

WELCOME TO **SURALINK!**



In an effort to maintain the security of your personal information while being environmentally friendly, WilkinGuttenplan uses an innovative digital platform for exchanging documents. Suralink is an online professional exchange and storage system. In order to get started you will need to create an account with your email and set up a password. Suralink is very user friendly and it will streamline the process of receiving and delivering documents in order to continue to provide you with a positive customer experience.

In this welcome packet you will find step-by-step instructions to help guide you through the use of Suralink. We have also included Suralink's provided Client Tutorial as well as a link to all the training videos on their website. As always, please do not hesitate to contact us with any questions or concerns.

Link to training videos: <https://wgcpas.suralink.com/clientUsers/views/Tutorials.php>

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ACTIVATING YOUR ACCOUNT

Welcome Jimmy Montgomery,

You have been invited to join the Test Client team.



Create your account below to get started

Create Account

A screenshot of a web form titled "Create Account". The form is divided into three main sections. The first section, "Account Information", contains fields for "First Name" (filled with "Jimmy"), "Last Name" (filled with "Montgomery"), "Email" (empty), "Password" (empty), and "Confirm Password" (empty). Below these fields is a checkbox labeled "I have read and understand my responsibilities and the privacy policy." and a green button labeled "Create Your Account". A green arrow points from the bottom left of the page to this button. The second section, "Email Notifications", includes a dropdown menu for "When to send me email notifications:" (set to "Daily Morning") and another dropdown for "My Time Zone:" (set to "Eastern Time Zone"). The third section, "Legal", contains links for "Customer Responsibilities" and "Privacy Policy".

01 You will receive an email stating a WG employee is inviting you to join Suralink.

02 Click the "Create Account" link within the email.

03 You will then be directed to Suralink's website to create your account. Your name and email should automatically generate, all you will have to do is create a password and check the box that states, "I have read and understand my responsibilities and the privacy policy". From here you can also set up the frequency of your notifications. Then click "Create Your Account".

LOGGING IN

WilkinGuttenplan Invited By James Montgomery

Test Client

Active Engagements:

Name	0	10	1	0	0	0	Due Date
Test							none

Reports:

Name	Published	Filename	Last Accessed
Tax Return	12-20-2018	2018 Return.pdf	01/09/2019 by Jimmy Montgomery

My Team:

Active Users

Name	Last Login
Marolis Katulis	12/20/2018
Jimmy Montgomery	01/09/2019

Pending Invitations

Name	Sent
Mat Langenberger	01-02-2019

WilkinGuttenplan Team:

Active Users

Name	Last Login
Karolis Matulis	

Jimmy Montgomery

Live Support | Tutorials | Knowledge Base | Feedback | Legal | My Account | Logout

01

Once your account is created, go to <https://wgcpas.suralink.com/> to log back in and enter your email and password.

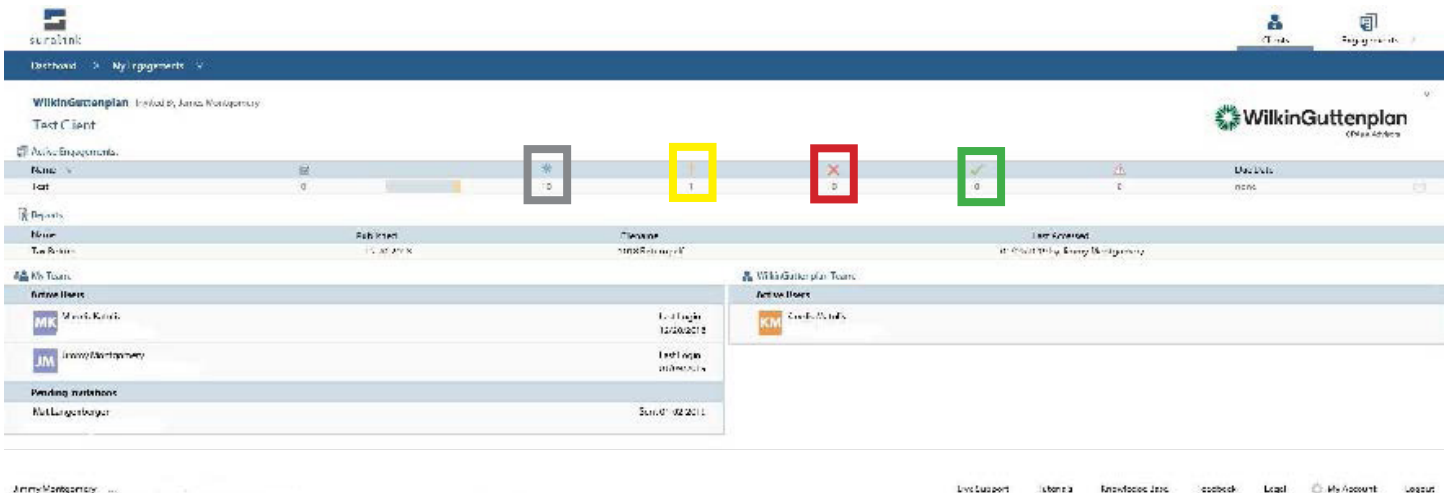
02

When you log into your account for the first time, Suralink has a welcome menu to help you navigate the website.

03

On the bottom right hand corner there are links to the tutorial videos, settings ("My Account"), and the logout button. In the "My Account" link you will be able to change your password and notification settings.

ENGAGEMENTS



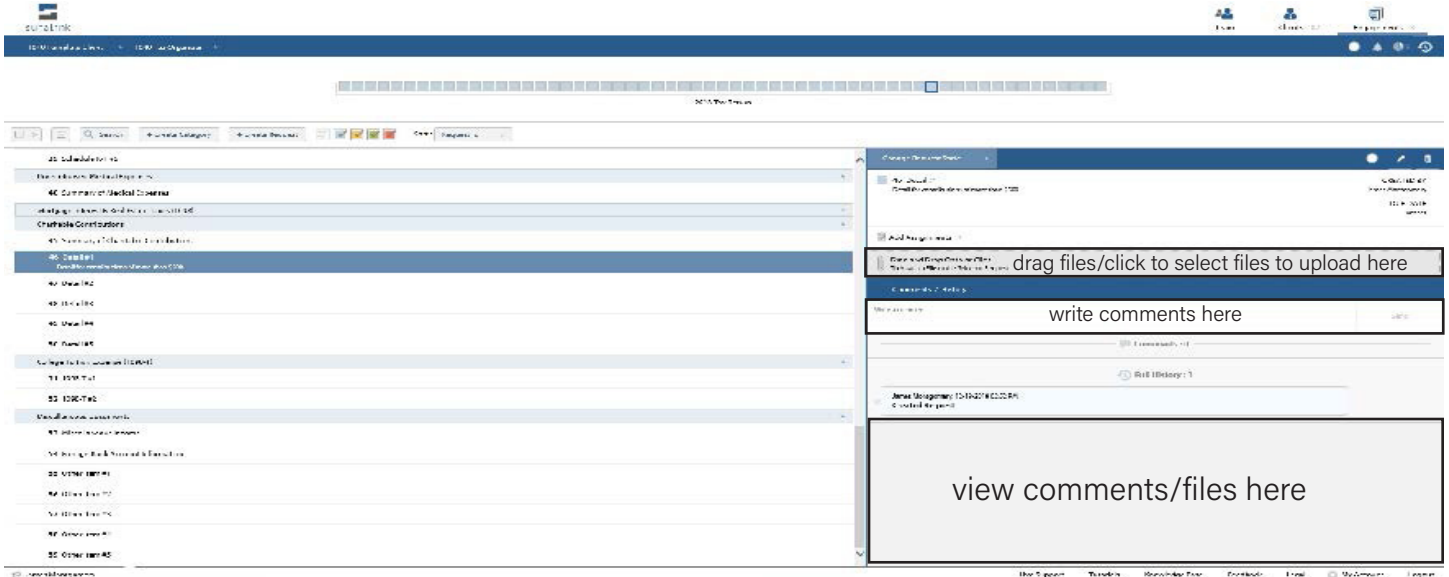
01

When you first login, you will have all your engagements and reports listed.

02

Each engagement will show you the status of each request within the engagement. See the image key below:

!	fulfilled	X	returned
*	outstanding	✓	accepted



03

Click on an engagement to see requests, comments, and upload/download files.

04

When you click on a specific request, a detail pane will appear on the right hand side. This is where you can upload/download files for that request. Within this section you can also add/view comments to clarify issues or ask questions.

UPLOADING/DOWNLOADING FILES

01

Drag and drop the files onto the request line item, or into the detail pane (right hand side) when a request is selected.

02

Click the upload area of either the request line item or the detail pane to select files from your computer to upload.

03

To download a file, click the link for the file you wish to download.

FORGOT YOUR PASSWORD?

01

At the bottom of the login page, click “Forgot your Password?”.

02

Enter your email address that you registered your Suralink account with.

03

You will receive an email to reset your password. Click on the “Reset Password” link.

04

You will be then be directed to Suralink’s website to create a new password.



Welcome to the Suralink Professional Document Exchange system.

This quick tutorial should help you get familiar with the system's layout and functionality from the perspective of a Client User. If you have any questions at all, please don't hesitate to reach out us at support@suralink.com. We want your experience with Suralink to be as seamless as possible. Additionally, if there is something you would like the system to do that it currently does not, please let us know!

LEGAL NOTICE:

This guide is intended for clients of firms who have purchased the Suralink Professional Document Exchange system only. If you are not either a customer of Suralink, or the client of a customer of Suralink, you are not authorized to view this document. Customers of Suralink are only authorized to provide this document to their own clients who will be using the system.

LOGGING IN- ENGAGEMENTS SCREEN

When you first log in, you will be brought to your engagements screen. Here you will see a list of engagements for your company. You can launch an engagement by doing either of the following below.

The screenshot shows the Suralink web application interface. The browser address bar displays <https://www.auditrequests.com/clientUsers/views/Engagements.php>. The Suralink logo is in the top left. In the top right, there are buttons for 'Firms' and 'Engagements', with the 'Engagements' button highlighted by a red box. Below the header, a blue bar shows 'Manage > 3 Engagements'. The main content area is titled 'ABC Co. Invited By Tim Ballantyne - Suralink' and 'Active Engagements'. It contains a table with the following data:

Name	Outstanding	Fulfilled	Rejected	Approved	Due Date	
12/31/14 audit	6	8	1	3	05-20-2014	Launch
Q1 2014 Review	0	0	0	0	05-30-2014	Launch
Q2 2014 Review	10	0	0	0	05-30-2014	Launch

The 'Launch' buttons in the table are highlighted by a red box. At the bottom of the page, there is a footer with the text 'Rabs McJabs - tim3@suralink.com' and links for 'Help', 'Feedback', 'My Account', and 'Logout'.

01

Click the “Launch” button next to that engagement’s name, or

02

Hover your mouse over the “Engagements” button in the top right of the window, and click on the engagement you want to launch from the drop down list.

REQUEST LINE ITEMS

After launching an engagement you will be brought to this area which is the heart of Suralink, it is a dynamic request list integrated with a secure file portal. The red box on the left is outlining a request line item. These are the individual requests of documents that your accounting firm needs from you. You would normally see these items in a spreadsheet request list that your firm typically provides.

The screenshot displays the Suralink web application interface. The top navigation bar includes the Suralink logo, user information (Firms > Engagements >), and a breadcrumb trail (ABC Co. > 12/31/14 audit >). Below the navigation bar, there are filters for request categories: General / Planning, Cash, Fixed Assets, AR & Sales, and Equity. A search bar and a 'Sort: Request State' dropdown are also present. The main content area lists request line items under the 'General / Planning' category. A red box highlights the 'Engagement Letter' item, which includes a warning icon, the text 'Engagement Letter', a file icon, 'Firm provided (1) file', and a download icon. Below this, there are other items like 'Employee Listing' and 'Articles of Incorporation'. The right sidebar shows details for the selected 'Engagement Letter' item, including a 'Change Request State' button, a description, a 'CREATED BY' field (Tim Ballantyne), a 'DUE DATE' field (not set), a file upload area, and a list of attached files (Signed Eng Letter.docx). The bottom of the page shows the user's name (Rabs McJabs - tim3@suralink.com) and navigation links (Help, Feedback, My Account, Logout).

Suralink

https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14

suralink

ABC Co. > 12/31/14 audit >

General / Planning Cash Fixed Assets AR & Sales Equity

Search Sort: Request State >

General / Planning

Controls Descriptions
Please provide control descriptions for all assets.

! Engagement Letter Firm provided (1) file (1 file) [Download]

Please sign and return.

Employee Listing Firm provided (1) file

List of all employees and their status for the 2013 fiscal year.

Articles of Incorporation

Cash

Bank Reconciliations Firm provided (1) file

Bank reconciliations for Dec and Jan for all bank accounts.

Bank Confirmationnnnnnn Firm provided (2) files (2 files) [Download]

Please fill out the attached bank confirmation template, sign, and return to us. We will handle the mailing of this confirmation.

Bank Statements 09-29-2014

Please provide bank statements for all bank accounts as of Dec 2013 and Jan 2013.

Fixed Assets

Rabs McJabs - tim3@suralink.com

Help Feedback My Account Logout

Change Request State > [X]

Engagement Letter
Please sign and return.

CREATED BY
Tim Ballantyne

DUE DATE
not set

Drag and Drop or Click
To Attach a Firm File

Your Attached Files

Download Files Delete Files

Total Files : 1

Signed Eng Letter.docx
Created By : Rabs McJabs 05-20-2014

Request History

Write a comment... +

REQUEST DETAIL PANE

When a request line item is selected, a detail of the request is displayed in the detail pane on the right. This area not only shows the details of the request, it also provides another access point to the files as well as a comment section for communication and history for the specific request.

The screenshot displays the Suralink web application interface. The browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The application header includes the Suralink logo, user information (Firms > Engagements >), and a navigation bar with categories: General / Planning, Cash, Fixed Assets, AR & Sales, and Equity. Below the navigation bar, there is a search bar and a sort dropdown set to 'Request State'. The main content area lists request items under each category. The 'Engagement Letter' item is selected, and a detail pane is open on the right. This pane shows the request details, including the title 'Engagement Letter', the instruction 'Please sign and return.', the creator 'Tim Ballantyne', and the due date 'not set'. It also displays a section for 'Your Attached Files' with one file attached: 'Signed Eng Letter.docx' created by 'Rabs McJabs' on '05-20-2014'. At the bottom of the detail pane, there is a 'Request History' section with a comment input field.

General / Planning

- Controls Descriptions
Please provide control descriptions for all areas.
- Engagement Letter** [Firm provided \(1\) file](#) (1 file)
- Employee Listing [Firm provided \(1\) file](#)
List of all employees and their status for the 2013 fiscal year.
- Articles of Incorporation

Cash

- Bank Reconciliations** [Firm provided \(1\) file](#)
Bank reconciliations for Dec and Jan for all bank accounts.
- Bank Confirmationnnnnnn** [Firm provided \(2\) files](#) (2 files)
Please fill out the attached bank confirmation template, sign, and return to us. We will handle the mailing of this confirmation.
- Bank Statements** 09-29-2014
Please provide bank statements for all bank accounts as of Dec 2013 and Jan 2013.

Fixed Assets

Change Request State

Engagement Letter
Please sign and return.

CREATED BY
Tim Ballantyne

DUE DATE
not set

Drag and Drop or Click
To Attach a Firm File

Your Attached Files

Download Files Delete Files

Total Files : 1

Signed Eng Letter.docx
Created By : Rabs McJabs 05-20-2014

Request History

Write a comment...

Rabs McJabs - tim3@suralink.com

Help Feedback My Account Logout

FIRM FILES

Each request has Firm files and Client Files:

Firm files are documents the Firm provides to you, the Client. (The access point highlighted below). Documents provided by the Firm may include: documents for your own records, a list of selections, or a template (such as a bank confirmation template) that you will need to do something with and return.

If the firm has provided a file to be used for a specific request, you will see a blue link on the request line item that says "Firm provided (x) files." Clicking this link will allow you to download the files.

The screenshot displays the Suralink web application interface. The browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The page header includes the Suralink logo and navigation links for "Firms" and "Engagements". Below the header, the user is logged in as "ABC Co." and viewing the "12/31/14 audit".

The main content area is divided into sections for different audit categories: "General / Planning", "Cash", "Fixed Assets", "AR & Sales", and "Equity". The "General / Planning" section is currently selected and expanded, showing a list of requests. A red box highlights the "Firm provided (1) file" link next to the "Engagement Letter" request. Other requests in this section include "Employee Listing" (Firm provided (1) file) and "Articles of Incorporation".

The "Cash" section is also expanded, showing requests for "Bank Reconciliations" (Firm provided (1) file), "Bank Confirmationnnnnnn" (Firm provided (2) files), and "Bank Statements" (due 09-29-2014).

On the right side of the screen, a "Change Request State" panel is visible, showing details for the "Engagement Letter" request, including the creator "Tim Ballantyne" and the due date "not set". Below this panel, there is a section for "Your Attached Files" showing a single file "Signed Eng Letter.docx" created by "Rabs McJabs 05-20-2014".

The footer of the page includes the user's email "Rabs McJabs - tim3@suralink.com" and links for "Help", "Feedback", "My Account", and "Logout".

CLIENT FILES

Each request has Firm Files and Client Files:

Client files are the documents that you, the Client, provide back to the Firm. You can upload files to a request in two ways:

01

Drag and drop the files onto the request line item, or into the detail pane (the areas highlighted below), or

02

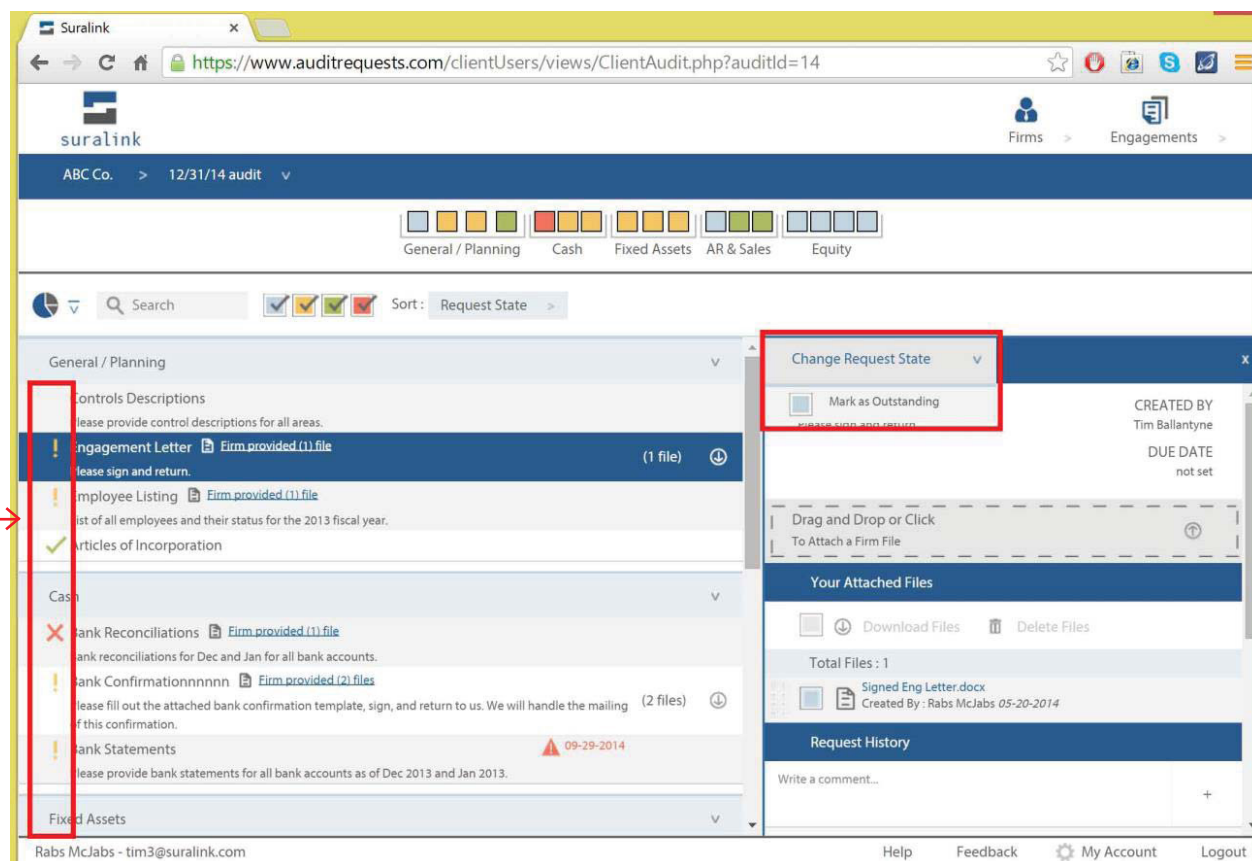
Click the upload area of either the request line item or the detail pane to select files from your computer to upload.

Once uploaded, the documents stay attached to the request line item throughout the engagement. The Firm can now easily access your documents for testing.

The screenshot displays the Suralink web application interface for a client audit request. The browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The interface includes a navigation bar with the Suralink logo and user information. Below the navigation bar, there are tabs for 'General / Planning', 'Cash', 'Fixed Assets', 'AR & Sales', and 'Equity'. A search bar and a 'Sort: Request State' dropdown are also present. The main content area lists various request items, including 'Engagement Letter', 'Employee Listing', and 'Articles of Incorporation'. The 'Engagement Letter' item is highlighted with a red box, showing a 'Firm provided (1) file' status. A 'Change Request State' modal is open on the right, displaying a 'Drag and Drop or Click To Attach a Firm File' area and a list of 'Your Attached Files' including 'Signed Eng Letter.docx'.

REQUEST STATUS

Once you upload a document to a request, the status of that request changes from “Outstanding” (grey) to “Fulfilled” (orange). After the firm evaluates the documents they can change the request status to either “Accepted” (green) or “Rejected” (red) depending on whether the supplied documents are sufficient for the firm’s needs. The status of each request is indicated by a specific color and can be changed in the detail pane view. (Note: Client users can only change between outstanding and fulfilled. Professionals on the firm side can change requests to any state)



Request Status & Colors:

Grey	Outstanding	This is the default status and these requests need action taken on them.
Orange	Fulfilled	This is the status after the client has provided the necessary documents.
Green	Accepted	This is the status of a completed request that needs no more action.
Red	Rejected	This is a request that does not suffice for the firm’s purposes and needs additional action. Any rejected requests should be accompanied by an explanation of why they were rejected in the detail view.

COMMENT AND HISTORY

Each request has a section that displays both the complete history of that request, along with comments made on that request. Each action taken, from creating the request to uploading files, is logged in the history. Both Firm and Client users can also make comments on a request in the box that says “Write a comment...”

You may add a comment to provide additional instructions to a file that has been uploaded, to ask for clarification, or to communicate anything related to that request or its files.

The screenshot displays the Suralink web application interface. The browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The page header includes the Suralink logo and navigation links for "Firms" and "Engagements". Below the header, the breadcrumb trail shows "ABC Co." and "12/31/14 audit".

The main content area is divided into sections for different audit categories: "General / Planning", "Cash", "Fixed Assets", "AR & Sales", and "Equity". The "General / Planning" section is expanded, showing a list of requests. The "Engagement Letter" request is highlighted, indicating it has been "Firm provided (1) file" and is in a "Fulfilled" state. Other requests include "Employee Listing" and "Articles of Incorporation".

A "Request History" sidebar is open on the right, showing a list of previous messages. The history includes:

- Tim Ballantyne: 09-25-2014 11:03 AM
Changed Request Status :
Fulfilled
- Tim Ballantyne: 09-25-2014 10:57 AM
Downloaded File :
Signed Eng Letter.docx
- Tim Ballantyne: 08-26-2014 03:02 PM
Downloaded File :
Signed Eng Letter.docx

The bottom of the page features a footer with the user's name "Rabs McJabs - tim3@suralink.com" and navigation links for "Help", "Feedback", "My Account", and "Logout".

SEARCHING AND SORTING

Located above the request line items, the search and sorting bar can be used to quickly get to what you are looking for.

01

The search bar will search request name and description.

02

The filter boxes with check-marks will hide or show requests for the request state selected (outstanding, fulfilled, accepted, rejected)

03

The sort drop-down box will sort requests based on the criteria selected

The screenshot displays the Suralink web application interface. At the top, the browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The Suralink logo is visible in the top left corner. Below the logo, the breadcrumb navigation shows "ABC Co. > 12/31/14 audit". A row of filter boxes with colored squares and checkmarks is present, labeled "General / Planning", "Cash", "Fixed Assets", "AR & Sales", and "Equity". A search bar with a magnifying glass icon and a "Search" button is highlighted with a red box. To the right of the search bar is a "Sort" dropdown menu currently set to "Request State". Below the search bar, the main content area is divided into sections for "General / Planning", "Cash", and "Fixed Assets". The "General / Planning" section includes items like "Engagement Letter" (with a "Firm provided (1) file" link), "Employee Listing" (with a "Firm provided (1) file" link), and "Articles of Incorporation". The "Cash" section includes "Bank Reconciliations" (with a "Firm provided (1) file" link), "Bank Confirmationnnnnn" (with a "Firm provided (2) files" link), and "Bank Statements". The "Fixed Assets" section is partially visible. On the right side, a "Change Request State" sidebar is open, showing a "Request History" section with a "Write a comment..." text area and a "View 13 previous messages" link. The message history shows three messages from Tim Ballantyne: "Changed Request Status : Fulfilled" (09-25-2014 11:03 AM), "Downloaded File : Signed Eng Letter.docx" (09-25-2014 10:57 AM), and "Downloaded File : Signed Eng Letter.docx" (08-26-2014 03:02 PM). The footer of the page includes the text "Rabs McJabs - tim3@suralink.com" and links for "Help", "Feedback", "My Account", and "Logout".

QUICK VIEW BAR

Across the top of the page is the Quick View Bar. This section provides a different way to display the same requests that you see down in the request line item section.

You can see the different categories and the requests that are in each category. Each box represents a request and the color of the box represents that request's status. Hovering over a box displays the name of the request, and clicking the box selects the request in the request line item section.

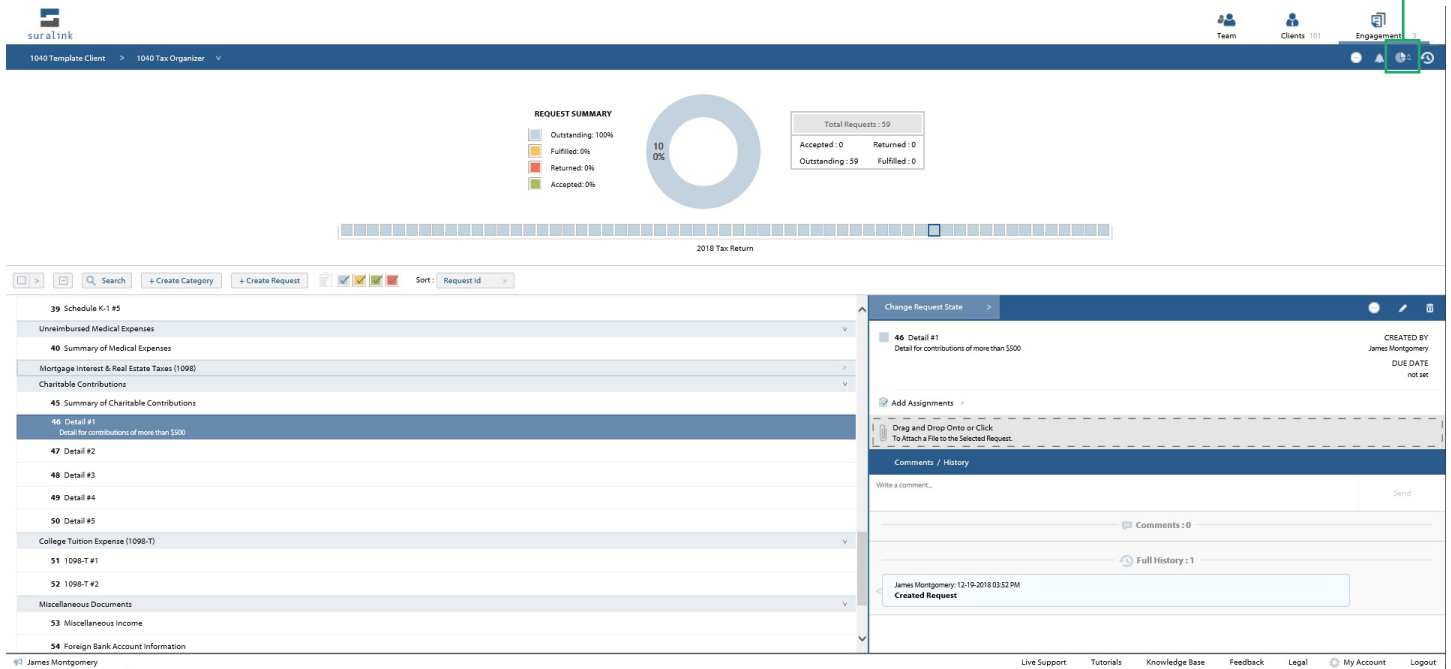
The screenshot displays the Suralink web application interface. At the top, the browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The Suralink logo is on the left, and navigation links for 'Firms' and 'Engagements' are on the right. Below the header, a blue bar contains the client name 'ABC Co.' and the audit period '12/31/14 audit'. A red box highlights the 'Quick View Bar' in the center, which shows a list of request categories with colored status indicators: 'Articles of Incorporation' (yellow), 'General / Planning' (light blue), 'Cash' (orange), 'Fixed Assets' (yellow), 'AR & Sales' (light blue), and 'Equity' (light blue). Below this bar, the main content area is divided into two columns. The left column lists request categories: 'General / Planning' (with sub-items: Controls Descriptions, Engagement Letter (1 file), Employee Listing (1 file), and Articles of Incorporation), 'Cash' (with sub-items: Bank Reconciliations, Bank Confirmationnnnnn (2 files), and Bank Statements), and 'Fixed Assets'. The right column is a sidebar titled 'Change Request State' which includes a 'Drag and Drop or Click To Attach a Firm File' area, 'Your Attached Files' (showing 'Signed Eng Letter.docx' created by Rabs McLabs on 05-20-2014), and a 'Request History' section with a comment field. The footer of the page includes the user name 'Rabs McLabs - tim3@suralink.com' and links for 'Help', 'Feedback', 'My Account', and 'Logout'.

DASHBOARD

The top section is the dashboard which gives quick information about the status of the engagement, as well as notifications on past due requests or items that require follow-up.

01

This section can be expanded or minimized with the Dashboard button.



That should get you started! Please let us know if you have any questions, comments, or suggestions at any time through our feedback system that is hiding in the bottom right of the screen.