



Sharing client files securely



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Each and every client in your care trusts you to handle their private information. It's a weighty responsibility that's only added to by the number of files being sent across your client base.

To effectively manage the tonnes of sensitive documents your business receives, you need to be able to securely and conveniently share files. For the first consideration, security, you should be looking for ways to limit access points to client info and verify approved users. For convenience, think about the user experience of viewing and uploading files as well as how you'll standardize file sharing moving forward. To strike a perfect balance between the two, we'd suggest investing in a client portal.



What is a client portal?

Client portals are simply secure platforms that allow businesses to exchange files with clients and any other external parties. Once logged in, clients can upload and retrieve sensitive documents without the threat of them being intercepted or exposing your file storage system to viruses.

Using client portals is preferred to sharing files via email, free cloud storage or consumer file sharing systems as they are purpose-built for security. This means confidential information such as tax returns or

financial statements are kept under lock and key. Less secure options, such as the ones listed above, offer little protection against the dangers of viruses, ransomware or the occasional blunder such as the wrong people accessing private information. What's more, they often don't provide the collaboration features that businesses have come to expect.

To securely manage documents and keep clear lines of communication with clients, portals are your safest bet.

Requirements of a client portal

Secure

It goes without saying that the portal you choose should be secure. Here are the features you should look for.

Password protected access

Adding login credentials brings a layer of resistance to breaches.

Two-factor authentication

Enabling two-factor authentication will bring an additional step of verification ensuring the appropriate people are accessing your files.

Session token

Once a client has logged in to your portal, you want to make sure that they're completing their work and then promptly logging out. If customers remain logged in while inactive, they're exposing themselves to potential breaches (e.g. if computers are left unattended). To account for any suspicious activity, your portal should include a session token to revoke access if sessions drag on without action.

File encryption

Encrypted files cannot be accessed until the appropriate credentials are entered. This ensures they're safe when shared and while they remain in storage.

Version history

Trace the updates to your documents so you're aware of every single edit made and can restore previous versions as necessary.

User-friendly

The bar is set high for user experiences. With more tech in circulation clients expect seamless online interactions. To meet this expectation, you should be choosing a solution which allows users to easily share, receive and work with your team on the same files.

Accessible

Once the appropriate login credentials are set, clients should be able to access your portal at their convenience. Opening up access also allows you to dodge emails requesting files — no need to be available 24/7!

Benefits of using a client portal

Centralized storage

Spreading your file storage across several systems creates more entry points for 'bad actors'. It also means that you have more platforms to manage and protect against cyberattacks. Having a client portal reduces your access points while providing greater security measures to verify log in attempts.

Client satisfaction

Great collaboration builds lasting relationships. Once you've found a solution that's both secure and user friendly, you'll be able to carry out all of your interactions from one place. This builds continuity with clients instead of overwhelming them with disparate apps.

Save time

Eliminate time spent gathering files from multiple sources and then accessing a platform to share with external parties. Picking the right client portal means crucial business processes are standardized, removing inconsistencies in your file sharing and reducing the risk of human error.

Strengthen your digital strategy

Your digital strategy is what sets the tone for internal and external collaboration. Client portals execute your strategy by streamlining workflows with external parties and scaling with your business as you grow.

Implementing a client portal

Portal plugins

If your website is hosted on WordPress, you'll be able to choose from a bevy of free plugins to securely exchange files. These will add a layer of security to your file exchange but will likely lack the added security features and collaboration tools that businesses require.

Integrated client portal

Integrated portals centralize your document storage without compromising on security. This means less time juggling applications, greater visibility of your client engagements and automations for document workflows.

Custom build one

Creating a bespoke client portal is a good way of ensuring that all your requirements are met and that your brand is integrated throughout your digital client experience. Of course, creating one from scratch means designing features that come standard with most offerings and investing a lot of money into your portal solution.

SuiteFiles Connect

SuiteFiles Connect is a client portal built directly into your document management system. This means greater convenience for you and clients as they'll be able to carry over login credentials from either Google or Xero accounts for access.

Create secure 'connected folders' within your client folder structure to review, edit or approve documents without leaving SuiteFiles. Should you need to collaborate on documents, you'll be able to work simultaneously with clients while both of

your edits sync. This eliminates the risk of version control because it ensures you're always working on up-to-date documents.

Once documents have entered Connect, you have all the tools you need to progress them and achieve a faster turnaround time. This begins with digital signing which lets you share, sign and then auto-save documents directly into the correct folder. After they're signed, documents are kept as a record for clients to refer back to as they wish.

SuiteFiles Connect makes gathering and sharing documents with clients simple and secure.

Next Steps

You're never going to regret investing in your clients' security.

However, if you're still deciding whether a portal is the right investment for your business, first consider:

- The size of your organization, are you servicing 10+ clients?
- Are you working remotely with clients? If so, do they require 24/7 access to their files?
- How often are you in contact with clients? Are you exchanging multiple emails and files daily?
- Do you need to be able to bulk upload and download documents?
- Do you need audit trails in place to track edits to your files?

If you service a large client base and are in regular contact with them, we'd suggest investing in a portal.

If you'd like more information on how to securely collaborate with clients or how to begin the discovery process for a portal, book in a time with our specialists.

[Book a demo](#)