



Secure File Sharing

CLIENT USER GUIDE

Secure File Sharing
Client User Guide

support@suralink.com
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suralink.com
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KAUFMAN
ROSSIN
cpa + advisors

Secure File Sharing combines the ease of email with the protection of a document exchange portal to transfer files securely, increase efficiency, and improve the file transfer experience.

How do I share files using Secure File Sharing?

- 1 Click the link provided by the person you'd like to send documents to.
- 2 On the Secure File Sharing page, click in the blue box and select files or drag and drop them in the window.

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Welcome to Secure File Sharing
Upload a file or two to get started

Drag and drop your files here or
tap to browse your files

You can upload up to 25 files at a time

Share some files!
Give us a little information so the recipient knows who you are and what you're sending.

Name
Jane Smith
Required

Email
janesmith@business.com
Required

Subject line
What are these files for?
0/255

Notes
Put any information the person receiving your files might need to know here.
0/2048

Send Attached Files

Live Chat Support

- 3 Files you've uploaded will appear in a list where you can **add more** or **delete files** you don't want to send.
- 4 When you've finished adding and removing files, enter your name, email and any additional information you'd like to provide. Click "Send Attached Files" and they'll be delivered securely to the recipient.

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Drag and drop your files here or
tap to browse your files

2 Files Selected **DELETE SELECTED FILES**

☒	☒	Payroll Q1.xlsx	4 KB	☐
☒	☒	Payroll Q2.xlsx	4 KB	☐
☐	☒	Bank Statements.docx	10 KB	☐
☐	☒	Charitable Contributions.xlsx	8 KB	☐

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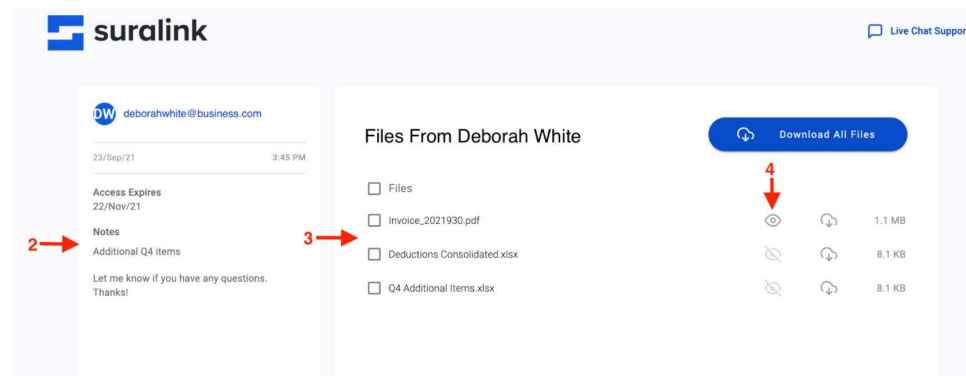
How do I receive files using Secure File Sharing?

- 1 Open the email from the firm user sending you files and click “Access Files.”

Access Files

*You may be asked to validate your email or enter a password provided by the sender before accessing the files that were sent.

- 2 On the left side of the page you will see the date the files were sent, an expiration date and any notes provided by the sender.
- 3 To the right, you will see the list of files that were sent. You can select individual files or download all of them at once.
- 4 You will also see a small  icon next to any files that can be previewed. Currently, only PDF documents can be previewed in the application.



Frequently Asked Questions

- **Does Secure File Sharing upload my files to Suralink engagements?**
Not yet! Currently, the files will be received separately from any Suralink engagement, but in the future the two will be integrated. Stay tuned!
- **Are there any file limitations?**
You can upload 25 files at a time and each file can be up to 10gb in size.
- **As a client, can I see which files I've previously sent?**
No, but the recipient will be able to clearly see what you've previously sent them.
- **What should I do if my file fails to upload?**
If your file fails to upload you'll see a red icon next to it in your list of files. You will need to upload the file again until it is successful and you see a green check mark.

For questions or additional information you can contact us at support@suralink.com