Egnyte Launches Document Portal for Financial Services Firms

Customer Portal Will Leverage AI to Improve Workflows and Customer Experience

MOUNTAIN VIEW, CA, UNITED STATES, October 29, 2024 /EINPresswire.com/ -- Egnyte, a leader in cloud content collaboration and security, is excited to announce its new Document Portal, a customer portal tailored to the needs of financial services firms. This portal transforms how customers, firms, and their partners interact with important documents, providing a secure and user-friendly environment for collecting, processing, and sharing sensitive information.

The platform features a customizable interface that offers an intuitive, guided document collection experience, including eSignature requests. Egnyte's Document Portal also includes automated workflows and enterprise-level progress and performance reports to streamline business processes and significantly enhance the experience for staff and external users.

"We are thrilled to expand Egnyte's secure collaboration platform for financial services firms with the launch of our Document Portal," said Ronen Vengosh, senior vice president of Industry Solutions at Egnyte. "Egnyte's vertical-focused approach to cloud collaboration and storage sets us apart from more generic solutions that are not focused on the needs of specific industries. Document Portal expands Egnyte's core collaboration platform, bringing efficiency and security to the manual, disjointed document collection and sharing workflows that too many firms deal with."

Later this year, Document Portal will introduce AI-powered document validation. This integrated feature, built upon Egnyte's AI Copilot, will increase the accuracy of document collection by alerting external users to incomplete or expired documents before submission, reducing the amount of back-and-forth communication required to collect documents accurately.

Egnyte's Document Portal addresses a significant need within the industry. According to Egnyte's 2024 Financial Services Market Report, 92% of organizations incorporating customer portals report higher customer satisfaction. More than half (53%) experienced improved data security with these portals, and 82% of respondents noted fewer workflow issues when using a customer portal.

For more information on Egnyte's Document Portal, click here. To learn more about Egnyte's 2024 Financial Services Market Report and hear from experts on the current state of the financial

industry's technology landscape, register for a free webinar on October 30, 2024, at 1 pm EST.

ABOUT EGNYTE

Egnyte combines the power of cloud content management, data security, and AI into one intelligent content platform. More than 22,000 customers trust Egnyte to improve employee productivity, automate business processes, and safeguard critical data, in addition to offering specialized content intelligence and automation solutions across industries, including architecture, engineering, and construction (AEC), life sciences, and financial services. For more information, visit www.egnyte.com.

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