

Secure File Transport —

Secure, compliant file exchange inside Salesforce

Secure File Transport, powered by Botdoc, moves your sensitive documents in and out of Salesforce without any portals, pins, or accounts. Trigger a file request from any record, and Botdoc sends a unique link by email or text to customer who then uploads the documents you asked for. Each file is encrypted, attached to that same record, and tagged by document type.

Secure File Collection

Request & receive sensitive files directly from Salesforce

Complete Audit Trail

Track who accessed, shared, uploaded, downloaded file

Automated Follow Ups

Automate requests and reminders

Salesforce-Native Workflows

Trigger routing, approvals, and follow-up actions

Why Businesses choose Secure File Transport —

- **No external portal or account required.** Built for secure file sharing Salesforce workflows, customers can upload files via secure link; no portals or downloads required.
- **Automate document collection.** Send file requests from any object via Flows or workflows. Recipient details pull automatically from the record.
- **Know what is still missing.** See which requested documents are missing at a glance. Botdoc sends automatic reminders until every file is received.
- **Message, request, and track in one place.** Chat with customers, request files, and monitor document status, activity, and expiration from a single secure interface.



What it does —

Send, Receive & Collect Files

- **Send file request** by SMS, email, or both, with every detail pre-filled from the record
- Send **any number of files**, either on record or upload from system, to customer in a single request
- **Apply document tags and metadata** such as document type, source, owner, & other information
- **Two-way file exchange and live chat**, with one inbox showing status, presence, expiry

Control, Track & Compliance

- **Botdoc** follows up on all file requests until every document has arrived
- **Enable** two-factor authentication and set link expiration on any request
- **Supports** frameworks like HIPAA, PCI DSS, GDPR, SOC 2, and FERPA, with encryption in transit and at rest
- **Dashboard** shows request volume, user activity, media transported, and average completion time

4.93/5 customer satisfaction • **1,500+ projects delivered** • **400+ customers**

Send and receive files securely in Salesforce.

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