

ShareFile

Feature Matrix

ShareFile helps you deliver a modern client experience, with a secure, easy-to-use technology that streamlines document and client-facing workflows.

Built Secure & Compliant

Easily share and collaborate without having to sacrifice security.

Just What You Need

Get going fast, with ready-to-go templates, solutions, and workflows that automate key processes and unlocks an enhanced client experience.

Designed for Efficiency

Boost productivity by automating the tedious tasks and freeing up time for the work you value most.

Explore [ShareFile Virtual Data Room](#) built specifically for complex document security needs such as merger and acquisition, valuations, or audit preparation.

The feature matrix below shows which features are available in each subscription plan: Standard, Advanced, Premium, and Industry Advantage.

Features	Description	Standard	Advanced	Premium	Industry Advantage
Built Secure and Compliant					
Active Directory and single sign-on (SSO)	Integrate ShareFile account with Active Directory to enable single sign-on (SSO) for users with AD credentials	●	●	●	●
Anytime, anywhere access	Securely access at the office or the home office to easily to view files and folders from any location.	●	●	●	●
Online security	Upon login, your connection with is secure and encrypted using industry-leading SSL technology.	●	●	●	●
Two-step authentication	Set up various two-factor and two-step authentication methods to keep your data in the right hands.	●	●	●	●
Activity logs and reports	Create, run, and schedule reports to track usage, access, messaging, and storage.	●	●	●	●
User management tool	Provision employee user accounts and distribution groups from Active Directory (AD).	●	●	●	●
OAuth Support	Token-based authentication through which secure connections with integrated business applications can be established.	●	●	●	●
Document encryption	Utilizing up to 256-bit EV SSL encryption ensures the privacy of our users' data.	●	●	●	●
Threat detection alerts	Get alerts if there is suspected unusual activity along with recommended actions to mitigate the potential threat. This includes unusual sign ins, unusual authentication, and malware detection.	—	●	●	●
Automated threat remediation	Automated threat remediation ensures constant protection against security risks, keeping data safe without the need for constant manual intervention.	—	●	●	●
Encrypted email	Protect both the message of your email and any	—	●	●	●

	attachments.					
Features	Description	Standard	Advanced	Premium	Industry Advantage	
Remote wipe	Allows you to remotely wipe mobile access to your ShareFile account. This will erase any data and saved passwords associated with the account to block or prevent unauthorized access.	—	●	●	●	
Device security	Remotely lock and wipe encrypted ShareFile data from a lost or stolen device.	—	●	●	●	
Archiving	Easily archive files and access them when needed to keep regularly used folders organized. Not SEC compliant.	—	●	●	●	
AI-Driven Secure Share Recommender	Automatically recommends hyperlink share settings based on the file content to keep sensitive data secure with no interruption to your efficiency.	—	—	●	●	
HIPAA eligible ³	Maintain HIPAA compliance ensuring you are keeping PHI data secure.	—	—	●		
SEC + FINRA eligible ⁴	Maintain regulatory compliance ensuring you are keeping financial data secure.	—	—	●		
Just What You Need						
Custom branding	Customize to match your brand by using your logo and colors for both internal and clients.	●	●	●	●	
Unlimited client users	Invite as many client users as you need to receive secure, personalized access.	●	●	●	●	
Client Portal	A password-protected portal for secure collaboration. Basic access includes file and folder access, while the advanced portal features real-time communication, progress tracking, reminders / notifications, and quick actions, in one platform.	Basic	Basic	Advanced	Advanced	

Features	Description	Standard	Advanced	Premium	Industry Advantage
Rapid client onboarding	Quickly onboard new clients with a built-in agreement that expedites the start of services.	—	—	●	●
Solutions	Ready-to-use suite of industry solutions that provide end-to-end workflows tailored to meet your organization's diverse use cases.	—	—	—	●
Designed for Efficiency					
Any device support	Use any device and operating system—no downloads, no plugins, no hassle.	●	●	●	●
All the storage you need ⁶	Plans start with 3TB of account storage (1TB of account storage per license aggregated).	●	●	●	●
Personal cloud connectors	Connect to industry services like SharePoint Online, OneDrive, OneDrive for Business, and Google Drive.	●	●	●	●
Developer API	Integrate with other services and build tools and apps on top of ShareFile.	●	●	●	●
Multi-language support	Localized languages including English, Spanish, French, German, Japanese, Dutch, Italian, and Portuguese.	●	●	●	●
File sync & versioning	Automatically sync files / folders across your entire company, with the ability to download previous file versions.	●	●	●	●
Offline Sync	Seamless access to files and synchronization even when internet connectivity is unavailable.	●	●	●	●
Full text search	Search for a document or folder name, as well as for words within documents.	—	●	●	●
Document feedback & approval	Submit a document for either in-line feedback or approval to speed up document workflows.	—	●	●	●
Co-editing with Office 365	Enable multiple users to edit Microsoft 365 documents stored with ShareFile.	—	●	●	●

Features	Description	Standard	Advanced	Premium	Industry Advantage
Email plug-ins with Outlook and Google Workspace	Send and request large attachments securely in your email. Bypass file size restrictions and add security to your attachments.	—	●	●	●
File check-in and check-out	Streamline file editing by checking-out a document, preventing others from changing the contents. Easily see who has a file downloaded.	—	●	●	●
Folder creation templates	Create a default subfolder structure that can be added to new or existing folders to allow for easy folder structure setup.	—	●	●	●
Network share connectors	Access files / folders stored on a connected on-prem or cloud-based resource. Use the web app and ShareFile apps to view / interact with data stored in connected locations.	—	●	●	●
Automated workflows	Build your own workflows to automate repetitive document-based processes.	—	—	●	●
Projects	Dedicated collaboration spaces to facilitate services from collecting files, setting tasks, and communicating all in a unified, simple place.	—	—	●	●
Templates	Easy-to-start templates, including templates for documents, projects, tasks, document request lists, information requests, and data tables.	—	—	●	●
Document request lists	Digitally create and manage document request lists with our easy-to-use tool	—	—	●	●
Information requests	Streamline the process of collecting client information inside of custom forms.	—	—	●	●
Data tables	Provide a structured approach to organizing project data	—	—	●	●
Tasks for project management	Create, assign, and manage for a specific project tasks.	—	—	●	●
Built-In Integrations	Seamlessly integrate with FreshBooks, QuickBooks, Xero, Salesforce, Pipedrive, Stripe, Zapier, and more.	—	—	●	●

Features	Description	Standard	Advanced	Premium	Industry Advantage
E-Signature					
All the e-signatures you need	Send up to 100,000 documents per month, applied at the account level.	—	—	●	●
Knowledge-based authentication (KBA)	Receive signer authentication via questions referencing non-discoverable information such as past addresses, vehicles owned, and more before granting access to documents.	—	—	●	●
Automatic field detection	Set up your document in just one click with automatic detection of fields on a document, needing no manual placement.	—	—	●	●
Data fields	Gather information with flexible / custom fields that include text fields, date boxes, checkboxes and more.	—	—	●	●
Diverse file type support	Upload documents in common formats: PDF, DOC, and DOCX files.	—	—	●	●
Document packager	Merge up to 5 separate documents and send it as a single request for signature.	—	—	●	●
Request attachments	Allow signers to attach supporting documents as part of signing process.	—	—	●	●
Document visibility	Full audits to show when the request was sent, when the signer opened the document, and when the document was completed.	—	—	●	●
Extensive delivery capabilities	Deliver documents over email, with a secure link that can be mass distributed, or embedded on your website.	—	—	●	●
Handwritten digital signatures	Sign documents with a real, hand-drawn signature for more authentic-looking contracts.	—	—	●	●
Signature variety	Request secure, legally binding signatures from either handwritten signatures, text to signature, or click to agree. All three options have the same validity and simplicity for the signer.	—	—	●	●

Features	Description	Standard	Advanced	Premium	Industry Advantage
Automated reminders	Set up automated reminders for signings to complete the agreement process.	—	—	●	●
Bulk send	Quickly send the same document to many signers with a few simple clicks.	—	—	●	●
Sequenced signing	Route documents to multiple users in sequencing order to fit your needed process. Specify a specific order and require users to sign one by one.	—	—	●	●
Void a sent agreement	Void a signature envelope if no recipients have signed the agreement yet.	—	—	●	●
Decline to sign	Signers have the option to 'decline document' for various reasons and notate why they need to decline. This voids the agreement for all recipients of the envelope.	—	—	●	●
Save progress	Enables signers to save their progress while signing that may need extra time.	—	—	●	●
Self-sign or in-person signing	The flexibility to receive a legal-binding signature from any place. Whether that's face-to-face with the signer or self-signed signatures.	—	—	●	●
Simple signer access	Signers do not need an account to complete an agreement. No downloads needed.	—	—	●	●
Step-by-step guided signing	Give signers step-by-step guided signing, reducing complexity, errors, and omissions.	—	—	●	●
Audit log	Every signed document and its time-stamped audit trail are locked and stored on secure servers.	—	—	●	●
Hash checksum	After signing, ShareFile secures your executed document with a complex hash algorithm to ensure the permanent record is tamper-proof.	—	—	●	●
Password authentication	Receive signer authentication with a specific password to access and sign the document.	—	—	●	●

Signature Certificate	Completed documents include time-stamped audit trail and metadata to confirm the validity of the signature(s).	—	—	●	●
User delegation	When a user leaves an organization, the documents will be accessed via the admin.	—	—	●	●
Signature limits	No limits	—	—	●	●

1. Feature not enabled in 0 GB packages with on-premises-only storage.
2. ShareFile integrates with popular DLP systems that support the ICAP protocol (Symantec Data Loss Prevention, McAfee Total Protection for DLP, and Forcepoint DLP) for customer-managed storage zone deployments to restrict document sharing based on the file's DLP classification. In addition, ShareFile supports popular CASB integrations to address cloud service risks.
3. HIPAA Compliance is only available in ShareFile Premium. Certain features may be unavailable or limited for customers who need HIPAA compliance. Please speak to your salesperson about how to purchase the HIPAA-compliant ShareFile edition. HIPAA customers must have a signed BAA in place with ShareFile (Cloud Software Group, Inc.). Archiving is available on ShareFile Premium plan with annual billing for those requiring legal or financial retainment of files. Archiving under this plan entitles customers to 200GB/User fair use storage amount. Customers must have a signed SEC Addendum in place with ShareFile (Cloud Software Group, Inc.).
4. Archiving is available on a separate plan under the Premium model for those customers requiring legal or financial retainment of files. Archiving under this plan entitles customers to 200GB/User fair use storage amount. Certain features may be unavailable or limited. Customers must have a signed SEC Addendum in place with ShareFile (Cloud Software Group, Inc.).
5. Ability request Advanced and Qualified Signature and user provides their own DigiCert certificate to sign the document.