Software Checklist

What to look for in a dynamic PBC request list solution

Not all PBC software is created equal. When looking for PBC request list management solution, make sure it checks the boxes below to give yourself the highest chances of success of seeing a return on your investment.

	VENDOR 1	VENDOR 2	SURALINK
LIST MANAGEMENT			
Create categories and subcategories			✓
Add, edit, and and remove requests			✓
Provide descriptions, instructions, and view the request history			✓
Drag and drop firm provided files to requests			✓
Accept or return the info provided for each request			✓
Perform multiple actions at the same time			✓
SECURITY			
Assign requests to specific users and lock them for security			✓
Clone requests from one engagement to another			✓
Enforce multi-factor authentication			✓
Adjust inactivity time-out			✓

	VENDOR 1	VENDOR 2	SURALINK
Enable third-party guest access via encrypted channels			✓
Restrict access by role or engagement			✓
Meet SOC 2 compliance standards			✓
CUSTOMIZATION			
Enable firm co-branding			✓
Choose a custom sub-domain			✓
Add personalized firm email domain			✓
Customize end-user license agreement			✓
ALERTS AND NOTIFICATIONS			
Send customized emails based on system events			✓
See events that happened while logged off			✓
Get instant notifications of any activity while logged in			✓
TEAM MANAGEMENT			
Add new departments, users, and assignments			✓
Search and sort team members			✓

	VENDOR 1	VENDOR 2	SURALINK
IMPORT AND EXPORT DATA			
Import and Export Data			✓
Export client list			✓
Export engagement			✓
Export individual or selected requests			✓
Import existing Excel spreadsheets or other file types			✓
Upload all file sizes and types			✓
Roll over engagements from year to year			✓
REPORTING AND COMMUNICATION			
Access real-time engagement overview dashboards			✓
Securely send reports to users inside and outside the organization			✓
Set limits on report viewing to protect sensitive information			✓
Add comments specific to each request			✓