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FIRM MANAGEMENT

2019 Review of Citrix ShareFile

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Mary Girsch-Bock • Oct. 18, 2019



Citrix ShareFile

Citrix

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www.sharefile.com

From the 2019 reviews of client portal systems for accounting firms.

Citrix ShareFile is a comprehensive file sharing application well suited for any business, including accounting firms, that need to share documents with clients or customers. Along with file sharing capability, Citrix ShareFile also includes document storage capability, a secure email, application, and file sync capability that allows users to sync a folder on a desktop or laptop and later sync the folder contents with ShareFile.

ShareFile offers excellent scalability, with three plans available, as well as the Virtual Data Room which is perfect for businesses that share highly confidential documents and desire additional security measures. A mobile app is also available for both iOS and Android devices. The ShareFile portal can be completely personalized and branded to include a business logo and color scheme.

Portal access levels can be customized for each client by determining which folders and files will be accessible, and then assigning sharing rules for those documents. The product also includes full-text search capability, making it easy to locate a document quickly. A file check-in and check-out option is available which allows users to keep track of document versions while also eliminating unauthorized changes in documents, and a file versioning option ensures that users will always have access to the most recent version of any document. Complete integration with Microsoft Office 365 allows co-editing of documents, and ShareFile supports multiple file types including Microsoft Word and Excel documents, PDFs, videos, and a variety of imaging files.

The Sync feature in ShareFile allows users to create a desktop folder to temporarily store documents until they can be synced with the application. Once a file has been synced, it can be accessed from any type of device, and users can also share synced files with colleagues without opening a web browser. Users also have the option to scan client files directly into ShareFile using a Fujitsu ScanSnap scanner and can link QuickBooks files directly with ShareFile for easy file sharing. ShareFile offers unlimited system storage and can support files up to 100GB in size.

ShareFile is completely bi-directional, and can support an unlimited number of clients. Along with the portal, ShareFile also offers secure email encryption using the ShareFile Microsoft Outlook plugin, which automatically encrypts any email sent, or users can copy a secure link to any file and then include it in the body of an email. Also available in ShareFile is the Microsoft 365 collaboration tool mentioned earlier. ShareFile also offers cloud document storage and a workflow management tool that

will automatically forward documents to the correct individual in the order indicated.

FileShare support electronic signatures, with users able to send documents via the portal or secure email to clients for signature, with a mobile signature option available as well. Security options are also extensive in the application, with two-step verification used throughout the application. All documents stored and transmitted in FileShare are completely encrypted using SSL and TLS security protocols, with the application hosted in ISO 27001 certified data centers.

ShareFile offers excellent integration options, integrating with more than 40 third-party applications including Zapier, eFileCabinet, Google Cloud, Hubdoc, Microsoft 365, Fujitsu ScanSnap, Redtail, and TeleSign.

A good selection of help and support resources are available to ShareFile users, including the technical help page that includes the ShareFile Getting Started Guide. A variety of Getting Started videos are also available on the technical help page. ShareFile also includes a searchable knowledgebase along with an FAQs section. Users have access to the community forum, where they can ask and answer questions from other ShareFile users, and numerous on-demand training videos are available to access at any time. ShareFile also offers toll-free telephone support during regular business hours, and a chat option is available for general questions 24/7.

Citrix ShareFile offers four plans, making the product well suited for businesses, including accounting firms, of any size. The Standard Plan is \$10.00 per month and is a single-user plan. The Advanced Plan is \$77.00 per month and is a 5-user plan. The Premium Plan is \$122.00 per month, and is also a 5-user plan that offers custom workflow capability and the ability to request and send electronic signatures. Finally, the Virtual Data Room is available for firms sharing highly confidential documents, offering advanced document security options. With the exception of the Standard Plan, additional users can be added to any plan, and all plans offer unlimited storage capability. For those interested in Citrix ShareFile, a free trial for any of the plans is available from the Citrix website.

2019 Rating: 4.75 Stars

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