

Secure file sharing for insurance professionals

Protect your data with Citrix ShareFile and provide the security your clients need.

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Citrix ShareFile

Cloud-based document vaults make it possible for insurance professionals to easily share and receive large files with clients without sacrificing security — a key customer concern when it comes to confidential financial and personal data.

Citrix ShareFile is a business-grade solution for securely sharing and storing files via the cloud. Built specifically to accommodate industries that frequently deal with sensitive client information, ShareFile allows users to send and receive files up to 10 GB.

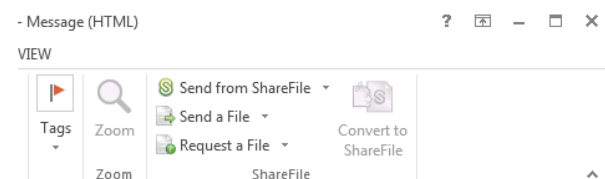
Anytime access, an easy way to send files to coworkers or clients, and secure cloud storage and file sharing are important to keeping business running smoothly. ShareFile cloud storage reduces stress on your computer's hard drive, and users can reach files from any device. Robust security precautions make it easy to trust ShareFile as your choice for business file sharing.

Easily share large files

Email is slow, and attachment file sizes are often very restricted. FTP sites are cumbersome and require complicated client software downloads for sending and receiving files. ShareFile eliminates all these hassles and provides an easy way to send files up to 10 GB in size.

The ShareFile Plugin for Microsoft Outlook provides a quick and easy way to deliver sensitive documents as well as a means for clients to return signed forms — all through email. Add ShareFile links via the toolbar just like a traditional attachment. Easy access to your secure, stored files means that client data remains protected and your workflow is never disrupted.

With a link from ShareFile, the client simply opens an email message and clicks on the link to download the file. There is no need to set up a separate account or download any additional software.



Sophisticated security without complicated installation

Sending confidential information via insecure email is a concern for many insurance professionals. Unlike consumer file sync and sharing tools, ShareFile is a business-grade solution that secures intellectual property while delivering the service users expect. Files uploaded to ShareFile servers are transferred

using SSL/TLS encryption and stored using 256-bit encryption. Additionally, the latest firewalls and Internet security updates ensure that ShareFile keeps data safe.

“ShareFile is a business-grade solution for securely sharing and storing files and online collaboration via the cloud.”

Immediate access to files with granular control of user permissions

Files and folders are available for encrypted, password-protected download via a custom-branded client vault. Provide an unlimited number of clients and professionals with unique logins where they'll find their own secure space and have access to performance reports, billing statements and tax and legal documents. Insurance professionals can provide access to CPAs, attorneys, mortgage specialists and other professionals, and limit access to documents relevant to their role in the client's life.

“Insurance professionals can easily share files or folders with clients from the document vault.”

Insurance professionals can easily share files or folders with clients from the document vault. Designate which actions clients are allowed to take, including uploading, downloading or deleting files. Choose additional levels of protection to prevent unauthorized users from gaining access to files. Protect links with a password or choose for the link to expire after a certain time frame. Added security measures can give you peace of mind, especially when dealing with confidential client information.

Design ✕

View/Edit Folder Access Add Users ▾ ➔ Notify Selected ✕ Remove Selected

<input type="checkbox"/>	Name	Download	Download Alerts	Upload	Upload Alerts	Delete	Admin	Notify	Remove
<input type="checkbox"/>	Super Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
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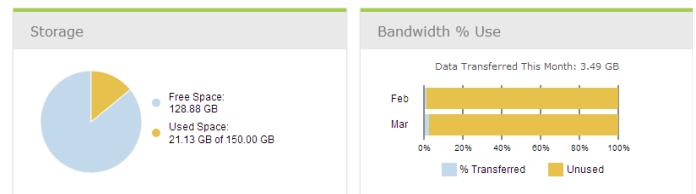
Apply permissions/alerts to existing subfolders

Save Changes Cancel

Custom reporting for easy tracking

ShareFile provides a reporting feature that lets you track user activity, so you can know when your clients download the files you send them. Reports are sent based on the customizable settings you choose, so you can decide which files and actions will generate notifications. A single report may contain an audit of all activity on the account, or it can be focused on specific actions or timeframes.

Run reports on permissions or account usage to easily check if each client has access to the correct files and folders. ShareFile saves a copy of each report, providing a complete record of portal access and usage. Choose to have reports sent when activity occurs or in one consolidated daily message.



Mobile access for the on-the-go user

ShareFile is always accessible to insurance professionals via the web interface and mobile apps. Mobile apps strengthen client relationships by making it possible to sit and review documents with clients on an iPad or tablet. You can send secure files no matter where you are.

With synchronization across all devices, users can be confident that they are working on the correct version of a file. Two-way sync makes files easy to update; changes to a file on your computer or mobile device are automatically recognized and adopted by every other computer or device where the file is synced. In the event of a lost or stolen device, IT can remotely remove files and company data.

Apple iOS, Windows mobile, Android and BlackBerry mobile apps are free to download and use for all users.

“Mobile apps strengthen client relationships by making it possible for advisors to sit and review documents with clients on an iPad or tablet.”

Excellent customer support

The ShareFile team employs dedicated onboarding specialists on our Customer Care team for help with setup and support. The ShareFile Customer Care team consists of ShareFile experts who answer questions, recommend the best features for your specific workflow and conduct custom training sessions.

As a ShareFile top priority, full customer support is available to all accounts 24/7. Users will always receive assistance as needed by phone, chat, email or via GoToMeeting.

Each custom-branded account receives its own client document vault with seamless integration into the company's website.

The smart choice for your business

ShareFile is made with your business in mind. We know the concerns of our customers, and we've worked hard to provide a solution that is easy to use and adaptable to a variety of needs.

“ShareFile is made with your business in mind.”

ShareFile was built from the ground up to be a secure, easy-to-use and professional web-based system for collaborating with clients and colleagues. ShareFile provides advisors with easy-to-manage administrative controls and tools to dictate a favorable client experience.

Contact ShareFile by calling 1-800-441-3453 or visit www.sharefile.com for a free demo to see how ShareFile can work for you.