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Citrix ShareFile

800-441-3456

www.sharefile.com

From the 2018 reviews of client portal systems for accounting firms.

Citrix ShareFile is a comprehensive application designed for businesses including accounting firms, of any size. Along with secure file sharing, ShareFile also offers cloud storage capability, secure email capability, and the ability to handle files of any size.

ShareFile is a scalable application, with three versions of the product available, as well as the Virtual Data Room, which is designed for businesses that share highly confidential documents and need an extra boost of security. A mobile app is also available, but users will need to have a ShareFile account set up prior to downloading the app.

Users can easily customize the appearance of the ShareFile portal to match company

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co-editing or co-authorizing of documents. ShareFile also supports multiple file types, so users can easily upload PDFs, Word documents, Excel spreadsheets, as well as videos and other images.

Another great feature is ShareFile Sync, which provides automatic syncing of folders on a desktop with folders stored in the ShareFile account, ensuring that all documents will reflect the most recent version. Once a file has been synced, it can be accessed from anywhere, on any type of device. Users can also share synced files directly from their desktop without having a browser open. Another option well suited for accounting firms is the ability to scan printed client files directly to ShareFile using a Fujitsu ScanSnap scanner. Users can also link QuickBooks files directly with ShareLink to avoid having to print files or save them on a portable drive.

ShareFile offers users the option to share files via the client portal or by utilizing the ShareFile Plugin for Microsoft Outlook, which allows users to copy a secure link to chosen files and include it in the body of an email. ShareFile supports files up to 100 GB in size, and users can also easily encrypt emails for additional security if desired.

ShareFile is completely bi-directional, and includes the ability to obtain legally binding signatures from clients using TeleSign, which integrates with ShareFile. Both stored and shared documents are encrypted, using SSL and TLS security protocols, with the application hosted in ISO 27001 certified data centers. Emails can also be encrypted, and the product converts any email attachments to a secure ShareFile link.

Along with the client portal, ShareFile offers other features such as complete cloud storage, file sync capability, content collaboration capability, and workflow management. ShareFile offers excellent integration options, integrating with more

than 40 third-party applications including Zapier, Google Cloud, Hubdoc, Microsoft

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for anytime access. ShareFile also offers toll-free telephone support, with support available during regular business hours.

Citirx ShareFile offers four plans, making the product well suited for businesses, including accounting firms, of any size. The Personal plan costs $16 per month and offers one employee account. The Team plan is $60.00 per month, with five employee accounts included, along with the option to purchase more. The Business plan is $100 per month and includes five employee accounts, and unlimited storage, with users able to add additional accounts if necessary. There is also a Virtual Data Room which provides advance level security and controls, and is a good option for businesses sharing sensitive data. Users can choose to sign up for a free trial of any of the plans if desired.

2018 Rating 4.75 Stars

Firm Management

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