



# Introducing Freeform: Secure File Sharing

## THE PROBLEM

One of Convolve's customers – a major US credit issuer – wanted to phase out the file transfer repository they used for sharing unstructured documents with their collection vendors. Given the issuer's long history with Convolve's debt collection tools, they requested that a similar tool be created that would replace what they were currently using.



## COMPLETELY NEW PRODUCT

## THE SOLUTION

In response, Convolve created a completely new solution within the Convolve platform to supplement their existing Vendor Management feature (see case study: [Convolve Expands Vendor-level Oversight](#)). While Vendor Management documents are more organized and structured, Freeform supports all unstructured files that do not fall into a well-defined category. This allows all parties to securely send files to one another to support any ad hoc need.

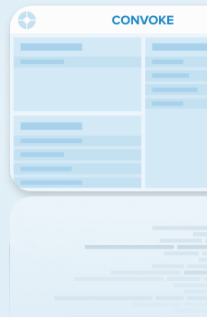
## KEY CLIENT OUTCOMES

- ◆ File organization easy to learn and implement
- ◆ No file extension constraints for uploads
- ◆ Flexible permission structure for file folders
- ◆ Meets the highest security standards
- ◆ Significant cost savings

## ALL FILE EXTENSIONS SUPPORTED



## CLEAR, INTUITIVE DESIGN



## CUSTOMIZABLE FILE FOLDER PERMISSIONS



## THE NEED FOR DOCUMENT ORGANIZATION

As part of their workflows with their collection vendors, one credit issuer customer was using a third-party software tool that allowed both parties to send ad hoc documents and other files to one another. Due to the significant costs associated with it, they decided to let their contract expire and find a replacement. Commercial sharing systems (e.g. Dropbox and Box) do not permit full security audits, which is a requirement in the financial services industry. Other solutions – such as shared drives or secure email – come with significant feature shortcomings. As Convoke had provided significant value to the issuer through its trusted platform, they requested that Convoke build a replacement product that contained all their feature requirements but with Convoke's fully-auditable security.

## A NEW PRODUCT

To help the issuer replace their old file-sharing tool, Convoke's product team designed and built **Freeform**, an entirely new software product that stands within the core Convoke platform. This would conveniently supplement their current use of Convoke's Vendor Management feature, which is specifically aimed at defined vendor-level documents. This not only helped them integrate more of their workflows into a central location, but with its intuitive, flexible design, users can easily drag and drop any files into predefined folders to share them. Unlike Vendor Management, where files must be uploaded according to specified criteria, Freeform is intentionally unstructured. Thus, users can load anything they wish without any restrictions on file extensions or naming conventions.

“Freeform is an easy, flexible, and secure tool for sending and receiving unstructured files on a trusted platform that meets our customers' strict security protocols.”

## A TRANSFORMATIVE OUTCOME

As both the issuer and its vendors regularly send ad hoc documents to each other, Freeform makes it easy for both parties to upload, share, view, and download files securely. Its unique permission structure ensures all repositories and folders are fully customizable, allowing issuers to set aside separate repositories for each of their vendors. Likewise, administrators can restrict access internally so only those who need access can view specific repositories and folders. Whatever the use cases – from background checks to third-party audits, ad hoc document sharing, and many others – Freeform has the power and flexibility to support the issuer's needs. Moreover, Freeform's security is fully auditable like the rest of the Convoke platform, making it fully compliant with credit issuer requirements. Adopting Freeform has proven to be a successful and cost-effective decision for this customer. Convoke is confident that Freeform will be able to provide similar benefits for many others in the future.

