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frictionless interactions.

Isaac M. O'Bannon • Jun. 01, 2023



ShareFile, the secure, collaborative client experience solution, today announced the release of [ShareFile for Accounting](#), designed with the unique needs of accounting professionals in mind. The new solution from ShareFile, a business unit of Cloud Software Group, improves client experiences by delivering simple, frictionless interactions; increasing the efficiency of accounting and tax professionals' document-centric workflows; and simplifying collaboration to enhance visibility, organization, and providing secure document management and collaboration for engagements.

The accounting landscape is undergoing a significant shift driven by the embrace of a digital-first mindset. This transformation is fueled by a desire to deliver exceptional customer experiences, and [82% of accountants](#) say technology is fostering more

meaningful client interactions. These trends highlight the growing demand for

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Group. "Modern accounting tools must blend seamlessly into accountants' and auditors' work, streamlining processes in a secure and easy-to-access way, and that's what we've launched today. We're excited to launch ShareFile for Accounting to provide accounting teams with industry-specific functionality that solves their pain points and enhances workflows, so teams can better serve and collaborate with clients."

The new ShareFile for Accounting solution includes the following capabilities:

- **Custom-Branded Portals:** Streamline client engagement and collaboration with custom-branded client portals.
- **Expedited Client Onboarding:** Accelerate client agreements, like engagement letters, when starting a new service with auto-fill templates and built-in unlimited e-signature functionality with knowledge-based authentication (KBA) included to expedite repetitive document preparation.
- **Optimized PBC List Processes:** Simplify document request and collection workflows with a streamlined provided-by-client (PBC) list experience to reduce manual document gathering over unsecured email channels and accelerate service.
- **Automated Workflows:** Streamline repetitive tasks with workflow management and automation to save time and enable firms to stay on top of a growing client list.
- **Secure Document Management and Collaboration:** Enhance document collaboration with flexible and secure management of files that makes collaboration easy. ShareFile provides real-time document co-editing, file encryption, file sharing flexibility with content integrations, and comprehensive user permissions to support collaboration in a single solution.

“With document requests inside of engagement spaces, this really is focused for the

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