The Suralink Professional Document Exchange Platform combines a dynamic PBC list, assignment workflow, and secure file hosting to deliver a more efficient and organized engagement. Make document requests, receive files, track the progress of the engagement, and manage your team and clients on a single platform.

Eliminate the need to manually manage client requests through spreadsheets, a process that takes significant amounts of time and must be constantly repeated. Further, searching through a basic file portal for the document you need can be a frustrating and unreliable endeavor. This adds up to inefficiency, a lack of visibility from partners and managers, and unnecessary miscommunications with your clients.

Suralink automatically links client provided files with the respective firm request, ensuring you never miss a client provided file again. Everyone involved in the engagement is looking at the exact same thing in real time so there is never any confusion on what has been requested by the firm, what has been provided by the client, and what is still needed to finish the engagement. A full audit trail on all activity provides true accountability. Import existing PBC spreadsheets, then template them, roll them forward, and archive engagements.

Suralink is the leading provider of next generation client interaction tools. To learn more visit www.suralink.com