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800-441-3453

www.ShareFileCPA.com

2012 Overall Rating 4.5

Best Fit

Accounting practices wanting a simple, yet secure method of sharing files with clients and allowing them to upload files to the firm.

Strengths

- Firm branding and the ability to place a login field on firm website
- Sharing of files two ways between client and firm
- Multiple users allowed at each client with different access rights
- Dependable hosting, security and uptime
- Outlook plug-in for quick secure sharing with any email recipient

Potential Limitations

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ShareFile for Accountants is an easy-to-use and learn tool that makes sharing documents with clients much more secure and compliant than email, and provides additional security and management tools, including automated document retention and expiration settings, that give added firm control over files and folders. ShareFile is available in plans starting at $29.95 for the Basic version and $59.95 for the Professional version, but users like accounting practices who send larger file types back and forth, such as bookkeeping program data files, are best matched with the Enterprise version, which costs $99.95 per month, for up to 20 staff users, and has the ability to create any number of client companies and users, who can all share files, documents, QB data or anything else, depending upon their access rights.

Firm User Experience 4.5

Client User Experience 4.75

Portal Capabilities 4.5

Technical Aspects 4.25

Help/Support 5

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