

# FileGenius for Accounting

## A Case Study

Security, ease-of-use, as well as detailed, in-depth transaction reporting are priorities to CPAs and financial professionals — all elements FileGenius integrates intuitively and seamlessly. Security protocols patterned after major financial institutions insure that all firm and client documents remain private and secure and that those with access privileges can work with them with unprecedented ease.

A CPA firm in Columbus, Ohio specializes in tax and estate management for more than 2,000 clients. They needed a way to let these clients pick up files and then submit files back to the firm. They had been doing this using fax and overnight delivery until they found the FileGenius portal solution.

Setting up a private file space for each of these 2,000 clients and over 5,000 users was their first challenge. They discovered other well-known solutions cannot support this number of users. Not only could FileGenius support this large number of users, it provided a way to automatically import the users and at the same time create associated private workspaces for each client. The entire process took less than 10 minutes!

*"Adding 2,000 clients in 10 minutes was simple."*

Without these FileGenius capabilities, set up for that number of clients in time for the upcoming tax season would have been prohibitive both in time and money.

FileGenius security was also a major selling point for the firm, as it is compliant with all necessary state and federal regulations governing client privacy. An added bonus, they said, was the overwhelming easy-of-use, allowing clients who were not computer savvy to use the portal as well.

*"Transferring files quickly and securely has been a challenge since the advent of the Internet, which is why FileGenius is one of the best utilities an IT guy in the accounting world can have in his tool-belt. After three years of setting up hundreds of user-accounts for both clients and fellow employees, I have not yet needed to instruct a new user on how to operate their website; the ease-of-use and simple interface makes it a breeze to transfer those accounting software backup files that are too large for email, or the important, time-sensitive document that can't afford to wait for the mail system."*

*"Keith Bumgarner and his team of professional and knowledgeable staff have never ceased to amaze me with their attention to detail and absolute commitment to security, quality and (most importantly) to the customer - no matter how big or small. The support staff always takes into account ideas and feed-back and, based on some of my team's suggestions, has even made enhancements to their already fantastic service. The FileGenius product has the quality and operation of that produced by a Fortune-500 company, with the customer service and feel of a small-town thrift store. FileGenius is truly a must-have product for any business that utilizes the Internet for the transfer of bulky or sensitive data."*

**Cris Van Inwegen**

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