GoFileDrop

GofileDrop – user manual

Secure Collaboration in the Cloud

gofiledrop.com

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Overview & Purpose

GoFileDrop provides a secure platform to both receive and send files in the cloud, unlike other file collaboration platforms GoFileDrop does not force people sending you files to use any particular platform.

To use GoFileDrop ALL your clients need is a web browser and an internet connection.

GoFileDrop provides you with a dedicated upload page to share with clients or embed on your website or Facebook page.

When files are received they are stored and organised in the cloud, this makes GoFileDrop both efficient and very secure.

Why use GoFileDrop?

Typically organizations use GoFileDrop when the files being exchanged are too sensitive and or the file size too large to be sent via email.

Files are automatically organised for you and data sent with the files is stored with the files as meta data.

You can automatically share files uploaded via GoFileDrop making use of the latest cloud collaboration technology.

Files received with GoFileDrop can be automatically synced to your local devices.

Who uses GoFileDrop?

Typical use case scenarios are:

1. Mortgage companies exchanging confidential financial records with clients.
2. Print shops receiving and processing files to be printed from clients
3. Financial advice organizations exchanging confidential files
4. Educational organisations receiving course work from students
5. Audio transcription companies receiving files to be transcribed
6. Solicitors / Lawyers exchanging confidential files
7. Video editing companies receiving video content from clients
8. IT support service organizations receiving and distributing files to clients
9. Real estate agents sending and receiving files from clients & photographers
10. Accountants receiving and sending confidential files to clients

Quick Start - settings

The first thing to do is to set your display name and basic settings such as the default Google Drive folder to upload files to and if you want to automatically share uploaded files with other people, the settings page is also where you upload your company logo or profile picture.

Simply access your settings page and enter your basic settings information. (see screenshot below)

Display name, this is the name that will be displayed to people who send you files (it defaults to your email address and we recommend changing it to your business name or your given name)

Folder name - this sets the default folder which files uploaded with GoFileDrop will be placed in, if the folder does not already exist it will be created when files are uploaded.

Note you can also override the folder for specific uploads which is useful if you want to file specific different clients files in different folders by sending them links specific to them - please see page 6 for more information.

Share with - here you can set a group email or single persons email with which you want to automatically share all files that are uploaded via GoFileDrop, note any email set here will have edit access to the files and of course they must be a Google Drive user, also ensure if you are ahring with a user outside your organization that this is enabled by your Google Apps administrator.

Reply To email address - here you specify an email address (defaults to the email you are using with GoFileDrop) that is used as the reply to email address on the confirmation email sent to people who upload files to your GoFileDrop account.

Imagine the scenario where you are using a Gmail account with GoFileDrop such as myrandomaccount1234@gmail.com, you may not want that email address to be used as the reply to address for business clients uploading files to you. You can set the Replyto address to anything you like such as enquiries@mycompnay.com and this will then be used instead of the Gmail address which gives a more professional appearance.

Time zone - GoFileDrop provides you with an inbox and a sent view showing the time files are received and sent, ensure you have set your timezone correctly so the correct times are shown in those views.

After making changes to your settings please **ensure your click SAVE.**

Next upload your company logo, click the button labelled "Change company logo" and select your logo image, it can be any image file type such as jpeg or png.

People sending you files will then see your logo rather than the standard GoFileDrop logo.

Receiving files?

To securely receive files you need to send a link to your hosted GoFileDrop upload page to your clients, alternatively you can embed the upload tool on your own website or a Facebook page you manage.

To send a link to your hosted upload page login to GoFileDrop and click on <u>Receive file</u> in the menu on the left hand side you will then see the page in the screenshot below:
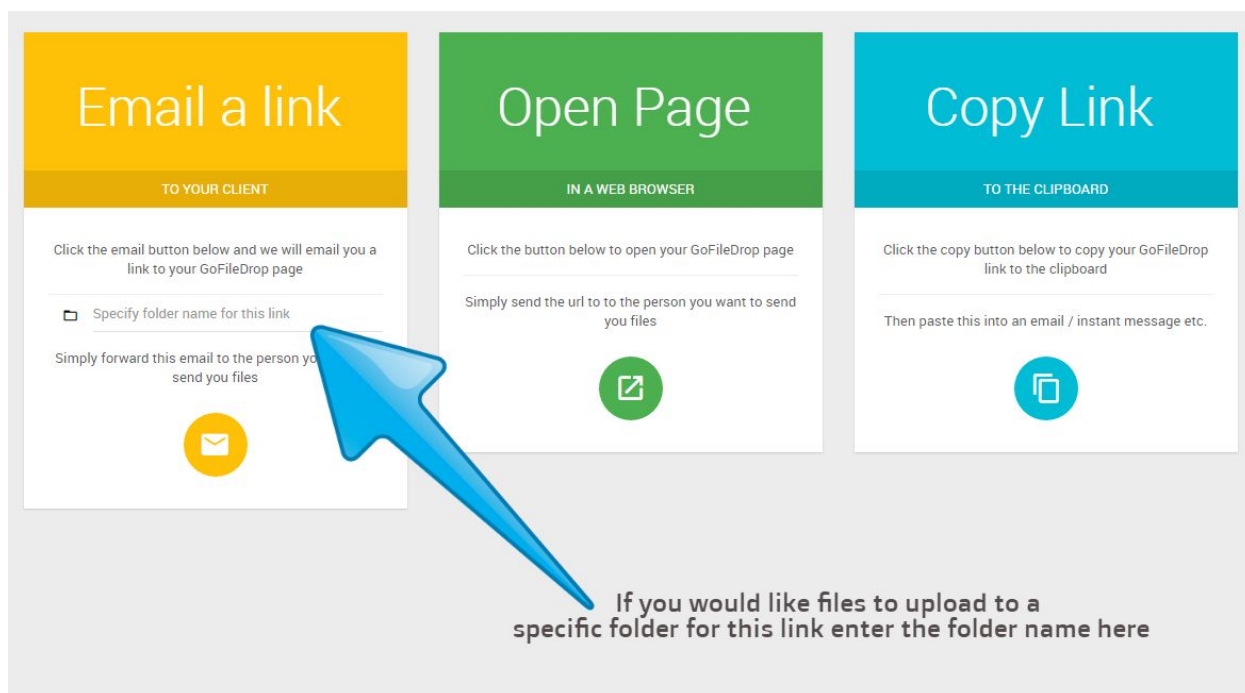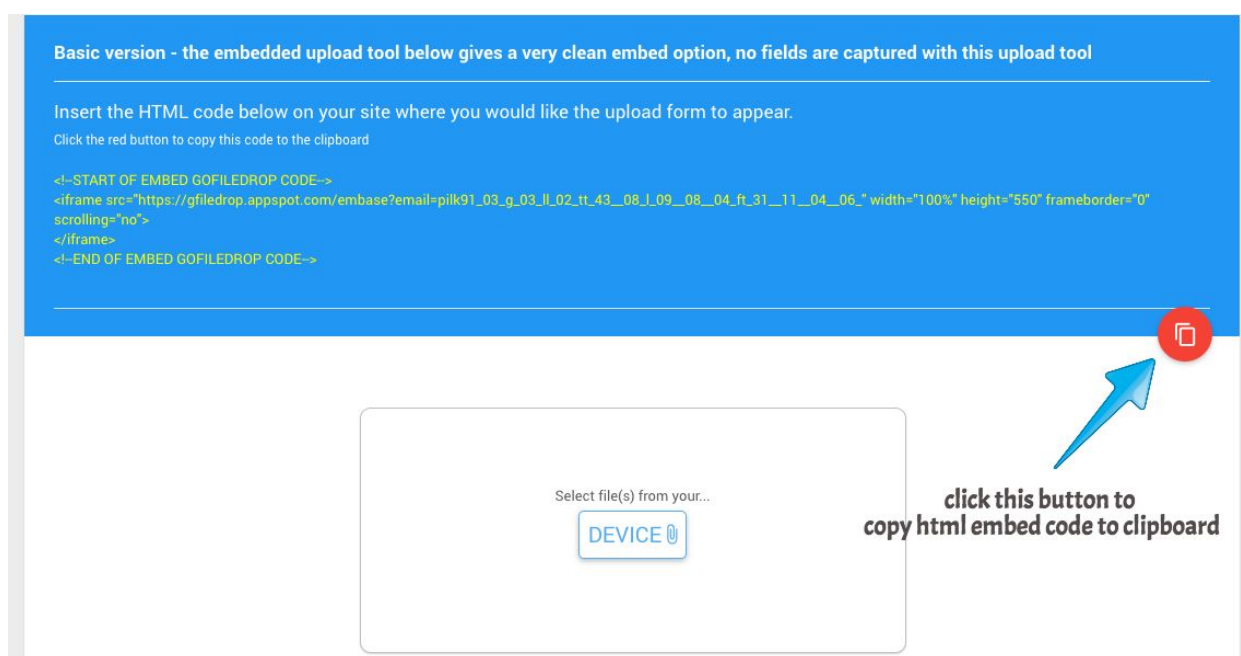

You now have three options from left to right:

- Click the mail button and you will receive an email with a link to your upload page, forward this to the person you wish to receive files from
- Click the open page button to open your upload page in your web browser
- Click the copy link button and a link to your upload page will be copied to the clipboard, you can then paste this into an email, instant message etc and send it to your client.

POWER TIP - You can specify a folder to upload files from this specific link by typing the name in the field (see blue arrow above).

Embedding the GoFileDrop uploader on your website

To embed GoFileDrop on your website login to the Application and click the menu item called "Embed the uploader \ On your website" this will then open a page with various versions of the upload tool along with corresponding html code above them, to embed the upload tool you want to use click the red button and the html code will be copied to the clipboard - see screenshot below:
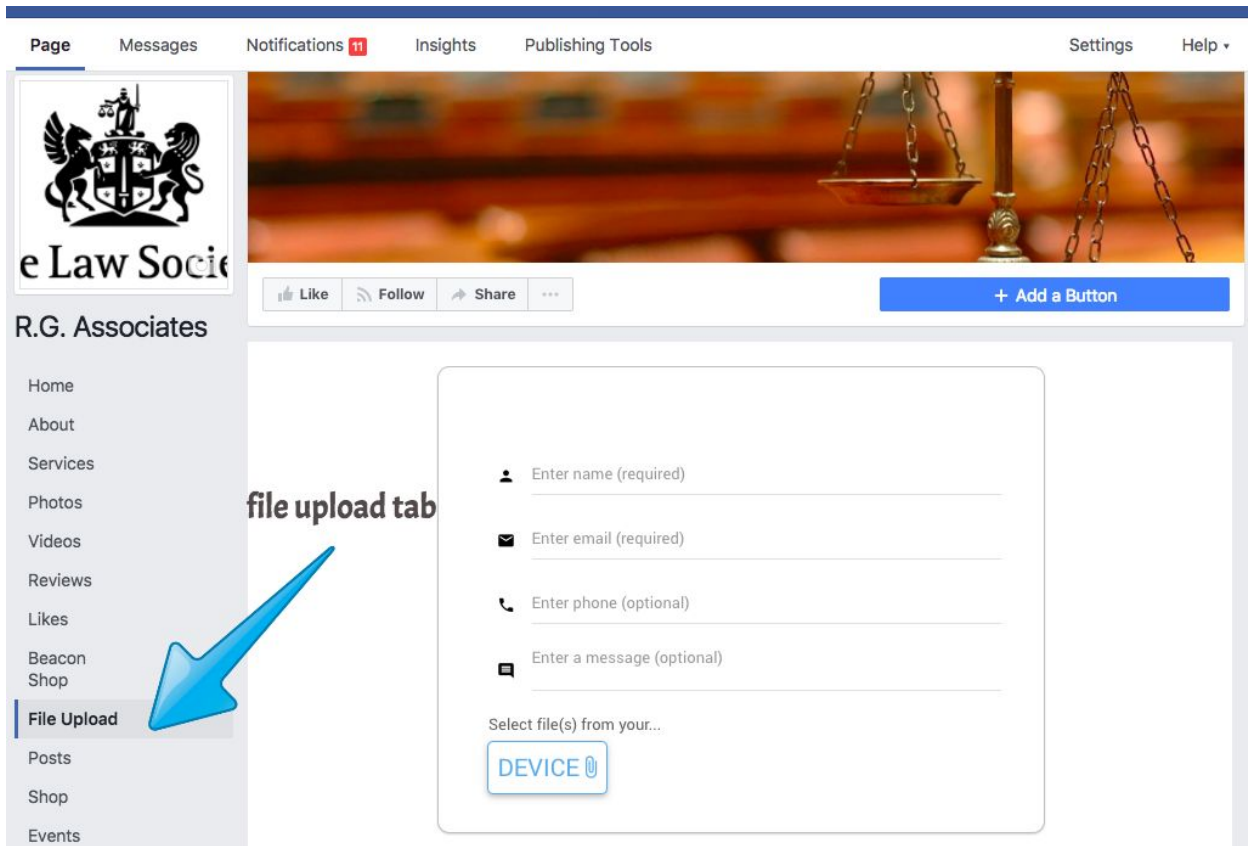
Next paste the html embed code into your web page where you want the upload tool to appear.

Embedding GoFileDrop on a Facebook page you manage

To embed GoFileDrop on a Facebook page you manage login to the Application and click the menu item called "Embed the uploader \ On your Facebook page"

This will redirect you to Facebook and prompt you to select the page you want to use.

Select the page and you are done, you can then open your Facebook page and you will see the File Upload tab as in the screenshot below:

Sending Files

To send files with GoFileDrop login to the Application and click Send File from the menu, on the next screen click the button labelled "Send Files" and select the files you want to send from your device, when the files have finished uploading you will receive an email for each file with a link to download the files - you can forward this email to the people you want to receive your file.

When files are uploaded you can also copy to the clipboard the download links by clicking the "copy to clipboard" button, this gives you a convenient way to paste the download links into an email or instant message. See screenshot below:

Copy the download link below and send it to your recipient to allow them to securely download your file(s)

Download mortgage statement.pdf

copy links to clipboard

COPY TO CLIPBOARD

Select file(s) to send below

When your file is uploaded you will receive an email - forward this to your recipient to allow them to download the file

SELECT FILE(S)
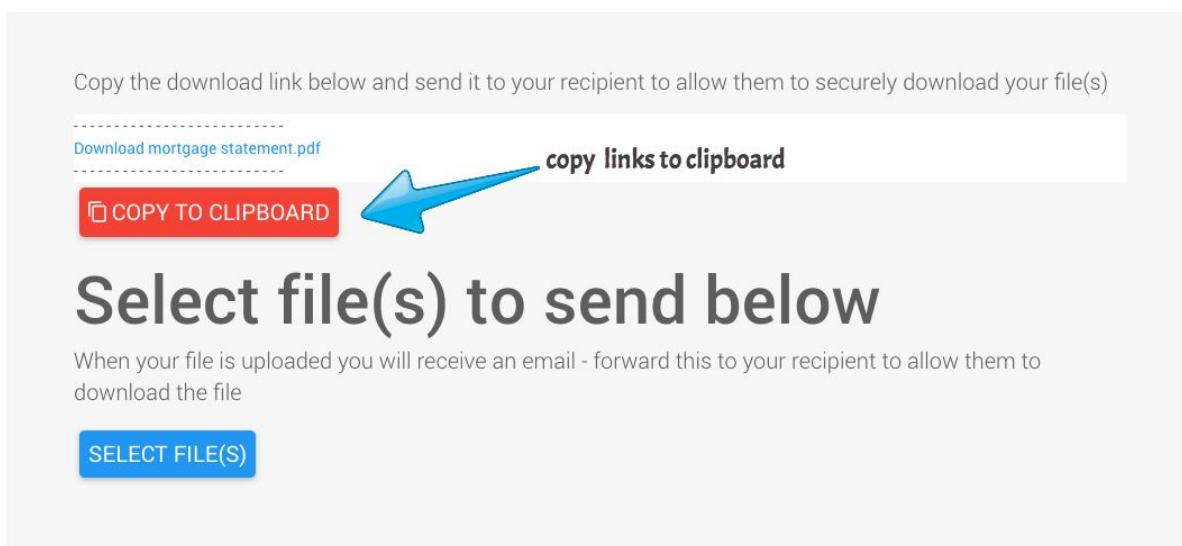
When your recipient clicks the download link they will be redirected to a download page branded with your company logo.

From here they click a download button and the file is downloaded over a secure HTTPS connection, the same type of secure connection used when submitting credit card details so you can rest assured it is a secure and safe transfer.

Files that you send are available to download for 21 days.

When a recipient downloads a file you will receive an email informing you it has been received and your GoFileDrop sent view will also record the time and date the file was accessed as well as information about the recipient such as their location and device / browser type.

Deleting a file you have sent

You can delete a file you have sent at any time, to delete a file open your sent view by selecting "Sent" from the menu and then click the delete icon to the right of the file you wish to delete.

The file will no longer be available for download and if the recipient clicks the download link you sent them they will see a page informing them the file is no longer available for download.

See screenshot below:

Inbox

The inbox shows you files that have been uploaded using GoFileDrop, when files are uploaded they are pushed to the cloud provider you have configured to work with the Application, such as Google Drive.

If there is an issue communicating with the Google Drive API you will still be able to access the uploaded files from your inbox.

The status column tells you where the files are, uploaded means the file is on the GoFileDrop secure server and has not yet been pushed to your chosen cloud provider. Google Drive means the file is now stored in Google Drive.

Note under normal circumstances the files are instantly pushed to your cloud provider such as Google Drive.

The key points of the Inbox are shown below:

Note that you can search your inbox using the provided search box.

Key parts of your Inbox

A - Clicking on the file name will open the uploaded file

B - Status shows you where the file is for example in Google Drive as in this screenshot

C - Clicking the person icon opens a dialog showing additional information about who uploaded the file - an example is shown in the screenshot below:

Using custom fields to gather information from the sender

GoFileDrop comes with several ready to use forms to gather information from people sending your files, however sometimes you will need to add / customize the fields used on the form.

To use custom fields we recommend you first use the custom form builder to quickly build your form, to use this login to GoFileDrop and select "Embed the uploader \ On your website" and scroll down to the button labelled "Launch Custom Form Builder" - clicking this will open a tool that allows you to drag and drop form elements onto your custom form.

Drag elements from the right onto the form on the left - ensure you name the elements appropriately by clicking in the field **A** and changing the label text, Field Name and Help Text **B** (see screenshot below)

When you are finished ensure you click the **"Publish this form"** button

You can also make changes to the html of your custom form directly, login to GoFileDrop and select "Embed the uploader \ On your website" and scroll down to the button labelled "Edit Custom Form HTML" clicking this button will enable you to edit the HTML code for your custom fields.

The custom fields should use standard Bootstrap layout - please see this link for more information.

As an example the code below would add an email field to your form:

```html
<div class="form-group">

  <label for="email">Email address:</label>

  <input type="email" class="form-control" id="email">

</div>
```

Support

For all support enquiries please click here and use our online support Application.