Citrix ShareFile

White Glove Setup

We'll provide training to your team and help you customize your ShareFile account to meet your company's unique needs — fast, easy and completely free of charge.

What is White Glove Setup?

Citrix ShareFile offers assistance with the setup and customization of your account to ensure a fast and efficient deployment. An onboarding specialist provides a comprehensive breakdown of the features and settings available for your account and configures each according to your preferences. Customized setup allows you to evaluate your account's features and settings in the first few days and weeks of opening an account and decreases the overall time needed for setup and administration of the account.

The following is a summary of the various features and settings discussed and configured during your White Glove Setup.

Our dedicated Customer Care team provides a comprehensive breakdown of the features and settings available for your account.

Customized training

White Glove Setup starts with an initial training session. During training, your onboarding specialist will cover the following areas and learn more about how we can make ShareFile work for you.

+ Walk through the web-based application, including an overview of employee and client user roles.
+ Introduce the Power Tools available for download and desktop use.
+ Provide an overview of account administration and reporting.
+ Discuss strategies for rolling out the account to employees and clients.

Customized setup

Your ShareFile account can be customized to include tools, structure and security features that support your workflow seamlessly.

- Customize email messaging from your account through a number of editable settings. Select the text and branding that will appear in all emails sent from the ShareFile system, how often activity notifications are sent and more.
- Place your company's terms of use on the login page of your account.
- Create passwords requirements regulating the length, case, required character classes and expiration for user passwords.
- Set up employees, client users and folders at once with bulk import and creation tools. Specify folder access and account permissions for a group in a single step.

Customized functionality

Configure advanced account settings to control functionality ranging from default permissions to display options.

- Create policies to manage multiple versions of files and expiration dates for files and folders.
- Set permission defaults according to your security needs. Configure login requirements, sending permissions, and Power Tools settings for all users on your account.

Time-saving features

During White Glove Setup, your account manager can explain and enable additional features that may be helpful to your team.

- Add a File Count to your folder display to show the number of files contained in each folder.
- Enable Folder Invites to allow users to create links that allow "self registration" for access to a folder.
- Create a File Drop link to an upload page where users can choose to upload files directly to specific employees.
- Simplify complex folder structures with Folder Templates that can be applied to newly created folders.

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VDR customization

For accounts on our Virtual Data Room plan, White Glove Setup also includes training with VDR features and customization of our security offerings.

- Customize the text of the watermark that will be displayed on viewed documents.
- Specify how users can access information you share with them—view-only, download or print.

White Glove Setup Outline

The following list is an example of the features discussed and implemented in a standard ShareFile White Glove Setup.

1. Customized training
    a. Initial call to establish needs
        i. ShareFile
            1. Employee view
            2. Client view
        ii. Power tools
        iii. Administration / reporting

2. Customized setup
    a. Email
        i. Customized templates
        ii. SMTP settings / send email from
        iii. Real-time v. consolidated notifications
        iv. Proactive notifications
        v. Email branding
        vi. Notify users of own activity
    b. Terms & conditions
    c. Password strictness
    d. Bulk folder / client creation
    e. Bulk employee and/or client import
    f. Advanced account settings
        i. Account-level Outlook defaults
            1. Outlook installation (MSI)
        ii. File versioning / max files
        iii. File retention
        iv. Folder expiration
        v. Require login for all downloads
        vi. Allow client send
        vii. Creator can delete
        viii. Show user access list
        ix. Show user access list to clients
    g. System defaults
        i. Tree view pinned
        ii. Upload tool
        iii. Sticky sort
    h. Hidden / beta features
        i. File count
        ii. Folder invites
        iii. File drop
        iv. Folder templates