

Citrix ShareFile for Insurance

Share, store, sync and secure data on any device, anywhere.

Features	Description
Client Portal	
Anytime client access	Clients can access copies of their policies from anywhere, on any device.
Large file transfer	Easily share files and folders up to 10GB in size with just a few clicks.
Unlimited file transfers	The frequency of file transfers will never increase the cost of or slow down your service, so you can send as many files as needed.
Unlimited client users	Set up all of current and future clients with ShareFile. You will never be charged for additional client users.
No complicated downloads	Access ShareFile from any web-enabled device with no complicated software downloads.
Custom branding	Complimentary custom branding of your ShareFile portal with your logo and website provides seamless brand recognition.
File versioning	Keep track of changes to files in your account and access older versions of files as needed.
Seamless integration	
Website integration	A ShareFile login area on your website gives your clients even easier access to their documents.
File drop	Include a space on your website where clients can easily upload files without having to log in for secure one-off file transfers.
Custom upload forms	Create custom forms, with fields for name, telephone number, email address and more, on your website for clients to fill out when sending you a file.
File sync	
ShareFile Sync	Sync all of your files, and all of your company's files, to one central and secure repository.
Streamlined workflow	Work on files in the same folder as coworkers or clients in real time, on any device, from anywhere.
Automatic updates	Sync folders between ShareFile and a central repository on your computer for easy, automatic updates and backup of data.
Two-way sync	Set up ShareFile to automatically sync any client file uploads to your desktop.
ShareFile Plugin for Microsoft Outlook	
Attachment conversion	Replace email attachments with secure ShareFile links to files and folders up to 10GB in size. No more email bounce backs of files that are too large for standard emails.

File encryption in transit	ShareFile combines the convenience of email with the security of a portal. Files are encrypted using either Secure Socket Layer (SSL) or Transport Layer Security (TLS) encryption protocols and up to AES 256-bit encryption.
Request files	Make it easy for clients to send files to you by including a secure link in your email that allows them to upload files directly to your ShareFile account.
ShareFile Desktop Widget	
Easy access to files	Quickly access files from your PC or Mac without ever launching a web browser. Use the drag and drop feature to move files between ShareFile and your local file system in seconds.
Security and compliance	
File encryption	All communications between ShareFile and the user are encrypted using either SSL or TLS encryption protocols and up to AES 256-bit encryption.
State-of-the-art security	Files are protected using SSAE 16 Type II certified datacenters.
Reliability	ShareFile consistently maintains 99.9 percent uptime including during scheduled maintenance.
Compliance with data breach laws	ShareFile allows you to securely exchange sensitive client information while complying with state and federal security regulations.
Multi-factor authentication	ShareFile supports various two-factor and two-step authentication methods including forms and token-based authentication as well as SMS, voice and backup codes.
Tracking and reporting	
Customized user permissions	Give employees and clients access to only the files you want them to see.
Control and visibility	Determine how long files are available for download and know the moment someone downloads a file you sent.
Track account activity	Workflow audit trails, configurable permissions and intuitive reporting tools give you insight into and control over who is accessing what data, when they are accessing it, and how often.
Email notifications	Receive reports on permissions or account usage when activity occurs or in one consolidated daily email.
Mobile access	
Mobile apps	Apple iOS, Android, Blackberry mobile and Windows mobile apps are free to download and use for ShareFile users and clients.
Anytime, anywhere access	Instantly access and share files from anywhere using your smartphone or tablet.
Permissions management	Manage permissions and access rights to your ShareFile account while on the go. Give clients access to their folder while traveling or visiting them at their office.
Offline access	Access downloaded files on your device even when offline.
Remote wipe	Remotely lock and wipe ShareFile data from a lost or stolen device.
Customer care	
Unlimited customer support	Our award-winning support team is always available and eager to help.
24/7 customer support	Contact ShareFile anytime, anywhere, any day via phone, live chat or email.
Personalized training	An onboarding specialist will conduct training for you and your firm to ensure you get the most out of the account. Our knowledge base at kb.ShareFile.com is also a great resource for finding answers and learning about new features.