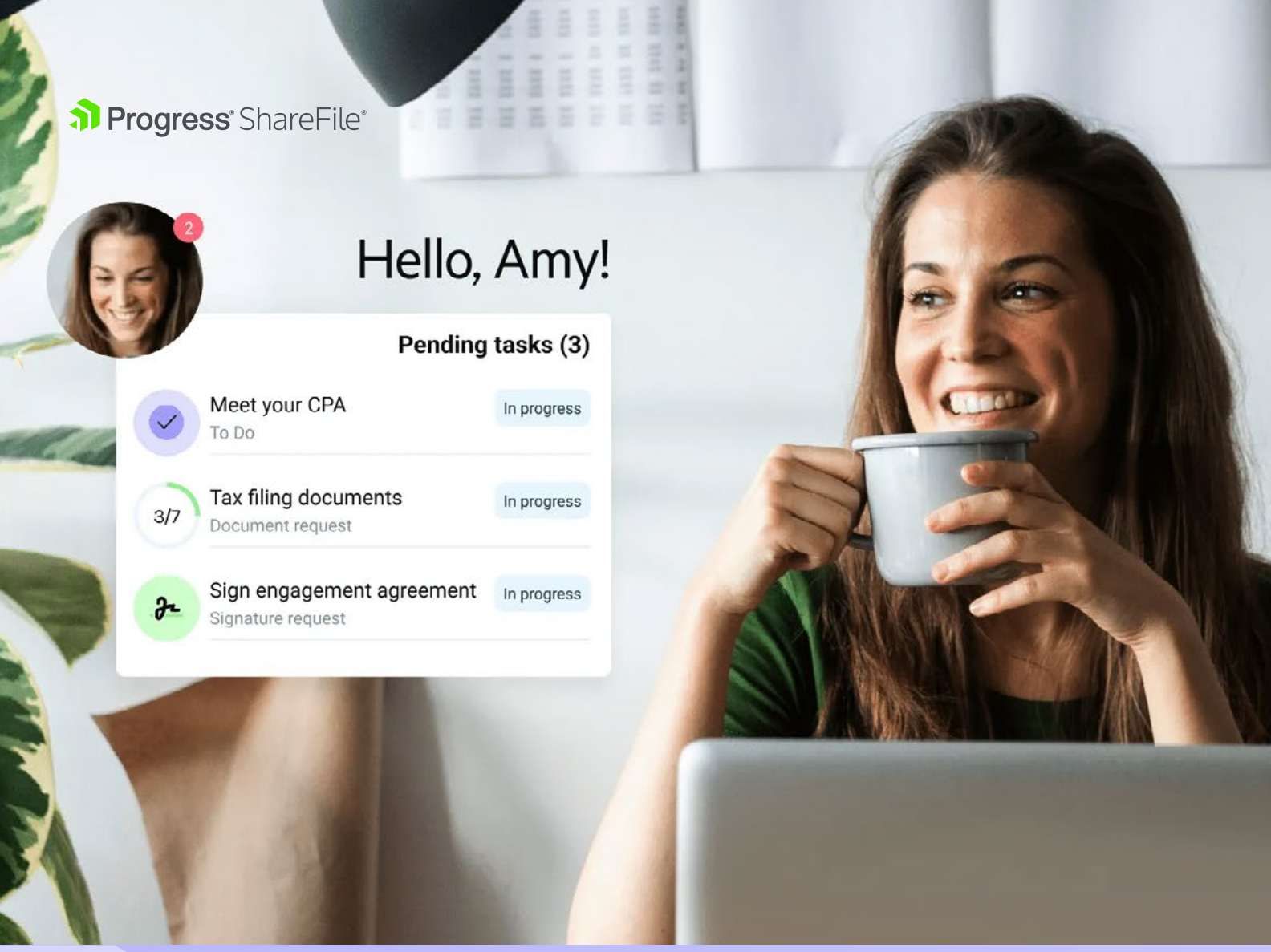

Enterprise File Sync & Share Buyer's Guide for Accountants

Choosing Secure, Efficient Document Collaboration for Modern Accounting Work

What Is Enterprise File Sync and Share (EFSS)?

Enterprise file sync and share (EFSS) platforms allow organizations to store, synchronize and share files across users, devices and locations. These platforms support collaboration, remote work, document access and secure file sharing through centralized cloud-based storage.

Many accounting firms adopted EFSS solutions to replace email attachments, simplify document exchange and improve access to client information across teams and offices.

While EFSS platforms support general collaboration effectively, accounting engagements often require greater structure, visibility and control than traditional file-sharing tools were designed to provide.

Why Accounting Collaboration Is Different

Accounting firms operate in highly document-centric environments where client responsiveness, accuracy, security and compliance must all work together under tight deadlines.

As firms manage increasing engagement complexity, document collaboration platforms play a larger role in operational efficiency, client experience and risk management.

Many firms still rely on generic EFSS tools for file sharing and document exchange. While effective for basic storage and collaboration, these platforms require workarounds. Over time, these workarounds can introduce delays, reduce visibility into engagement status, increase administrative overhead and create additional governance challenges.

This guide outlines the key workflow, security, governance and client collaboration considerations accounting firms should evaluate when assessing EFSS and purpose-built document workflow platforms.

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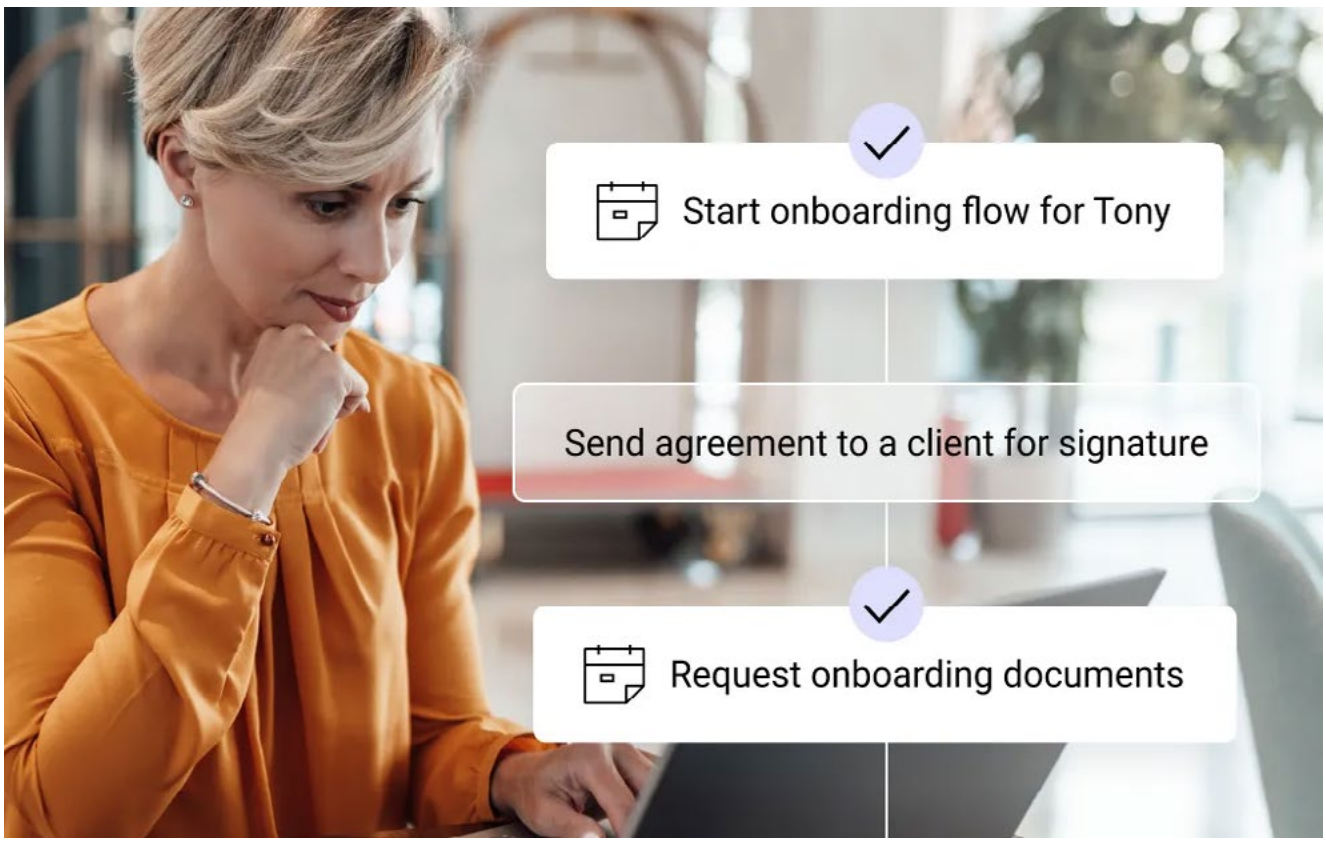
Who This Guide Is For

This guide is intended for anyone involved in technology and operational decisions within an accounting firm, including:

- CIOs and IT leaders
- Firm administrators
- Tax and audit leadership
- Compliance and risk stakeholders
- Operations and workflow teams
- Managing partners

It is designed to help firms evaluate whether generic file-sharing platforms remain sufficient or whether a purpose-built accounting workflow solution is needed to support secure, scalable client engagement delivery.

The information provided in this guide does not, and is not intended to, constitute legal advice. Any reader who needs legal advice should contact their counsel to obtain advice with respect to any particular legal matter. No reader, user or browser of this content should act or refrain from acting on the basis of information herein without first seeking legal advice from counsel in their relevant jurisdiction.



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Evaluating Collaboration Models for Accounting Firms

As firms evaluate document collaboration platforms, the distinction is often less about file sharing itself and more about how workflow structure, client interaction, governance and operational visibility are supported throughout accounting engagements.

The comparison below highlights how generic EFSS platforms and purpose-built accounting workflow solutions typically differ in these areas.

Capability	Generic EFSS Platforms	Purpose-Built Accounting Workflows
File storage and sharing	Centralized storage and basic collaboration	Integrated collaboration within engagement workflows
Client document collection	Manual uploads and email coordination	Structured document request workflows
Client collaboration	Shared links and email attachments	Secure client portals with guided workflows
Engagement visibility	Limited tracking across tools	Centralized engagement status and activity visibility
Audit trails	Basic activity logging	Detailed engagement-level activity tracking
Approvals and signatures	Often managed separately	Integrated into engagement workflows
Workflow management	Isolated file exchanges	Standardized intake, review, approval and delivery workflows
Automation	Limited workflow automation	Automated reminders, routing and reusable templates
Governance visibility	Fragmented across systems	Centralized oversight and reporting
Scalability during peak periods	Increased manual coordination	Structured workflows that support operational consistency

The comparison below highlights how generic EFSS platforms and purpose-built accounting workflow solutions typically differ in these areas.

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EFSS Capabilities Accounting Firms Should Prioritize

Purpose-built legal workflow platforms extend beyond file sharing to support secure, matter-centric collaboration throughout the lifecycle of accounting work.

The following capabilities often distinguish general-purpose file-sharing tools from platforms designed to support accounting workflows and client engagement management.

Structured Client Collaboration

Accounting engagements depend heavily on timely client participation. Secure client portals and guided workflows help firms centralize communication, document collection, approvals and engagement activity within a single environment. Effective platforms should allow firms to provide secure, branded client experiences, centralize document requests and submissions, track outstanding items and engagement progress and reduce reliance on email and manual follow-up.

Workflow Automation and Standardization

Reusable workflows and automated processes help firms reduce administrative effort while maintaining consistency across engagements. Look for platforms that offer standardized engagement setups, automated reminders and notifications, reusable templates and workflows and consistent intake and review processes.

Integrated Approvals and Signatures

Approvals, engagement letters and other authorization documents should remain connected to the associated engagement and supporting documentation. Integrated workflows with embedded e-signatures help keep approvals connected to related documentation, improve accountability and simplify document management.

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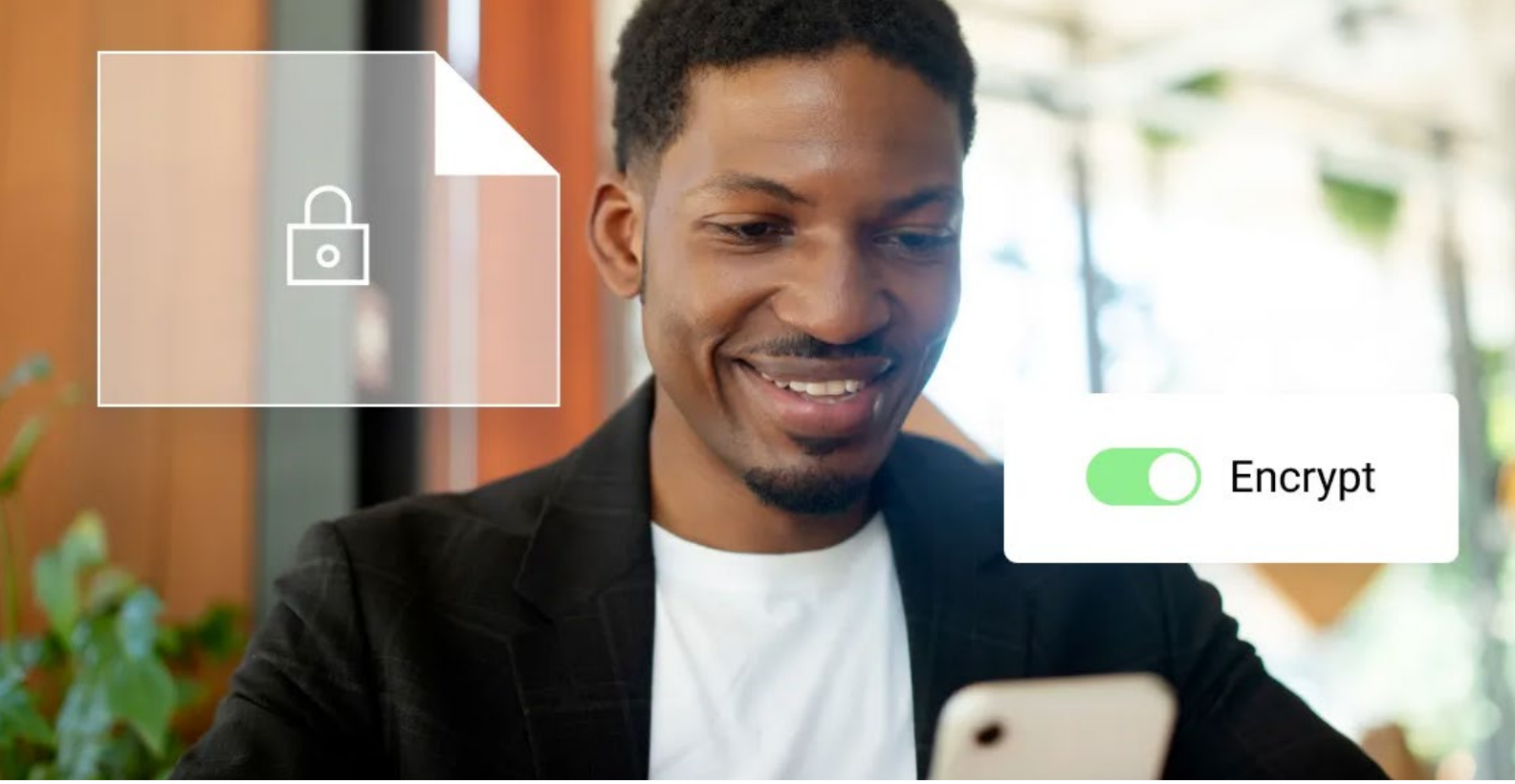

Engagement Visibility and Auditability

Reusable workflows and automated processes help firms reduce administrative effort while maintaining consistency across engagements. Look for platforms that offer standardized engagement setups, automated reminders and notifications, reusable templates and workflows and consistent intake and review processes.

Secure Document Governance

Accounting firms manage highly sensitive financial and personal information that requires secure handling throughout the engagement lifecycle. A trustworthy platform should support granular access controls, encryption in transit and at rest and secure external collaboration.

Security, Governance and Audit Readiness

For accounting firms, security extends beyond file-level controls. Firms must demonstrate that sensitive financial information is consistently governed throughout client engagements and internal workflows. Key requirements for an EFSS solution include granular access control, support for encryption standards and detailed activity tracking.

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Questions to Ask Vendors

When evaluating EFSS or accounting workflow platforms, firms should focus on operational fit, workflow structure, security and client experience rather than feature volume alone.

Many platforms appear similar at a high level. The more meaningful differences often emerge in how effectively each solution supports document collection, engagement coordination, governance, auditability and client collaboration during day-to-day accounting work.

Recommended Questions

Security and Governance

- How are permissions managed across engagements and client interactions?
- What activity tracking and audit capabilities are included?
- How are retention and document governance practices supported?
- How does the platform support secure external document sharing?
- What authentication options are available for staff and clients?

Vendor Transparency

- Can the vendor provide security and compliance documentation?
- Does the vendor have experience supporting accounting firms?
- How are onboarding, support and workflow implementation handled?

Workflow and Operational Fit

- Does the platform support structured engagement workflows?
- Can document requests, approvals and signatures be managed within the same system?
- How are reminders, routing and follow-ups automated?
- Does the platform reduce reliance on email and manual tracking?

Client Experience

- Does the platform provide secure, branded client portals?
- Can clients easily track outstanding requests and engagement status?
- How intuitive is the client submission experience?
- How are client interactions and submissions tracked?

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EFSS Evaluation Checklist for Accounting Firms

The checklist below is designed to help accounting firms translate requirements across operations, IT, compliance and firm leadership teams into a more structured evaluation process. Use this checklist to compare how effectively each platform supports secure collaboration, workflow consistency, audit readiness and client engagement management across accounting operations.

Security and Governance

- ☐ Encrypts data in transit and at rest
- ☐ Supports granular access controls
- ☐ Helps protect sensitive client information
- ☐ Maintains detailed activity tracking and audit visibility

Client Collaboration

- ☐ Provides secure client portals
- ☐ Supports structured document requests
- ☐ Minimizes reliance on email attachments and shared links
- ☐ Helps teams track and manage client submissions

Workflow and Automation

- ☐ Supports standardized engagement workflows
- ☐ Automates reminders and follow-ups
- ☐ Helps reduce manual coordination and tracking
- ☐ Supports reusable templates and workflow consistency

Approvals and Signatures

- ☐ Supports integrated electronic signatures
- ☐ Keeps approvals connected to engagement records
- ☐ Tracks approval and signature activity

Operational Visibility

- ☐ Provides centralized engagement visibility
- ☐ Helps teams identify outstanding tasks and documents
- ☐ Supports operational consistency during peak periods

Vendor Fit and Usability

- ☐ Demonstrates accounting industry expertise
- ☐ Provides clear governance and security documentation
- ☐ Minimizes workflow friction
- ☐ Is intuitive for staff and clients

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Interpreting Your Results

Not every accounting firm requires the same level of workflow automation, governance or client engagement management. Firms with simpler collaboration needs may prioritize a lightweight tool, while firms managing higher engagement volume, complex client interactions or stricter oversight requirements may require a more robust solution.

Rather than viewing the checklist as a pass/fail scorecard, firms should use it to identify workflow gaps, prioritize operational requirements and evaluate how well each platform aligns with their current needs and long-term scalability goals.

Taking the Next Step

Choosing a document collaboration platform is no longer just a technology decision. It is a decision about how a firm handles client interactions, manages sensitive information, supports operational consistency and maintains visibility across increasingly complex engagements.

For some firms, generic EFSS platforms may continue to support basic collaboration needs. But as accounting workflows become more client-driven, deadline-sensitive and process-oriented, many firms require stronger workflow coordination, automation and governance than traditional file-sharing tools were designed to provide.

Modern document collaboration solutions help firms move beyond simple file exchange by embedding document collection, approvals, signatures, workflow automation and engagement visibility directly into everyday accounting operations. Platforms that align collaboration with workflow management not only help reduce administrative overhead but also create a more consistent experience for staff and clients alike.

As firms evaluate their next steps, the focus should be less on adding complexity and more on enabling secure, efficient and scalable accounting workflows that support both client service and operational control.

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How Progress ShareFile Supports Accounting Workflows

Progress® ShareFile® software is designed to help accounting firms securely manage client collaboration, document collection, approvals and engagement workflows within a unified experience.

Built to support the operational and security requirements of accounting environments, ShareFile software combines secure file sharing with capabilities that help firms improve visibility, reduce manual coordination and maintain greater control across engagement-related workflows.

Whether supporting tax preparation, audit engagements, advisory services or ongoing client collaboration, ShareFile software helps firms create more consistent customer experiences while reducing reliance on disconnected tools and manual processes.

Learn How ShareFile software supports secure, efficient accounting collaboration

About Progress Software

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