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800-441-3453

[www.ShareFileCPA.com](http://www.ShareFileCPA.com)

**Best Fit:** Firms who would like a simple and secure tool for storing and exchanging files with clients, staff, and vendors.

### Strengths

- Flexible, secure (99.99% uptime), and stable tool with features and plans which can scale to meet the needs of firms of all sizes.
- Customizable, firm-branded site (yourfirmname.sharefile.com) with colors and fonts similar to your firm's website configured by ShareFile support personnel as part of implementation.
- Add-ins and sync tools for Windows and Outlook allow users to work with files without using a web-browser.
- Product is backed by enterprise-grade support and infrastructure from Citrix, who also operates cloud services like GotoMeeting and provides infrastructure software to mid-sized and large organizations.
- ShareFile also has mobile applications for iOS, Android, BlackBerry, Windows RT/8, and Windows Phone, and many of the apps allow administrators to view an audit trail for mobile access and automatically wipe any cached data from the remote application.

### Potential Limitations

- There are very few direct integrations with professional accounting applications.
- Monthly data transfer allowances on some plans can cause firms who use the product heavily or those who use the file sync feature to go over their allotted quotas and incur extra charges.

## Detailed Observations

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its hosting provider has been examined in an SSAE 16 (e.g. SOC) engagement, but a copy of this report was not available by our press deadline.

The service is simple to use, and clients can be added individually, using user-configurable templates, or created in batches from uploaded data. Firm employees can access the service using an Outlook add-in, a directory-mapping tool, or the easy to use web interface. There are a wide variety of published and unpublished service plans, and some include advanced features like enterprise directory integration, file synchronization, version tracking, and command line access.

Since our last review in January 2012, ShareFile has added user-requested features such as folder templating, file drops, and integrations with productivity applications, including QuickOffice, PDF Expert, Results CRM, and Thomson Reuters eMochila websites.

ShareFile mobile applications are available for almost every operating system, including iOS, Android, BlackBerry, Windows RT/8, and Windows Phone. Many of the apps allow administrators to view an audit trail for mobile access and automatically wipe any cached data from the remote application. The applications will also allow account administrators to block mobile access from any device which has been unlocked using tools for "rooting" or "jailbreaking" the device. A perpetual audit trail is retained on all transactions in a company's account.

Sharefile is a tool which is both easy to use and flexible enough for almost any file transfer requirement. While the application doesn't directly interface with any document management or professional accounting programs, the included tools make it simple to send or receive confidential files in a secure fashion from a variety of interfaces.

## Summary & Pricing

Basic plans start at \$29.95 per month (\$359.40/yr) with two included employee

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