



Progress Software Unveils Powerful New ShareFile Features for Accountants to Automate Administrative Tasks and Deliver a Great Client Experience

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AI-powered document insights, client mobile app and unified client hub help firms work faster and better

BURLINGTON, Mass., June 05, 2025 (GLOBE NEWSWIRE) -- [Progress Software](#) (Nasdaq: PRGS), the trusted provider of AI-powered digital experience and infrastructure software, today announced significant new enhancements to [Progress® ShareFile®](#), its SaaS-native document-based collaboration and client workflow product. Designed for accounting professionals, these enhancements cut friction, elevate client interactions and give firms a competitive edge.

With staffing shortages and client expectations on the rise, many accounting firms are struggling to keep pace, especially when administrative burdens reduce time for strategic advisory services. The latest ShareFile product enhancements directly address these pressures by providing AI-powered document insights, centralizing client interactions, automating repetitive tasks and simplifying workflows. With these new AI-powered capabilities, accounting firms can cut up to 4.25 hours off each tax engagement and extract key insights from financial documents up to 96% faster—enabling them to serve more clients, more effectively, without increasing headcount.

"ShareFile is helping accounting professionals spend less time on administrative work and more time delivering value to their clients," said Loren Jarrett, EVP & GM, Digital Experience, Progress Software. "For example, [Strategic Treasurer](#) has saved over 1,000 hours a year by consolidating their e-signature processes to ShareFile. From faster client onboarding to automated tax workflows, these features reflect our commitment to enabling firms to work smarter and better with AI-powered tools."

These key enhancements provide:

- **Streamlined client management:** The new client hub (beta) provides a centralized view of client information, files, folders and projects—streamlining client management and simplifying day-to-day work. Whether managing a single client or an entire organization, firms gain quick access to the details they need to move work forward.
- **Accelerated time to insights:** Firms can bypass manual reviews of financial documents and focus on higher-level, revenue-driving work. The AI document assistant transforms lengthy documents into clear, actionable insights with just one click or question. Key details are extracted instantly, reducing time spent on document review and enhancing decision-making.
- **Unified client interactions:** Accounting firms can manage client tax engagements from start to finish within the ShareFile product. The upgraded income tax return solution now includes enhanced client onboarding workflows that allow firms to create multiple engagements in bulk to accelerate onboarding, making it easy to initiate service for numerous clients at once.
- **Improved client response time:** Available for both iOS and Android, the new ShareFile for Clients mobile app (beta) gives clients an easy, secure way to stay engaged on the go. Clients can view and complete tasks, upload and scan documents and track service status—all from their mobile devices. This helps improve responsiveness and keep engagements on schedule.

"I think the client hub is a really impressive tool—it genuinely makes things easier," said Faisal Farah, Managing Director of Numerical CPA Professional Corporation. "Being able to see all client documents in one place and request what I need directly from there is a huge time-saver. It has the potential to be a very valuable part of our workflow."

Unlike fragmented tools that only solve part of the problem, ShareFile brings together client touchpoints in a single product. With built-in AI-powered workflows, firms can analyze financial documents faster, reduce client turnaround times and eliminate manual follow-ups—freeing staff to focus on high-value, advisory work.

Progress will showcase the latest ShareFile product innovations at [AICPA ENGAGE 2025](#), June 9–12, 2025, in Las Vegas. Attendees can experience hands-on demos and learn how thousands of accounting professionals are transforming their firms with the ShareFile product.

To learn more about ShareFile and its latest capabilities, [visit the website](#).

About Progress Software

[Progress Software](#) (Nasdaq: PRGS) empowers organizations to achieve transformational success in the face of disruptive change. Our software enables our customers to develop, deploy and manage responsible AI-powered applications and digital experiences with agility and ease. Customers get a trusted provider in Progress, with the products, expertise and vision they need to succeed. Over 4 million developers and technologists at hundreds of thousands of enterprises depend on Progress. Learn more at www.progress.com.

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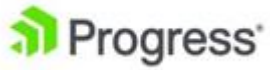
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A video accompanying this announcement is available at <https://www.globenewswire.com/NewsRoom/AttachmentNg/10eb631f-a142-4eae-a9f9-7711bf4ea9ff>



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