

Client Portal Software

BUYER'S GUIDE





It's our job every day to make every important aspect of the customer experience a little bit better.

Jeff Bezos

Onboarding and collecting the documents required to begin consulting, is a crucial step in any client relationship.

It doesn't have to be a struggle with email tennis and attachments that won't upload. You shouldn't need to chase IT or your provider to set up a new portal instance for every new customer.

With 91% of cyber attacks and data breaches starting with phishing via email, moving your document collection out of the inbox to an independent, safe and secure platform adds further security and protection for you and your clients.

The new generation of client portal software can create a new portal in minutes, ticking all the boxes of access permissions, security and branding.

Here are our 10 key features to consider when reviewing client portal software

Accessibility From Any Device	01
Speed Of Deployment & Security	02
Custom Branding & White Label	03
Replicable Templates	04
Digital Forms	05
e-Signatures Or Digital Signatures	06
Due Dates, Reminders & Chat	07
Audit History & Logs	08
Cloud Storage	09
Integrations & APIs	10

ONE

Accessibility From Any Device

Making this first administrative process as streamlined as possible is paramount. Regardless of the device that your client is using they should easily be able to view, upload and communicate with you.

Top platforms allow clients to upload files, use their smartphone camera, and even complete and sign documents digitally on their phone.





Speed Of Deployment & Security

With the latest client portal software, creating an individual, secure document portal for every new customer takes a matter of seconds. No more submitting requests or logging a ticket with IT to have a new portal created.

Defining user access and permissions is in your hands and adding or removing access is in your control.

Great platforms will let you choose from open or password protected client portals and access your own cloud instance if required.



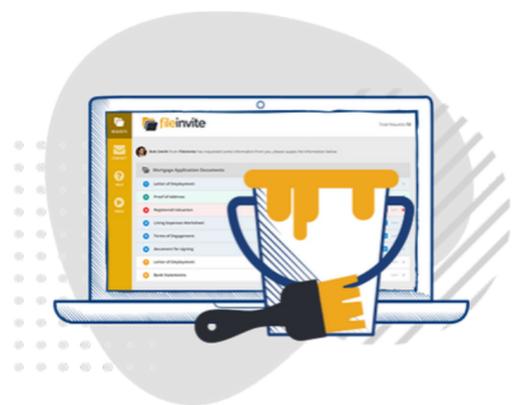
THREE

Custom Branding & URLs

It may feel like a nice to have but the security and trust conveyed by your own custom URL, logo and a complementary colour palette on portals - can really make a difference.

Client portals that match your branding really reassure your customer of your commitment to security.

Modifying the messaging on the portal can add a personal touch to introductions, messages and alerts that fits with your brand messaging.



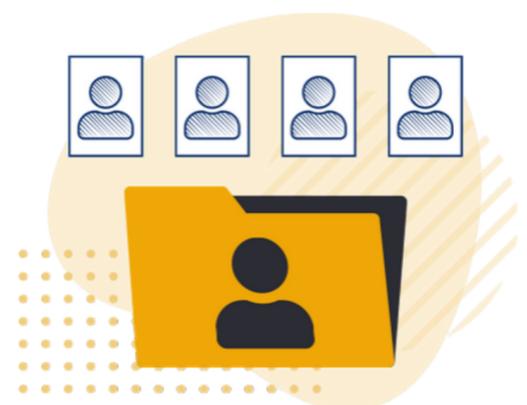
FOUR

Replicable Templates

Modern professional service firms understand that standard procedures and master templates are the secret to business growth.

By using a master template you can ensure that your entire team is complying with the latest standards, using the correct branding, and getting the right information every time.

Good client portal software will save document lists, messages and forms for repeat use. Creating a new portal from the master template takes seconds, but also allows you to add client specific data and documents as needed.



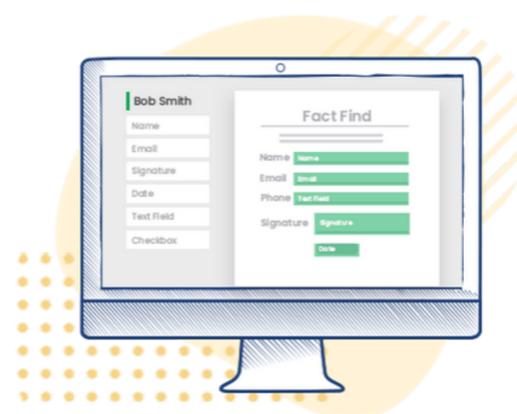
FIVE

Digital Forms

Beyond the ability to pass completed documents and files, the latest client portals now allow you to create digital forms for surveys or completing applications.

The battle of trying to decipher hand written application forms or transcribing from one platform to another will disappear.

Online forms will allow you to collect individual data points for exporting and use in other platforms or to leverage via integrations.



SIX

e-Signatures Or Digital Signatures

Why print and send a hard copy of your contract or send a separate email requesting an e-signature?

The latest portals let you collect e-signatures on contracts with digital signature authentication, all from within the platform.

You can even have multiple parties sign, without installing adobe acrobat or other PDF software.



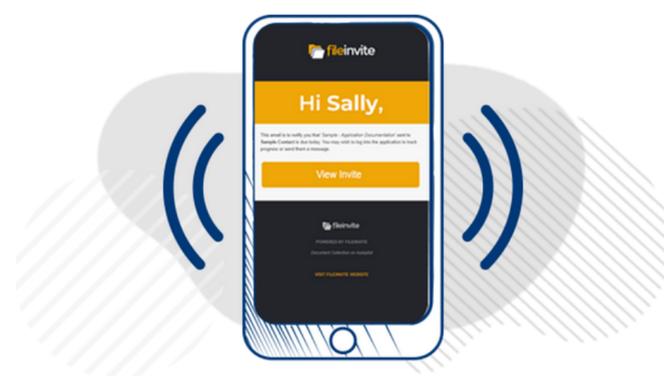
SEVEN

Due Dates, Reminders & Chat.

Getting documents back in a timely fashion is far easier when clients receive SMS and email reminders.

Great client portals now let you set a due date for the completion of documentation, which triggers follow up algorithms as due dates loom.

Add to this the ability to message within a client portal via chat. Then you can quickly respond and eliminate any confusion a client may have about what you are requesting of them.



EIGHT

Audit History & Logs

We are all subject to constant regulatory updates. Privacy legislation and industry standards are constantly being reviewed.

Gain peace of mind with an audit history and log of:

- Messages to clients
- file uploads
- user access
- and any chat messages.

Keeping the entire document collection process ring-fenced in a secure separate environment, also means no more digging through emails to provide records to auditors.



NINE

Cloud Storage

Your growth in clients and client portals also means growth in the number of documents and the storage capacity that you need to hold your data.

Integrations with cloud platforms like OneDrive, Google Drive, Box, and Dropbox are key to having extensible data storage.

Great platforms will instantly have files converted, renamed and pushed to tidy folders for you too.



TEN

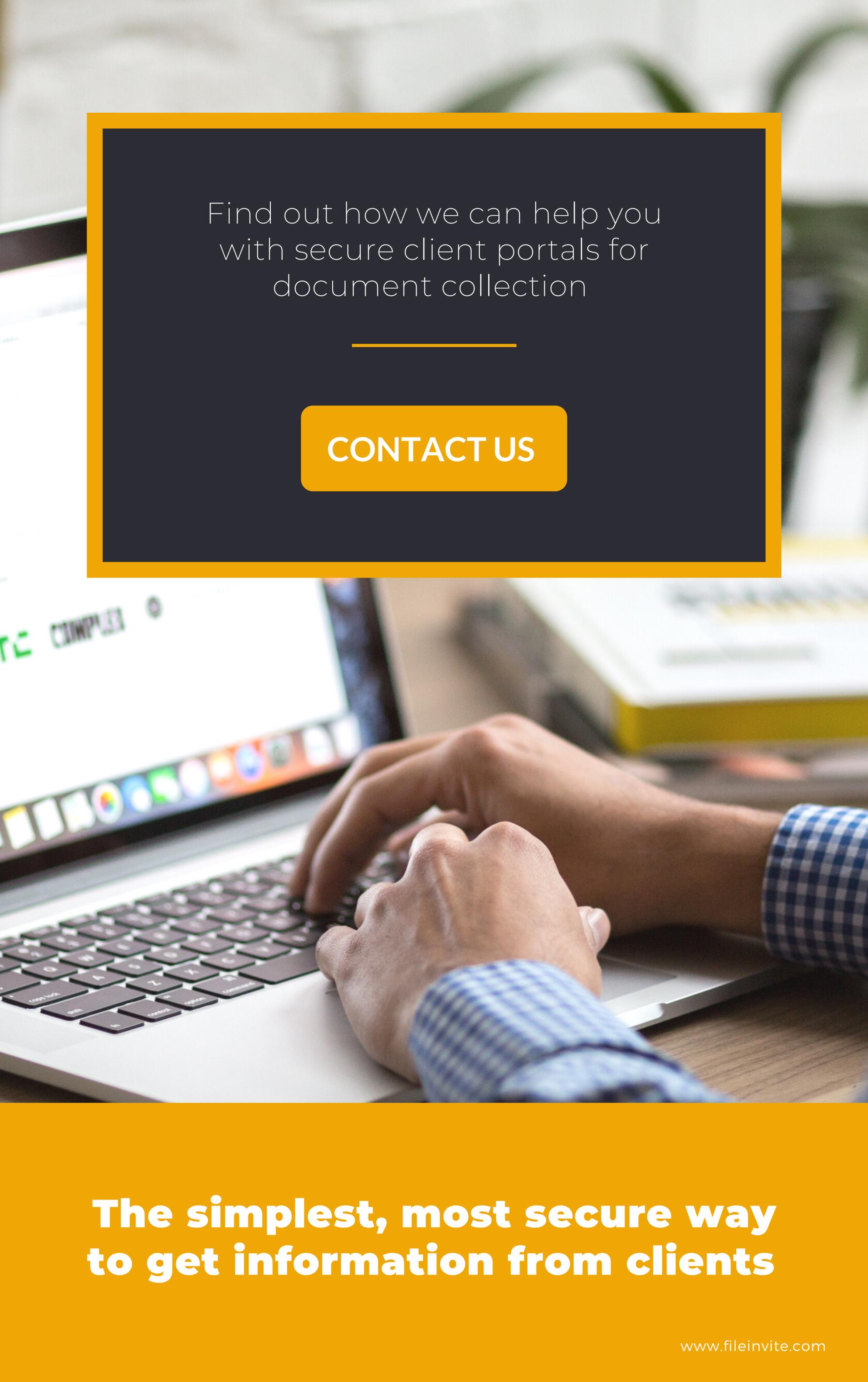
Integrations & APIs

Many client portals will have industry specific integrations with data providers like bank statements, to request data from clients enabling you to supercharge your document workflows and save hours for you and your clients.

With client portals doing the leg work of collecting files, having a seamless next step in the process can save you hours in productivity.

Look for portals with an API that can integrate with your existing CRMs and systems or use Zapier to trigger the next steps.



A close-up photograph of a person's hands typing on a laptop keyboard. The person is wearing a blue and white checkered shirt. The laptop screen is visible in the background, showing a desktop environment with several application icons. The background is slightly blurred, showing a desk with some papers and a plant.

Find out how we can help you
with secure client portals for
document collection

[CONTACT US](#)

**The simplest, most secure way
to get information from clients**