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Citrix ShareFile

www.sharefile.com

From the [2020 reviews of client portals](#) for accounting firms.

Citrix ShareFile provides document management and client portal functions for professional firms and can be scaled to meet the needs of most sized entities. The system also offers integrated email, and file syncing functions that enable working while not connected to the internet, and then syncing folder contents when back online.

The system is available in three versions: Standard, Advanced and Premium, with template folders and conventions for accounting firms, financial firms, healthcare office, legal firms and additional business types. An enterprise-level version is also offered, as well as the Virtual Data Room, which provides additional controls. The system can be used on computer and mobile device browsers or via an app available

for Android and iOS. Clients can also access their folders via these devices, sharing

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unlimited, but individual files can be up to 10 or 100GB in size, depending on the plan level.

When working offline, users can easily create a folder on their desktop using the Sync feature, which can be used to temporarily hold documents until they are synced with the application. to create a desktop folder to temporarily store documents until they can be synced with the application. Along with the drag-and-drop functionality, users can also scan client files directly into ShareFile using a Fujitsu ScanSnap scanner. Additionally, QuickBooks files can also be linked to ShareFile. The system also integrates with more than 40 third-party applications including Outlook, Zapier, eFileCabinet, Google Cloud, Hubdoc, Microsoft 365, Fujitsu ScanSnap, Redtail, and TeleSign.

The ShareFile Microsoft Outlook plugin, provides secure email encryption, and users have the ability to copy a secure link to any file and then include it in 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.

ShareFile includes support for electronic signatures, with client recipients offered the mobile signature option when receiving files that need to be signed. The system uses financial industry standard security options, with two-step verifications. All documents are completely encrypted using SSL and TLS security protocols, with the application hosted in ISO 27001 certified data centers.

ShareFile users can access online help and support resources, centered on the help website's Getting Started Guide, along with getting started and training videos, a knowledgebase and an FAQ section. A community forum allows interaction with

other ShareFile users. Live, phone-based and chat-based support is offered during

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2020 Rating: 4.5 Stars

Firm Management

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