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Storage capability.

Mary Girsch-Bock • Oct. 20, 2017



Citrix ShareFile

www.sharefile.com

From the [2017 reviews of Accounting Firm Portals](#).

Citrix ShareFile works well with both accounting firms and other businesses that are looking for a secure way to share files. ShareFile also includes excellent document storage capability.

ShareFile from Citrix is a scalable product, with four versions available, making it suitable for firms of any size. In addition, ShareFile offers mobile apps for iOS, Android, Windows, and Blackberry devices. Users will need to have a ShareFile account prior to downloading the app.

ShareFile offers a custom branding option, so users can easily personalize the client

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viewing any currently synced files, recently synced files, and any files that have been checked out. Using the file sync tool also ensures that the latest version of any document is always available. The file sync tool syncs files in real time, so once a document is saved to that folder, it is automatically synced to ShareFile as well. The included desktop app also allows users to share any synced files directly from the desktop without opening a browser.

Because files can be shared via the portal or by email using the ShareFile Plugin for Microsoft Outlook, users can send files of any size and type up to 100 GB, including a variety of image file formats. Encrypted email options are also available, with users able to convert attachments to a secure ShareFile link, or copy a secure link to a file and include it in the body of an email.

Completely bi-directional, ShareFile allows accountants to easily send completed documents to clients, which can be e-signed using RightSignature, which integrates with ShareFile.

The product is completely secure, offering SSL/TLS encryption, with encryption for both in-transit and stored documents. ShareFile also employs multiple data storage locations worldwide, and offers 99.9 percent uptime.

The ShareFile mobile apps allow users to easily access, share, and edit any file. Users can access desktop systems using the mobile app as well.

Beside the client portal, ShareFile also offers complete cloud storage capability, secure email, and a custom workflow solution that allows users to easily automate common tasks. The product also offers integration with other applications such as Microsoft Office 365, DotAuto, BidPlanroom, Redtail, ScanSnap, Basepin, Gmail, Trumpet, and numerous others.

The ShareFile support option provides new users with an excellent selection of tools

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through Friday, with users able to also request support or send in a support related question directly from the ShareFile website if desired. Toll-free telephone support is also available, with support in the U.K., Australia, and international support available during regular business hours.

Available in four plans, Citrix ShareFile is well suited for accounting firms and other businesses that need a secure method of transmitting files. The Personal plan of ShareFile is \$16.00 per month, billed annually, and is suitable for a single employee account. The Team plan is \$60.00 per month, billed annually and offers 5 employee accounts and 1 TB of storage. The Business Plan, considered the most popular is \$100.00 per month, billed annually and offers five employee accounts along with unlimited storage and a 100 GB limit on file size. The Virtual Data Room, which offers advanced security for sensitive data is available for \$295.00 per month, billed annually. A free trial is available for any of the plans offered.

2017 Rating 5 Stars

Firm Management

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