CPA

Practice **Advisor**

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of Document Storage systems.]

I think it is more appropriate to refer to ShareFile as a file sharing portal, more so than a document storage application. Its core purpose is to provide a secure online storage for files that are exchanged with clients and others. My point being is that ShareFile is more likely to be used as an extension of your primary file storage/management.

The user interface is intuitive. You initially login to the secure site via your web browser. The toolbar displayed along the top of the screen consists of the following tasks: Manage Users, Send a File, Request a File and Admin. A folder list is displayed along the left side that is similar to an Outlook e-mail folder structure. The primary user interface with the system is to either upload a file to the portal or to request that a client upload a file to the portal on your behalf, i.e., a QuickBooks data file. The nature of this interface is an e-mail message window where you create a message along with a link to a particular file.

You can have generic folders for storing files that are not client specific, i.e., tax forms, newsletters, etc. Each client that has files will have a folder structure for managing the files stored. This folder structure can be uniquely customized for each client. When you request a file upload from within a specific folder, the file that is eventually uploaded by the requested party will be stored directly in that folder. When you create a folder, you can establish user access permissions as well as upload and download alerts that will send email notifications when a file is accessed. You can also track whether or not the recipient has downloaded a file. You can assign an expiration date to a folder. This means that once the expiration date is achieved, the files in the folder will be automatically removed.

Due to the nature of the ShareFile application, there is really no direct

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ShareFile offers a very cost-effective solution for exchanging files online securely. It is a web-hosted solution; therefore, you don't have to worry about any of the IT infrastructure issues. It is also very easy to use. The important point to keep in mind is that it is best suited for use as a companion to your internal file storage system. You can also use the system as an online storage backup solution. Pricing starts at \$29.95 per month for two employee accounts, unlimited client logins and 5GB of data storage and transfer. At the top end, the price is \$499.95 per month for 150 employee accounts, unlimited client accounts and 150GB of data storage and transfer. Custom plans are also available, and each account is branded using your corporate logo and color scheme.

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