

Improving Client Experience With Suralink

By combining a request list and file portal, Suralink streamlines the tools we use to request and receive information from you. All requests are in one place, updated live, with a simple drag and drop to attach files. Suralink is a browser based system with no software to install.

What Is Suralink?

Suralink is a file portal with an integrated request list.

Suralink is a web based application that combines a file portal, request list, and workflow features. Each request has a status of outstanding, fulfilled, accepted, or returned. Each request holds files uploaded by both parties, comments, responsibility assignments, and a full activity log. To upload files and fulfill requests, simply drag and drop files from your computer onto the correct request.

Why Are We Using Suralink?

To make your experience better.

Suralink provides a much more transparent and efficient way to request and receive information. It allows all of our requests to be in the same place, visible by everyone involved, and updated in real-time. Suralink adds an additional level of clarity and organization to the information collection process, and provides you with the easiest way to upload files.

Getting Started Is Simple.

- Receive an email invitation for the system.
- Click the included link and set your password.
- Open your engagement and view your request list.
- Fulfill requests by dragging and dropping files from your computer onto the request.



Suralink supports any file type, any file size, and there is no software to install.

Is Suralink Secure?

Suralink's data in transmission and data at rest is encrypted with AES-256 bit encryption (the same as online banking). Data is backed up on a daily basis and Suralink servers are housed in SSAE16 Type II SOC1, SOC2 compliant data centers.

Users can protect their account with optional Two-Factor Authentication.