

suralink | CPAMERICA INTERNATIONAL

Suralink and the CPAmerica Alliance

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Working with your peers to reduce costs and increase efficiency

Building trust within the CPAmerica Alliance

As part of the CPAmerica Alliance, you work with some of the top firms and leading professionals in the industry—and you trust each other to share best practices, stay up to date on the latest trends, and provide recommendations on everything from conferences to attend and software to buy.

At Suralink, we are the leading provider of document and request list management software, and some of the biggest names in the CPAmerica Alliance trust us to help them simplify their audit, tax, advisory, and compliance processes.

Our partners in the alliance

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About Suralink

Suralink is the leading provider of document and request list management, helping firms simplify the audit, tax, and compliance processes while improving the client experience. Our cloud-based application integrates a dynamic request list and assignment workflow solution with a secure file hosting platform to serve as a single location for client interaction. It includes:

Dynamic request list

Suralink's dynamic request list is integrated with our secure file hosting system for seamless document request coordination. All your client requests are in one place, updated in real time, and accessible by everyone working on the engagement. Spend your time getting the job done, not reconciling a messy list of outstanding items.

Approval workflow

Quickly and easily manage the lifecycle of each request. Accept requests that have been fulfilled properly and send back requests that aren't complete.

Import, export, templates, and rollover lists

Import your existing spreadsheet PBC list for ultra-fast setup. Create templates to reuse when adding new clients. Roll engagements over from year to year and capture all additional requests that came up during the engagement.

Drag and drop file upload

Want to add a file? Drag it and drop it. Want to add 30 files? Drag them and drop them all at once. You don't need to worry about opening folders and digging for files. It doesn't get easier or faster—for you or for your clients.

E-signature

E-signature is now integrated directly into Request List Management. Designed to reduce frustration and save time for you and your clients, Suralink's e-signature solution will eliminate the need to switch between different software solutions and improve the process of getting all types of documents signed.

If you're ready to discover what other CPAmerica Alliance firms already know, visit: **suralink.com** or email **sales@suralink.com** to get started.

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