

Using DeepBox

Recommendations for the optimal use of DeepBox between fiduciaries and clients

DeepBox provides secure and structured document management. Depending on the use, there are two main approaches to how a fiduciary company and its clients can work together:



The "shoe box principle": the fiduciary company opens a Box in DeepBox

- The fiduciary opens the Box within its organisation and releases it to the client (Box release)
- Important: the client can view and process the documents, but it is not possible to train DeepO (DeepFlow, suggestions, etc.) in a shared Box.

Advantages:

- The fiduciary retains control of the Box
- Easy document sharing for the client
- Invoicing for Deep Services usage via own DeepBox organisation

For clients who wish to avoid administrative responsibilities and prefer the fiduciary to maintain control.



The "independent customer": the client opens their own DeepBox

- The client opens their own DeepBox organisation, and the fiduciary connects the client to the relevant DeepBox organisation (connection per client)
- The fiduciary should have a user in the client's organisation

Advantages:

- The client has full control over the Box
- Both sides can work together efficiently
- Invoicing for Deep Services usage via own DeepBox organisation

For clients who want to take on administrative responsibility and retain full control over their Box.

The "shoebox principle" is suitable for simple collaboration, while the "independent customer" is recommended for clients with higher administrative requirements.

For more information visit: deepbox.swiss/en/

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