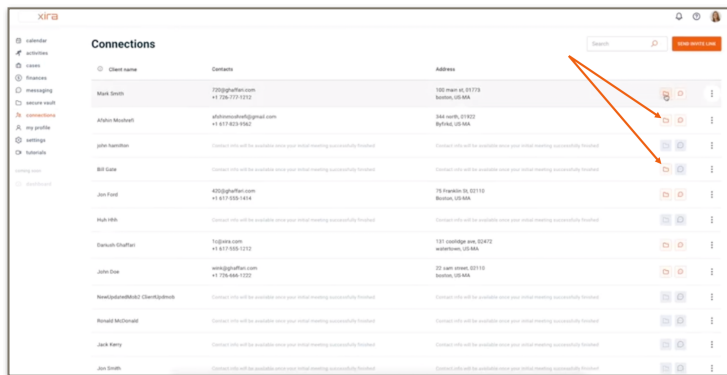
1. log in and select "cases" tab (briefcase icon). Highlight a specific client's case.
2. select the orange folder icon to the left of the messaging icon.
3. you will be taken to the document vault for that client's specific case.



attorney cases view

connections

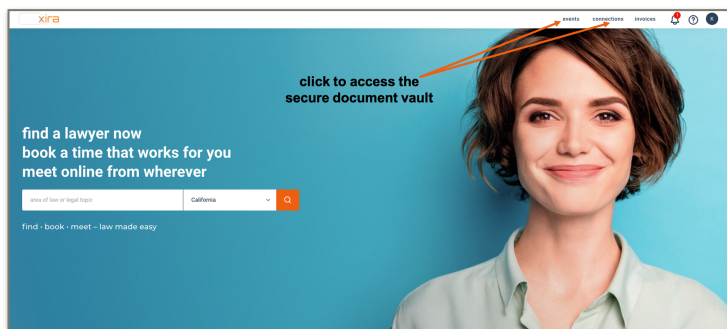
1. log in and select "connections" tab (icon of two people).
2. select a client name from your "Connections" list.
3. select the orange folder icon to the left of the messaging icon.
4. you will be taken to the document vault for that client's specific case.



attorney connections view

how it works (clients)

Once clients are connected with their attorney on XIRA, they can view or upload files to the secure document vault by clicking on either the "connections" or "events" tabs.



client login view

notification indicators

XIRA displays notifications for new, uploaded files in red next to the bell icon in the browser



browser notification indicator

a **video tutorial** of the secure document can be found [here](#).

have questions?
for any other questions you may have, send an email to info@xira.com

get XIRA's free mobile app now!



XIRA Connect, Inc.
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rev. a 8/21

connections

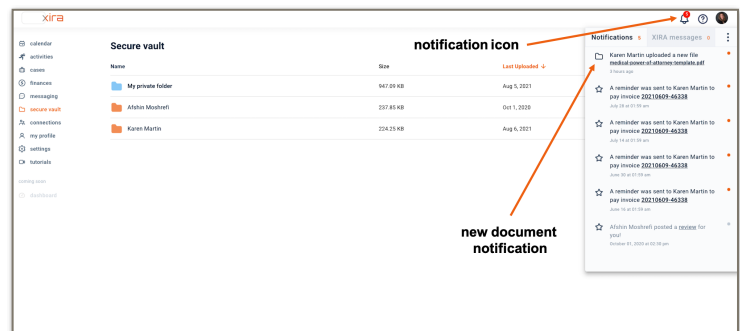
The client "connections" screen displays all the attorneys a client has connected with or has scheduled meetings with. After clicking the orange folder icon on their attorney's card (next to the messaging icon), the client is taken directly to the secure document vault for their case. The folder icon will only turn orange once a client has completed an initial consultation.

events

The client "events" screen shows all pending attorney meetings (completed or cancelled meetings can be purged from the "events" screen). Clients select a specific meeting on their "events" screen in order to see the meeting details. They can then click the folder icon (next to the messaging icon) to get to the secure document vault. Clients can only access the secure document vault in the "events" screen when there is an active meeting scheduled.

notifications

XIRA's platform informs you and your clients when any new documents have been uploaded to the secure document vault. A red number will appear next to the notification indicator (bell icon) located at the top of the browser. A folder icon with the file description will be displayed when the notification icon is clicked. An email is also sent to the attorney or client informing them that a new document has been added by the other party to the secure document vault.



attorney notification view

Now, you are an expert at using XIRA's secure document vault!

stay current with XIRA's latest activities and media coverage. check out our [press page](#) and like and share our social media pages

