My Swiss Keeper

GETTING STARTED

Welcome to your private vault.

How to manage your vault: the documents, the people who have access, and everything that happens around them.

End-to-end encrypted Swiss data storage Absolute privacy

Download the app

The same vault is available on your phone. Scan the code, or tap a store button if you are reading this on your phone.

Download on the App Store

GET IT ON Google Play

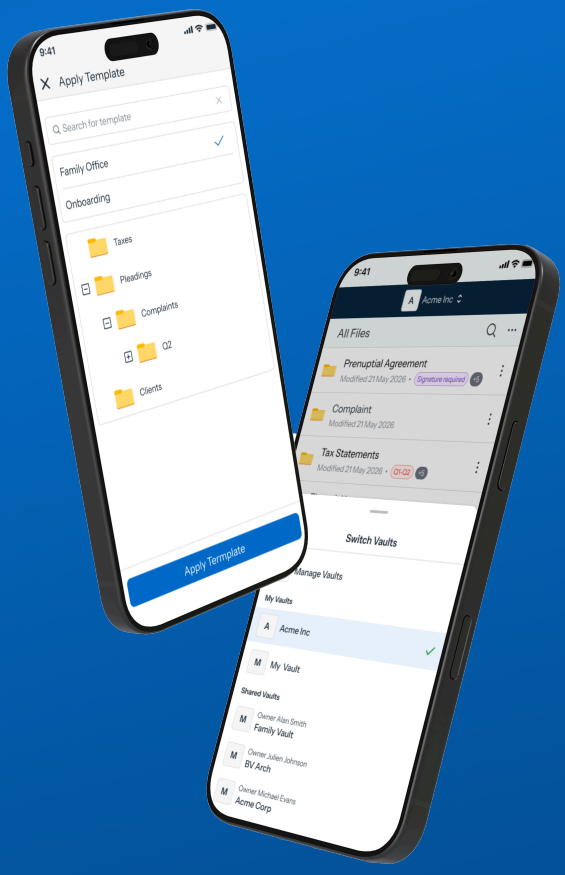


Table of contents

Managing files and folders 4

Invite contributors 15

Discussions 21

Share a file with someone outside your vault 27

File requests 30

File versions 35

Activity log 37

Templates 39

Tags 45

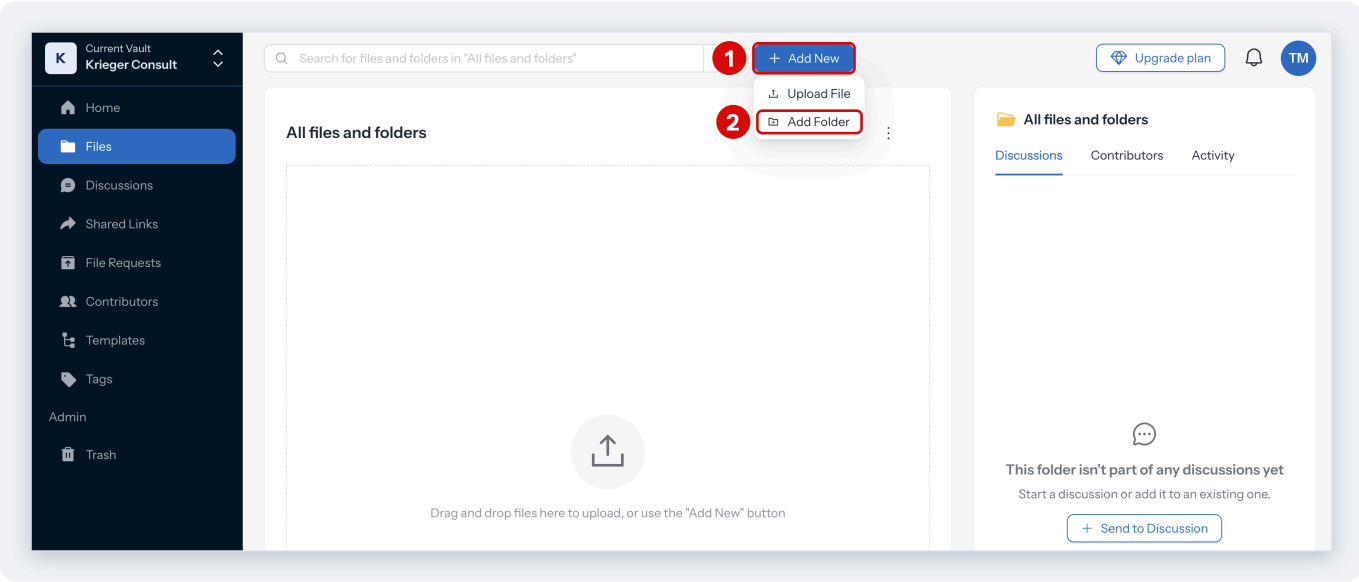
Your vaults 50

Managing files and folders

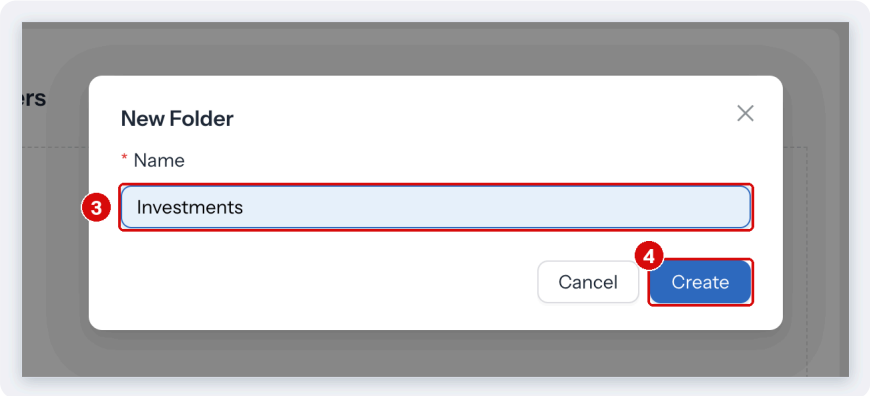
WHERE **Files** in the left menu.

Create a folder

1. Click **Add New**.
2. Click **Add Folder**.

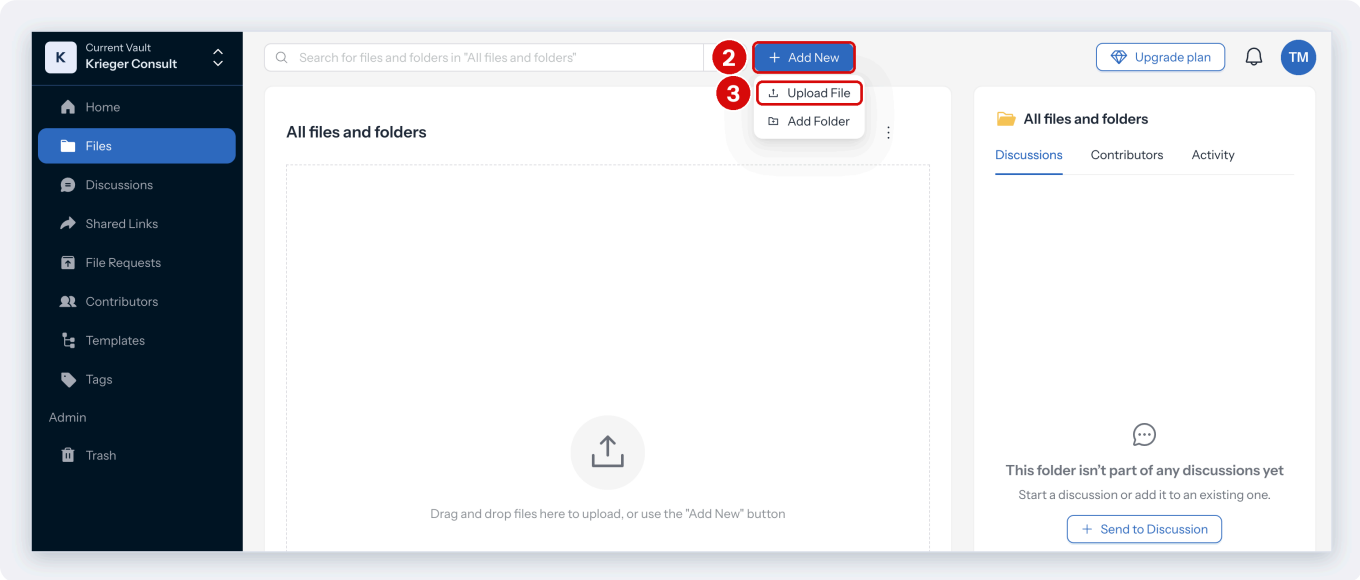


3. Enter a name for the folder, for example "Investments".
4. Click **Create**.



Upload files

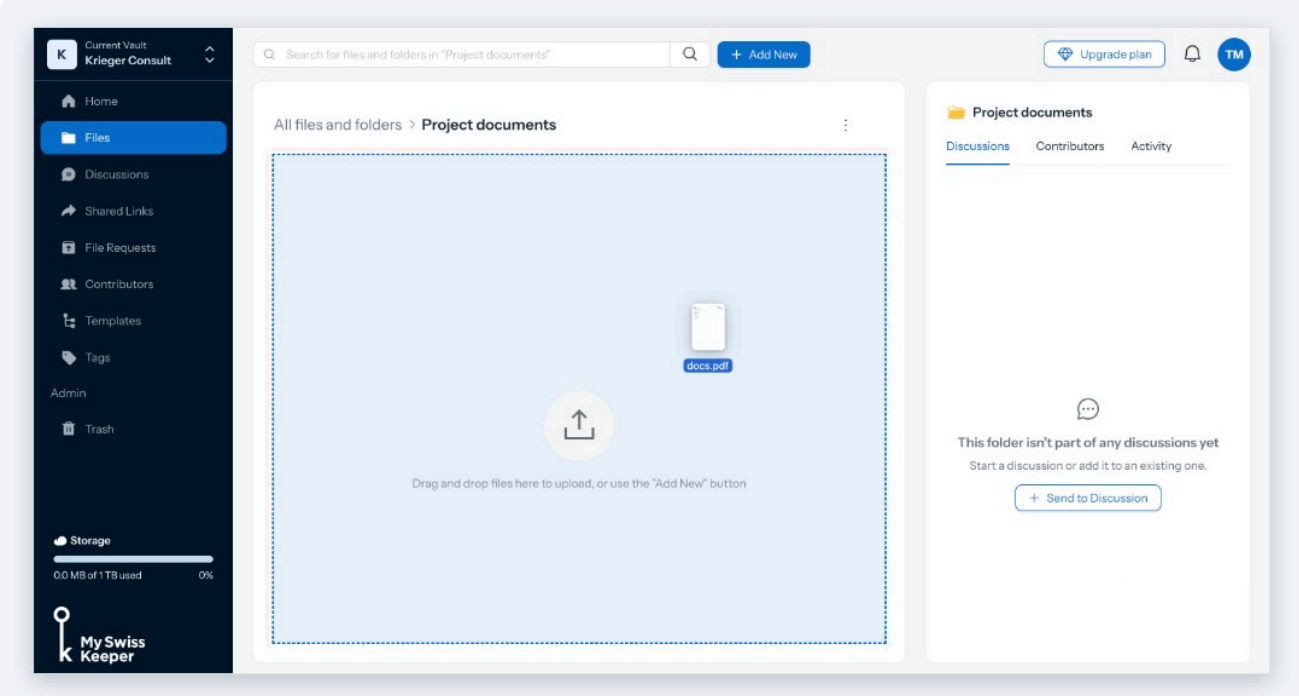
1. Open the folder where you want to upload the files.
2. Click **Add New**.
3. Click **Upload File**.



4. Select one or more files on your computer.

You can also drag a file from your computer onto the folder you have open.

Drop the file in the drop zone to upload it to the open folder. To upload it to a subfolder, drop it directly on that folder.



Copy or move a file or folder

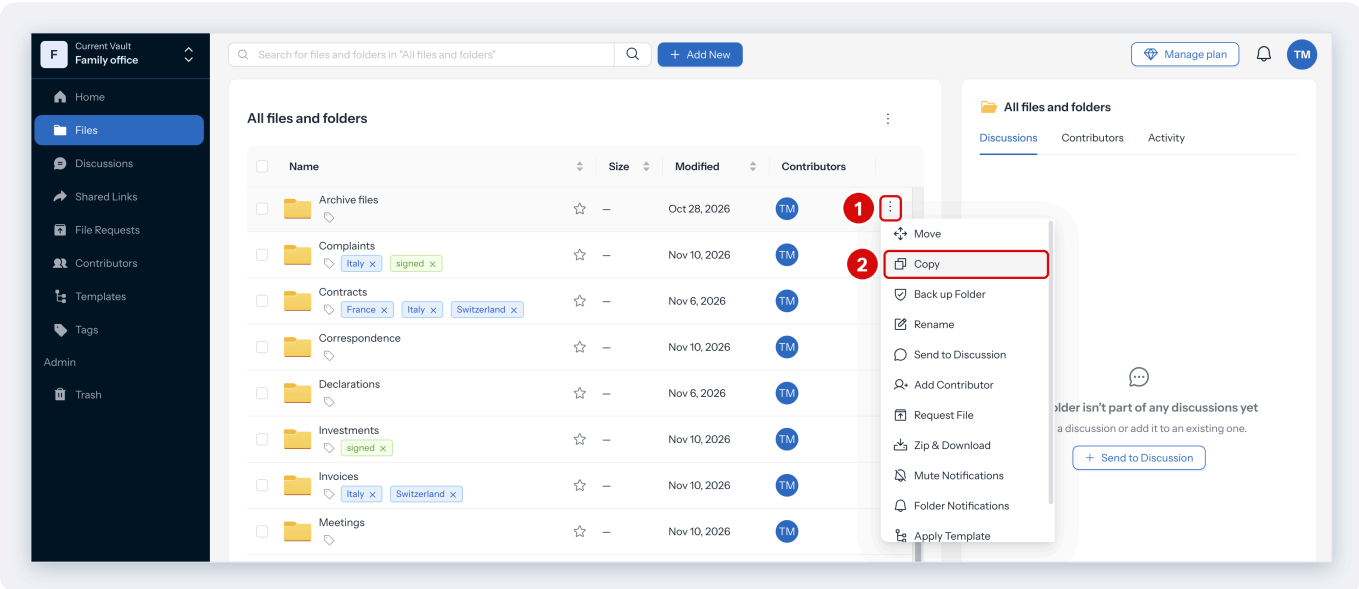
The destination can be another folder in this vault, or a folder in another vault.

COPY

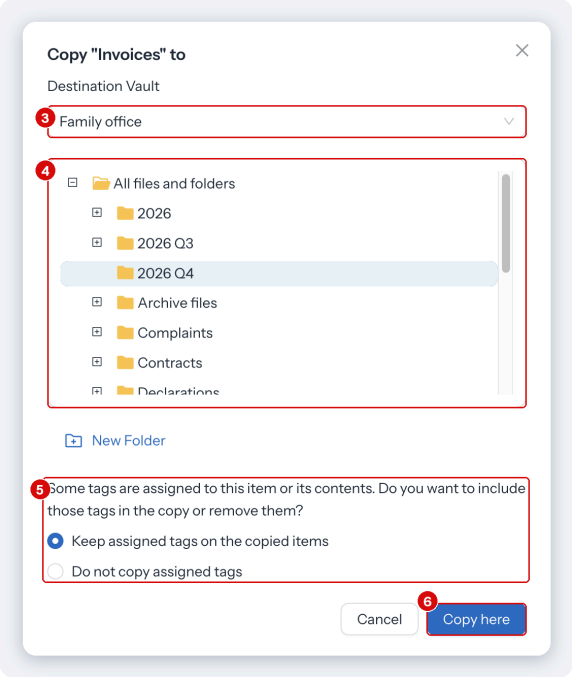
Use this when the same file or folder should also exist somewhere else. The original stays where it is.

> To copy a file or folder, you need at least **Editor** permission on the destination folder.

1. Open the row menu on the file or folder.
2. Click **Copy**.

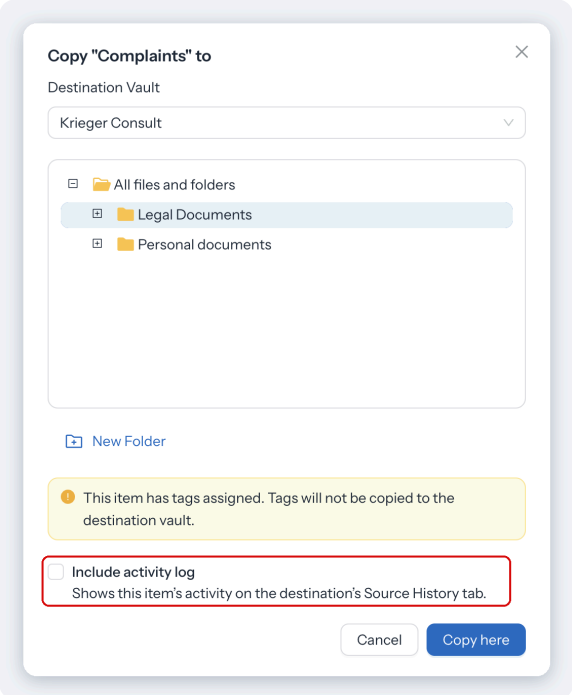


3. Under **Destination Vault**, choose the vault.
4. Choose the destination folder.
5. If the item has tags, choose whether to keep them on the copy.
6. Click **Copy here**.

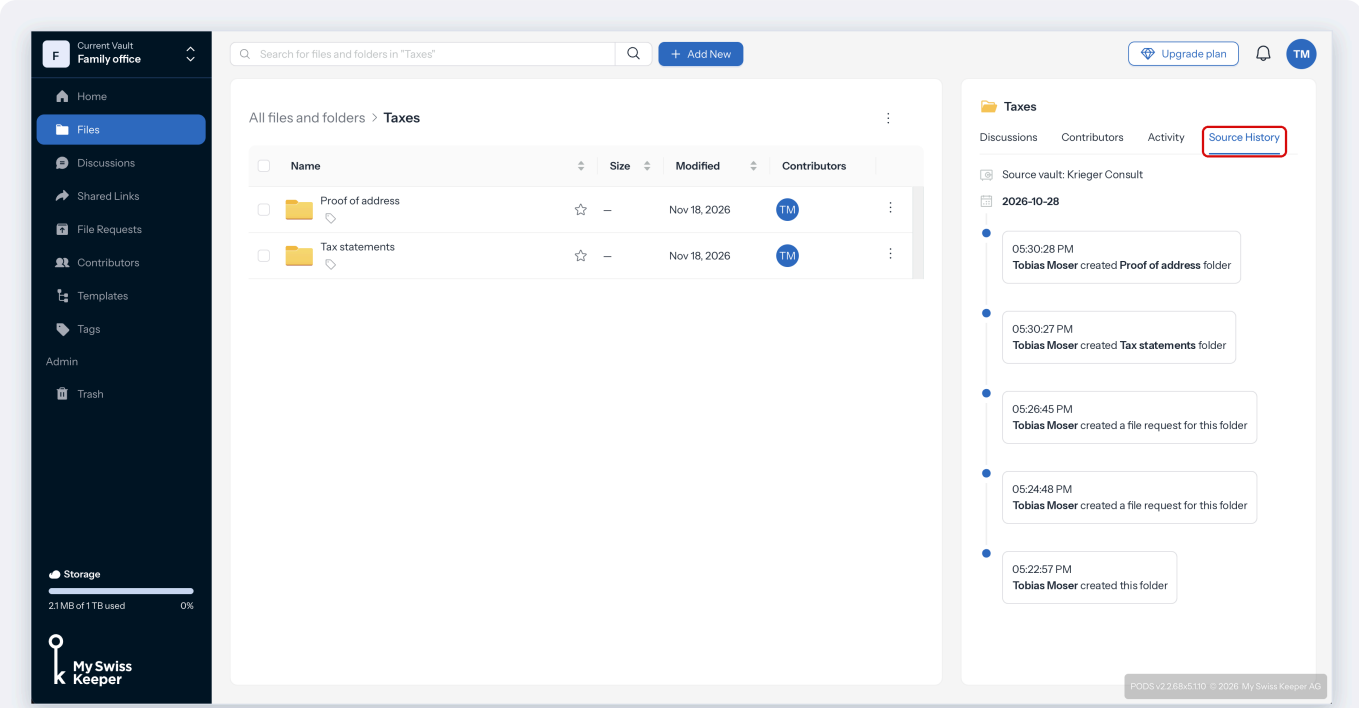


COPY TO ANOTHER VAULT

When you copy to another vault, tags are not copied. Turn on **Include activity log** to bring the item's history with it. This option appears only when the destination is in another vault.



In the destination vault, the copy then has a **Source History** tab, next to **Activity**. It shows the source vault and everything that happened to the item there.

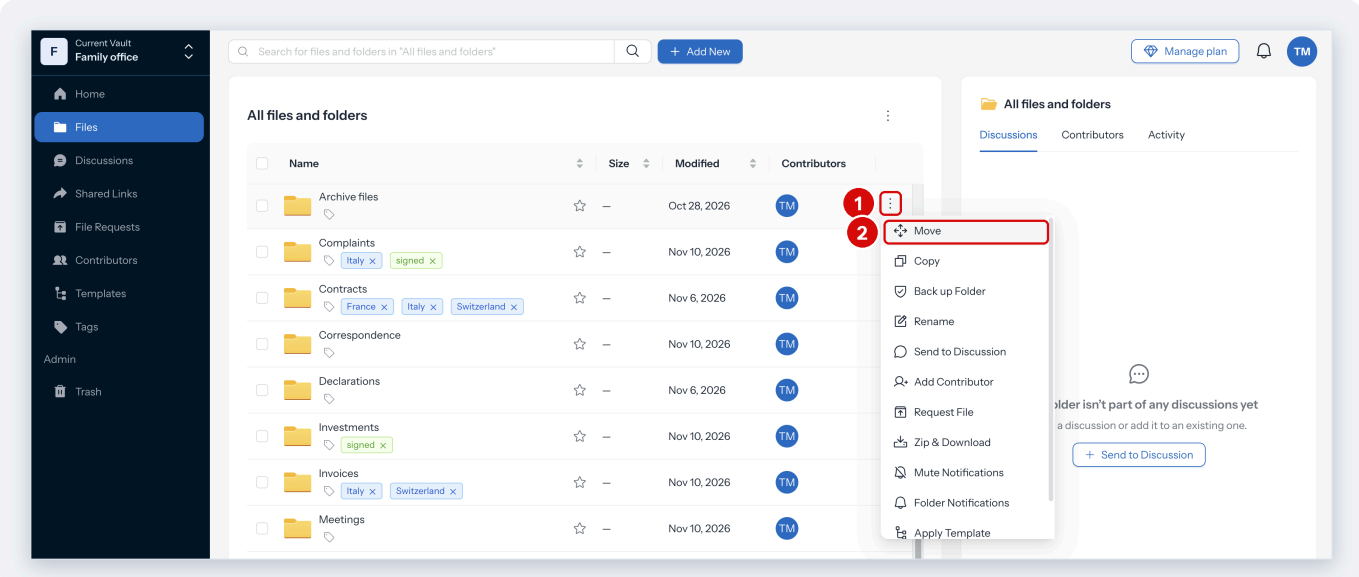


MOVE

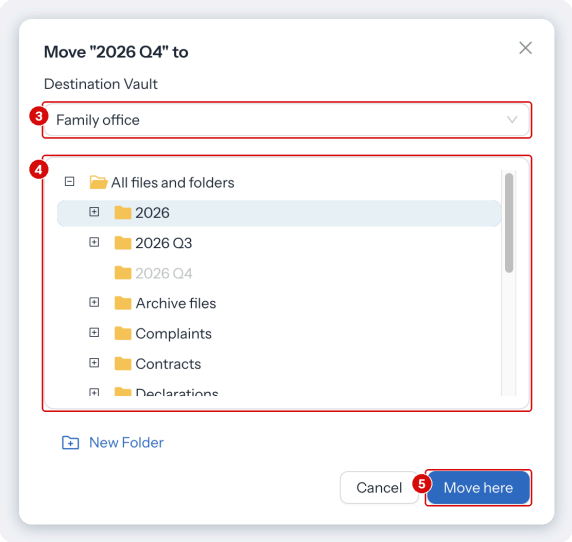
Use this when the file or folder should leave its current folder. Nothing stays behind.

> To move a file or folder, you need to be an **Owner** of that folder.

1. Open the row menu on the file or folder.
2. Click **Move**.



3. Under **Destination Vault**, choose the vault.
4. Choose the destination folder.
5. Click **Move here**.



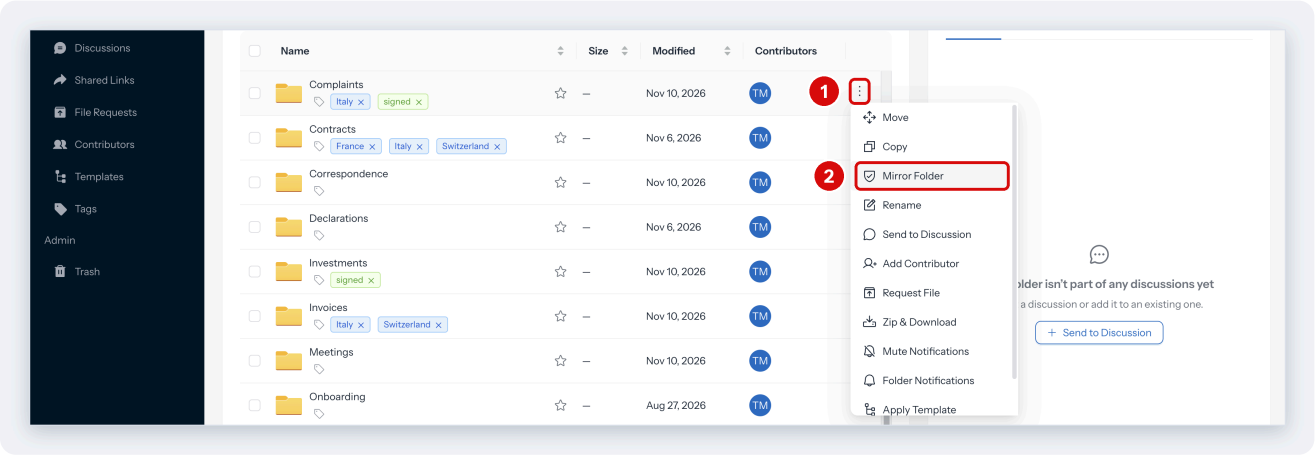
Moving to another vault works the same way as copying to another vault: tags are not moved, and you can turn on **Include activity log** to bring the item's history to a **Source History** tab.

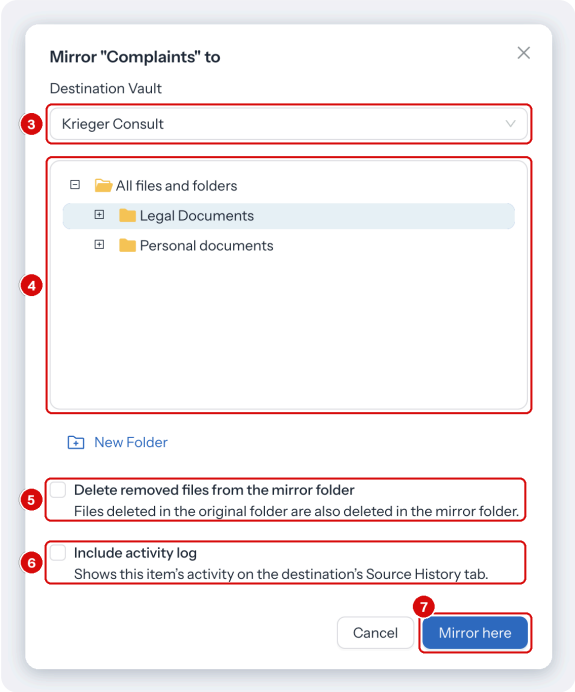
MIRROR A FOLDER

Use a mirror when a folder should have a second copy that you can keep up to date. The original stays where it is. Unlike a copy, which is made once, a mirror can be updated with changes from the original folder whenever you need.

> To mirror a folder, you need at least **Viewer** permission on the original folder and at least **Editor** permission on the destination folder.

1. Open the row menu on the folder.
2. Click **Mirror Folder**.



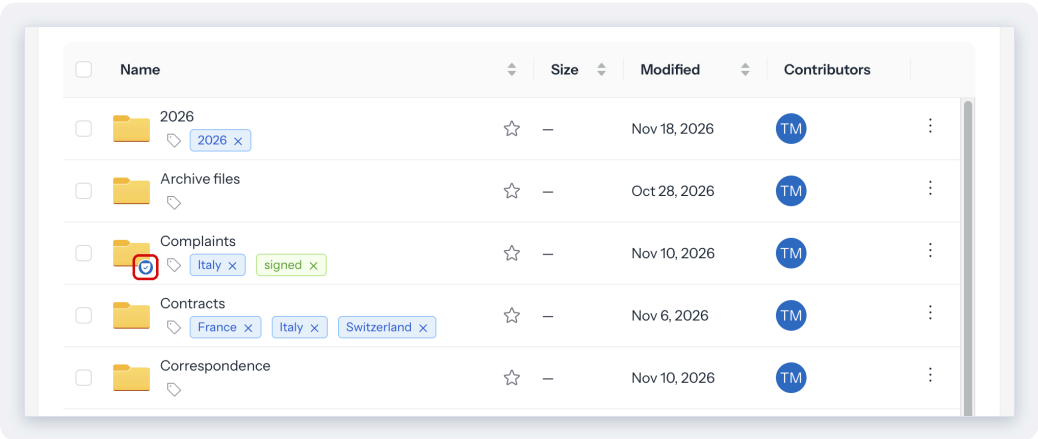


3. Under **Destination Vault**, choose the vault.
4. Choose the folder where the mirror should be created.
5. Optional: turn on **Delete removed files from the mirror folder** if files removed from the original folder should also be removed from the mirror. New files and newer versions are always added.

> Removing deleted files from the mirror needs **Owner** permission on the mirror folder.

6. Optional, for another vault only: turn on **Include activity log** to show the original folder's history on the mirror folder's **Source History** tab. It is refreshed each time you update the mirror.
7. Click **Mirror here**.

Once the mirror is set up, a mirror icon appears on the original folder.

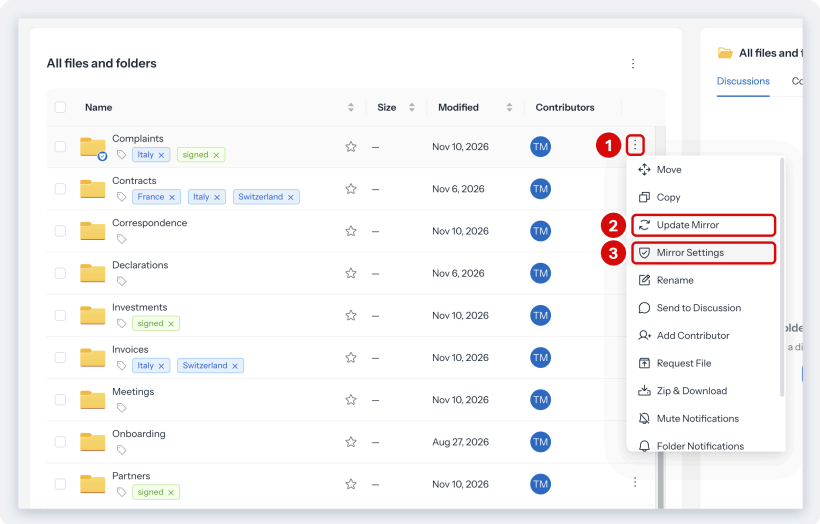


The mirror is not updated automatically. To copy the latest changes, open the row menu on the original folder and click **Update Mirror**.

MANAGE A MIRROR

Open the row menu on the original folder (1). It now shows two mirror actions instead of **Mirror Folder**:

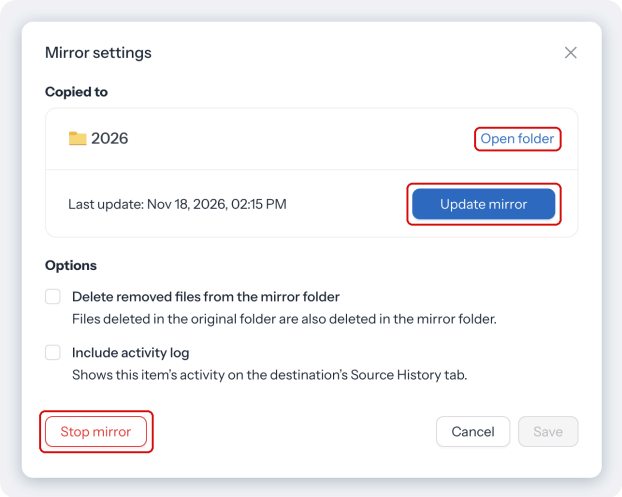
- **Update Mirror** (2): copies the latest changes to the mirror folder right away.
- **Mirror Settings** (3): opens the settings below.



In **Mirror settings**:

- **Open folder:** opens the mirror folder.
- **Update mirror:** copies the latest changes from the original folder to the mirror folder. **Last update** shows when this last happened.
- **Delete removed files from the mirror folder:** files removed from the original folder are also removed from the mirror.
- **Include activity log:** shows the original folder's activity log on the mirror folder's **Source History** tab. Available when the mirror is in another vault.
- **Stop mirror:** the mirror folder stays where it is, but it can no longer be updated. The mirror icon disappears from the original folder.

If you change an option, click **Save**.

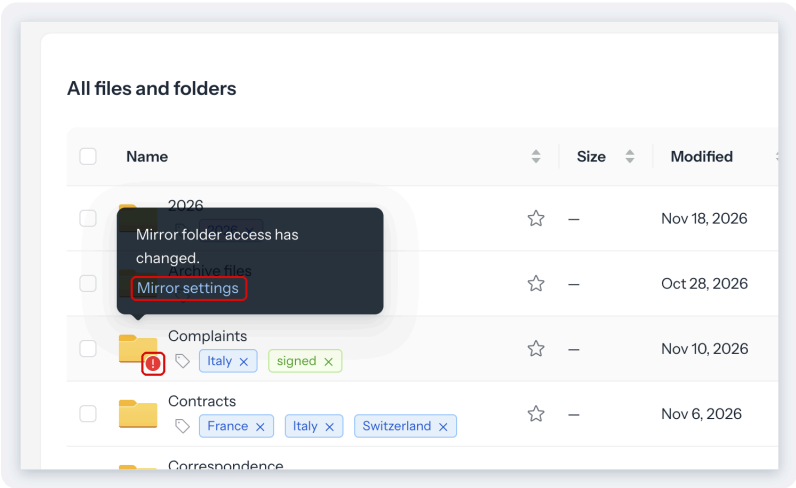


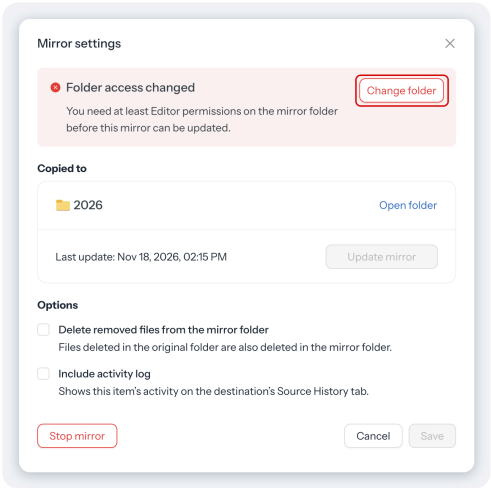
IF A MIRROR CANNOT UPDATE

When a mirror has a problem, the original folder shows a red or orange mark. Point to the mark to see what is wrong, then click **Mirror settings** in the tooltip to fix it.

Mirror folder access has changed

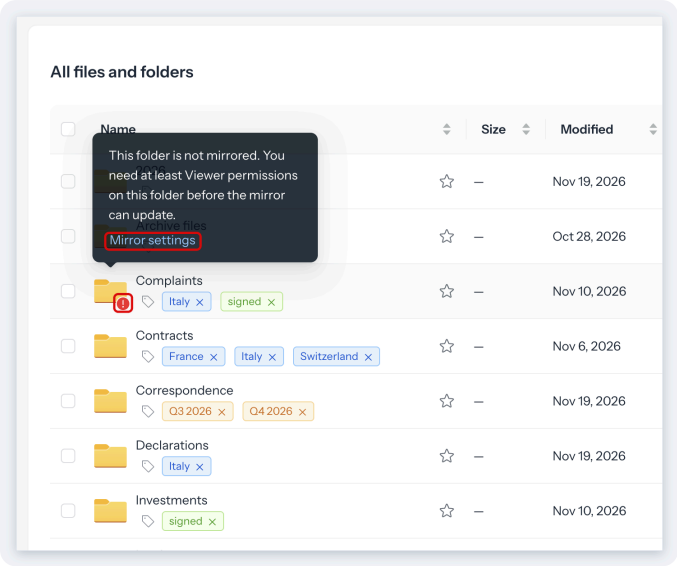
You no longer have at least **Editor** permission on the mirror folder, so **Update mirror** is unavailable. Ask the owner of the mirror folder for Editor access, or click **Change folder** to mirror to a different folder.

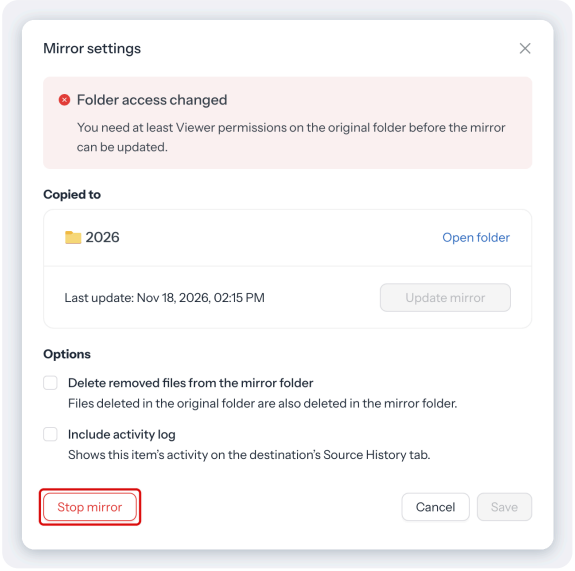




Original folder access has changed

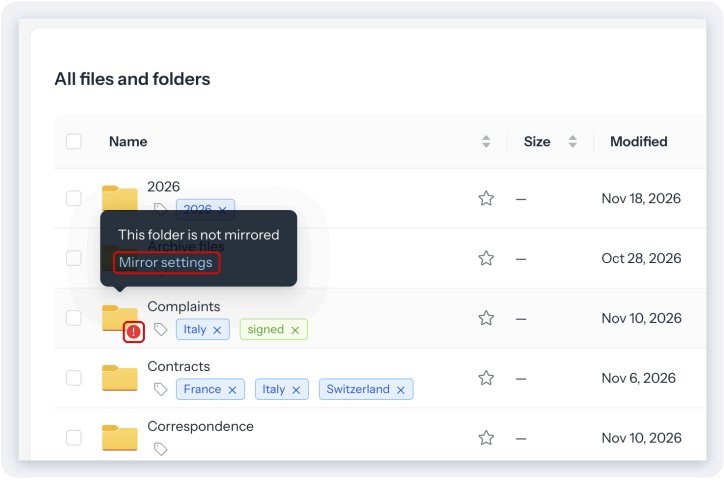
You no longer have at least **Viewer** permission on the original folder (for example, your role was changed to **Previewer**), so the tooltip says **This folder is not mirrored** and **Update mirror** is unavailable. Ask the owner of the original folder for Viewer access, or click **Stop mirror**.

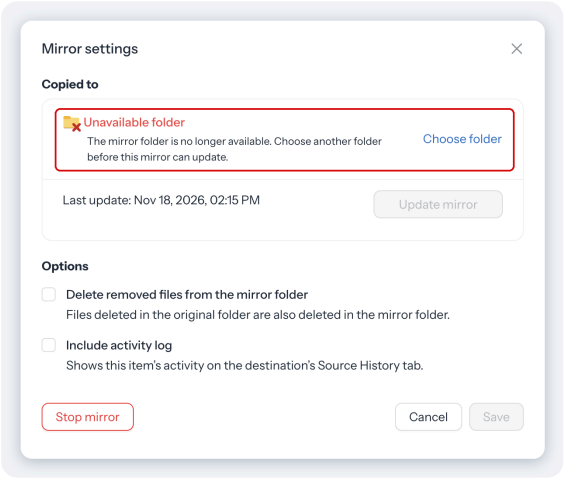




Mirror folder unavailable

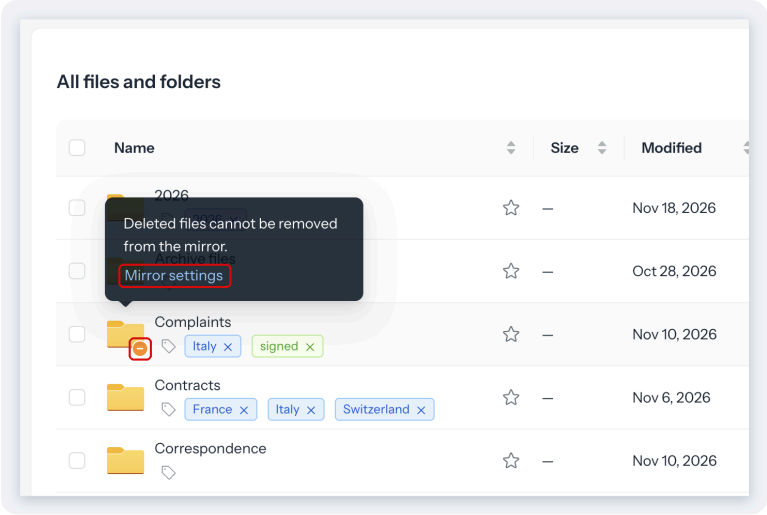
The mirror folder no longer exists, so the tooltip says **This folder is not mirrored** and **Update mirror** is unavailable. In **Mirror settings**, the mirror location shows **Unavailable folder**. Click **Choose folder** to pick a new location.

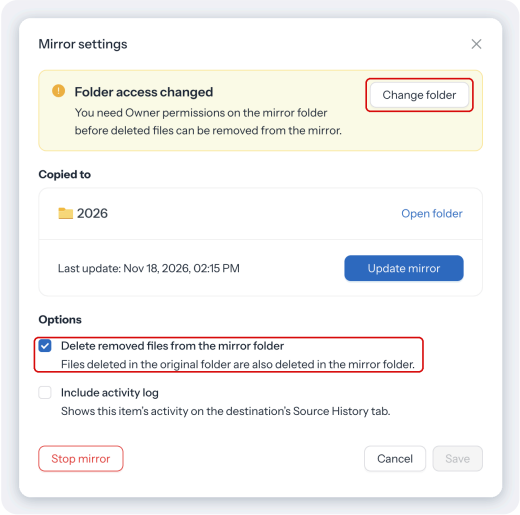




Deleted files cannot be removed

Delete removed files from the mirror folder is on, but you don't have **Owner** permission on the mirror folder. You can still update the mirror: new files and newer versions are added, but files deleted from the original folder stay in the mirror. Ask for Owner permission, turn off **Delete removed files from the mirror folder**, or click **Change folder** to mirror to a folder you own.





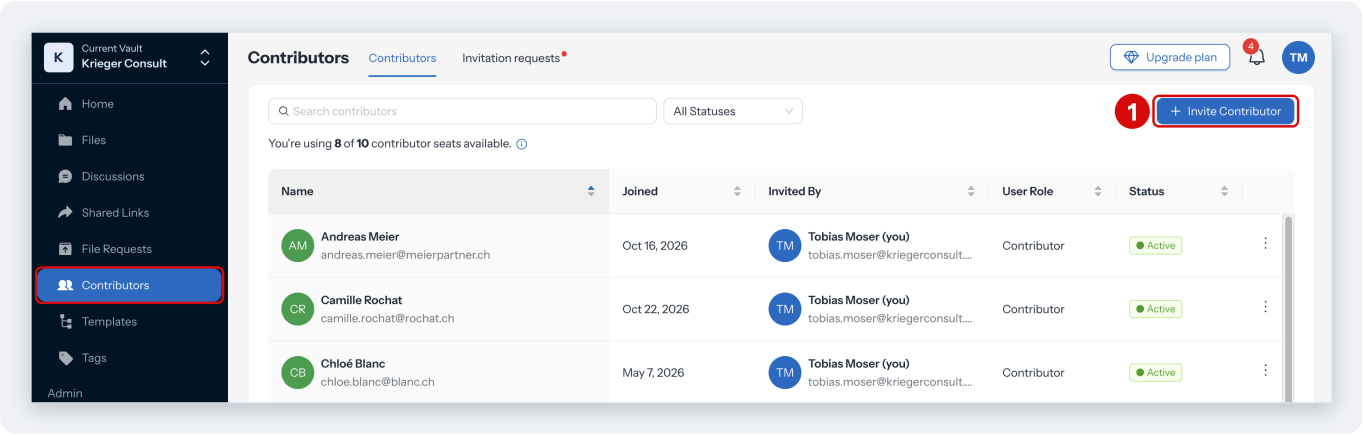
Change folder starts a new mirror in the folder you choose. The previous mirror folder stays where it is.

Invite contributors

WHERE **Contributors** in the left menu, then **Invite Contributor**.

Invite someone to collaborate, and give them access to the folders they should work in.

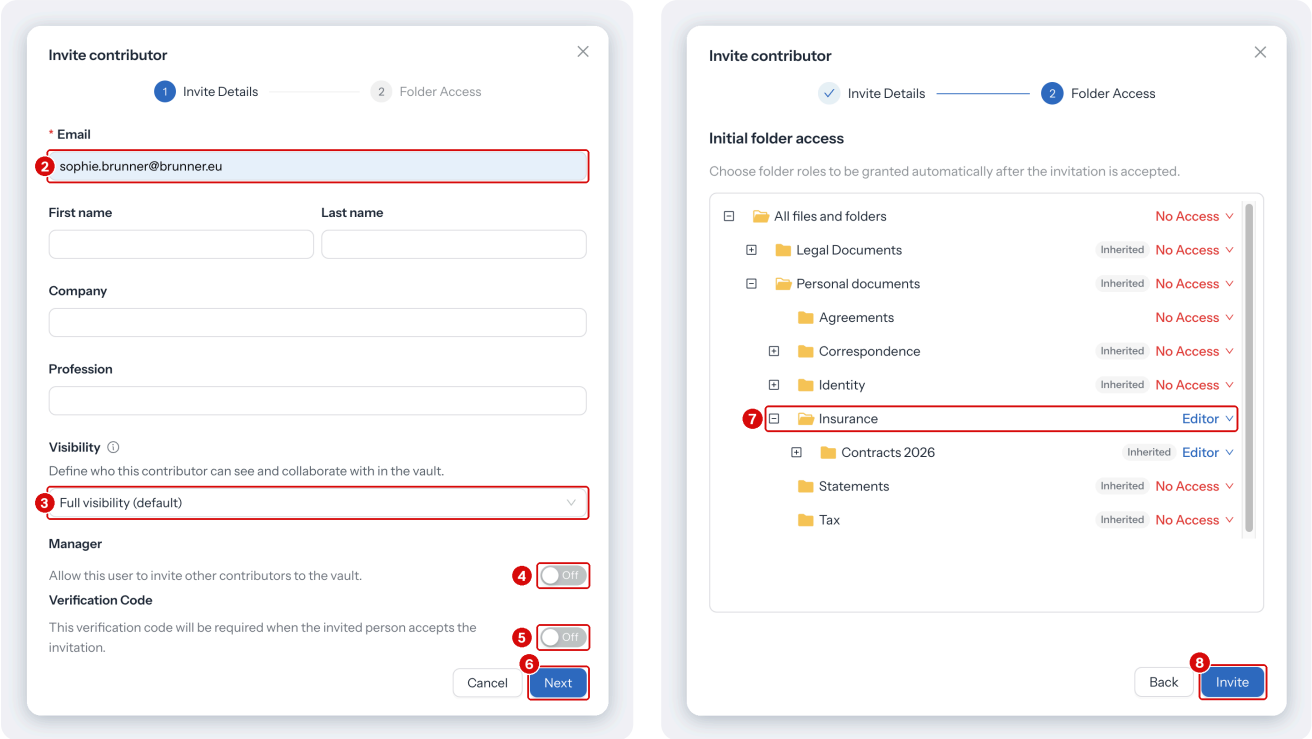
Send the invitation



1. In **Contributors**, click **Invite Contributor**.
2. Enter their **Email**. The invitation goes to this address.
3. Under **Visibility**, choose **Folder-based visibility** or **Full visibility**.
   - **Folder-based visibility:** they only see people who have access to the same folder. Two people with limited visibility will not see each other if they are not in the same folder.
   - **Full visibility:** they can see and work with everyone in the vault.

> To change the default visibility for new contributors, go to **Settings**, then **Contributors**.

4. Leave **Manager** off unless this person should invite other contributors. When **Manager** is on, the contributor can invite other contributors to the vault.
5. Optional: turn on **Verification Code**. The invited person must enter that code when they accept. You tell them the code yourself. It is not in the invitation email, and it does not replace the link.
6. Click **Next**.
7. On **Folder Access**, set a role only on the folders they should see. Leave every other folder unchanged.
8. Click **Invite**.

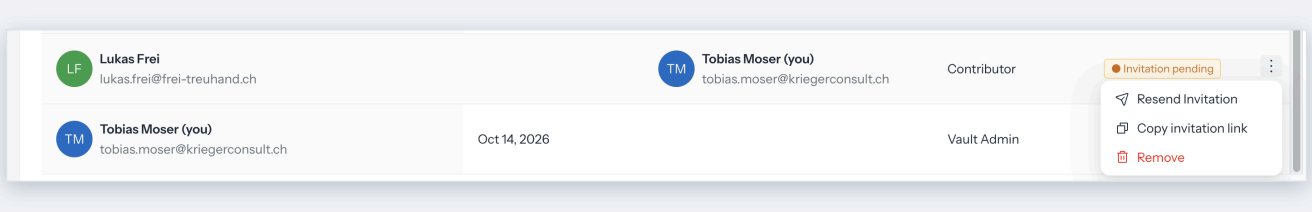


A new contributor will not see any folders unless you grant them folder access.

> The invited user receives an email with a link. They log in, or create an account, then accept. Until they accept, they are not a contributor.

While the invitation is waiting

The invitation appears in **Contributors** with the status **Invitation pending**.



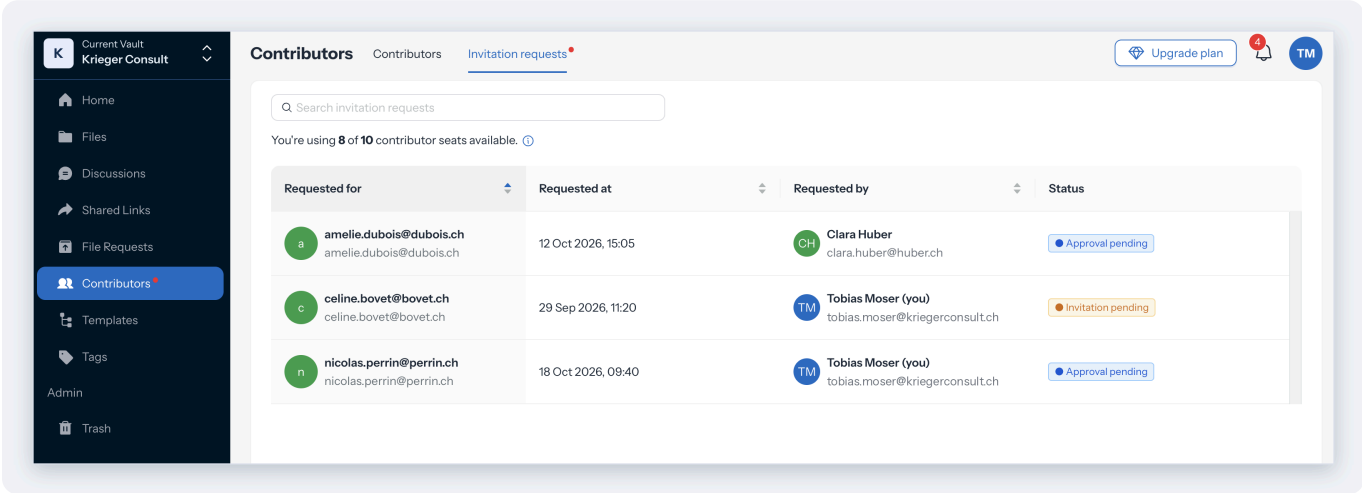
The row menu lets you:

- **Resend Invitation:** sends the email again.
- **Copy invitation link:** copies the link so you can send it yourself.
- **Remove:** cancels the invitation.

Invitation requests

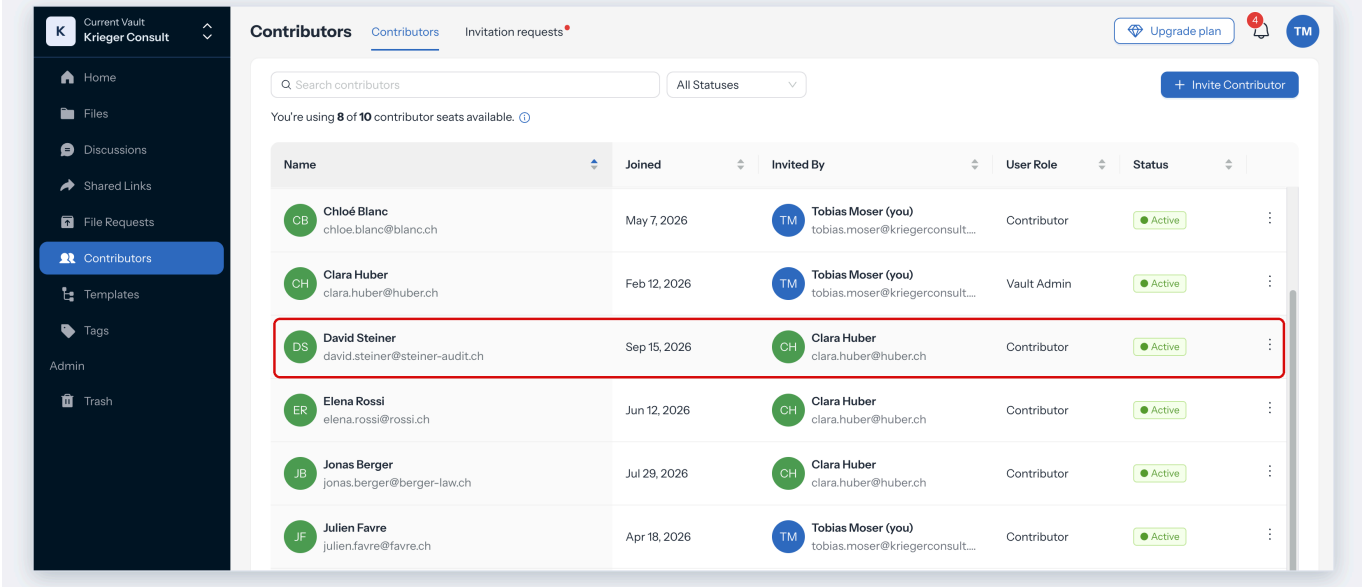
Contributors who are not Managers cannot invite people directly. Instead, they can send an invitation request. Requests appear in **Contributors**, on the **Invitation requests** tab. A vault admin or a **Manager** approves them before the invitation is sent.

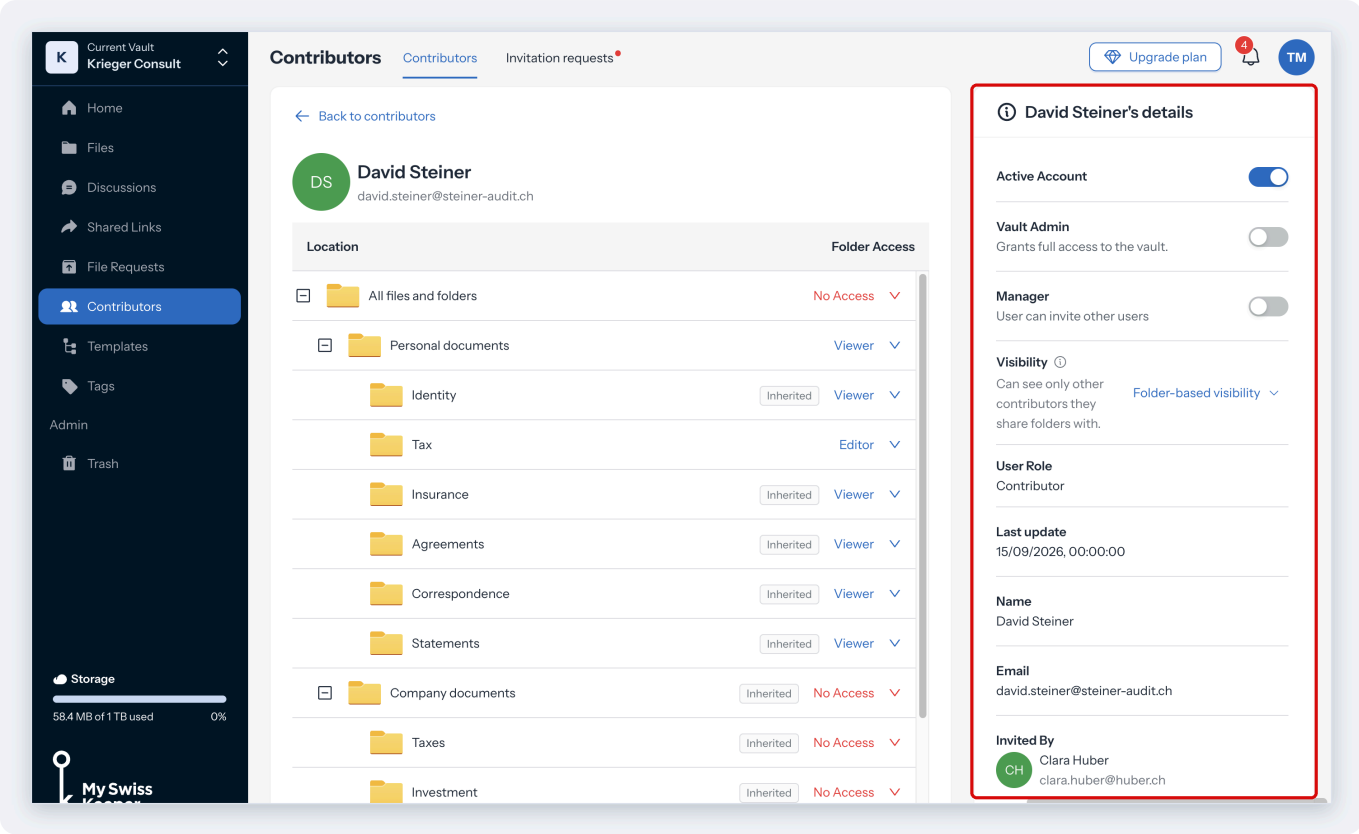
- **Approval pending:** the request has not been approved yet.
- **Invitation pending:** the invitation was sent, and the person has not accepted yet.



Manage a contributor

Click a contributor in **Contributors** to open their details.





- **Active Account:** turn it off to deactivate the contributor. They lose access to the vault and no longer use a seat on your plan. Turn it on again to restore their previous folder roles.
- **Vault Admin:** gives full access to the whole vault, separate from folder roles. Turn it on only after the person has accepted, and only for someone you trust with everything.
- **Manager** and **Visibility:** work the same way as in the invitation. See Send the invitation above.

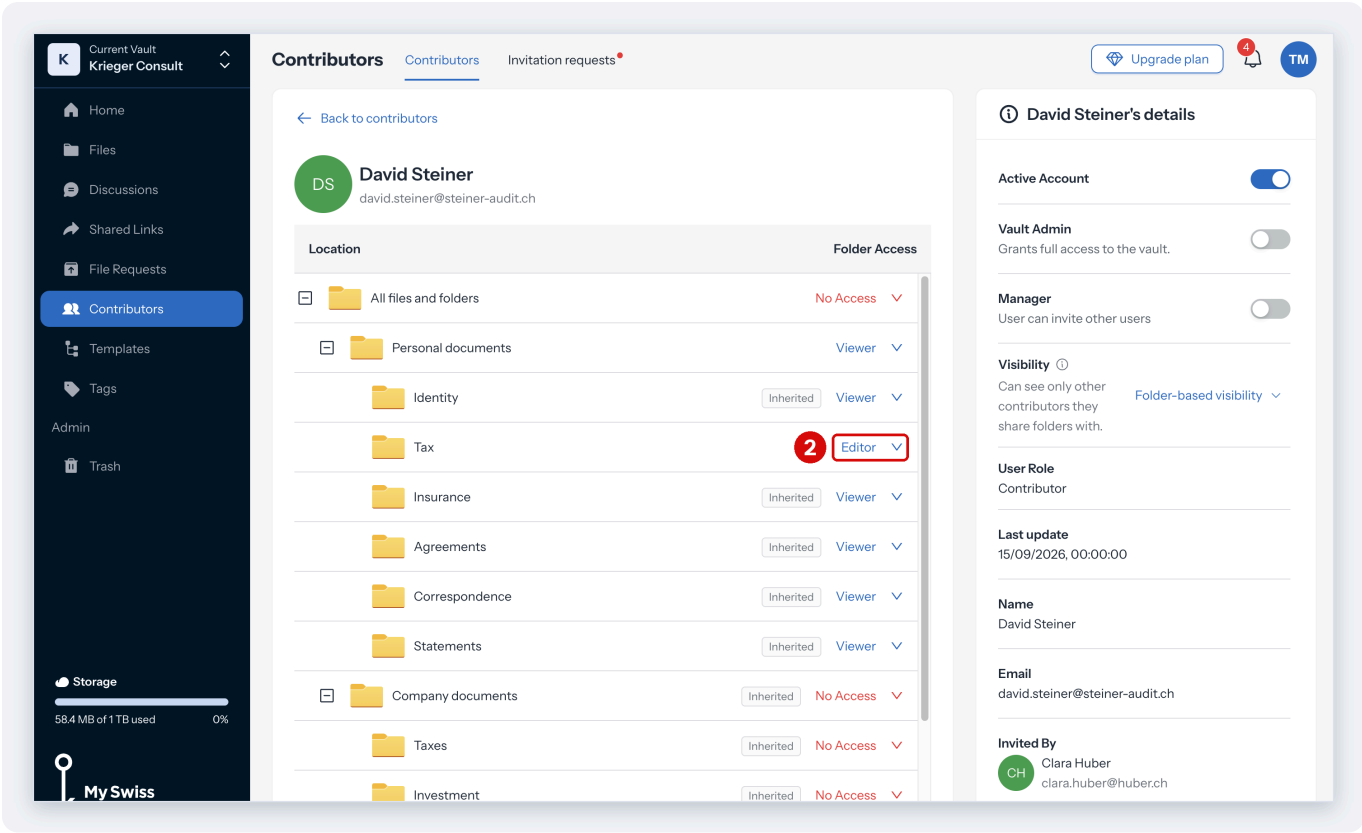
> You cannot deactivate an admin user. A vault always keeps at least one admin. Another admin can remove your admin access. You cannot remove your own.

Set folder roles

A contributor can have a different role in each folder, for example Viewer in one folder and Editor in another.

1. In **Contributors**, click the contributor to open their details, as shown in Manage a contributor.
2. On **Folder Access**, set their role on each folder.

> A role set on a folder also applies to its subfolders. A role set directly on a subfolder replaces the inherited one and is no longer marked **Inherited**. Click **Reset access** to go back to the parent folder's role. If the contributor has no access to the parent folder, this removes them from the subfolder.



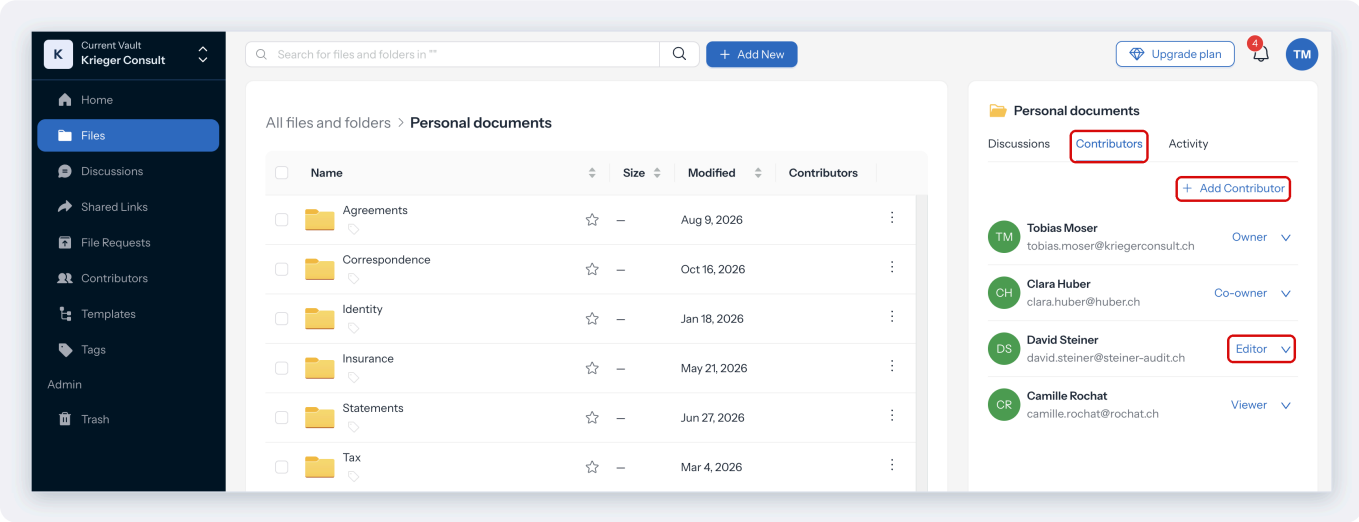
Action	Owner	Co-owner	Editor	Viewer	Previewer
View item list in folder	✓	✓	✓	✓	✓
Preview files	✓	✓	✓	✓	✓
Download files	✓	✓	✓	✓	
Zip & download files/subfolders	✓	✓	✓	✓	
Share files with link	✓	✓	✓	✓	
Upload files	✓	✓	✓		
Rename files/subfolders	✓	✓	✓		
Add new document version	✓	✓	✓		
Create subfolders	✓	✓	✓		
Add contributors	✓	✓			
Remove contributors	✓	✓			
Move	✓				
Delete files & folders	✓				

Change access from a folder

In **Files**, open a folder and go to its **Contributors** tab. It lists everyone who can access the folder.

> To change who can access this folder, you need the **Owner** or **Co-owner** role on it.

- To change a role, use the role menu on the contributor's row.
- To give someone access, click **Add Contributor** and choose their role on this folder.
  - **Someone already in the vault** gets the folder access right away. No invitation or approval is needed.
  - **Someone new to the vault:** if you are a **Manager**, the invitation is sent right away. If you aren't, this creates an invitation request with the status **Approval pending**. When a vault admin or a **Manager** approves it, the invitation email is sent and the status changes to **Invitation pending** until the person accepts.



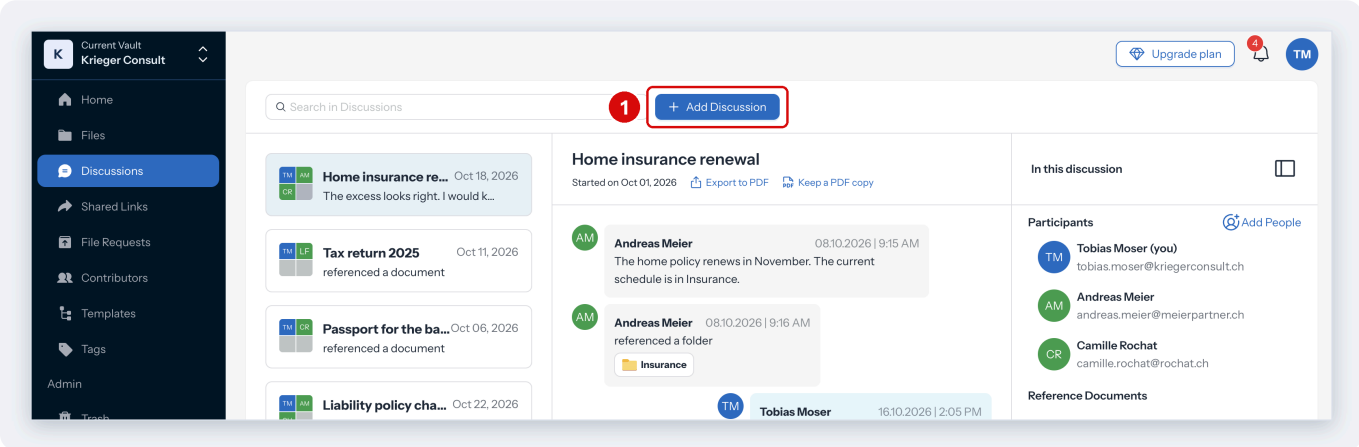
Discussions

WHERE **Discussions** in the left menu.

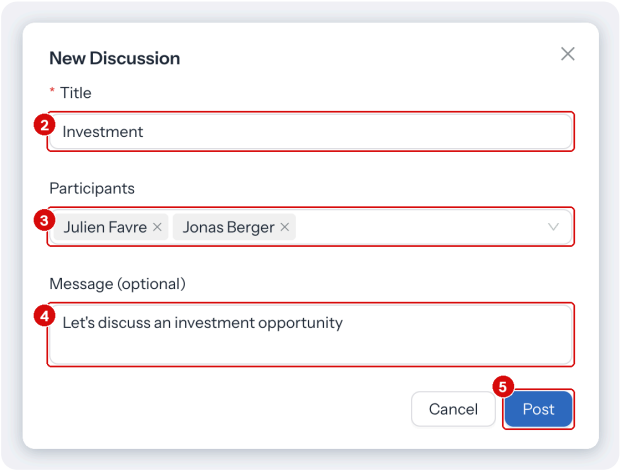
Use discussions to message contributors in your vault, for example to ask about a file instead of emailing it again. Messages are encrypted.

Create a discussion

1. In **Discussions**, click **Add Discussion**.

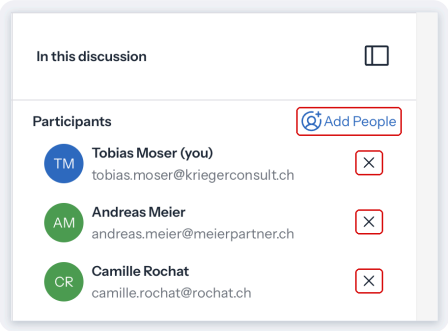


2. Enter a **Title** that helps you find the discussion later.
3. Add **Participants**. You can add more later.
4. Optional: write a first message.
5. Click **Post**.



Add or remove participants

In the **Participants** panel on the right, click **Add People** and select the contributors to add. If the panel is hidden, open it with the panel button at the top right.



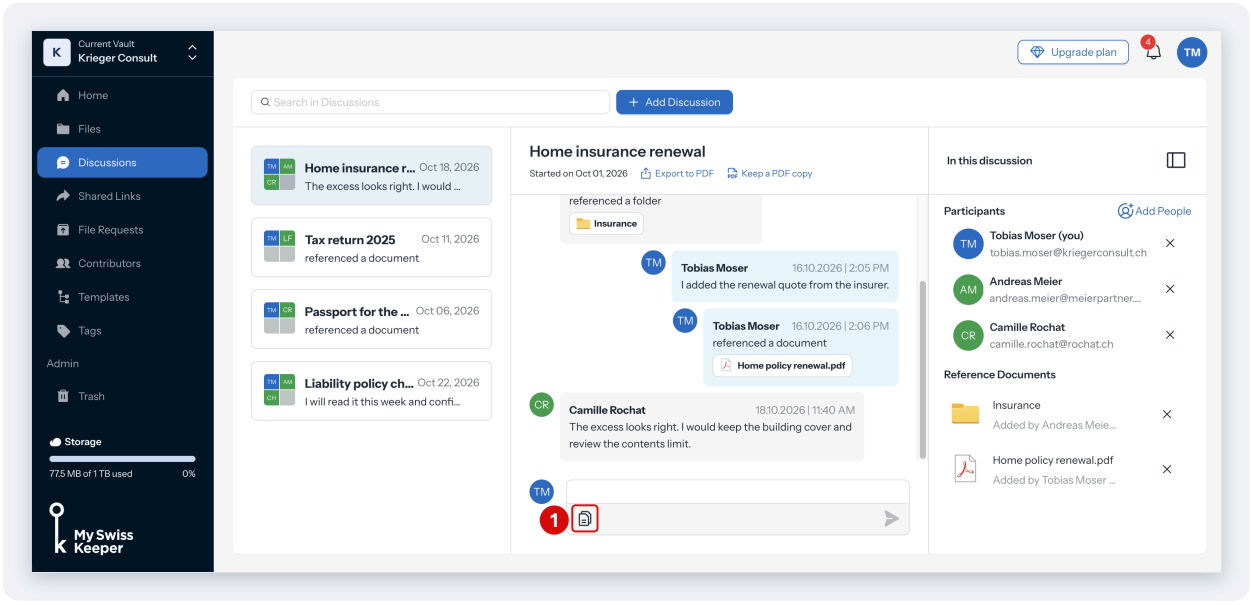
You can add only contributors you can see. With folder-based visibility, you can only see contributors who share access to at least one folder with you.

> If you have folder-based visibility and someone adds you to a discussion, you see all its participants, including people you normally cannot see.

To remove a participant, click the **X** next to their name. Their earlier messages stay in the discussion, but they can no longer open it.

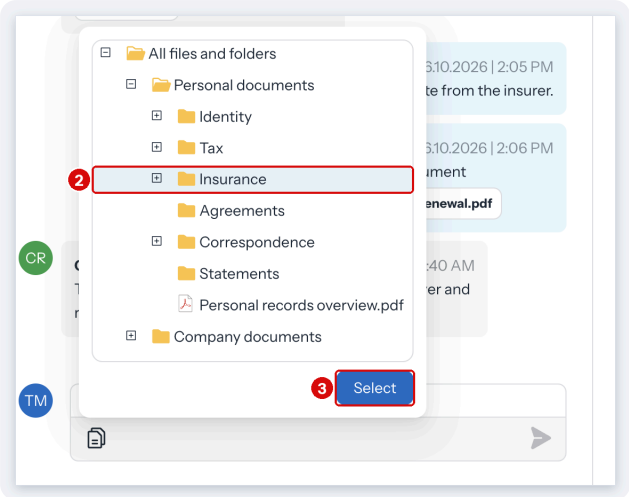
Link a file or folder

1. In the message box, click **Add a file or folder to the discussion** (the document button).



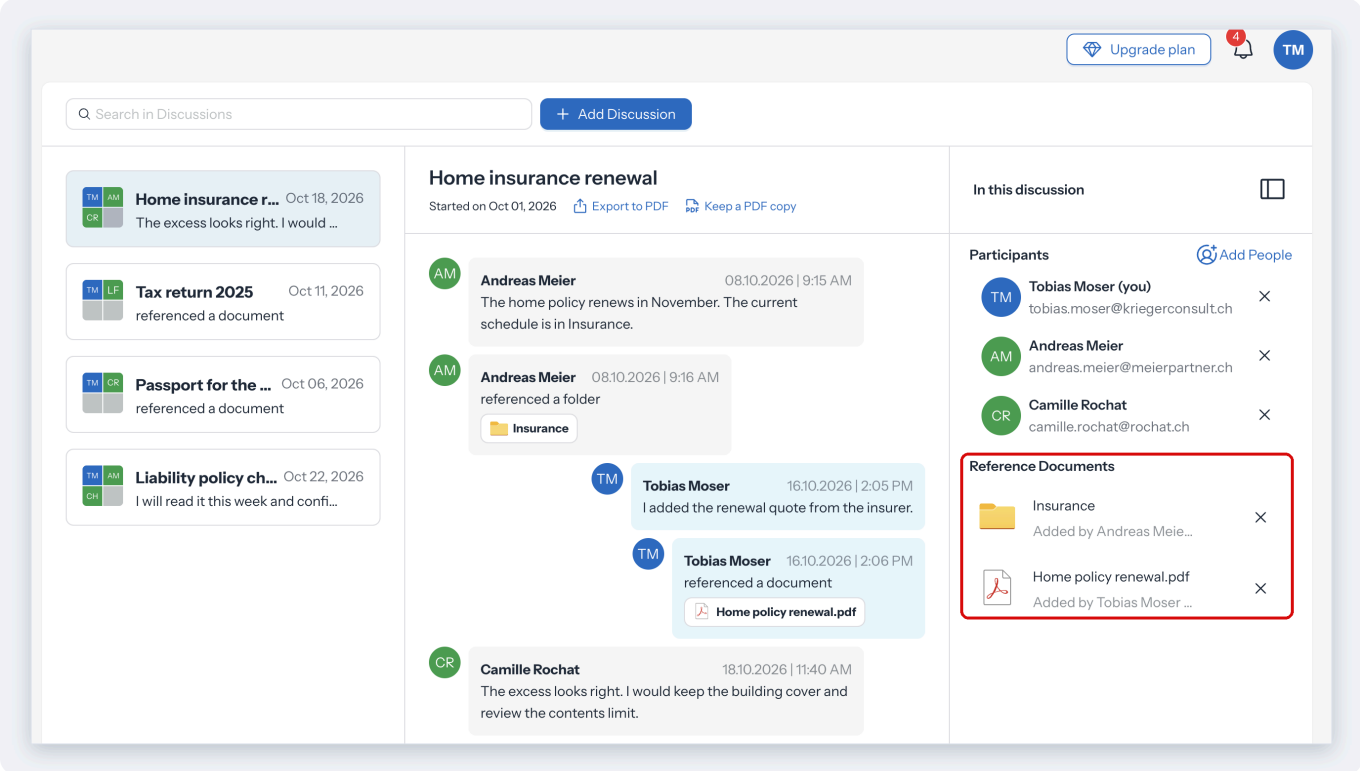
2. Choose the file or folder.

3. Click **Select**.



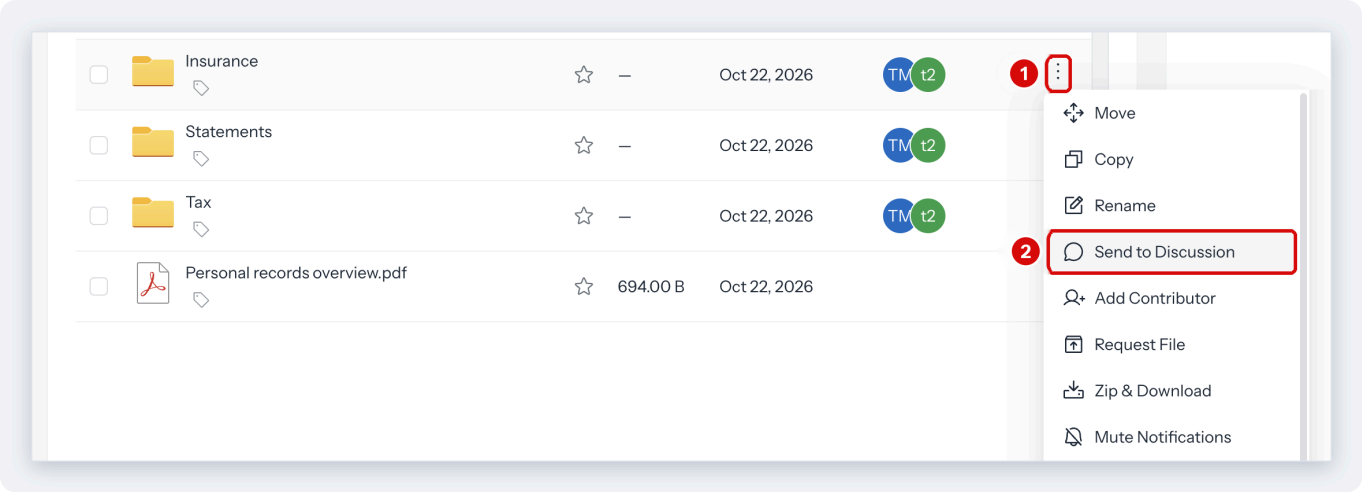
The file or folder appears in the discussion and under **Reference Documents** on the right.

To remove a file or folder from the discussion, click the **X** next to it in **Reference Documents**.

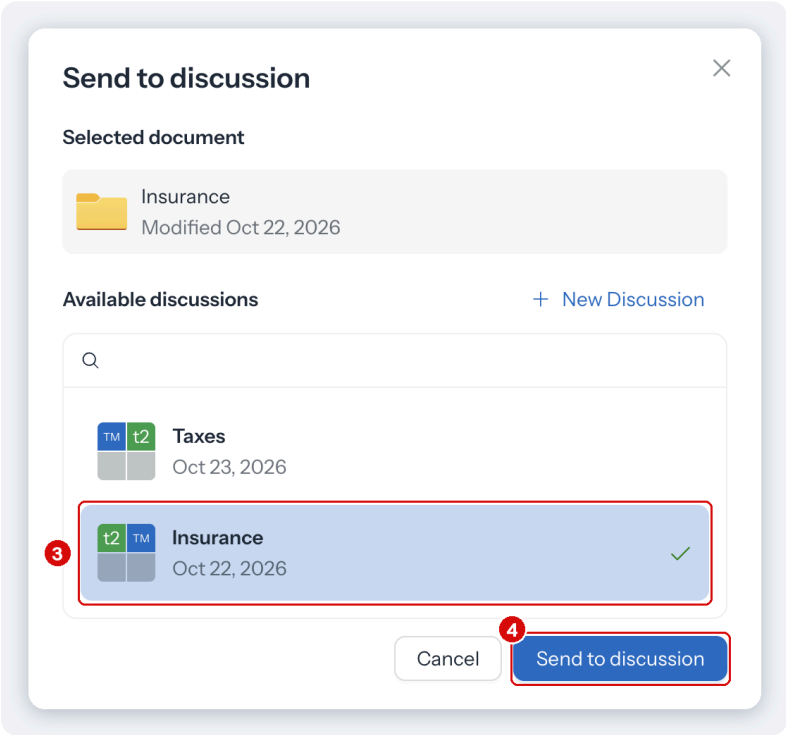


You can also start from the file or folder:

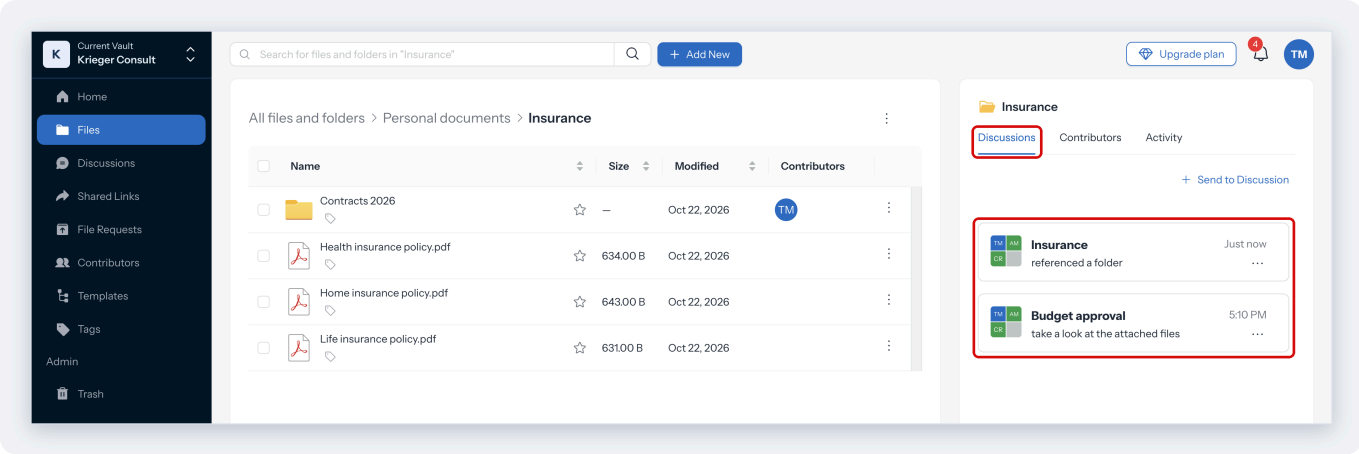
1. Open the row menu on the file or folder.
2. Click **Send to Discussion**.



3. Select a discussion, or click **New Discussion** to start one.
4. Click **Send to discussion**.



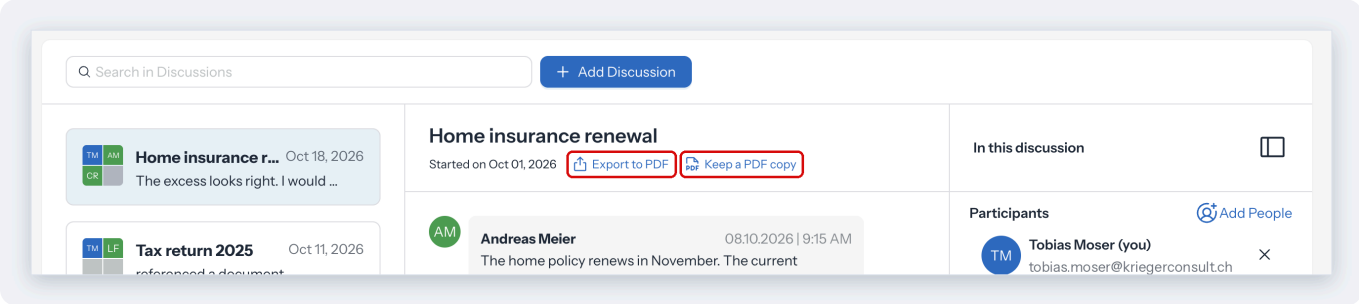
To see every discussion that links to a file or folder, open it and go to the **Discussions** tab.



> Participants who cannot open a file do not see it in the discussion. To show it to them, give them at least the **Previewer** role on its folder.

Save a discussion as a PDF

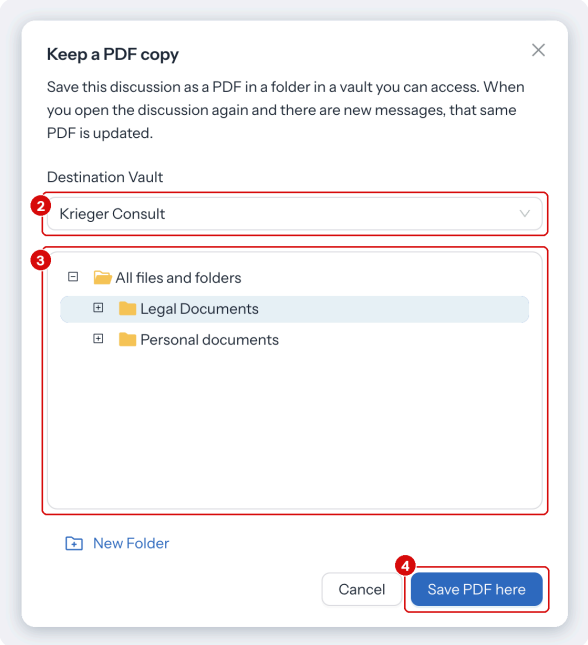
In the discussion header, you can export the discussion once or keep an updated copy in the vault.



Click **Export to PDF** to download a one-time copy to your computer. It includes all messages in order, their senders, and the linked files and folders.

To keep an up-to-date PDF in the vault instead:

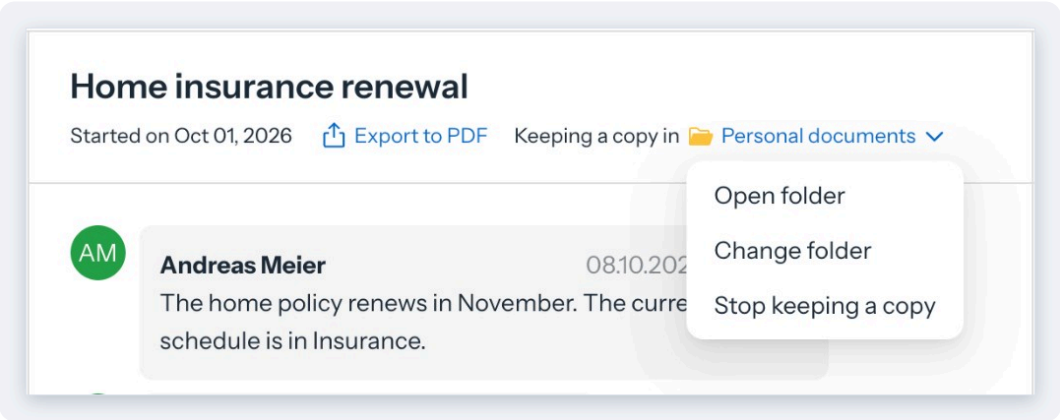
1. Open the discussion and click **Keep a PDF copy**.
2. Under **Destination Vault**, choose the vault.
3. Choose the folder.
4. Click **Save PDF here**.



The PDF is named after the discussion title. Each time you open the discussion and there are new messages, the PDF is updated.

To manage the copy, click the folder name next to **Keeping a copy in**:

- **Open folder:** opens the folder that contains the PDF.
- **Change folder:** saves future updates in a different folder.
- **Stop keeping a copy:** stops updating the PDF. The existing PDF stays in the folder.



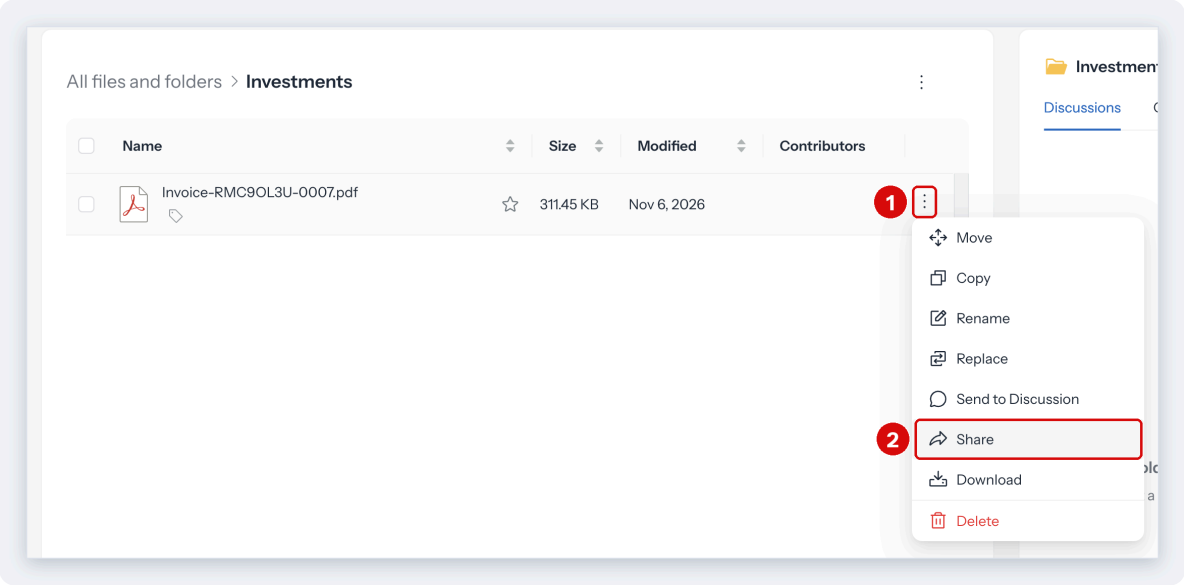
Share a file with someone outside your vault

WHERE The row menu on a file, then **Share**.

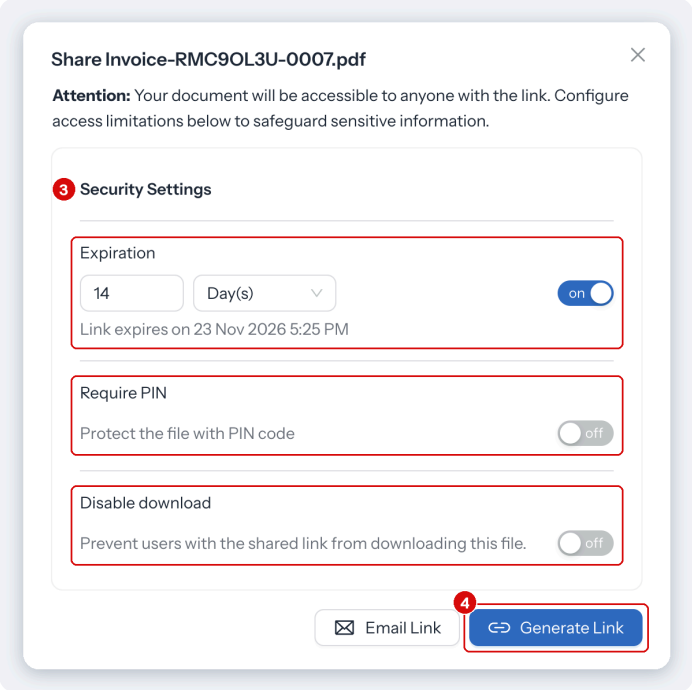
Share a single file by link with someone who is not a contributor. The recipient sees only that file, not your folders. The link is encrypted.

Share a link

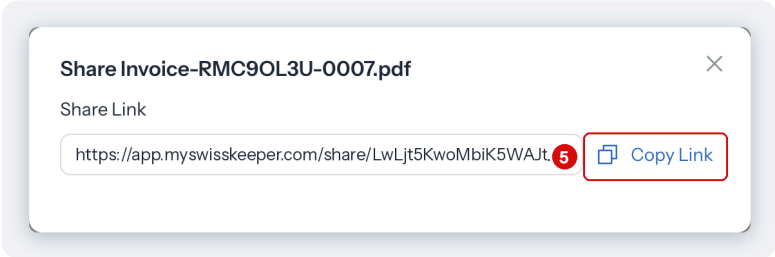
1. Open the row menu on the file.
2. Click **Share**.



3. Under **Security Settings**, set the options you need:
   - **Expiration:** the link stops working after the time you set, in minutes, hours or days.
   - **Require PIN:** the recipient must enter a PIN of at least 4 characters. Letters, numbers and symbols are allowed.
   - **Disable download:** the recipient can preview the file but not download it.
4. Click **Generate Link**. To send the link by email from the vault instead, click **Email Link**.



5. Click **Copy Link** and send the link to the recipient.



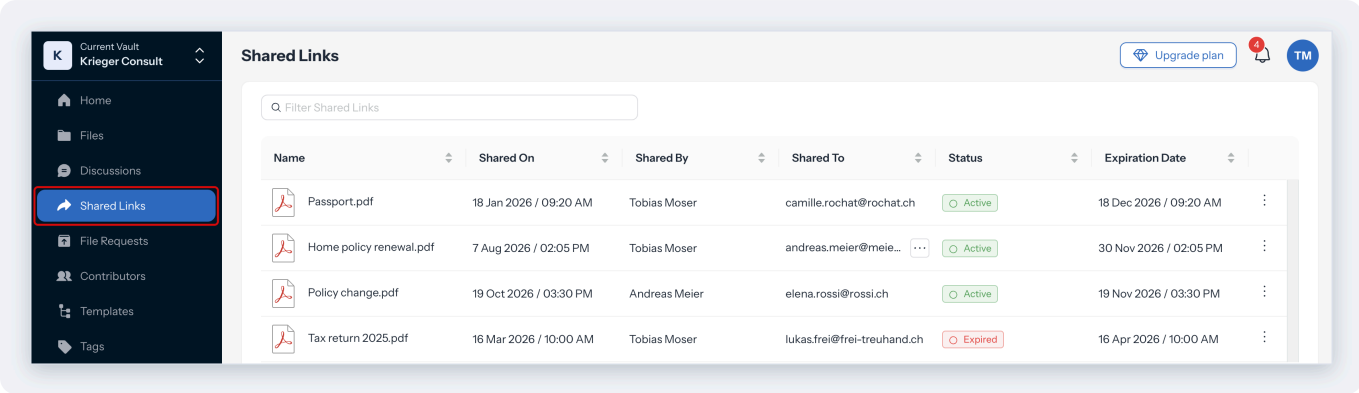
Send the link and the PIN through different channels, for example the link by email and the PIN by text message. Disabling download does not stop the recipient from copying text from the preview or taking a screenshot.

Viewers can create share links. Previewers cannot.

Manage your links

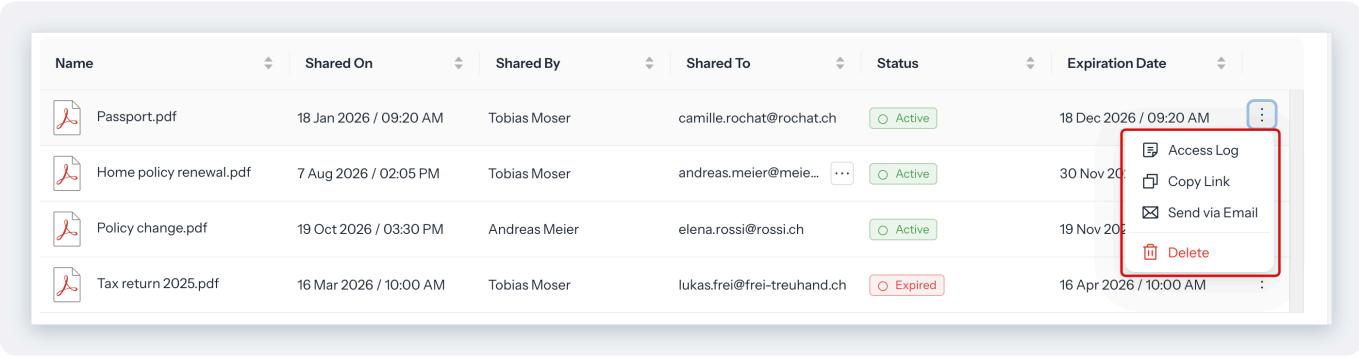
WHERE **Shared Links** in the left menu.

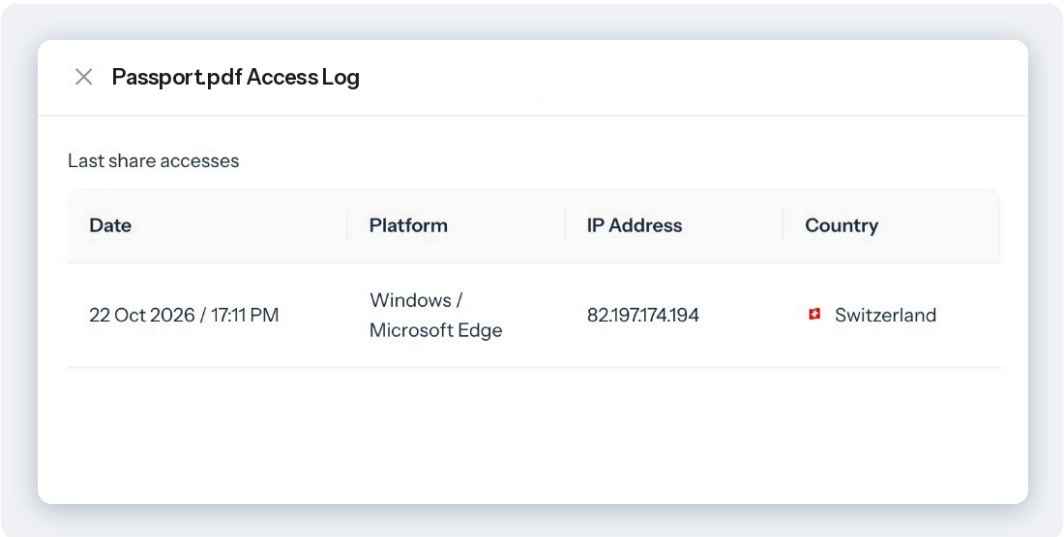
The list shows each shared file, when it was shared and by whom, the recipients' email addresses if you sent it from the vault, whether the link is active or expired, and when it expires. You see the links you created. If you are a vault admin, you also see links created by other contributors.



The row menu lets you:

- **Access Log:** shows each time the link was opened, with date and time, platform, country and IP address.
- **Copy Link:** copies the link.
- **Send via Email:** sends the link again.
- **Delete:** disables the link immediately. The file stays in your vault.





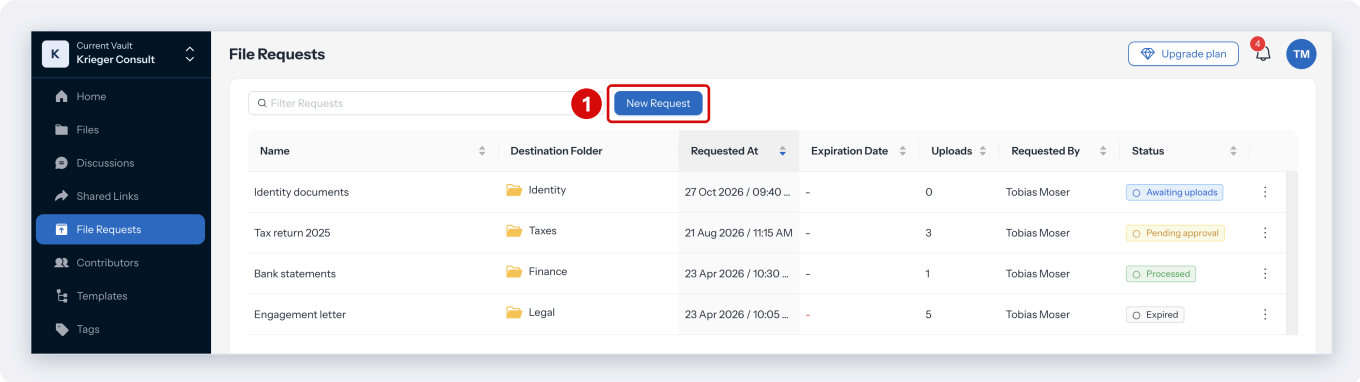
File requests

WHERE **File Requests** in the left menu. From a folder: row menu, then **Request File**.

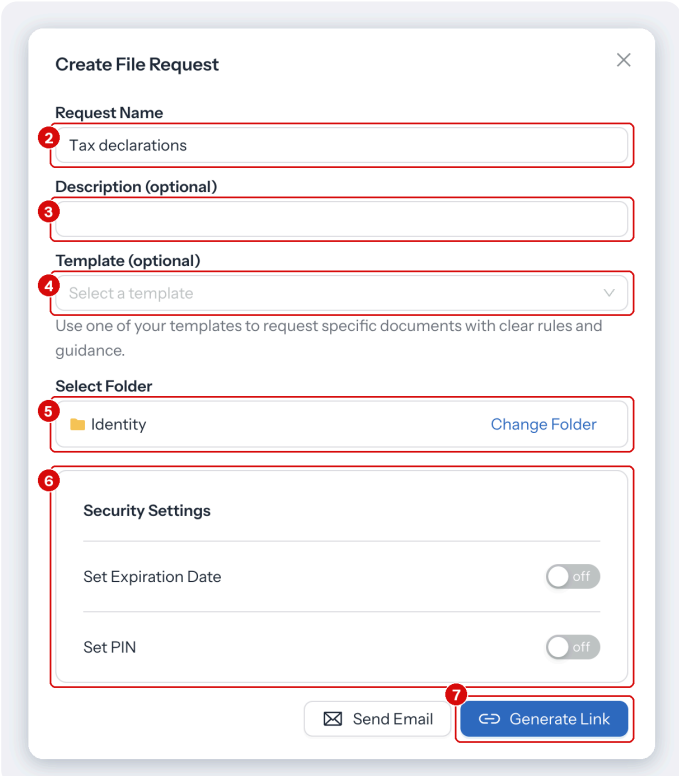
Use a file request to collect files from people outside your vault. Uploaded files wait for your review, and only the files you approve are added to your vault.

Create a file request

1. In **File Requests**, click **New Request**.



2. Enter a **Request Name**.
3. Optional: add a **Description**. It is shown on the upload page.
4. Optional: choose a **Template**.
5. Under **Select Folder**, check where approved files go. Click **Change Folder** to pick a different one.
6. Optional: under **Security Settings**, turn on **Set Expiration Date** to limit how long the link accepts uploads, or **Set PIN** to require a code before upload.
7. Click **Generate Link** to copy the link, or **Send Email** to open your email app with the link ready to send.



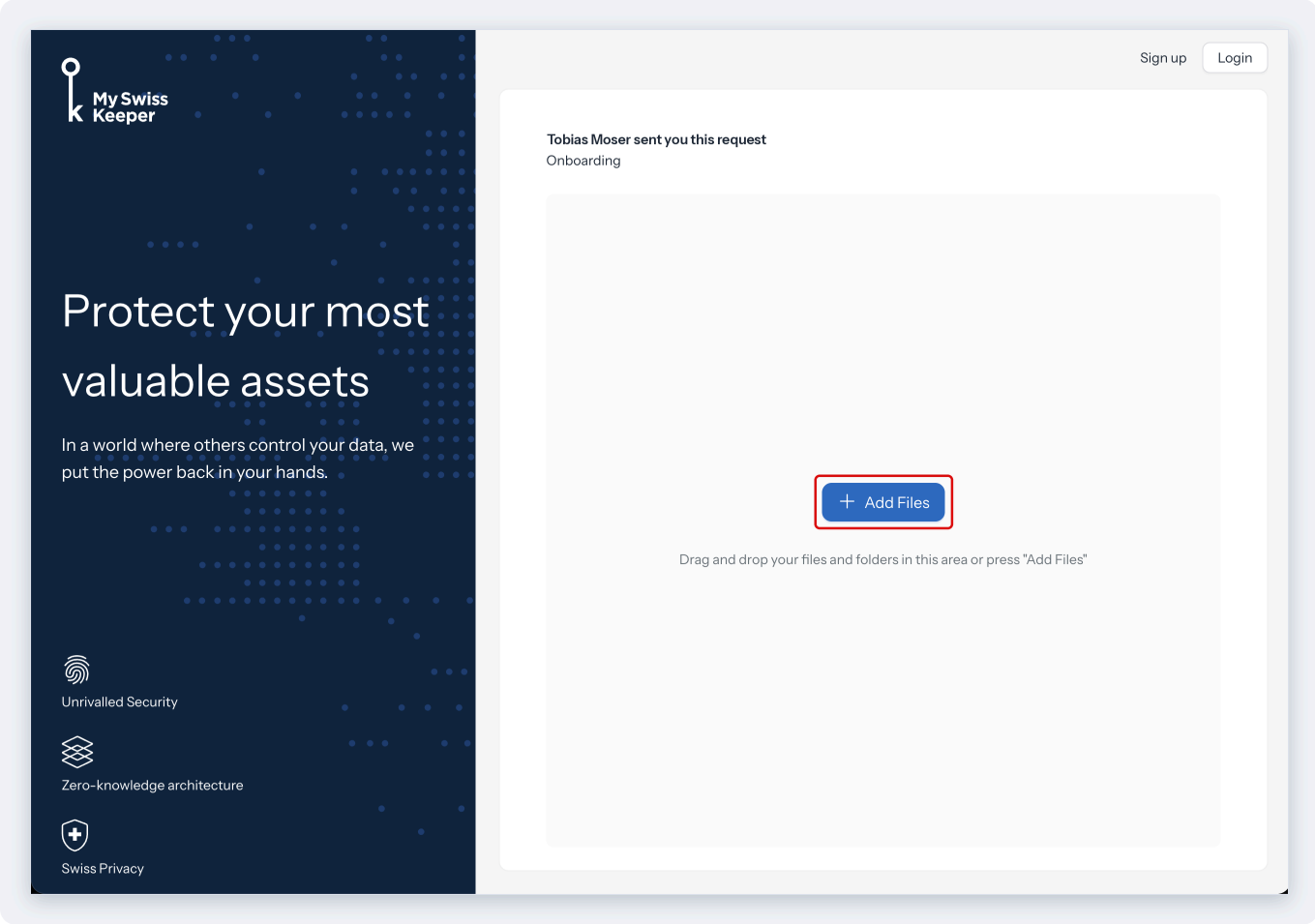
Without a template, the uploader gets one upload area with no limits on the number or type of files. With a template (see Templates), the uploader sees one section for each document you ask for:

- Required sections must have a file before the uploader can submit.
- Optional sections can be left empty.
- Files that don't match a section's limits are rejected in that section.

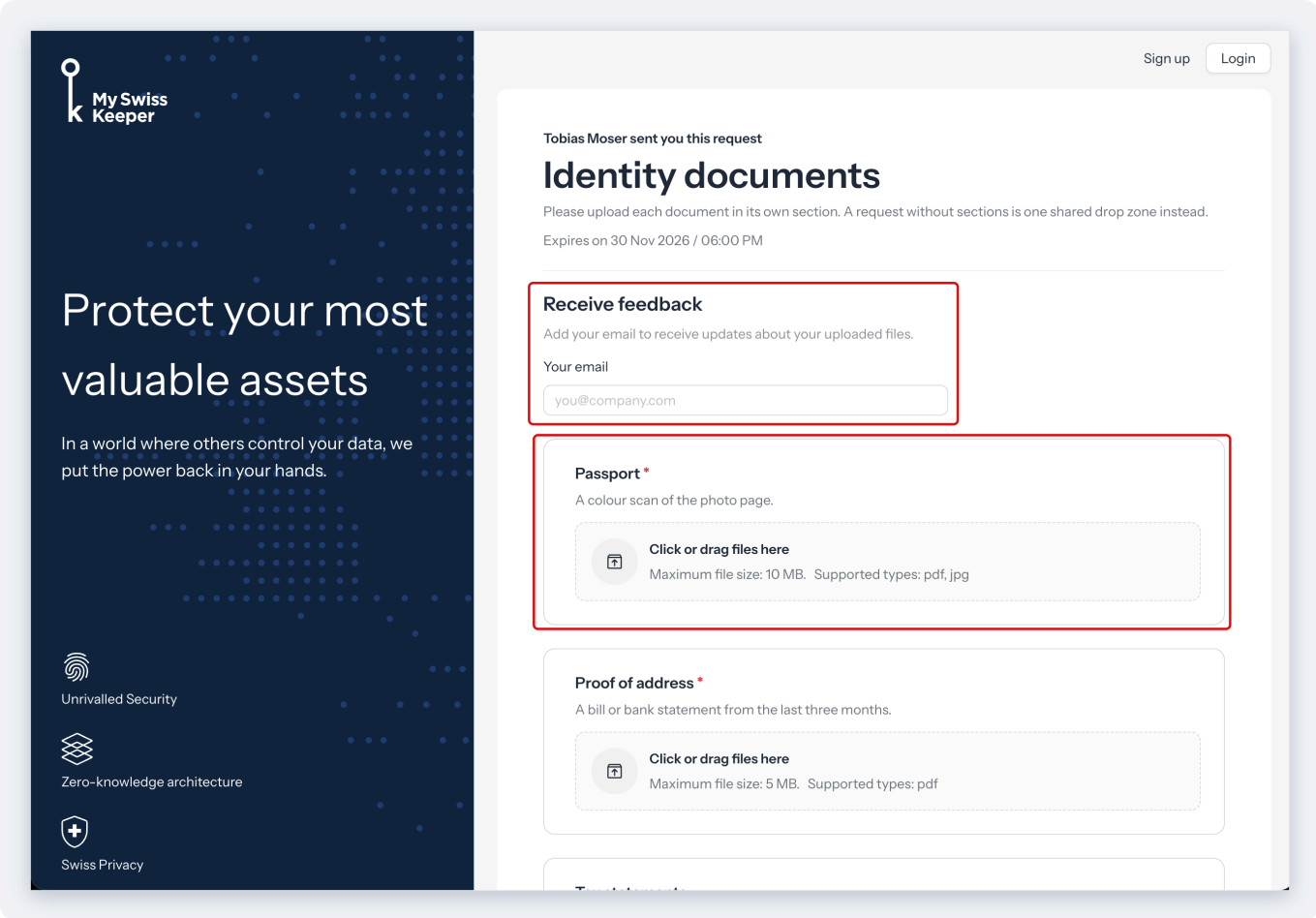
If you set a PIN, send it separately from the link.

What the uploader sees

The uploader opens the link. No account is needed. If you set a PIN, they enter it first. Then they upload their files and submit them.



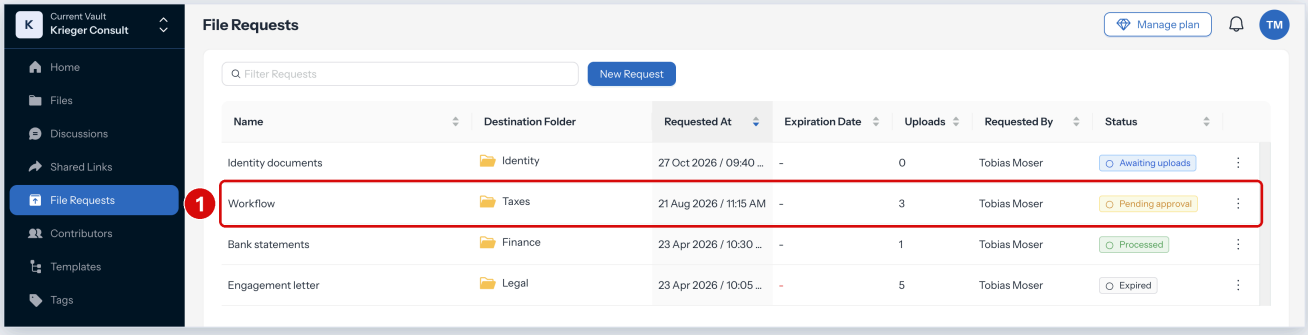
In a request with sections, the uploader sees one upload area per section, with its instructions, file limits and whether it is required. They can also enter their email to receive your feedback and the status of their files.



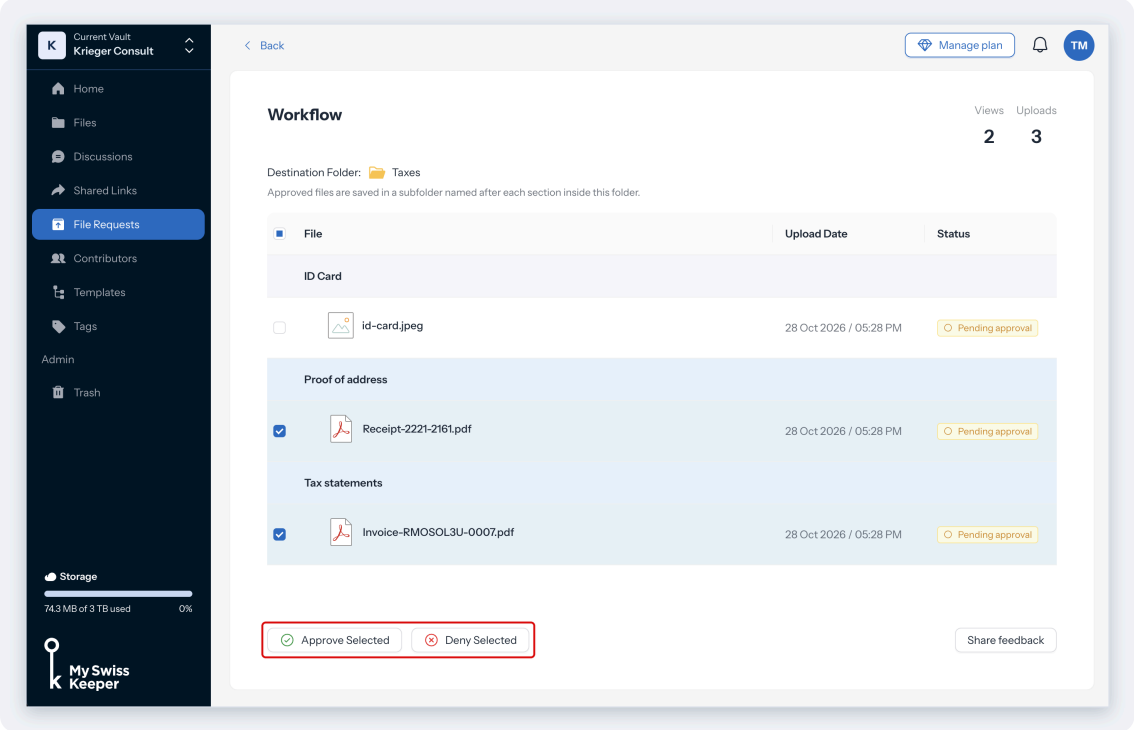
Submitted files are not in your destination folder yet. They wait in the request until you review them.

Review uploaded files

1. In **File Requests**, click the request to open its files.

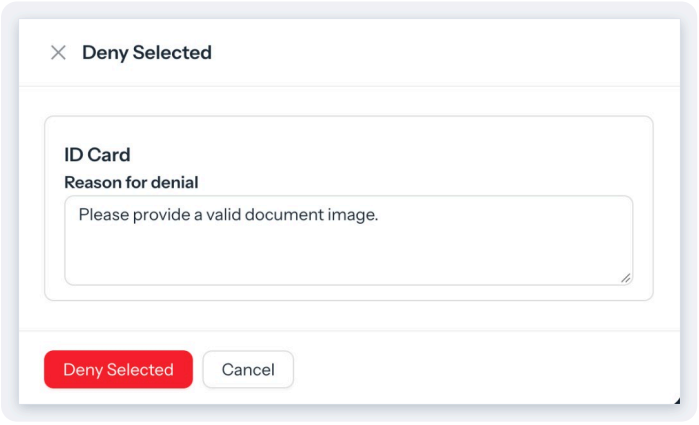


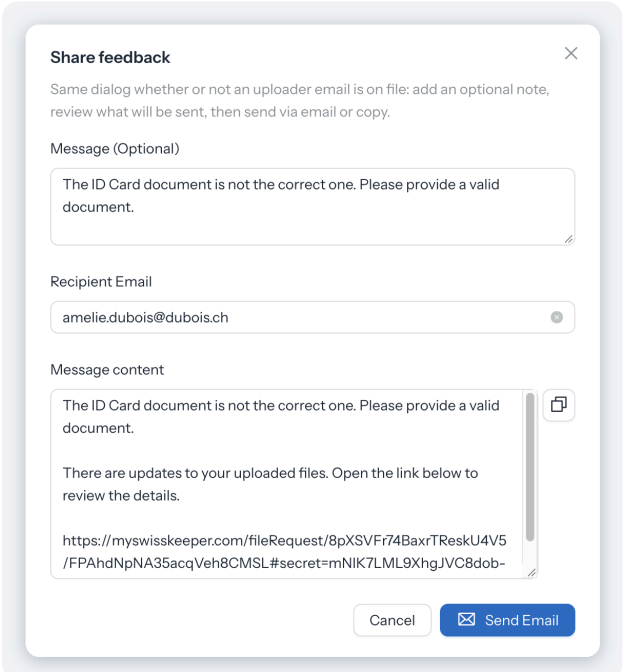
2. Preview the files and select the ones to approve or deny.
3. Click **Approve Selected** to move them into the destination folder, or **Deny Selected** to keep them out of your vault.



You can still approve a denied file later.

In a request with sections, you can add a **Reason for denial** when you deny a file. Click **Share feedback** to send the uploader a link where they can see your feedback and the status of their files.

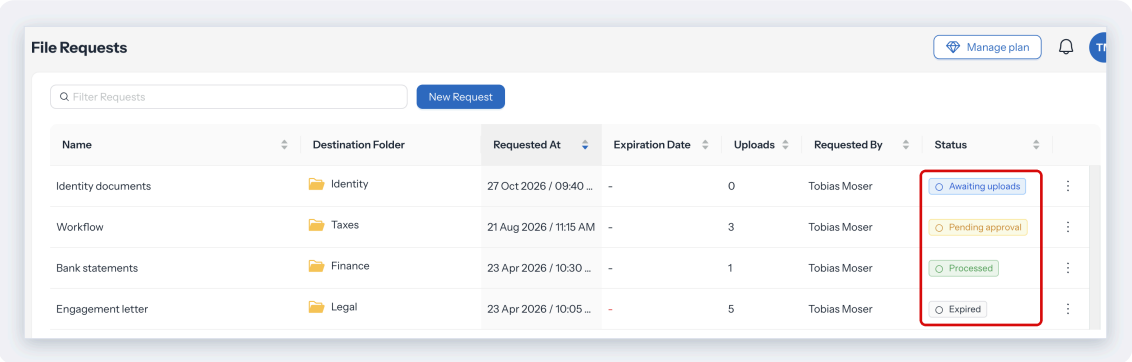




Manage file requests

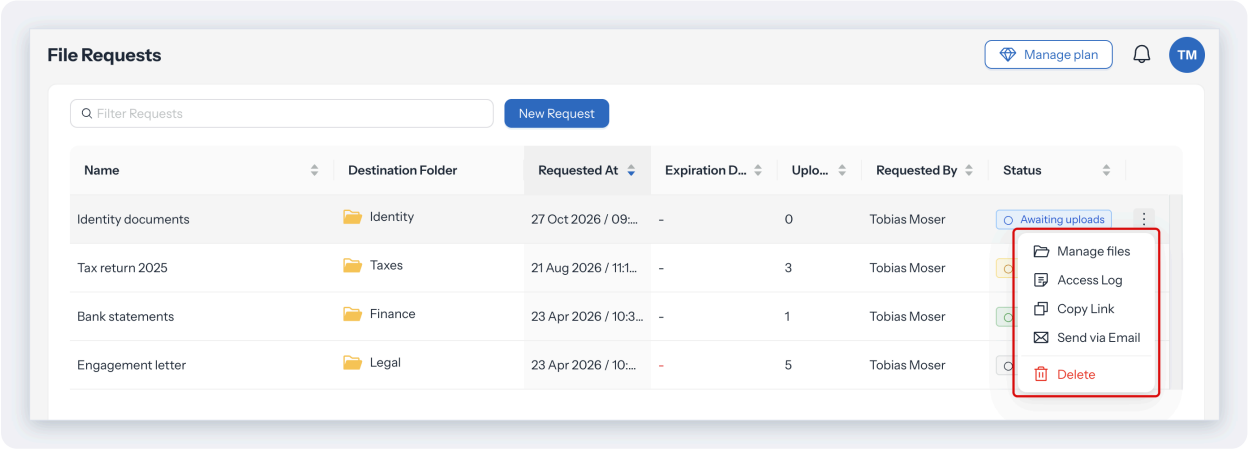
The list shows who created each request, its destination folder, when it was created and expires, the number of uploads, and its status:

- **Awaiting uploads:** nothing has been submitted yet.
- **Pending approval:** files are waiting for your review.
- **Processed:** all files have been reviewed.
- **Expired:** the link no longer accepts uploads.



The row menu lets you:

- **Manage files:** review the uploaded files.
- **Access Log:** shows when the upload page was opened.
- **Copy Link:** copies the upload link. Available until the request expires.
- **Send via Email:** opens your email app with the upload link. Available until the request expires.
- **Delete:** deletes the file request and disables the link. Files you already approved stay in the destination folder. Expired requests stay in the list until you delete them.



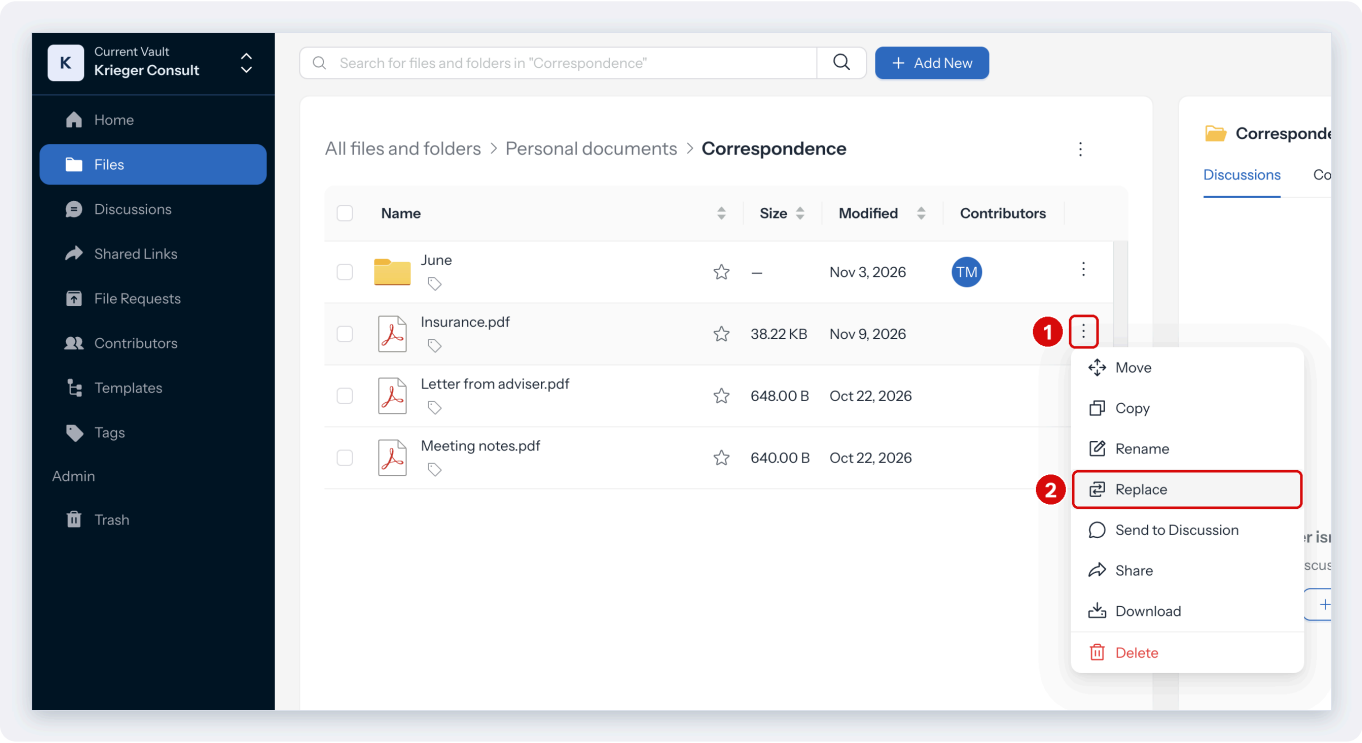
> You see the file requests you created. A vault admin sees all file requests in the vault. Only the person who created a request, or a vault admin, can approve, deny and share feedback.

File versions

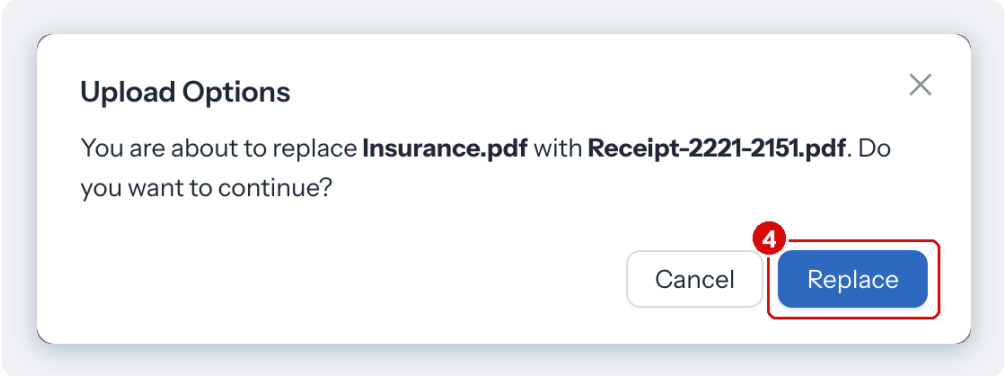
When you replace a file, the vault keeps the previous content as an old version.

Replace a file

1. Open the row menu on the file.
2. Click **Replace**.

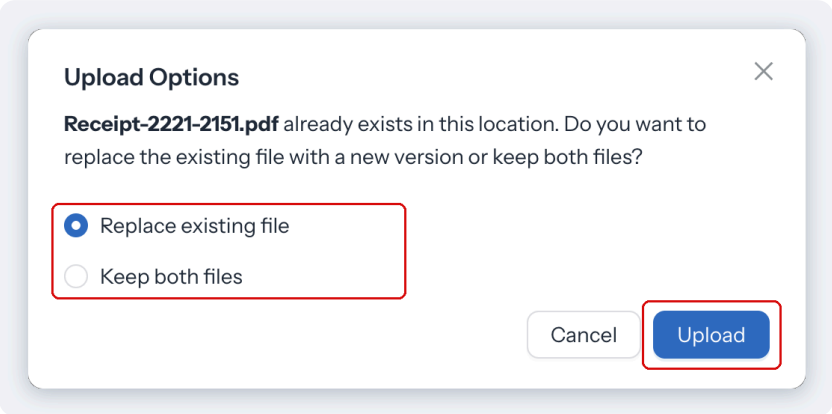


3. Choose the new file on your computer.
4. If the new file has a different name, click **Replace** to confirm. The file then takes the new name.



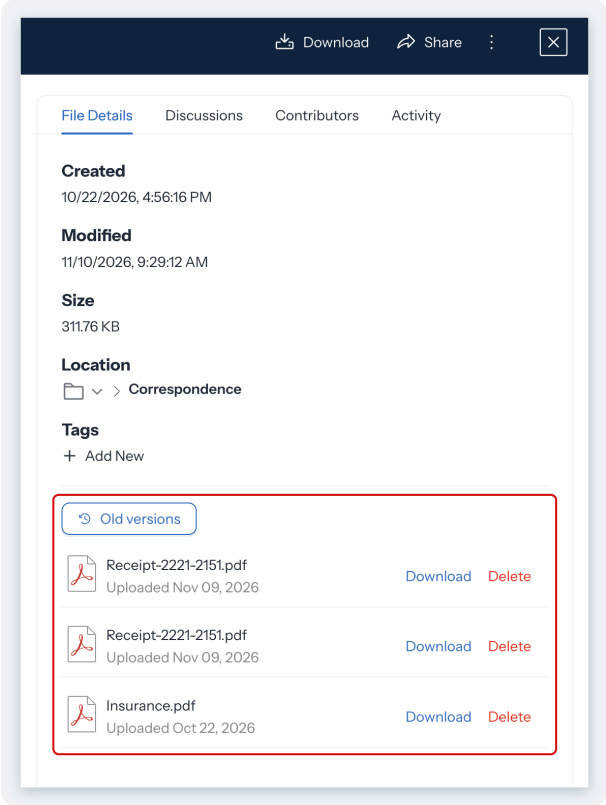
You can also upload a file into a folder that already has a file with the same name. You are then asked to choose an option and click **Upload**:

- **Replace existing file:** updates the file and keeps the previous content as an old version.
- **Keep both files:** keeps the existing file and saves the new one under a different name, for example "name (1).pdf".



View old versions

Open the file and, on **File Details**, click **Old versions**. The list shows each earlier version and the date it was uploaded. Click **Download** or **Delete** next to a version.

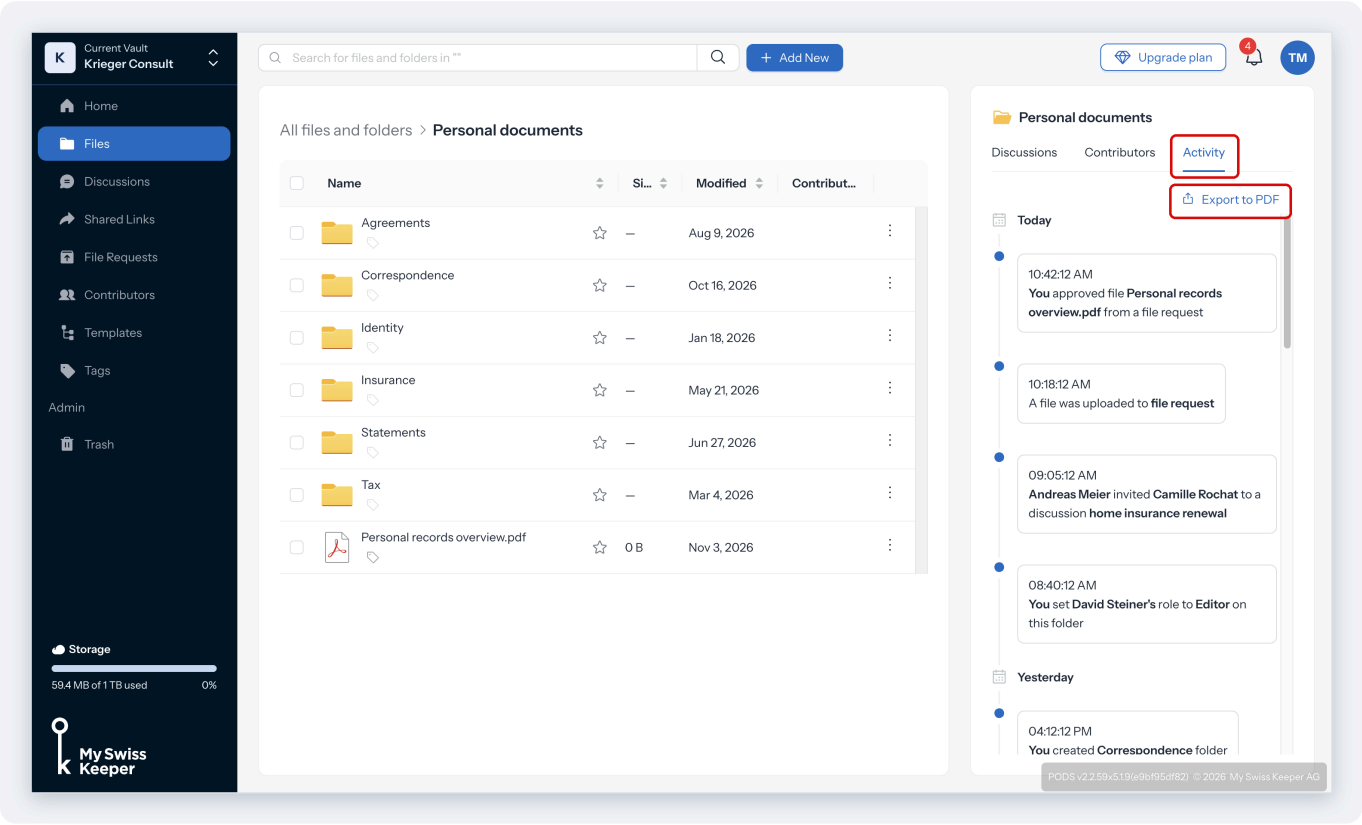


Old versions are kept until you delete them. Deleting an old version does not affect the current file.

Activity log

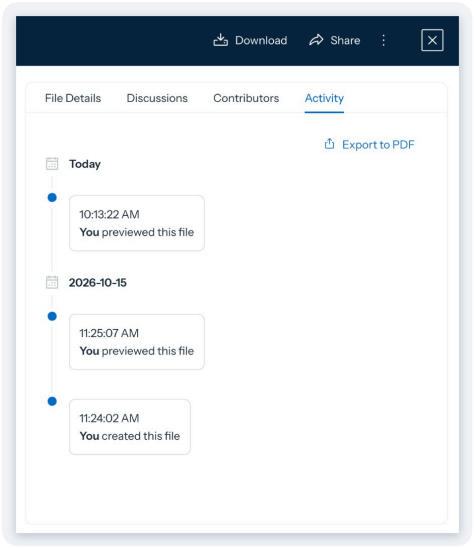
WHERE Open a folder or file, then the **Activity** tab on the right.

The activity log shows who did what and when, newest first. Click **Export to PDF** to download the log.



A **folder's** log records files and folders created in it, renames, deletions, permission changes, moves in and out, replaced files, and links to discussions. Deleted items are recorded on their parent folder.

A **file's** log records renames, moves, replacements, previews, downloads, shares, each time its share link is opened or downloaded, old versions downloaded or deleted, and links to discussions.



Source History

Items copied, moved or mirrored from another vault can also have a **Source History** tab, next to **Activity**. It shows what happened to the item in its original vault. See Copy to another vault in Managing files and folders.

Templates

WHERE **Templates** in the left menu.

Templates save you from setting up the same thing twice.

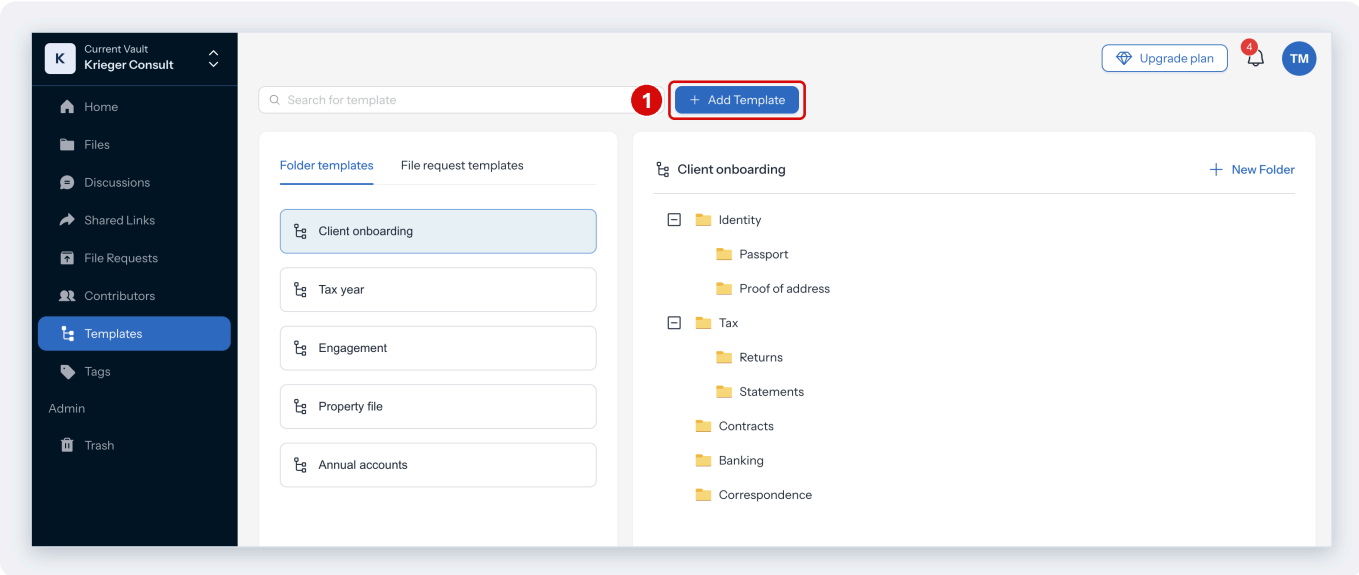
- **Folder templates** create the same folder structure in one step, for example for every new client.
- **File request templates** save a set of sections, one for each document you ask for, so you can reuse them in every file request.

> Templates are personal. Other contributors cannot see the templates you create. Your templates are available in every vault you own.

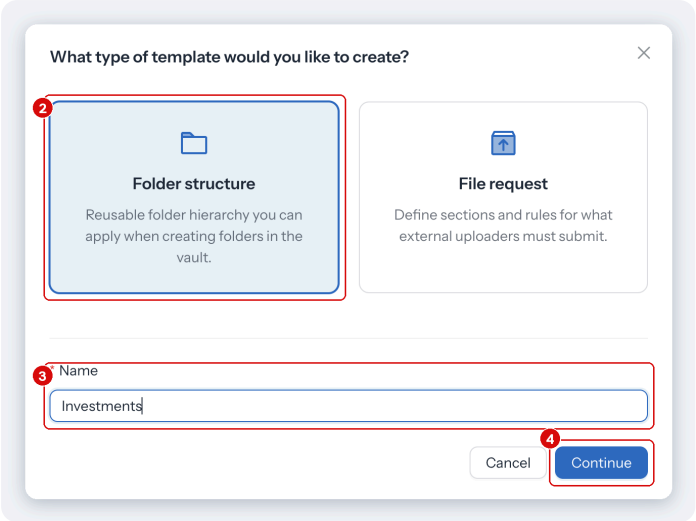
Create a folder template

A folder template is a saved folder structure. Apply it to any folder to create the same set of folders in one step.

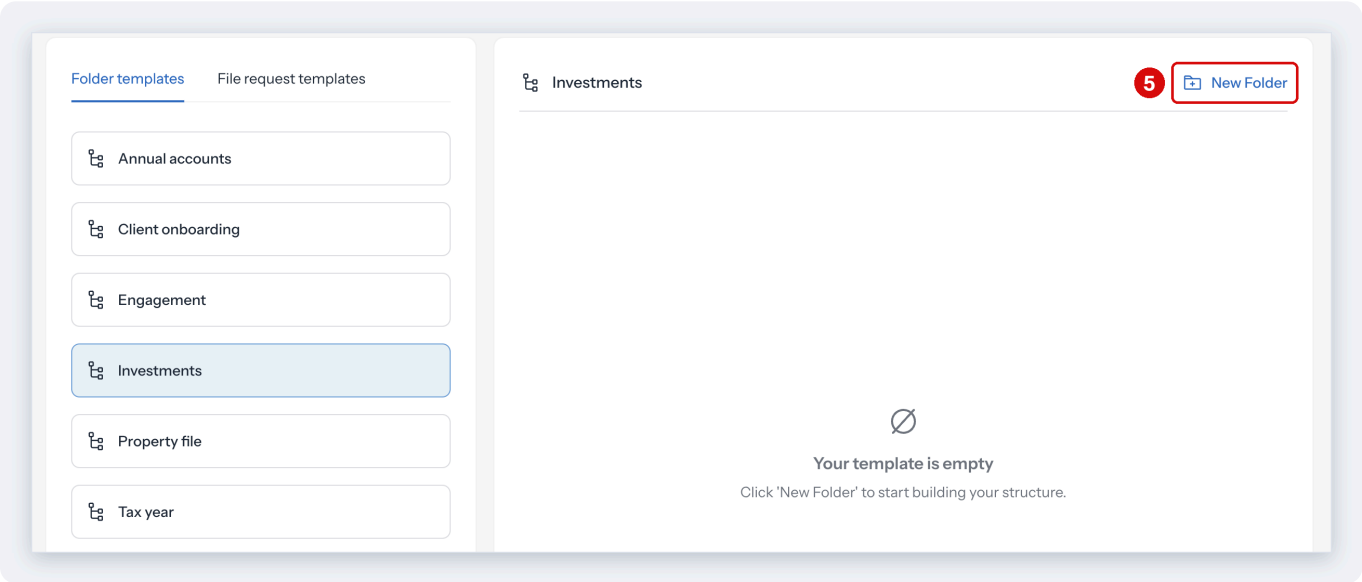
1. Click **Add Template**.



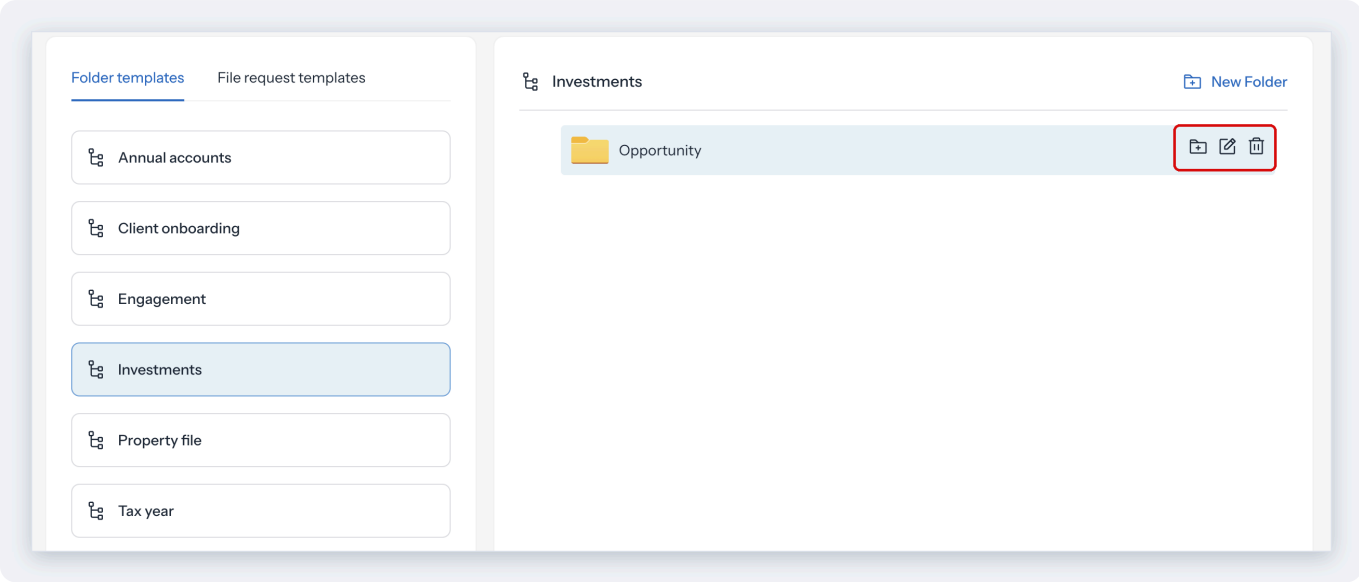
2. Choose **Folder structure**.
3. Enter a **Name**.
4. Click **Continue**.



5. Click **New Folder** to add folders at the top level or inside other folders.

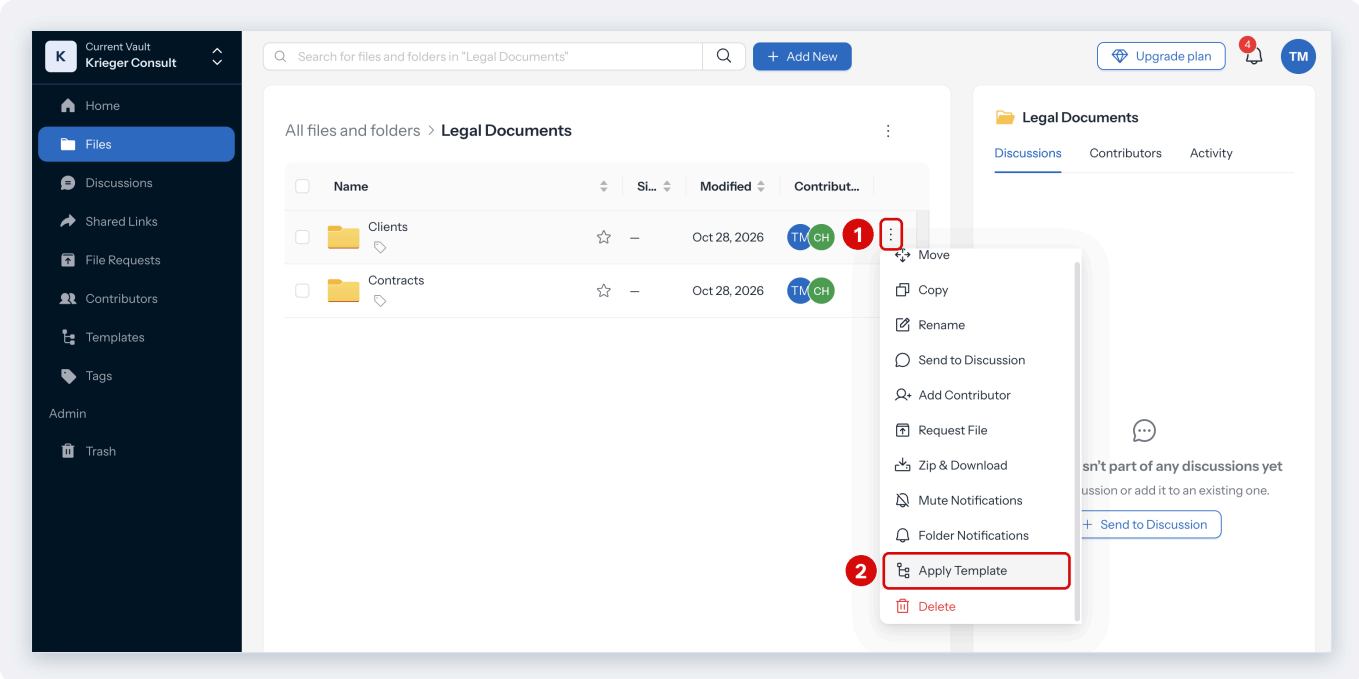


Changes are saved automatically. Use the icons next to a folder to add a subfolder, rename it or delete it.

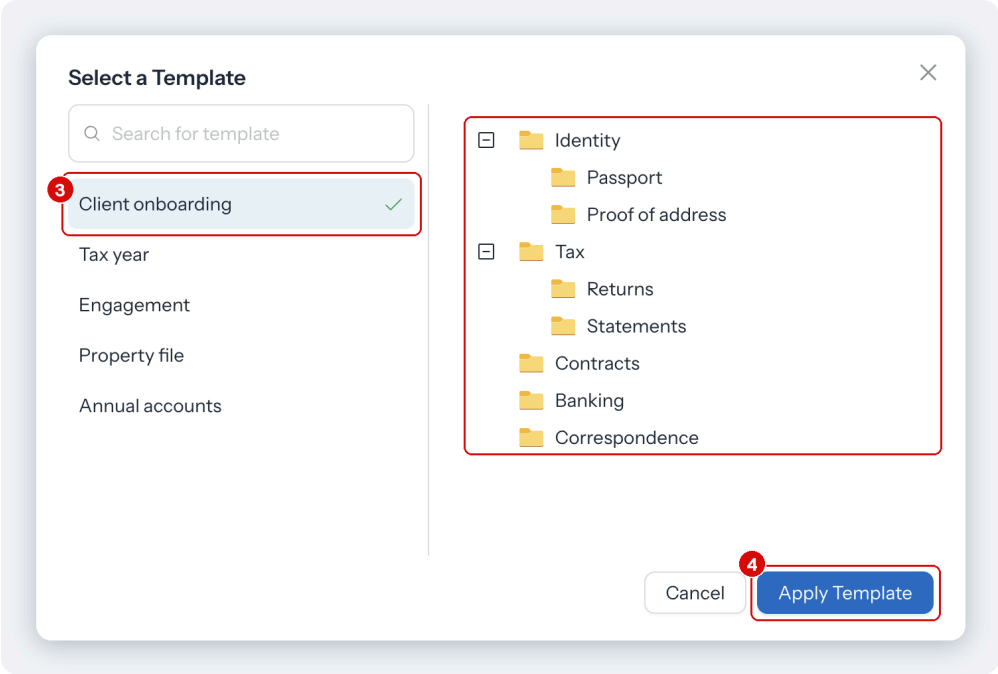


Apply a folder template

1. In **Files**, open the row menu on the folder where you want the structure.
2. Click **Apply Template**.



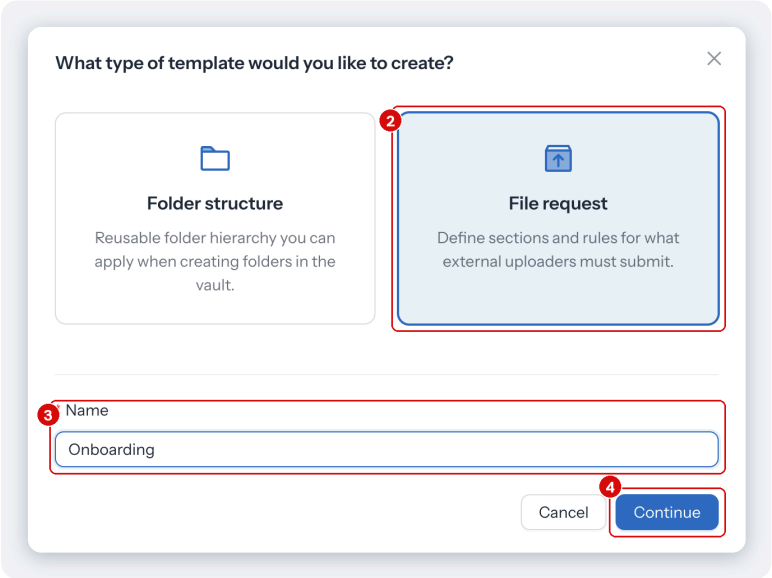
3. Choose the template. The preview shows its folders.
4. Click **Apply Template**.



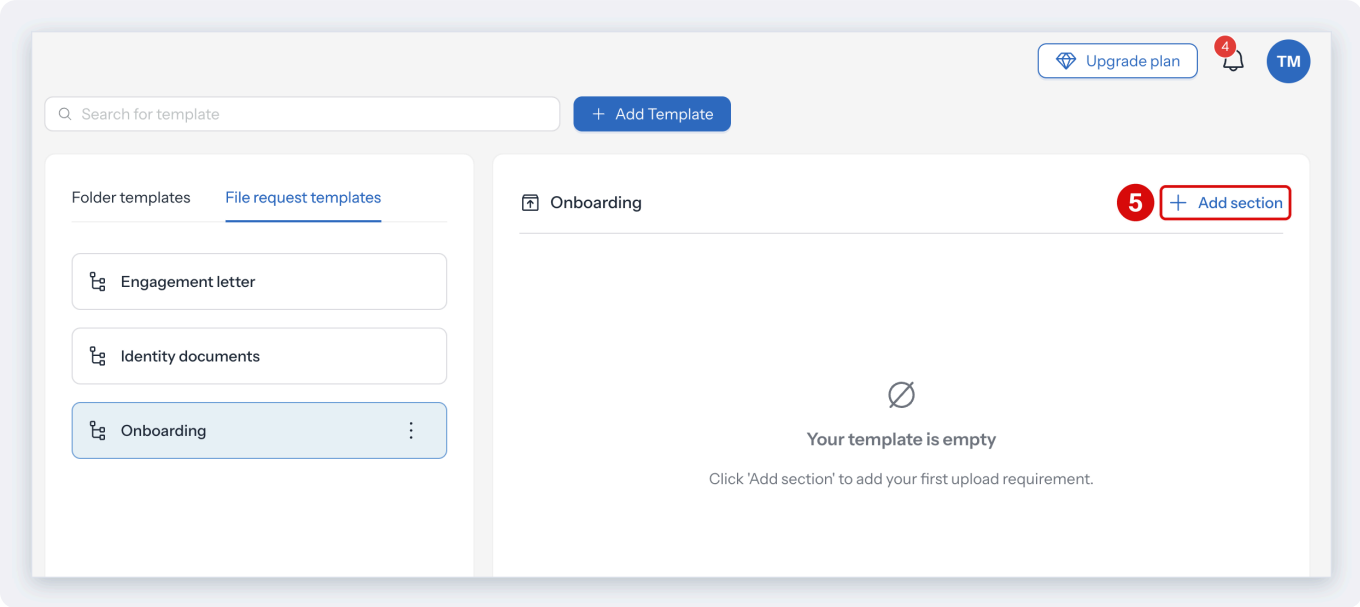
Missing folders are created. Folders with the same name are reused, not duplicated. Existing folders that are not in the template stay as they are. Deleting a template does not delete folders you created with it.

Create a file request template

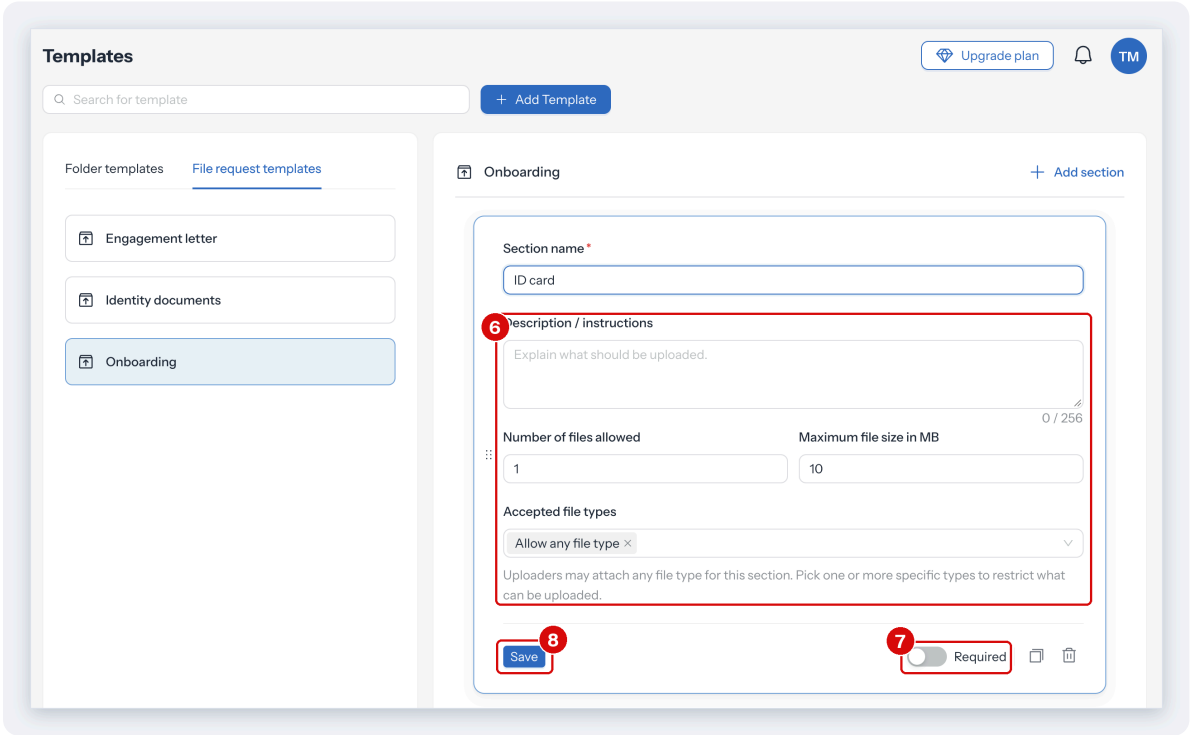
1. Click **Add Template**.
2. Choose **File request**.
3. Enter a **Name**.
4. Click **Continue**.



5. Click **Add section** and enter a section name.



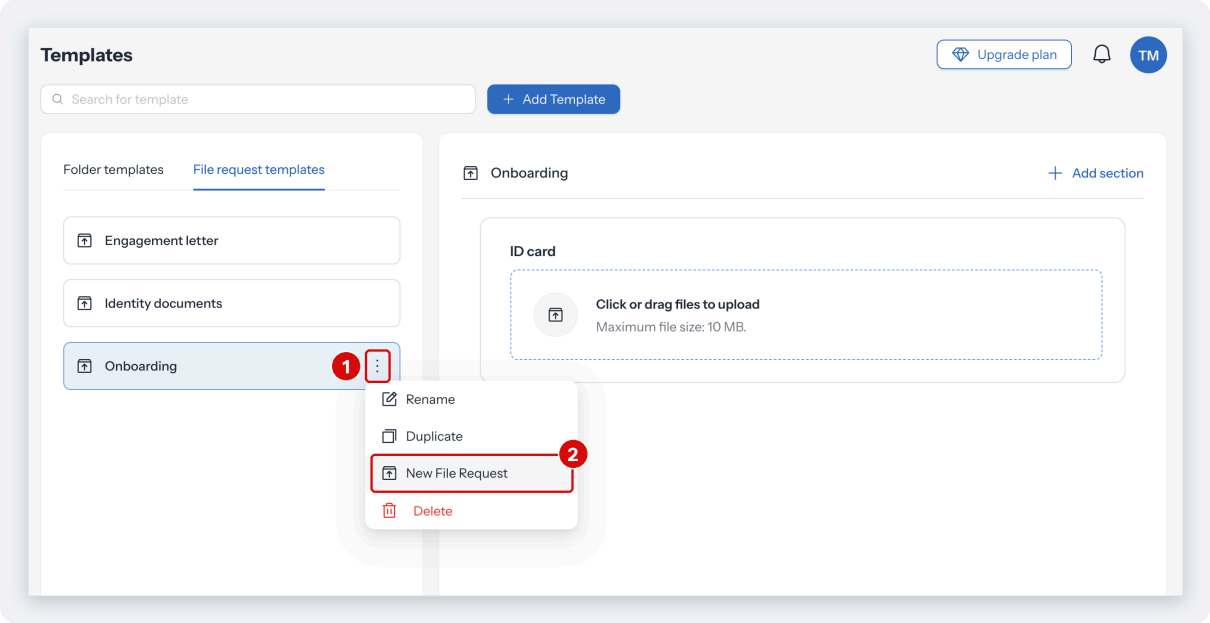
6. Optional: add instructions, and set the number of files, maximum file size and accepted file types. Leave a limit empty for no limit.
7. Turn on **Required** if a file must be uploaded to this section before the request can be submitted.
8. Click **Save**.
9. Repeat for each document you want to request.



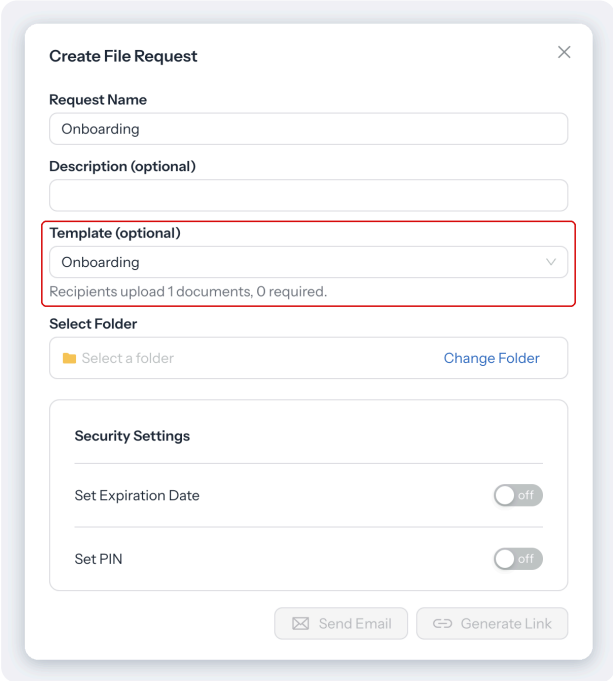
To rename, duplicate or delete the template, use the template's ⋮ menu.

CREATE A FILE REQUEST FROM A TEMPLATE

1. Open the template's ⋮ menu.
2. Click **New File Request**.



The **Create File Request** dialog opens with the template already selected. Complete the rest as described in Create a file request.

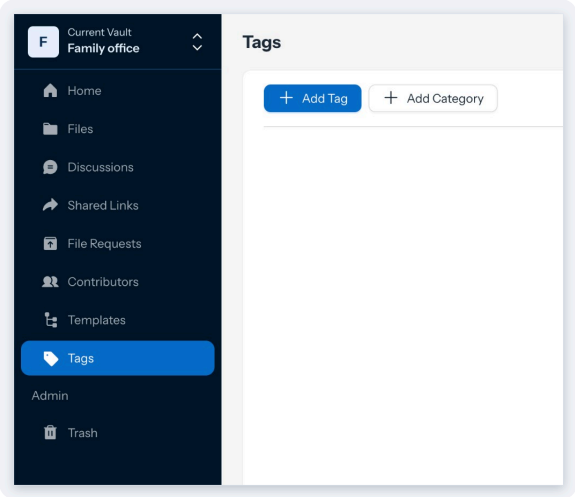


> Each request keeps its own copy of the sections, so editing or deleting the template later does not change requests already sent.

Tags

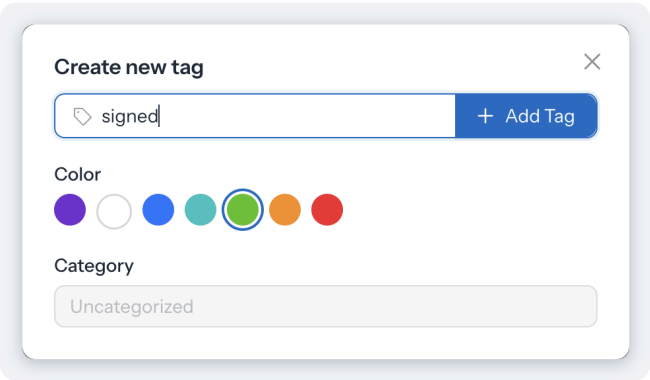
WHERE **Tags** in the left menu.

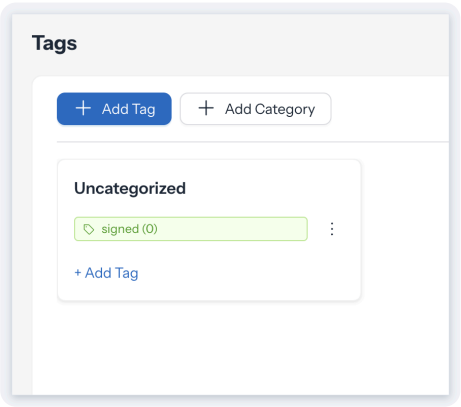
Tags group files and folders by topic, wherever they are stored. Tags are shared with everyone in the vault. They do not change who can open a file.



Create a tag

Click **Add Tag**, enter a name, choose a color and, optionally, a category. Then click **Add Tag** again. Tag names must be unique in the vault, and tags without a category appear under **Uncategorized**.

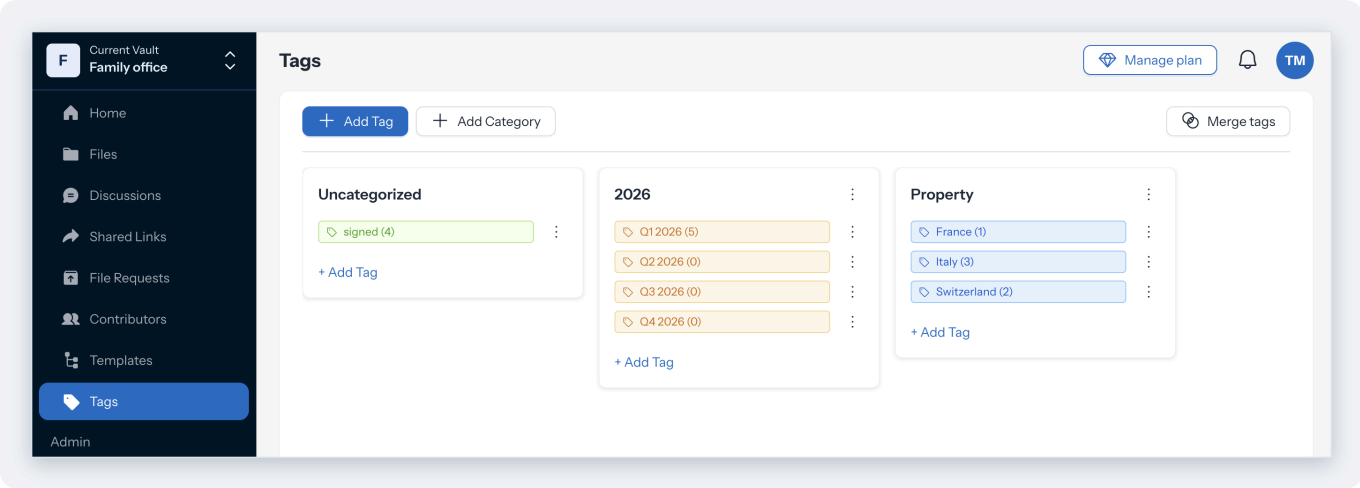




Vault admins can edit and delete tags.

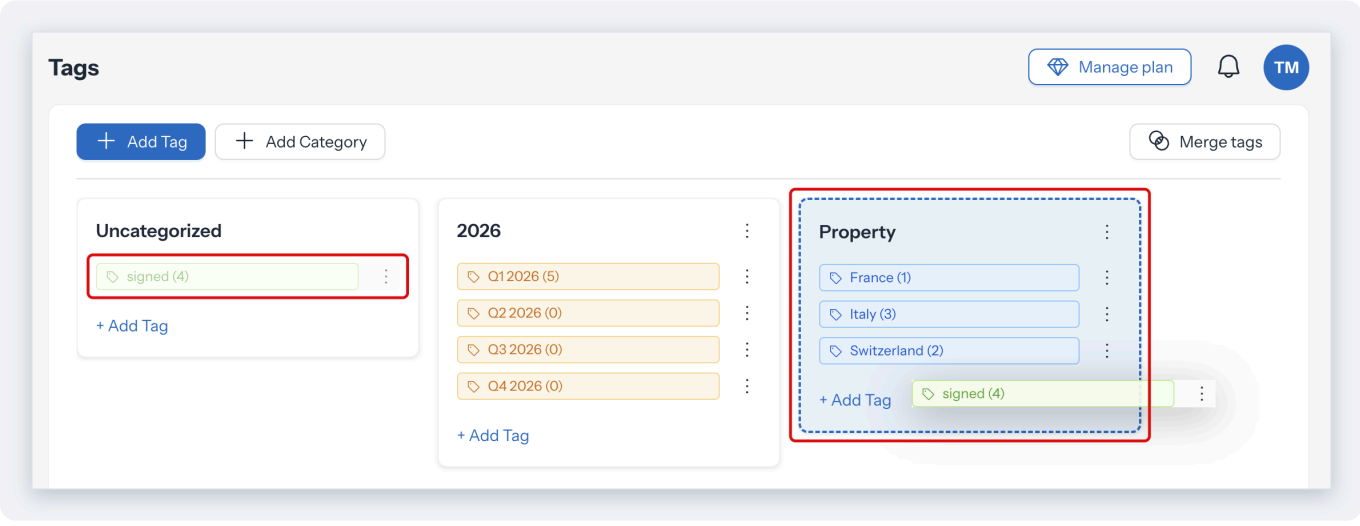
Organize tags into categories

Click **Add Category** to create a group of tags. When you create or edit a tag, you can choose its category. The **Uncategorized** group cannot be renamed or deleted.



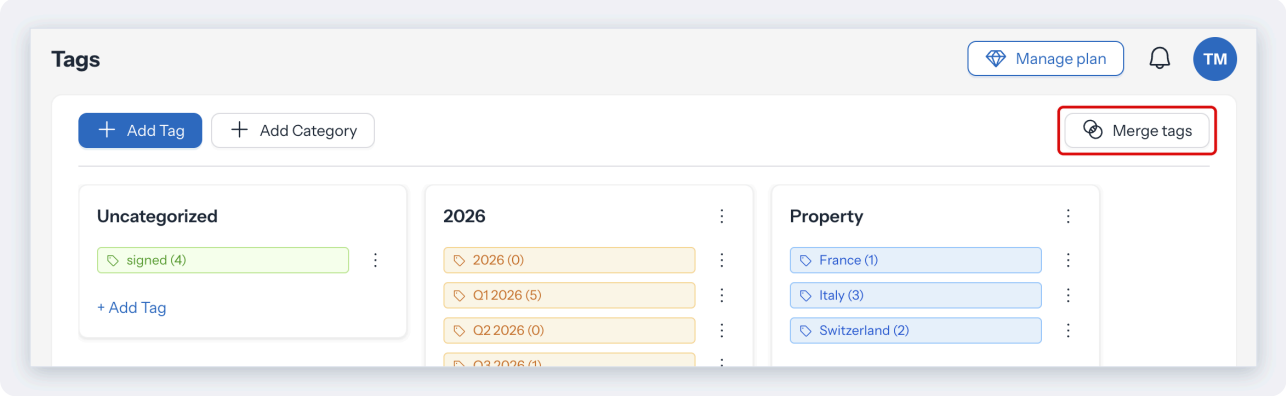
Deleting a category also deletes its tags and removes them from files.

You can drag and drop tags between categories.



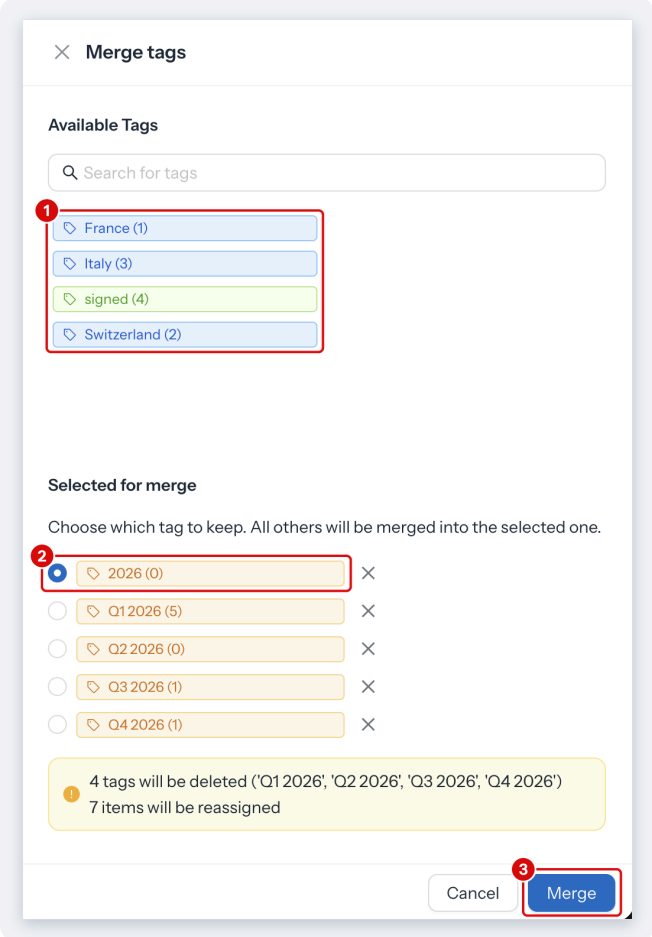
Merge tags

Vault admins can merge multiple tags into one. On **Tags**, click **Merge tags**.



1. Select at least two tags.
2. Choose which one to keep.
3. Click **Merge**.

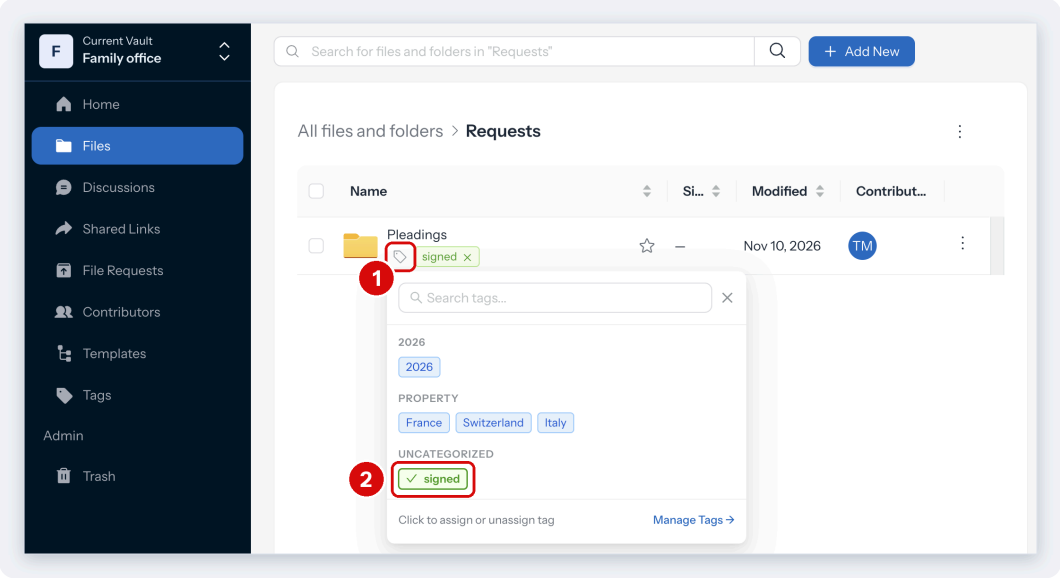
All files and folders with the merged tags now have the tag you kept. The other tags are deleted.



Tag files and folders

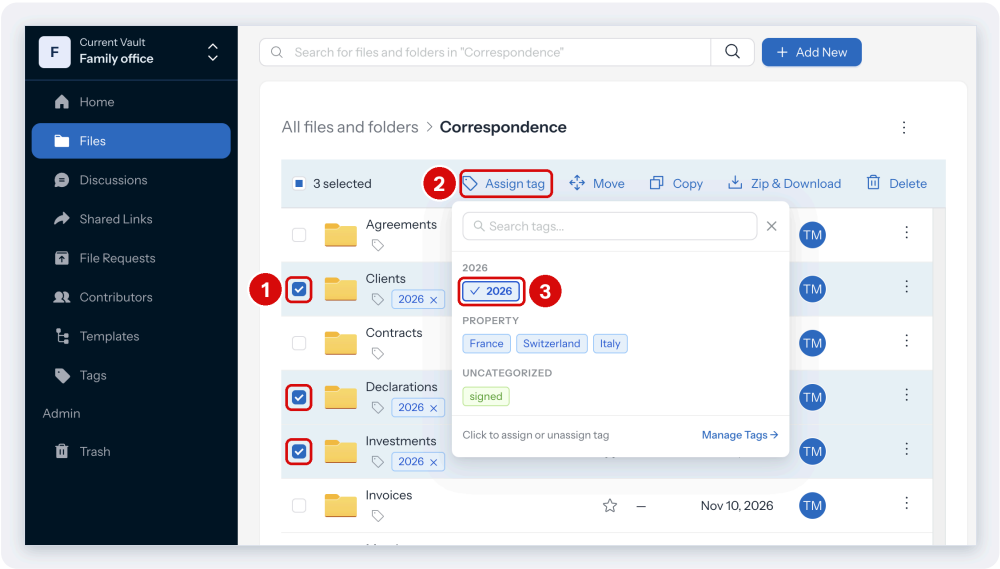
1. In **Files**, click the tag icon on a file or folder.
2. Select a tag. It appears next to the name.

To remove a tag, select it again.



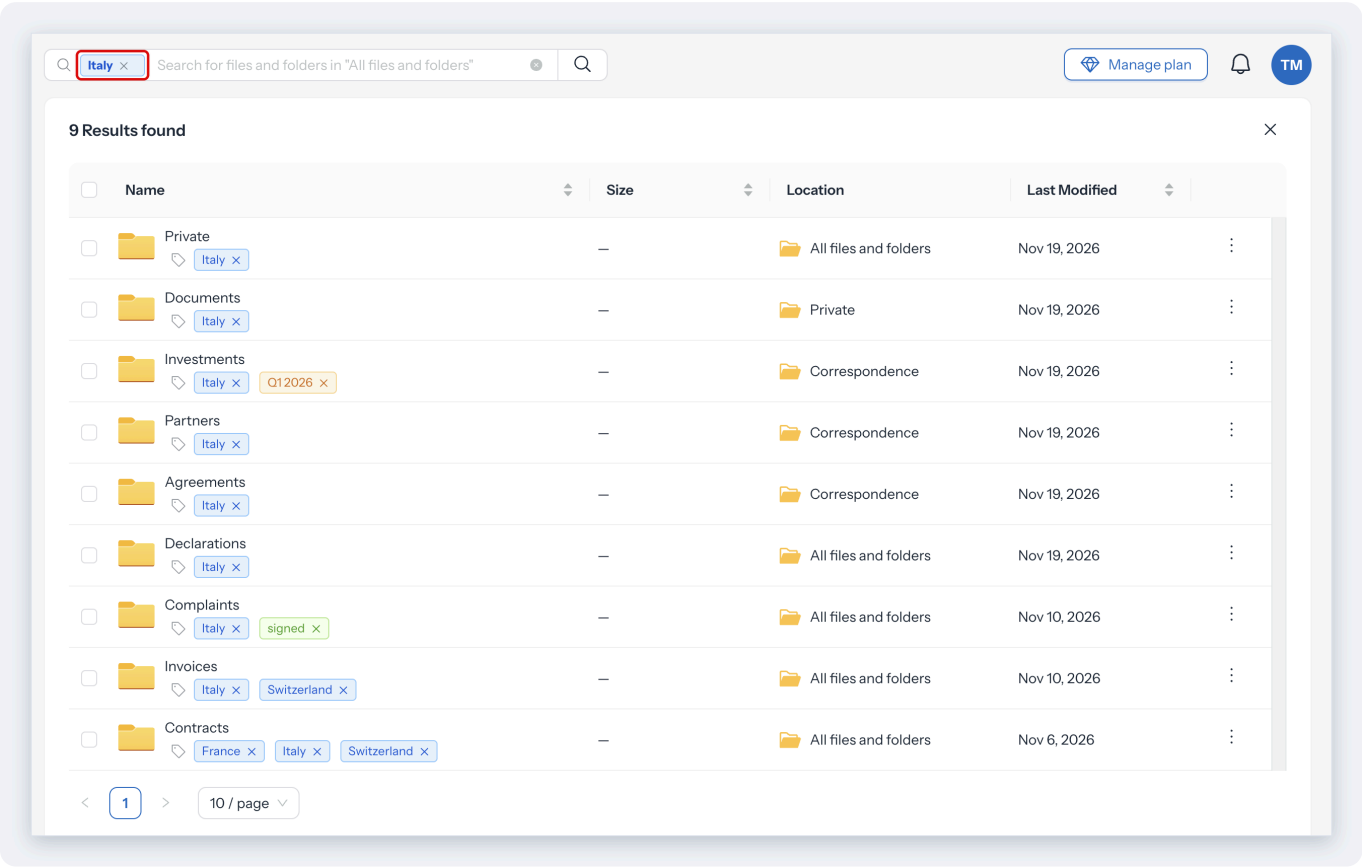
TAG SEVERAL ITEMS AT ONCE

1. Select the files and folders.
2. Click **Assign tag**.
3. Select a tag.



Find files by tag

On **Tags**, click a tag to see every file and folder that has it. You can also type in the search box in **Files** or **Home**: matching tags appear next to file names, and you can combine tags with search words. Results include only items you have access to.

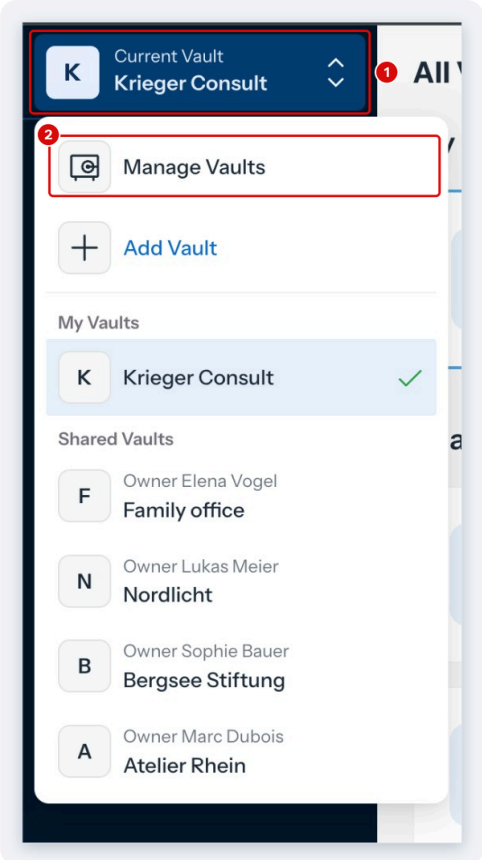


Your vaults

WHERE Vault menu at the top of the screen, then **Manage Vaults**.

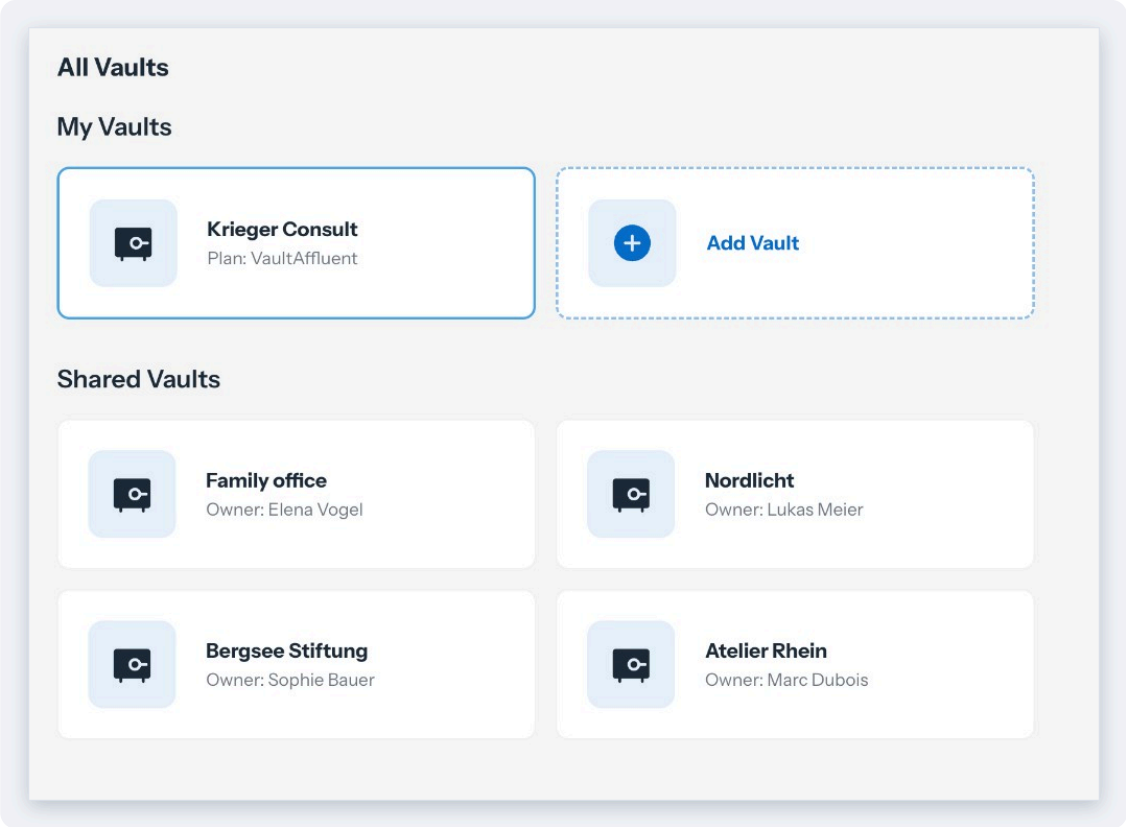
A vault is a secure space with its own files, contributors and share links. You can own vaults, and you can be invited to vaults that other people own. Switching vaults does not move any files.

1. Click the vault menu at the top of the screen.
2. Click **Manage Vaults**.



All Vaults shows two groups:

- **My Vaults:** vaults you own, including vaults gifted to you. Each card shows the plan.
- **Shared Vaults:** vaults owned by someone else. Each card shows the owner. You see only the folders shared with you and can do only what your role allows.

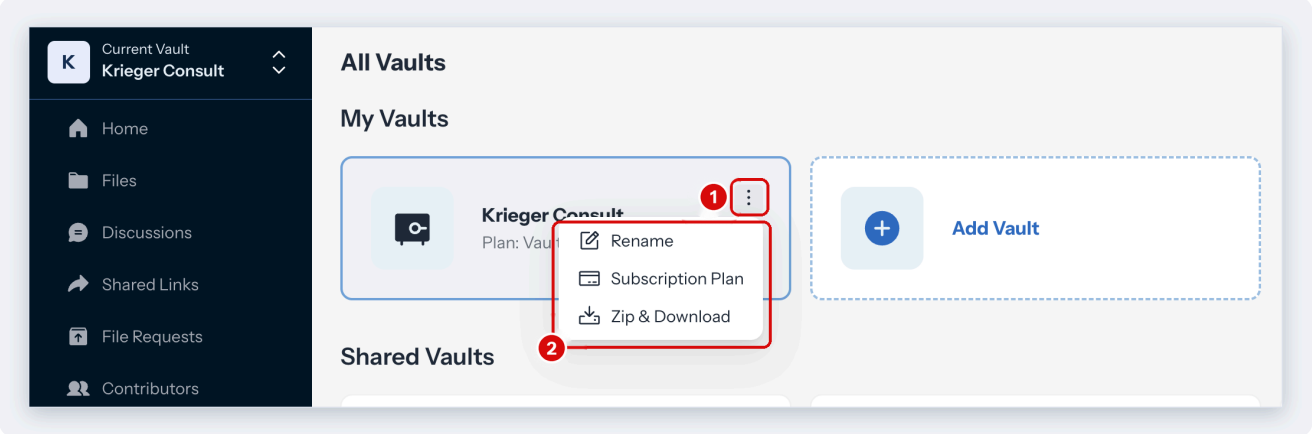


To switch vaults, click a card, or pick the vault directly in the vault menu. Your current vault is highlighted.

To create another vault, click **Add Vault**, enter a name and continue. Each new vault needs its own subscription. You don't need a new vault to work with someone: invite them to your vault and give them access to one folder.

MANAGE A VAULT YOU OWN

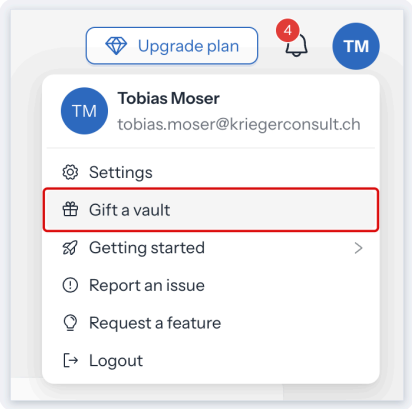
1. On a card under **My Vaults**, click ⋮.
2. Choose **Rename**, **Subscription Plan**, or **Zip & Download** to download the whole vault.



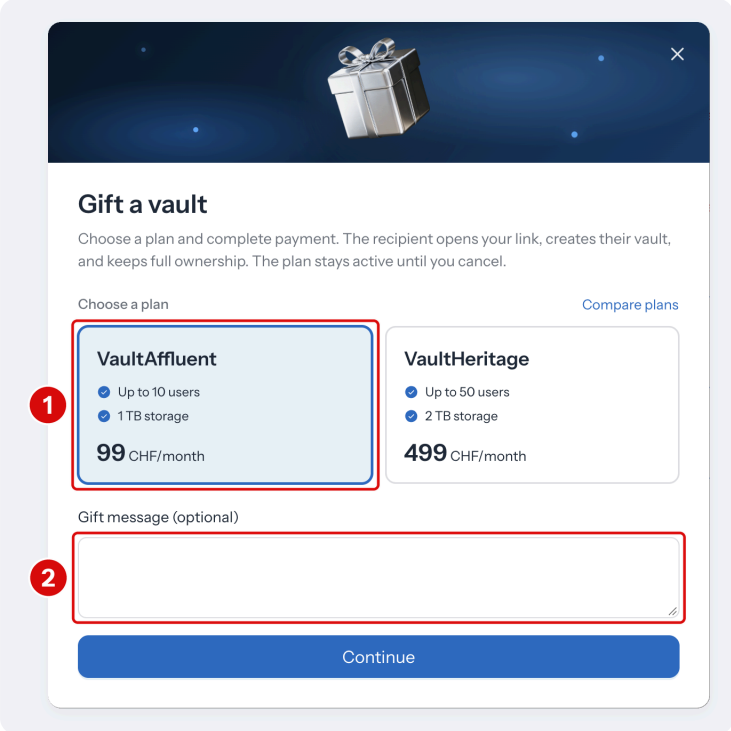
Gift a vault

WHERE Profile picture menu, then **Gift a vault**. Also under **Settings**, then **Gifts**.

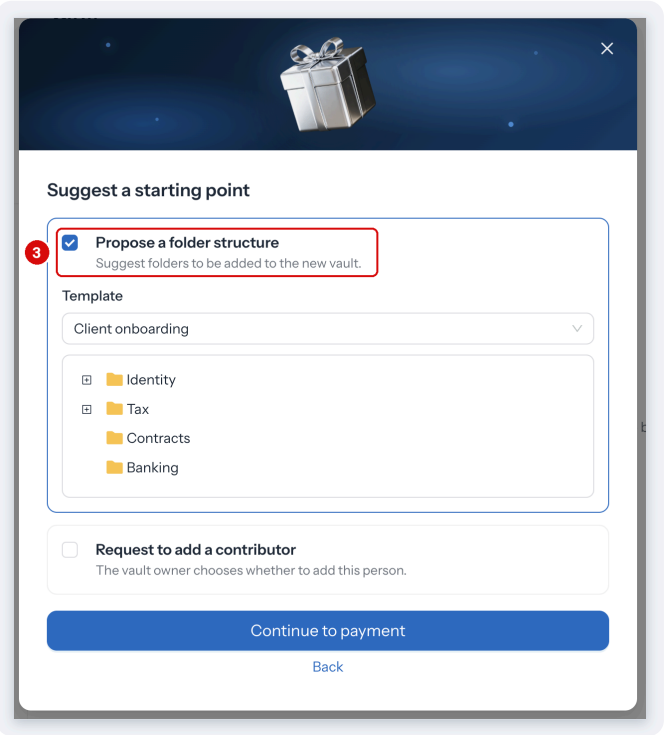
Give someone a vault of their own. You pay for the plan. They own the vault, and you cannot see its files.

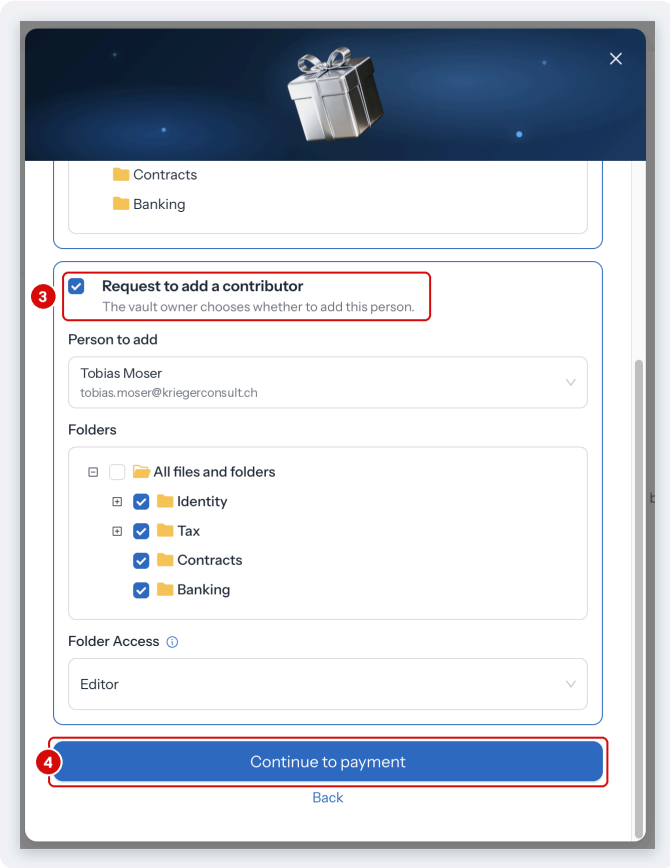


1. Choose a plan.
2. Optional: add a message to the recipient.

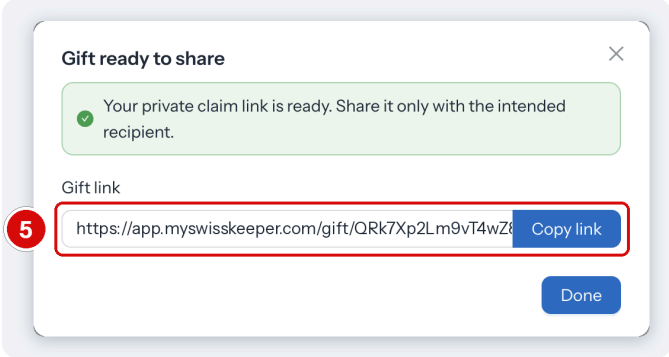


3. Optional: suggest a starting point. You can propose a folder structure from one of your templates, or request to add a contributor to the new vault: yourself or someone from your vault, with the folders and access they need. The recipient decides whether to use your suggestions.
4. Click **Continue to payment** and complete the payment.



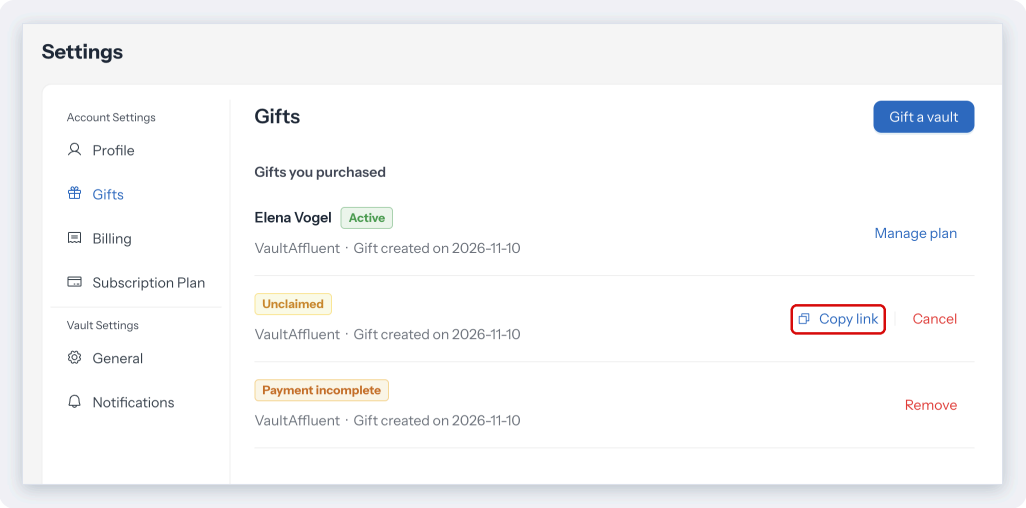


5. Copy the gift link and send it to the recipient.



Under **Settings**, then **Gifts**, you can see every gift you bought and its status:

- **Active:** the recipient has claimed the gift. You manage the gift subscription from **Manage plan**.
- **Unclaimed:** the link hasn't been used yet. Click **Copy link** to copy it again, or **Cancel** the gift.
- **Payment incomplete:** the payment wasn't completed. Click **Remove** to delete the gift.



The recipient opens the link, clicks **Claim my gift**, signs in or creates an account, and creates a new vault. A gift can only be used for a new vault, not added to an existing one.

