Forgot Password

We have a "Forgot Password" option on the login page. Please note: common things that people run into when resetting a password are:

1. You are using an old password reset email.
    - These reset emails expire after a single use or a period of time. Please make sure you are using a new password reset email.
2. You are inputting the wrong email address used as your login.
    - The system does not tell you if it is the password or the login that is incorrect, so sometimes you are using the wrong email address.
3. You aren't getting past the new password screen because your password does not meet the following requirements:
    - At least 8 characters
    - Both upper and lower case letters
    - A mixture of letters and numbers
    - At least one special character < > @ ! # $ % ^ & * ( ) _ + [ ] { } ? : ; | ' " \ , . / ~ ` - =
4. You do not receive the password reset email because it is being filtered or blocked by your email firewall. In this case, please check spam and junk folders. Also, email support@suralink.com to open the channels of communication and try once more.

Trouble Uploading and Downloading Files

If you're trying to upload or download files, and can't seem to complete either process, we have a list of steps to try that resolve most cases.

1. Please navigate to https://securefiles.suralink.com/. You should be directed to a page where you can view our logo and an IP address. If you do not see this message, skip to step 4.
2. While in Suralink attempting the upload, press the F12 key on your keyboard. This activates the browser tools window. At the top of the new window, click on the Console Tab (typically the second tab). Refresh the page and try uploading or downloading the attachment(s) with Console open. Do you see any red errors appear? If so, please copy and paste these into an email or document and send it to support@suralink.com with any other findings.
3. If you're using Internet Explorer, try using a different browser, such as Chrome or Firefox. If one of those browsers works, it may be an Internet Explorer setting (contact your internal IT for a remedy). If none of those browsers work, then it is likely a company-wide setting or security software on your end.
4. You will need to contact your IT department and have them add https://securefiles.suralink.com/ and the suralink.com domain to your "allowlist".
5. After completing step 4 try uploading/downloading again. If your attempts are still unsuccessful, please contact us on our live support or include these findings in an email to us.

Contacting Support

You can reach Suralink Customer Support on our Live Support chat, by emailing support@suralink.com or by calling us at 801.203.0002.

The FAQ listed here answers the most common questions we receive so feel free to browse that for your answer first. We also have in-depth descriptions of each page and feature broken down into sections that can provide a great amount of clarification. If you still cannot find your answer in either of these options or believe you may be experiencing a bug or glitch in the system, please reach out to Customer Support at your earliest convenience. *It is best to include as much detail as you can and any possible screenshots documenting the issue you may be experiencing. If the problem you're encountering is affecting other team members or clients as well, please note this in the details you provide.* If Live Support is not online when you reach out, you will hear back from us within 1 business day.

You're also welcome to reach out with any feature requests that you feel will benefit your and other users' experiences in Suralink. We track and record all feature requests for the Application Design & Development team who continually work towards enhancing the system. This can also be done using the "Feedback" link in the bottom right area of your screen on the website footer. We appreciate any insight as our customer's perspective is the most valuable!

Adjusting Your Notification Settings

There are two different places where notifications can be adjusted. There are the general "My Account" notification settings as well as settings that can be adjusted within each engagement for the intended engagement only.

My Account

The settings on your My Account page (link located at the footer of the site) can be adjusted from as frequently as several times a day to as infrequently as "Never". You can also determine which specific actions you receive notifications for.
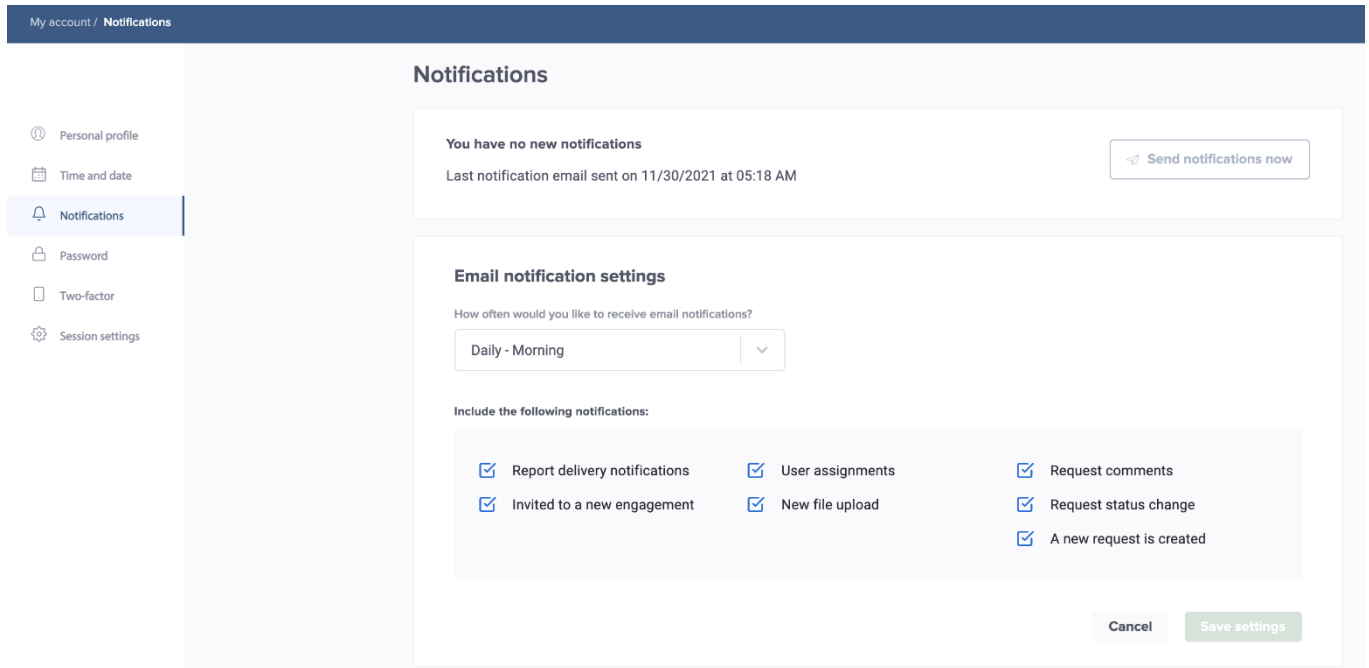
*Make sure to select "Save Settings" after any preferential adjustments.

There's also an option to send all pending notifications to yourself at that exact moment by clicking the "Send notifications now" button.

In an Engagement

When within an engagement, there is a bell icon in the upper right corner. Clicking that will bring up notification options that apply to that engagement only and can be muted or escalated to every ten minutes.

Engagement Notification Settings   X

Each user controls their own settings :

○ 🔕 **Mute** : The system will not send you any notification emails.

○ 🔔 **Assignments** : The system will only send you notification emails for actions on requests that you are assigned to.

◉ 🔔 **Default** : The system will send you notification emails based on the settings in your My Account page.

○ 🔔 **Escalated Assignments** : The system will send you notification emails every 10 minutes for actions on requests that you are assigned to. Notification emails on non-assigned requests will still be sent based on the settings in your My Account page.

○ 🔔 **Escalated** : The system will send you notification emails for all activity every 10 minutes.

Change Notification Settings

Changing Your Email Address

Email changes require Firm User approval and must be done through Suralink Support for security purposes. We will verify with you directly on all email changes before requesting the approval and implementing the change.

Assigning and Locking Requests

All Firm Users and Client Users have the capability to add assignments to requests. You can assign one or multiple individuals to requests. This acts as a way to make certain persons responsible for completing the request and can help keep it organized.

1. To add an assignment to a request, you'll first need to click the specific request you want to add the assignments to.
2. In the request details on the right, just above the area for uploading files, is a "clipboard" icon with "Add Assignments" next to it.
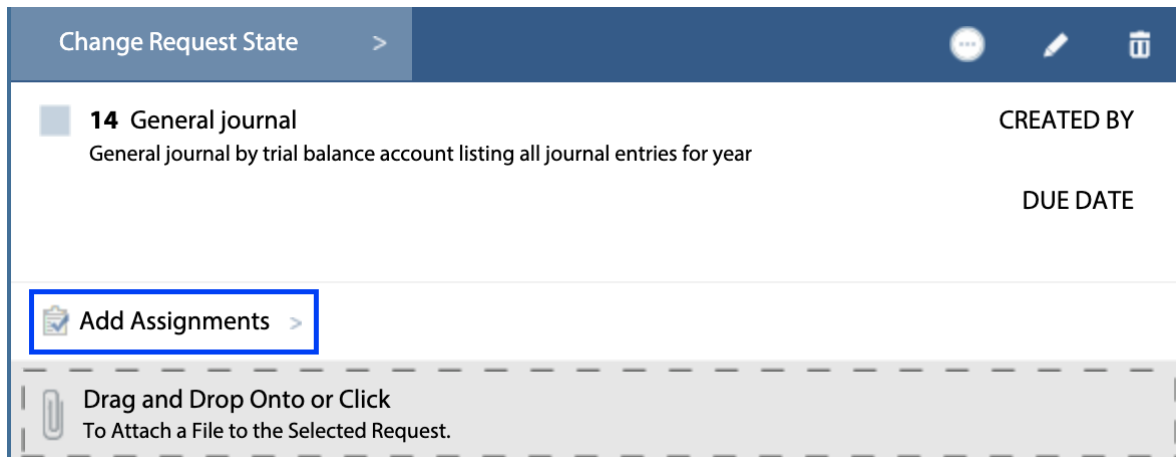
3. Click the add assignments icon and click on each user you want to be assigned to the request. They will then be assigned to the request and will also receive a notification letting them know they've been assigned.

4. To remove an assigned user simply hover your mouse over the user you'd like to remove, and their name details will pop up as well as an option to "Remove Assignment".

All Firm and Client users can also lock requests. Locking a request prevents any client user who is not assigned to the request from accessing it. Requests can only be locked if there are users currently assigned to them. Client Users cannot lock requests they are not assigned to.

1. To lock the request, click the More Options icon to the right of "Change Request State". This will be the circle with three dots inside.
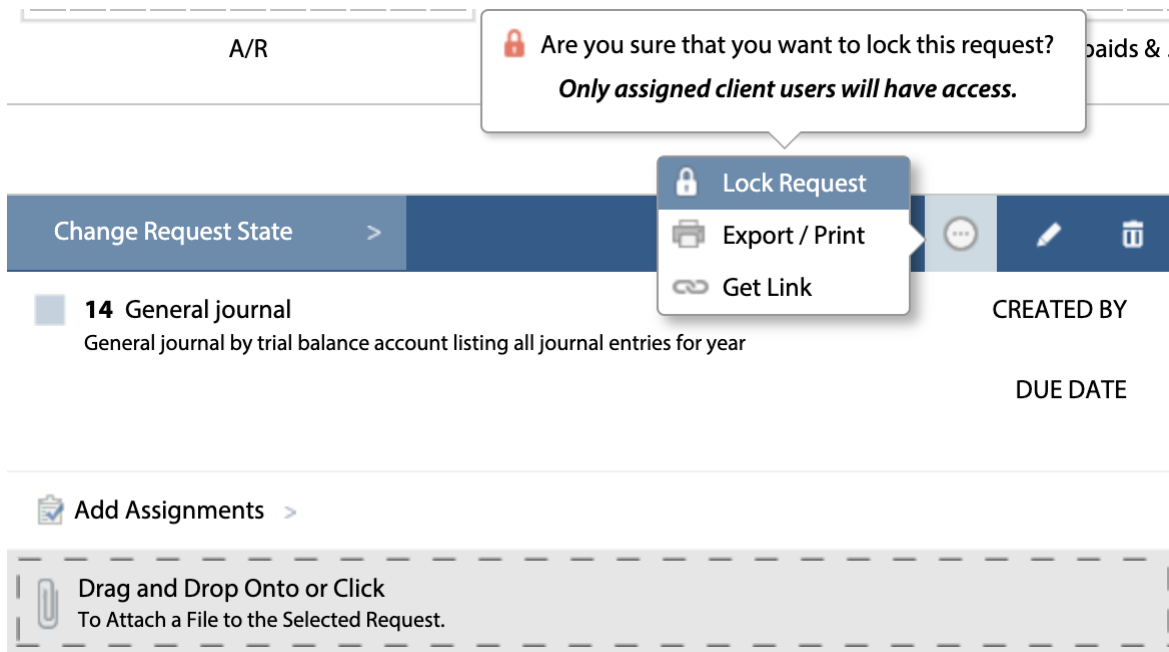

3. The first option is to "Lock Request". Click that to officially lock the request.

4. Follow the same steps to unlock the request.

Printing The Request List

Client Users can export or print the request list. At the top right of the Engagement, there are four icons, one of which is a circle with three dots. This is our "Overflow" menu.

When you click this, a sub-menu will appear with the option to "Export/Print".
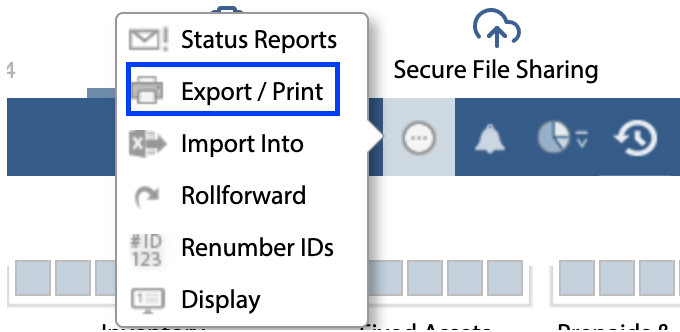
Once the "Export" option has been selected, you will be taken to the exporter where there will be a variety of checkboxes. Use these to select which info you'd like included in the export.
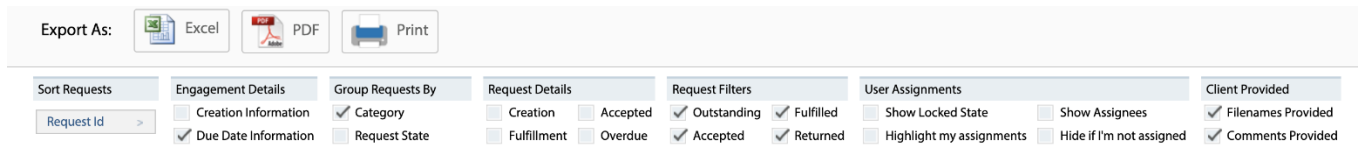
You can convert the engagement into an excel sheet, a PDF file, or print it directly. On most browsers, the file will appear in a bar at the bottom of the browser. You should also be able to locate the file in your "Downloads" folder on your computer if downloaded as opposed to print.