

A woman with short, grey hair and glasses, wearing a brown sweater over a light blue collared shirt, is smiling and looking at a laptop. Her hand is resting on her chin. The background is a blurred office or meeting room with other people.

Secure File Sharing FAQs

Product FAQs

- **What is Secure File Sharing?**

Secure File Sharing combines the ease of email with the protection of a document exchange portal to help you transfer files securely. With virtually no limits on file sizes, enterprise-grade security, and an easy-to-use interface, Suralink's Secure File Sharing solution increases efficiency for your team and improves the file transfer experience for the client.

- **Who can benefit from using Secure File Sharing?**

Anyone that needs to securely and efficiently exchange files with clients. Secure File Sharing can be used for quick one-off exchanges and is best suited for smaller engagements. For larger engagements, we recommend using our Request List Management software. The combination of both tools will allow you flexibility and the ability to service both large and small clients easily.

- **What browsers does Secure File Sharing support?**

As with Request List Management, you can use any browser to access Secure File Sharing; however, we recommend using Google Chrome. After June of 2022, with the deprecation of Internet Explorer, Secure File Sharing and Request List Management will no longer support the Internet Explorer browser.

- **What operating systems does Secure File Sharing support?**

Because Secure File Sharing is a cloud-based solution, it will work with any operating system as long as you have access to the internet and a web browser.

- **What file types are supported on Secure File Sharing?**

There are no file types (extensions) limits when sending, requesting, or receiving files with Secure File Sharing.

- **Can files be archived when using Secure File Sharing?**

In order to archive files, you would first need to download them and attach them to an engagement within Request List Management. Once attached, you can archive that engagement and the files that are attached.

- **Can files be deleted when using Secure File Sharing?**

Yes, files can be deleted. There is a trash bin icon on the right side of the folder row under My Files.

- **As a client, can I see which files I've sent my firm?**

Not at this time. Files can only be viewed by the firm.

- **As a firm user, how do I access Secure File Sharing?**

You can access Secure File Sharing by logging in to Suralink and clicking on the "Secure File Sharing" icon in the top right.

- **Can I put my personalized link in my email signature?**

Yes. Links do not expire unless you choose to regenerate them for security reasons. This means you can put your personalized link in your email signature for anyone to use.

- **Does Secure File Sharing have limitations on file sizes I can share and request?**

Secure File Sharing supports sending and receiving up to 10 GB of files. Meaning you can send up to 25 files at 10 GB per file.

- **How many files can I send per message?**

Secure File Sharing supports sending up to 25 files per message.

- **How many files can I receive per message?**

Secure File Sharing supports receiving up to 25 files per message.

- **Is Secure File Sharing mobile friendly?**

We recommend using a desktop to use Secure File Sharing for the best experience.

- **How many users can send me files?**

There is no limit to the number of users who can send you files.

- **How many users can I send files to?**

There is no limit to the number of users you can send files to.

- **What types of files can you preview?**

Currently you are only able to preview PDFs.

- **From the firm side, can you send files to multiple recipients?**

No. Secure File Sharing supports one recipient at a time when sending files.

- **From the firm side, can you request files from multiple recipients?**

Yes. Secure File Sharing supports requesting files from multiple recipients.

- **Can you use this system to bulk send, or you can only send these documents/requests to one email address at a time?**

When sending files, you have to send them to one client at a time; however, when requesting files you can request from multiple individuals at one time.

- **Can you share access to files?**

You can share the same link, but all files will be tied to a single account. You would need to download and add them to engagements to have multiple team members see them.

- **Can multiple firm personnel access the uploaded files from the same client?**

No. Only the individual requesting the documents will be able to access the files. Other team members will not be able to view them.

- **Can I set a standard file expiration period other than 60 days?**

Currently you can set a file expiration date that is shorter than 60 days, but cannot go beyond 60 days.

- **What is the experience like for the client if the client attempts to access an expired file (after 60 days or based on my firm's customized time period)?**

The client will see a personalized error page that explains the files have expired for security reasons and to contact the firm to resend.

- **Is there an Outlook plug-in available?**

There is not currently an Outlook plug-in. However, this is a highly requested feature and is next on our development roadmap.

- **Can I co-brand my instance of Secure File Sharing and the notification email that goes to the recipients?**

While this feature is not available immediately upon launch, it should be available shortly after.

Security FAQs

- **How secure is Secure File Sharing?**

The same enterprise-level security applied to our Request List Management application is also used for Secure File Sharing. For more information about Suralink's security features, [click here](#).

- **Is data shared through Secure File Sharing encrypted?**

All documents that are uploaded using Suralink (whether you're using the Request List Management or Secure File Sharing product) are always secured with AES-256 bit encryption. Client organization names, engagement names, and all comments between users are treated as sensitive and are also encrypted at rest with AES-256 bit encryption. For more information about security, [click here](#).

- **Is Secure File Sharing SOC2 compliant?**

Yes. Suralink maintains SOC2 compliance across the organization for all products and services. For more information, reach out to your sales or customer success manager to request a copy of the report.

- **Does Secure File Sharing support SSO?**

Yes. Single sign-on (SSO) can be enabled in the Security Tab under My Firm in Suralink's Request List Management application.

- **Does Secure File Sharing support two-factor authentication?**

Yes. Two-factor authentication may be enabled in the Security Tab under My Firm in Suralink's Request List Management Application.

- **Are files I receive through Secure File Sharing automatically archived?**

Not at this time. To archive files, you would need to download them and attach them to a Request List Management engagement.

- **If the recipient receives the documents and wants to forward them on, can they set up a password for them?**

No. Recipients cannot set separate password or security requirements before forwarding. The recipient can forward the email with the link and will have to share the password unless the link is shared without any security requirements.

- **Is it possible to use knowledge-based authentication (KBA) for client authentication instead of a password?**

Currently we only offer password-based authentication.

- **Can the security options be enforced/controlled by firm admin?**

Security settings for Secure File Sharing will be administered by the account owner, not the firm administrator.

Support FAQs

- **Who do I contact if I have issues/questions about Secure File Sharing?**

You can reach out to your designated customer success manager or our support team by using the live chat support option on the login page. You can also email support at support@suralink.com. If you'd like to request a demo of Secure File Sharing, you can reach out to your customer success manager or our sales team at sales@suralink.com.

- **Does Secure File Sharing include training and support?**

You can arrange a training for Secure File Sharing by contacting your assigned customer success manager. If you are not sure who that individual is, you can reach out to support@suralink.com or use live chat support on the login page.

Pricing and Sales FAQs

- **How much does Secure File Sharing cost?**

The price of Secure File Sharing differs depending on your current Request List Management contract. To get pricing and product information, please contact sales@suralink.com.

- **Can we assign Secure File Sharing licenses to different departments without giving them a license for Request List Management?**

Yes. You will have the ability to add user licenses specific to Secure File Sharing. Please reach out to your customer success manager for additional information.

- **Who do I contact for pricing information?**

You can always reach out to our support team with any questions using live chat support or support@suralink.com. For specific pricing questions or to request a demo, please contact sales@suralink.com.

- **As a firm user, who do I contact to get a demo of Secure File Sharing?**

You can reach out to your assigned customer success manager or sales@suralink.com.