



Five Ways a PBC
Solution Simplifies
Request List
Management

SAVE AN AVERAGE OF 20 HOURS
PER ENGAGEMENT WITH SURALINK



Automating PBC request list management

Managing the hundreds or thousands of documents required to complete an audit is time-consuming, stressful, and inefficient. But choosing a PBC request list management solution can be the solution you didn't know you needed. Instead of just getting you through, **the right software can actually make your processes more streamlined, more efficient, and a lot more productive.**

Keep reading to discover the top five ways the right PBC solution can help you save up to 20 hours per engagement.

DID YOU KNOW?

The average firm spends 20 hours per engagement managing document requests.

1

Get a jumpstart on engagements

ANNUAL ENGAGEMENTS seem to sneak up on us every year. You can see them coming ... but before you know it, they're here and you're not ready. Even though engagements are 90% the same year to year, you might not have a good way to roll them over.

A good PBC solution will allow you to create templates, copy engagements, or roll them over so you're ready for an engagement before it even begins. Imagine the time you could save if, going into an engagement, your PBCs were ready—not just getting started.

SURALINK STANDOUT

FEATURES

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.



CLIENT SNAPSHOT PART 1: **HENRY+HORNE— STARTING EARLY**

Henry+Horne was founded in 1957 by two CPAs to provide tax, accounting and business consulting services. Sixty years later, its team of approximately 150 highly skilled professionals are still focused on its clients' success and overall financial well-being.

Henry+Horne have worked with Suralink since 2016, including three busy seasons. Suralink gives Henry+Horne an earlier start. For many clients under the old system, PBCs would only be ready about a month before the engagement. Now Henry+Horne can take 2018 engagements, for example, and roll them over to 2019, make edits, and activate them. *"This really just gives us a jumpstart," says Bach. "We now have PBCs in clients' hands before the year is even completed. It's a huge timesaver."*

2

Automate Manual Tasks

SENDING EMAILS, managing and updating spreadsheets, creating reports, tracking engagements, communicating with team members. These little tasks only take a few minutes here and there—until all that time spent manually managing PBC request lists adds up, and suddenly, you've lost a huge part of your week.

Imagine if you could get those hours back by automating those busy-work tasks. A good PBC solution will do just that.

SURALINK STANDOUT

FEATURES

Dynamic Request Lists

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 Workflows

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

Multi-Select and Action

Make your process more efficient by selecting and actioning on multiple items at the same time. Download all client files in a section, accept all requests that have been approved, or edit a group of requests at the same time—all with just a few clicks.

Back and Forth Communication

Increase the speed and effectiveness of your client communication with the ability to add comments specific to each individual request.



DID YOU KNOW?

60% of businesses have experienced a data breach—almost all of them introduced via email.

3

Stop worrying about security

WITH EVERYTHING that goes on during an engagement, keeping your clients' sensitive information safe should be the last thing on your mind. Most firms use spreadsheets and email to manage PBC lists. Not only is email one of the least secure forms of communication—easily hackable, unencrypted, and susceptible to phishing—it's almost virtually impossible to control. Documents that should be deleted, aren't. Documents get lost. And it's easy to avoid accountability because individual email accounts aren't transparent to everyone involved in the process.

The right PBC solution will feature built-in, highly advanced security measures to keep your clients' information safe—and keep you from spending precious time worrying about it.

SURALINK STANDOUT

FEATURES

- AES-256 bit encryption
- SSL/TLS digital certificate encryption
- SSAE16 Type II SOC 1, SOC 2 compliance
- TLSv2, TLSv1.1, TLSv1.2 protocol
- Cyber-liability insurance
- Two-factor authentication

“It's been great for us. It's secure for our clients. Everything I've heard on the client side has been positive. I've actually had a couple clients say, ‘What took you so long to get something like this.’”

—PATRICK THOMAS
AUDIT SUPERVISING SENIOR, PP&CO

4

Get Real-time Updates

REPORTING ON your engagement can be time-consuming. Whether it's a client, colleague, or supervisor that needs the information, gathering, analyzing, and presenting data about your engagement's progress takes time you often don't have. And usually by the time you're done getting everything together, it's out of date and you have to start all over.

What if you could, at a glance, get real-time information about the status of your engagement, and then share it securely with the people who need it?

SURALINK STANDOUT FEATURES

Dashboards

Get a bird's eye view of the document gathering process in real time. Managers and partners can now assess the progress of an engagement at a glance. No need to have the team prep a status update. It's right there. We give you better information so you can make better decisions.

Report Delivery

Schedule reports, send them to designated recipients, control access to who sees them (inside or outside the organization), track who has received and engaged with them, and then delete them automatically to ensure clients' data stays secure.



CLIENT SNAPSHOT PART 2: **HENRY+HORNE— SAVING TIME**

Before Suralink, Henry+Horne was spending anywhere from one to six hours per week managing engagements. Now, accountants just run a status report out of the platform and report on it during 30-minute meeting.

5

Spend less time managing and more time working

AT THE END of the day, it's all about spending less time fighting with ever-changing PBC lists and more time focusing on your engagement and your client.



Suralink is the leader in request list and document management, helping businesses simplify the document exchange process while improving the client experience.

The company's 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. Suralink's technology, combined with its industry expertise, helps more than 275 clients in North America and the UK ensure security, simplicity, transparency, and accountability throughout the document exchange process.

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