

Trustworthy.

Trustworthy Next: A Special March Member Event

Frequently Asked Questions

Is there a way to print/export summary reports that Autopilot generates?

Most Internet browsers support a right click on the chat and you can choose to print your results or switch to "Save to PDF." Results will vary based on browser.

Is the auto feature files a document in the wrong place, how do I move it?

We've got an update coming shortly that will make this smoother to move files. Right now [this video](#) will show one of the options available.

Are the reminder only visible/used within Trustworthy or do you get reminders outside the system when it's not in use?

Reminders are sent via email. In the coming weeks you'll also have options for push notifications in our mobile app.

Re the email: how does Trustworthy know what to bring in? I get a million emails a day with attachments that I do not want into Trustworthy

Files that don't align with household data will remain in unsorted where you'd need to delete them. If there's common senders you want to block you can do that in Sender filtering under settings > connections > gmail. Ideally we create a staging area to preview inbound gmail files to allow you to approve.

Subscriptions have become a big thing. If a user passes, it would be great to have a section for subscriptions for legacy users to access and see what needs to be cancelled

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Have email encryption procedures been added when sharing links to documents?

For now, sharing links to documents works as it did previously. We will be adding a feature to generate a 'pin' to unlock the document.

Has there been adjustments to inbox permissions for TCEs? For example, a client wants to give a TCE access to Inbox but doesn't want to give full account permission access

As of right now, you as a TCE will be able to 'add' items through the add feature. However, the new 'inbox' is effectively unsorted. I do believe that's currently hidden as it's hard for us to know whether or not you should see all files in there. Normally permissions are related to categories, but an unsorted file has no category. I think the client assigning a specific permission called 'Unsorted' to their TCE likely makes the most sense. We'll add this to our backlog.

With so much that can be pulled in automatically, can we have an intermeditate check point where we review what has been pulled in before it is filed away?

This is something we're evaluating. A staging area effectively where you can approve items. Timing is TBD but I think it'll be helpful to have especially if you connect to your Gmail.

What if your login email is not a gmail address? Can you still authorize Trustworthy to scan your gmail email attachments?

Yes, you can login with your regular email, then go to Account Menu > Settings > Connections. You can then connect a gmail inbox, even if that email address doesn't match your login. You can also connect many inboxes if your partner wants to connect their own for example.

Re AI. is Chat based on Open AI platform or other company like Anthropic?

We route chat requests to multiple models depending on the specific type of task; these include OpenAI, Anthropic, and Amazon.

Have you enhanced the ScanSnap connection to Trustworthy? Currently scanning a document has to use the ScanSnap cloud and then the document has to travel into Trustworthy. This seems very insecure when transferring sensitive documents. ScanSnap is recommended by Trustworthy.

As part of our SOC2 compliance we regularly review all of our vendors and their security policies. ScanSnap is a trusted vendor that uses Microsoft Azure Cloud for infrastructure, providing robust security, data encryption with SSL during transmission, and secure handling of files before directing them to Trustworthy. They make regular security updates which we monitor to ensure that your documents are private and secure.

I have the current Trustworthy. How do I get this new version for both Mac and Phone?

Just logging in on the website will give you the new version. On your mobile, just ensure your app is up to date. Visit your app store to see if there's an update or if you're current.

Any plans to add Apple iCloud as a connection?

This is something we're considering if their APIs support it. From what we've seen their public integration capabilities are less than adequate, but we'll keep you posted.

Do you have plans for Reminder to note when documents can be deleted? Example, tax records that should be kept for x years but then deleted.

Yes! It's not in there now, but it's something we're keen on adding.

Any plans to also us to customize fields? Ex: I add a file for "property." I categorize it as "other." "Brand/artist" is an automatic option to enter data. If it's not applicable, can we delete that field - or add a custom field (and not just add info to notes.)

Field customization is on the roadmap, but it's a bit further down the list. The property category got quite expanded, so for example if you added 'Technology' you'd see type, manufacturer, brand, model, year, serial etc.

Can you download all of the information? What happens if Trustworthy goes out of business - sorry, Nat. but that is an unfortunate possibility.

You can download all of your files in Settings > Export data. This will provide a zip of file. Extracting the rest of the data (like notes) in a nice printable binder format is a future roadmap task, and would be a great addition to the system.

Do you have a timeline for the Health and Medical rollout?

Not exact timing but we're hoping in about a month.