



# SECURE DOCUMENT COLLECTION: Which Solution, or Combination, is Right for Your Institution?

Financial institutions are under increasing pressure to securely exchange documents, while meeting higher expectations for speed, convenience, and compliance. As onboarding, lending, and service workflows expand beyond traditional branch and digital banking channels, banks and credit unions need solutions that support both ongoing document access for account holders and secure document collection from applicants, prospects, and third-parties.

WebShare and Alogent Document Portal address these needs in different—but complementary—ways. WebShare extends secure document access and exchange through digital banking for known users, while Alogent Document Portal modernizes document intake for both known account holders and external, thirdparties.

Understanding when to use each solution helps institutions reduce risk, improve efficiency, and deliver better experiences across the full document lifecycle.

	WEBSHARE	ALOGENT DOCUMENT PORTAL
<b>PRIMARY USE CASE</b>	Secure two-way document exchange for existing account holders through digital banking	Secure document intake for account holders, prospective account holders, and other third-parties
<b>TARGET USERS</b>	Account holders	Account holders, prospects, applicants, and third-parties
<b>IDENTITY &amp; ACCESS MODEL</b>	Permission-based access tied to digital banking login	Identity-based enrollment with password-protected portal accounts
<b>TRACKING &amp; VISIBILITY</b>	Intake-specific tracking	Real-time visibility into request status and completeness
<b>WORKFLOW AUTOMATION</b>	Document exchange routed to review, approval, and other workflows	Document intake routed to review, approval, and other workflows
<b>AUDIT &amp; COMPLIANCE SUPPORT</b>	Secure exchange within digital banking context	Structured, auditable document intake
<b>DATA EXPOSURE CONTROLS</b>	Ongoing access within digital banking	Time-bound requests. Documents not stored long-term in portal
<b>INTEGRATION</b>	Integrated with FASTdocs	Integrated with FASTdocs and available via API for AccuAccount users and other third-party solutions