WELCOME TO
SURALINK!

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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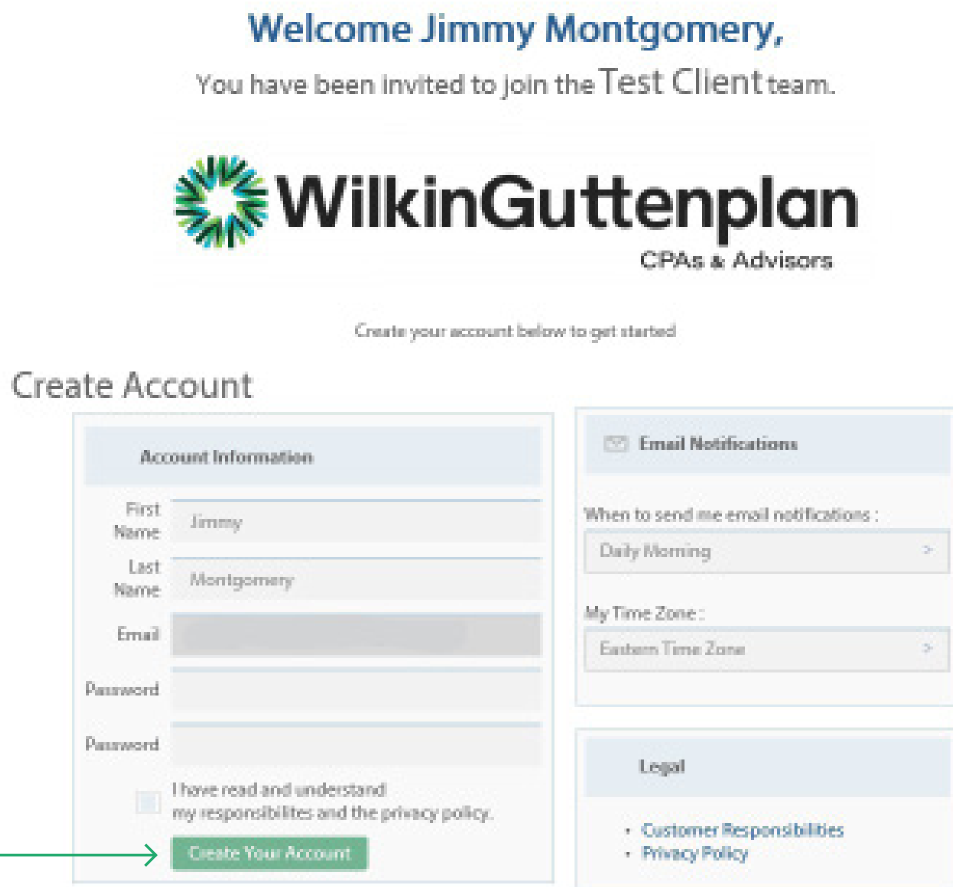
CLICKABLE LINKS BELOW

ACTIVATING YOUR ACCOUNT

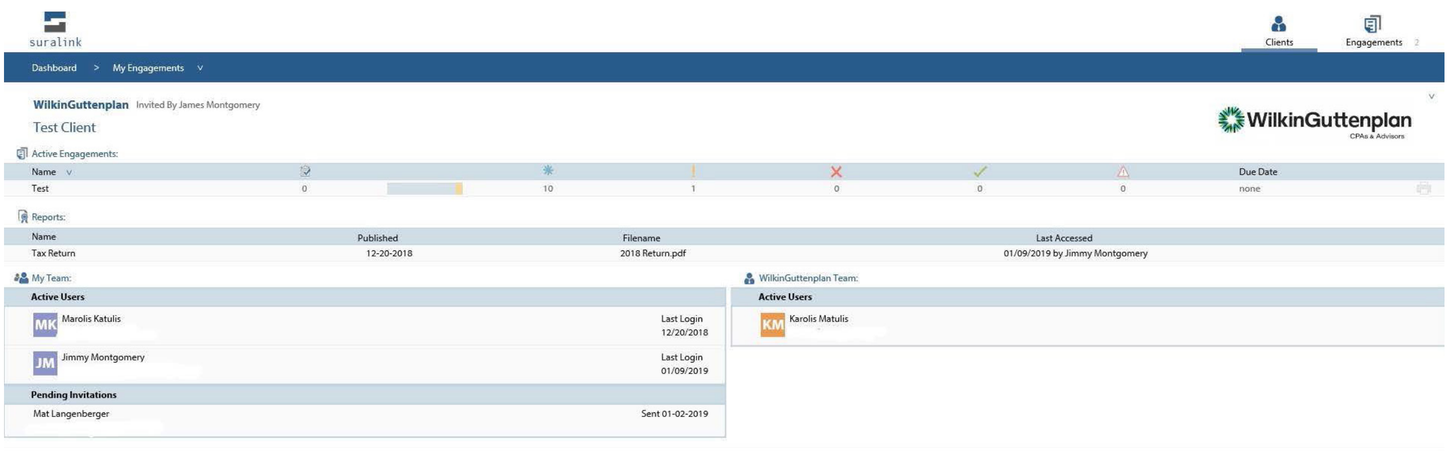


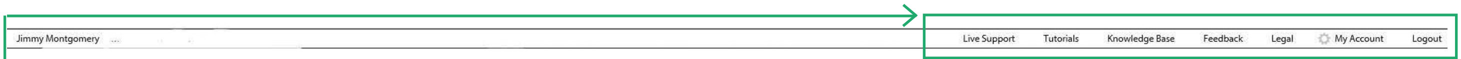
01 You will receive an email stating a WG employee is inviting you to join Suralink.

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



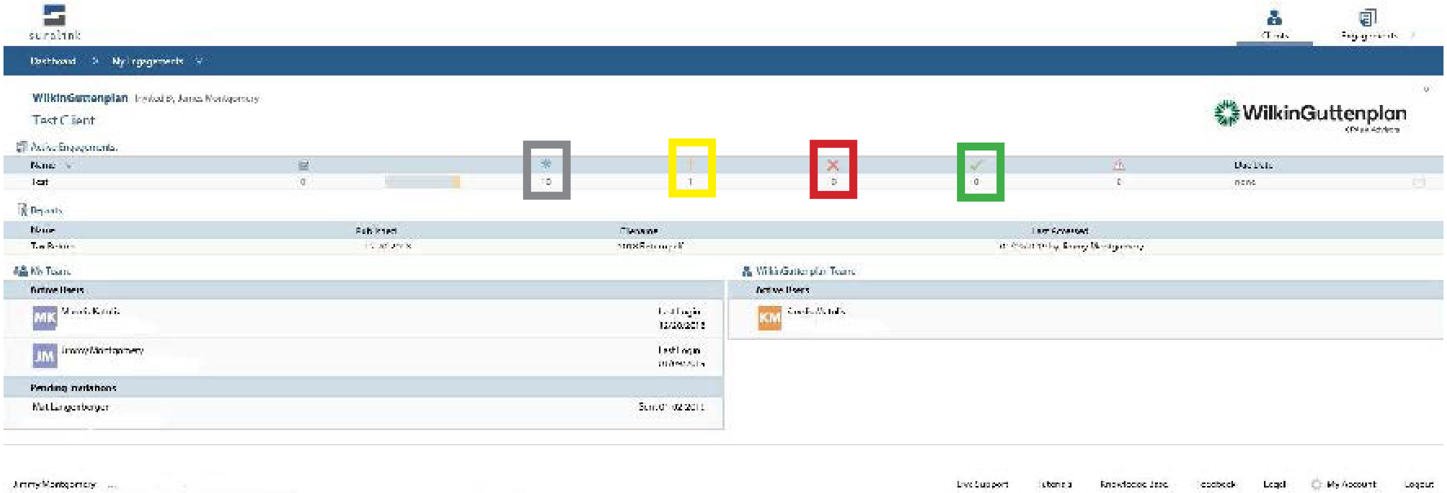


01 Once your account is created, go to https://wgcpas.suralink.com/ to log back in and enter your email and password.

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.

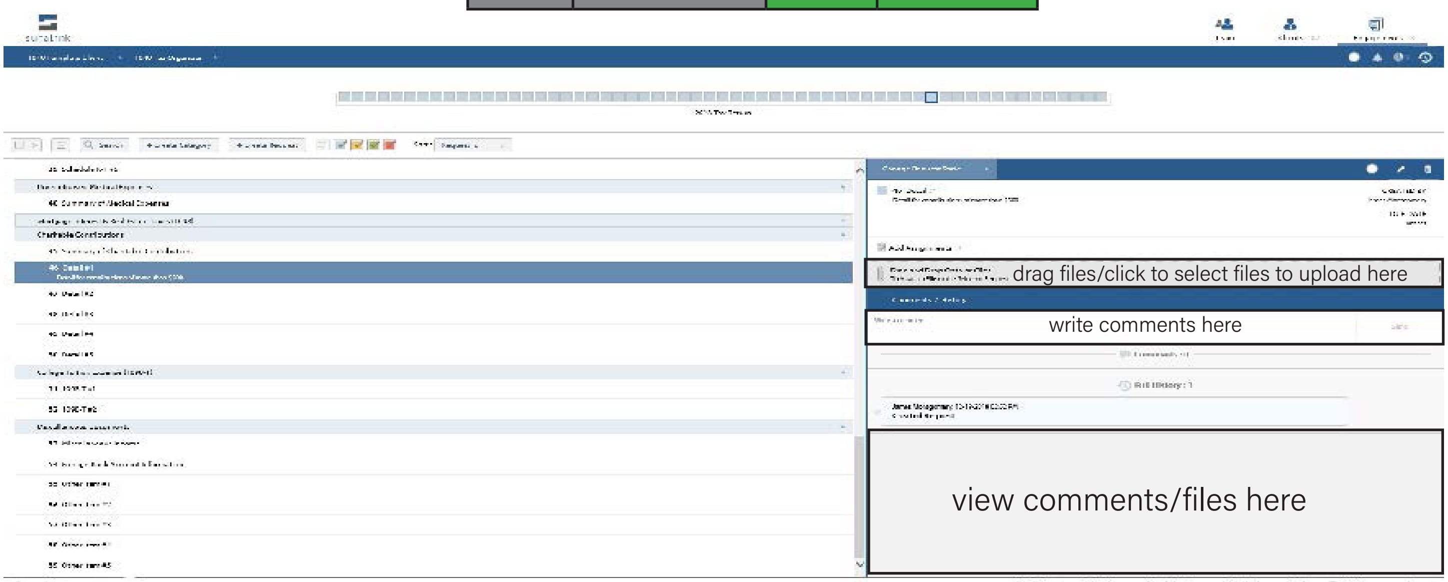
ENGAGEMENTS



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.

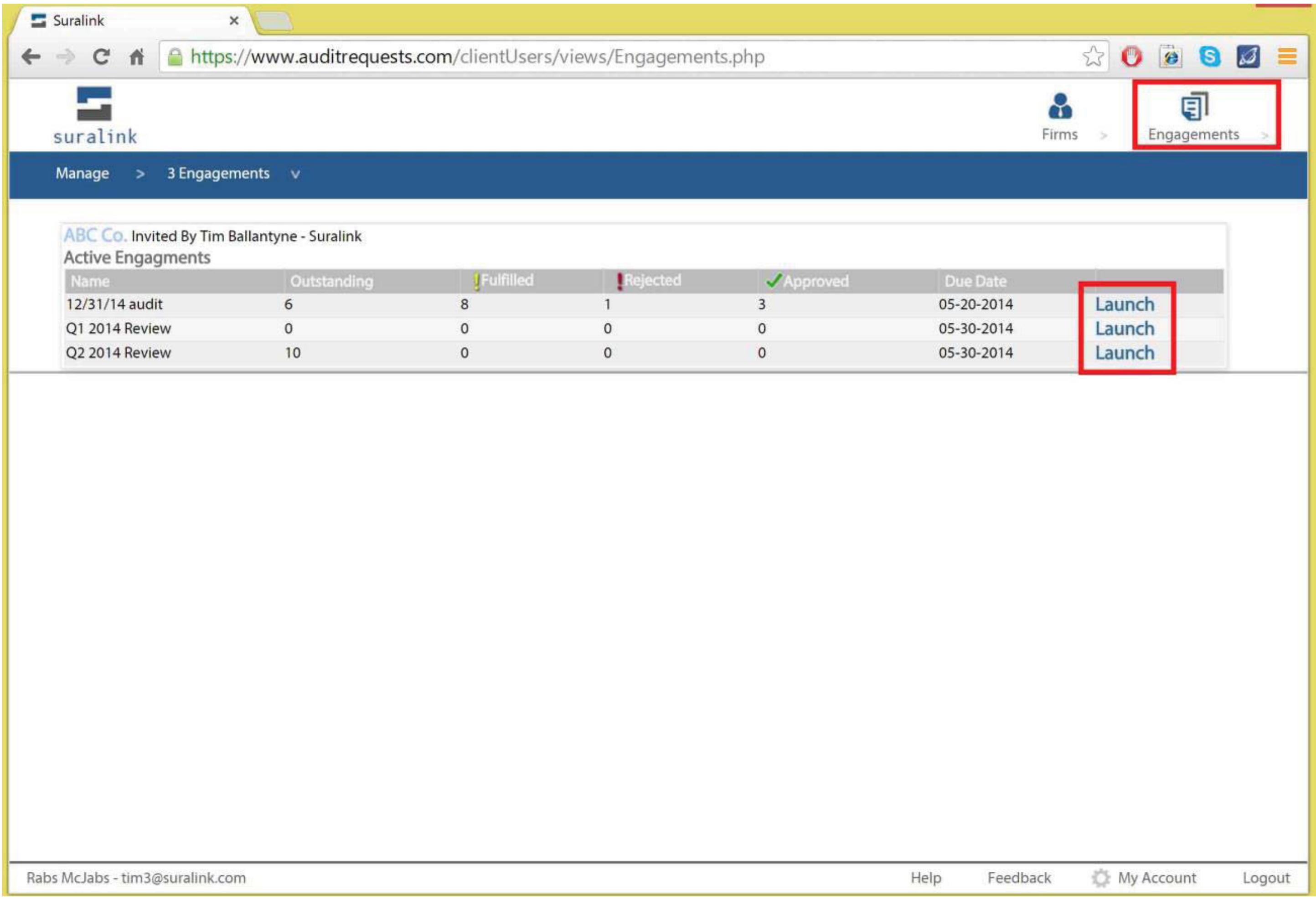
This quick tutorial should help you get familiar with the system's layout and functionality from the perspective of a Client User. If you have any questions at all, please don't hesitate to reach out us at support@suralink.com. We want your experience with Suralink to be as seamless as possible. Additionally, 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.

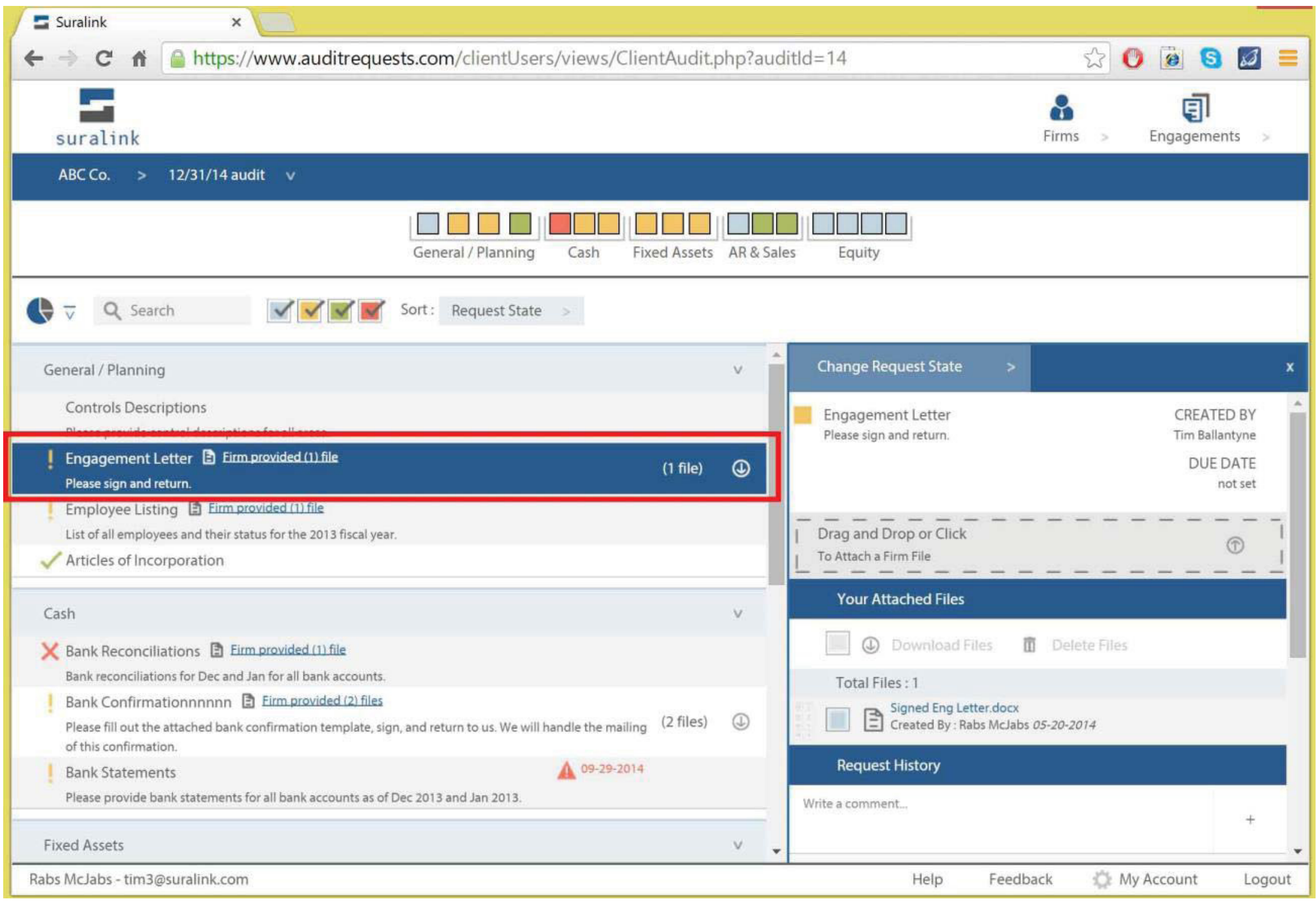


01 Click the “Launch” button next to that engagement’s name, or

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.

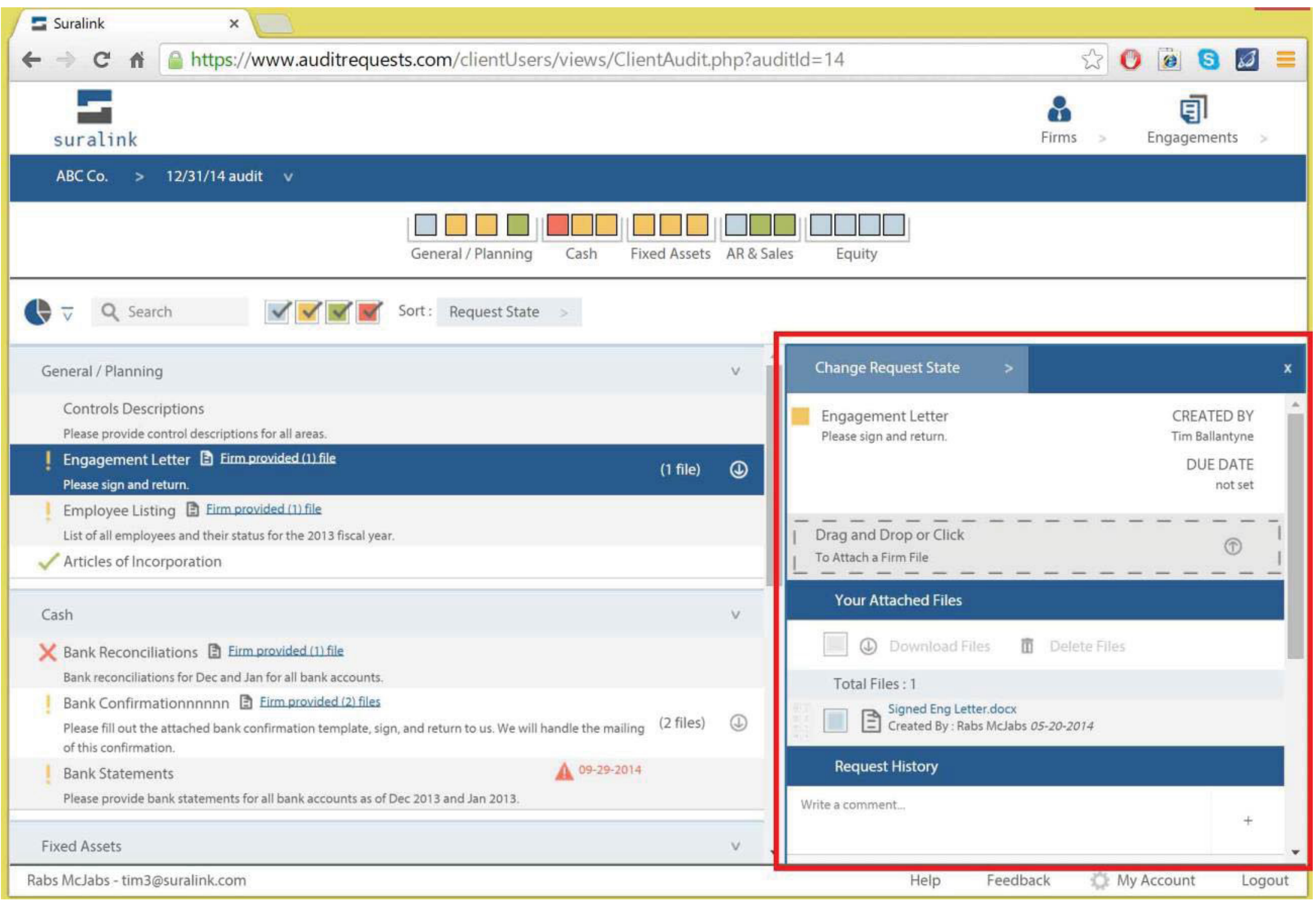
REQUEST LINE ITEMS

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.



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.

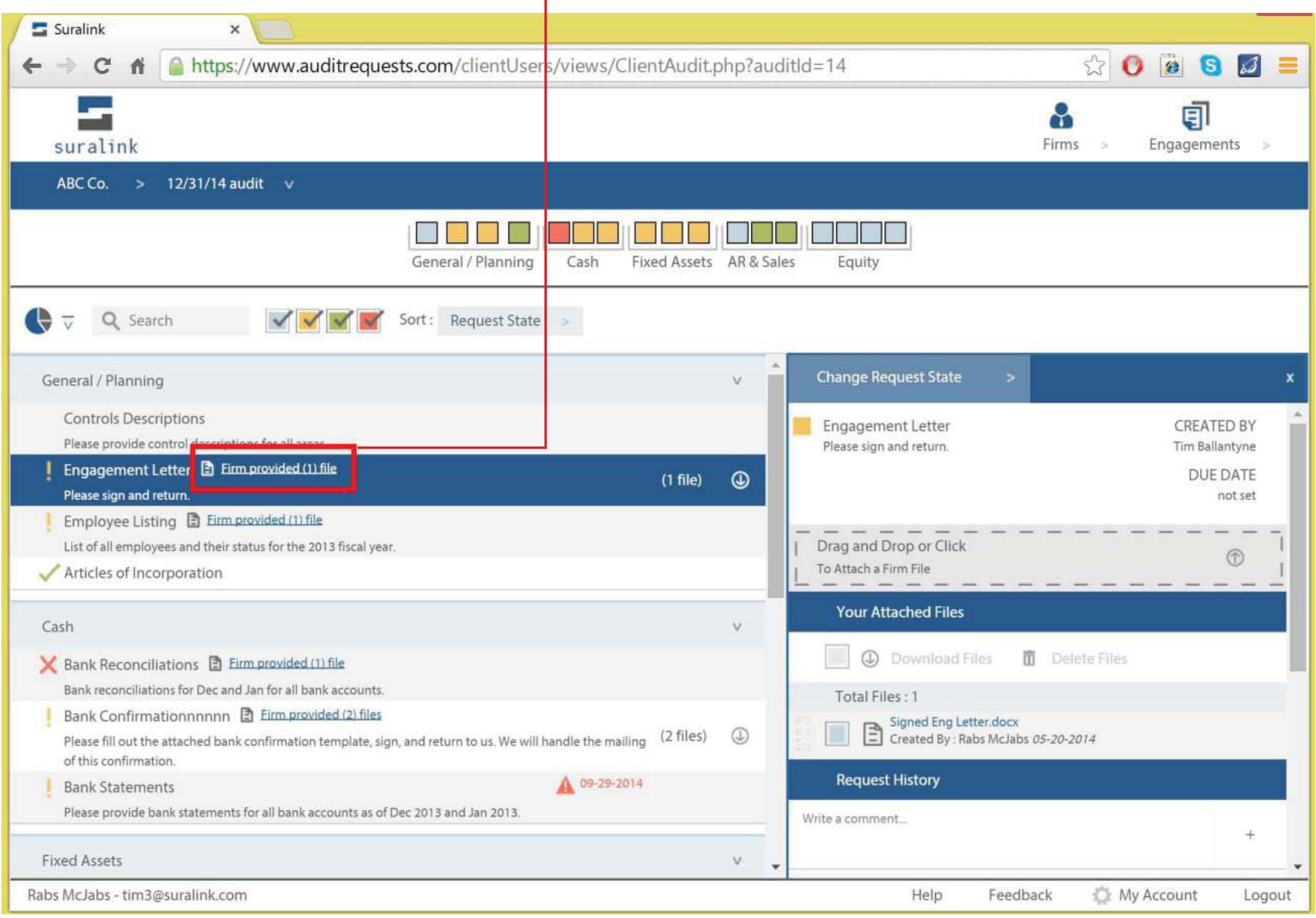


FIRM FILES

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.



CLIENT FILES

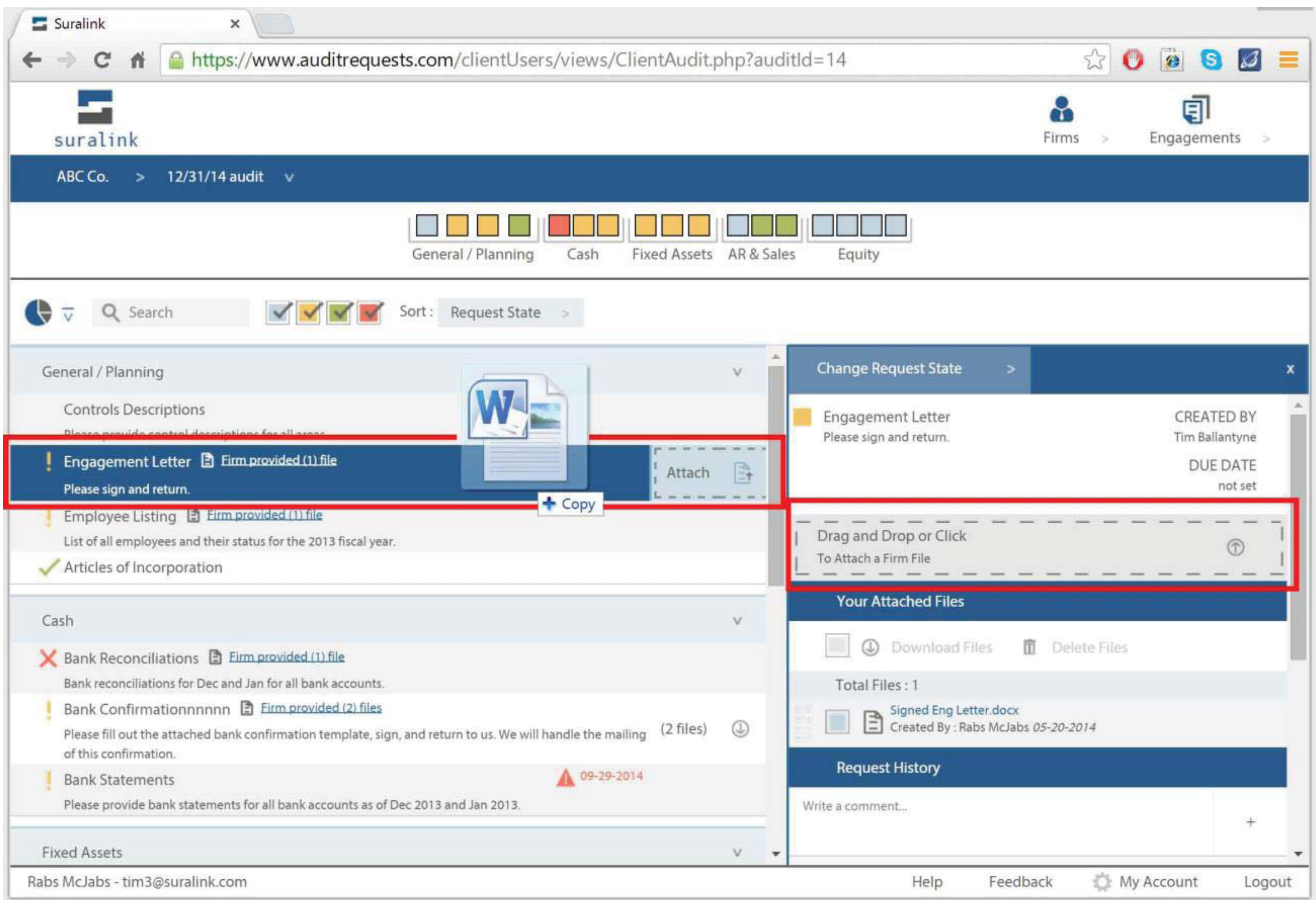
Each request has Firm Files and Client Files:

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

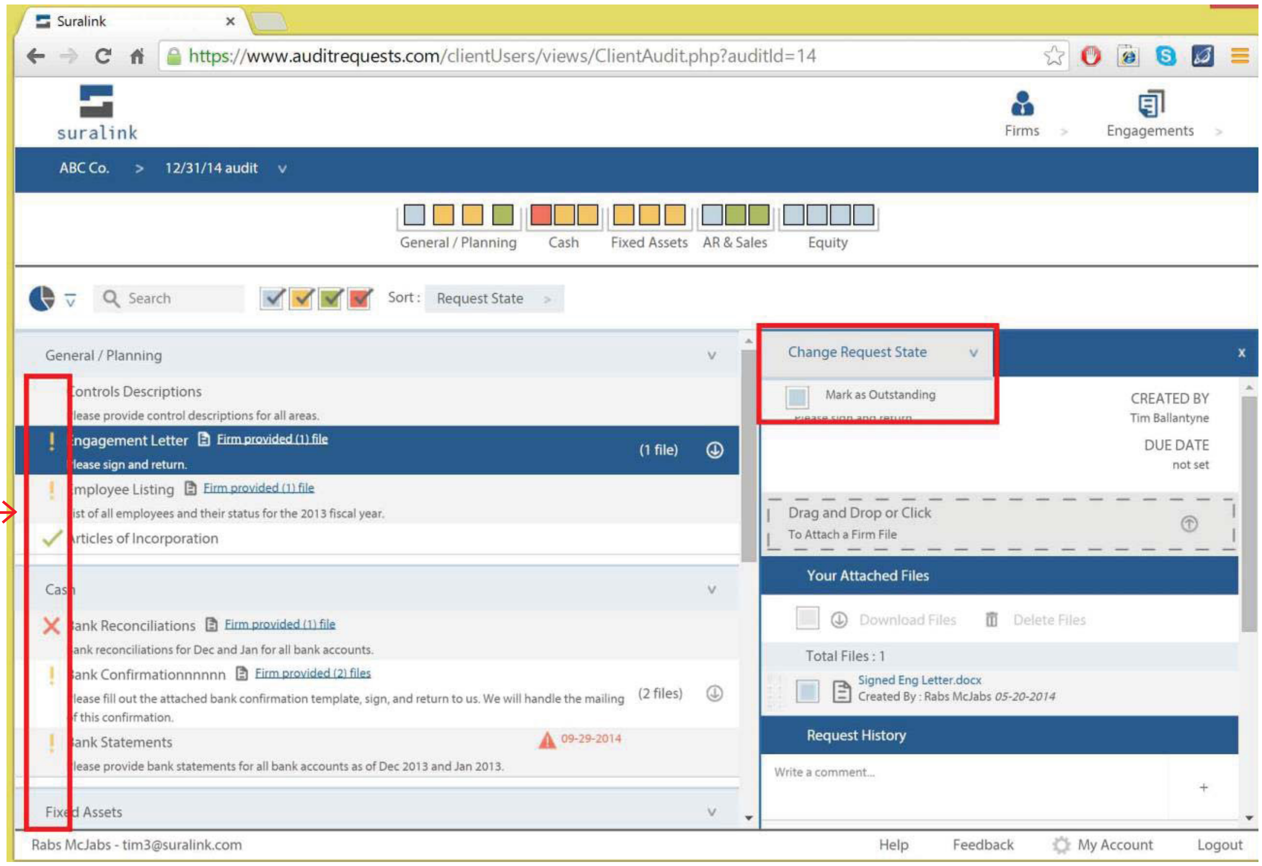
02 Click the upload area of either the request line item or the detail pane to select files from your computer to upload.

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



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)



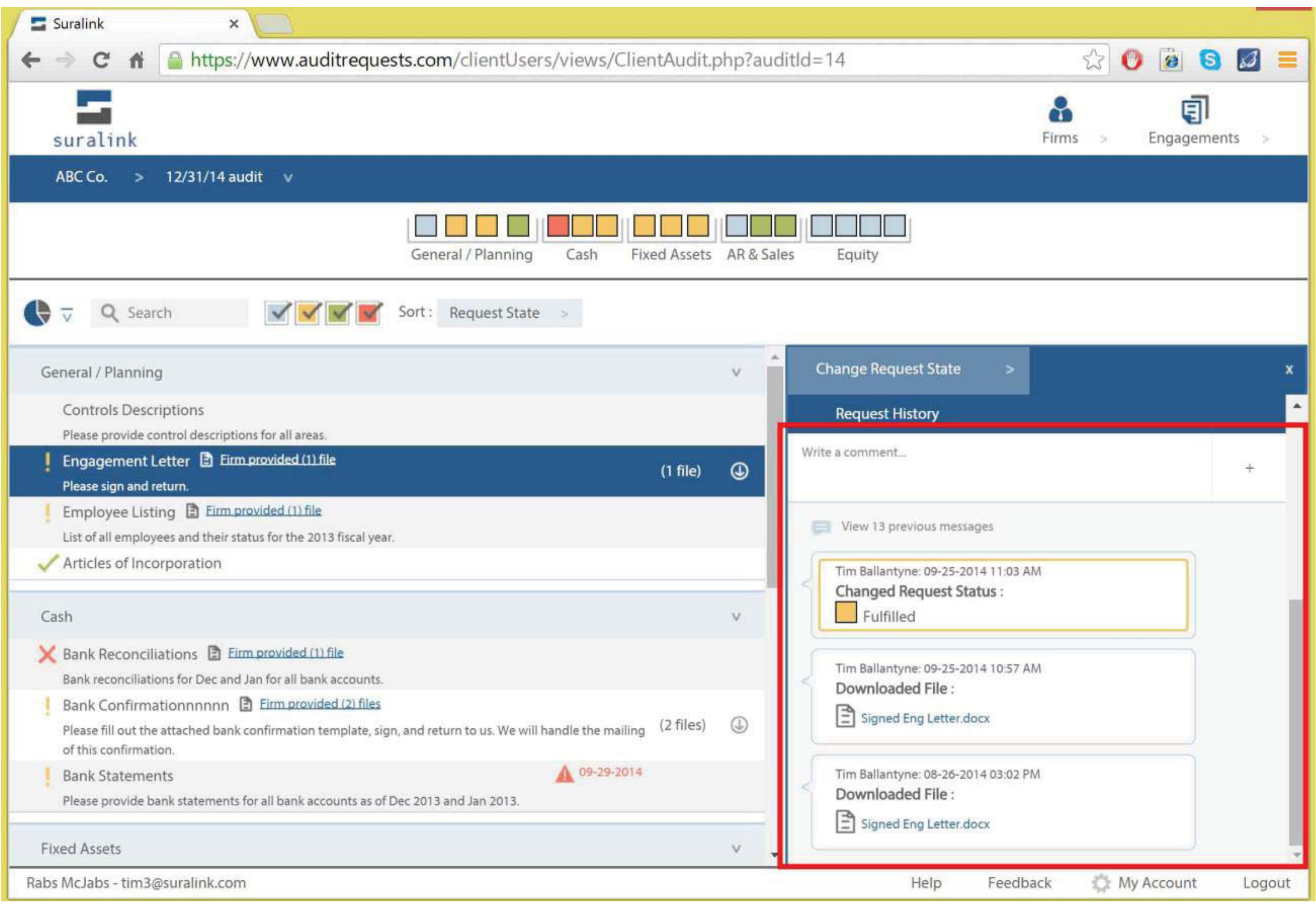
Request Status & Colors:

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.



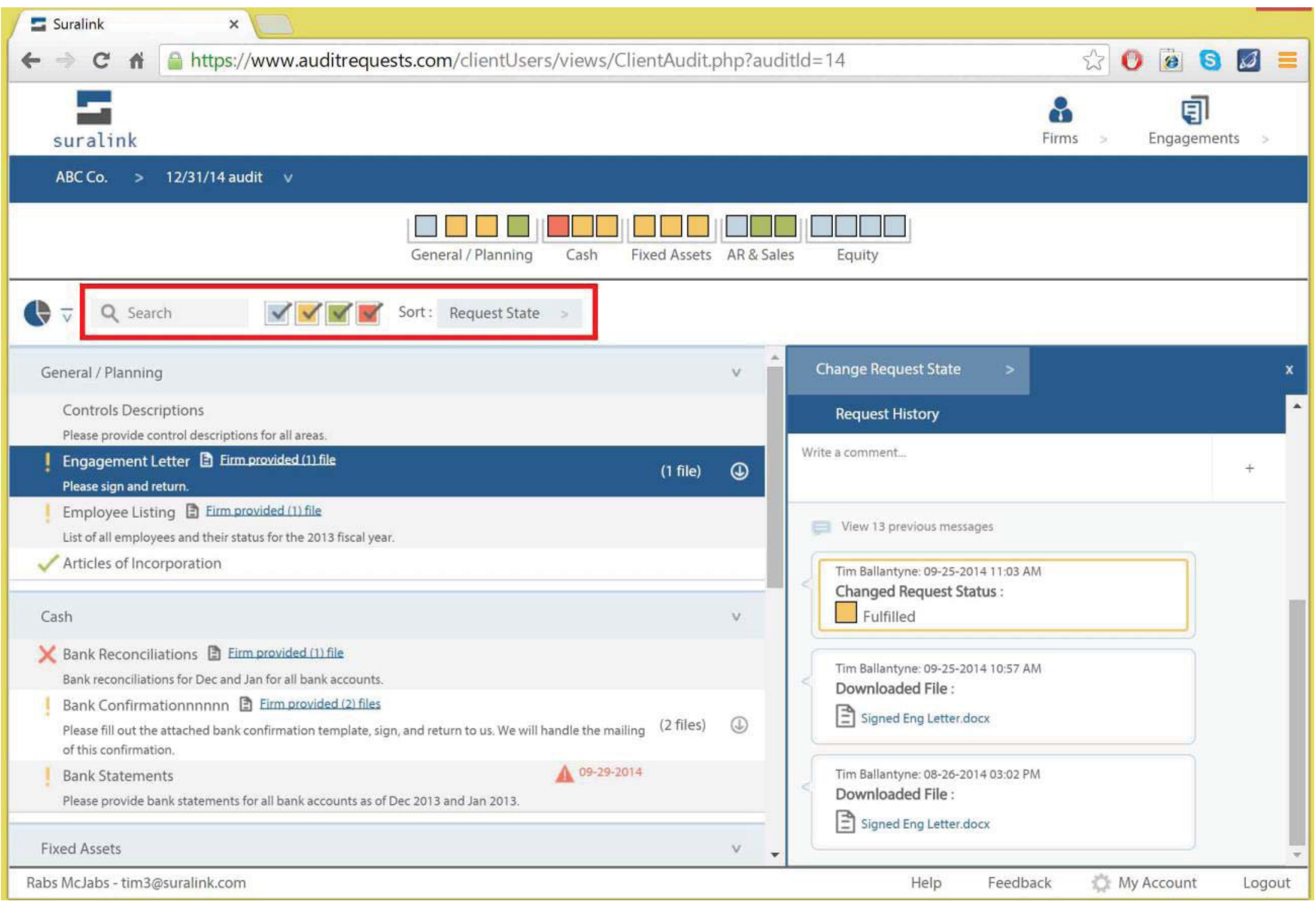
SEARCHING AND SORTING

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)

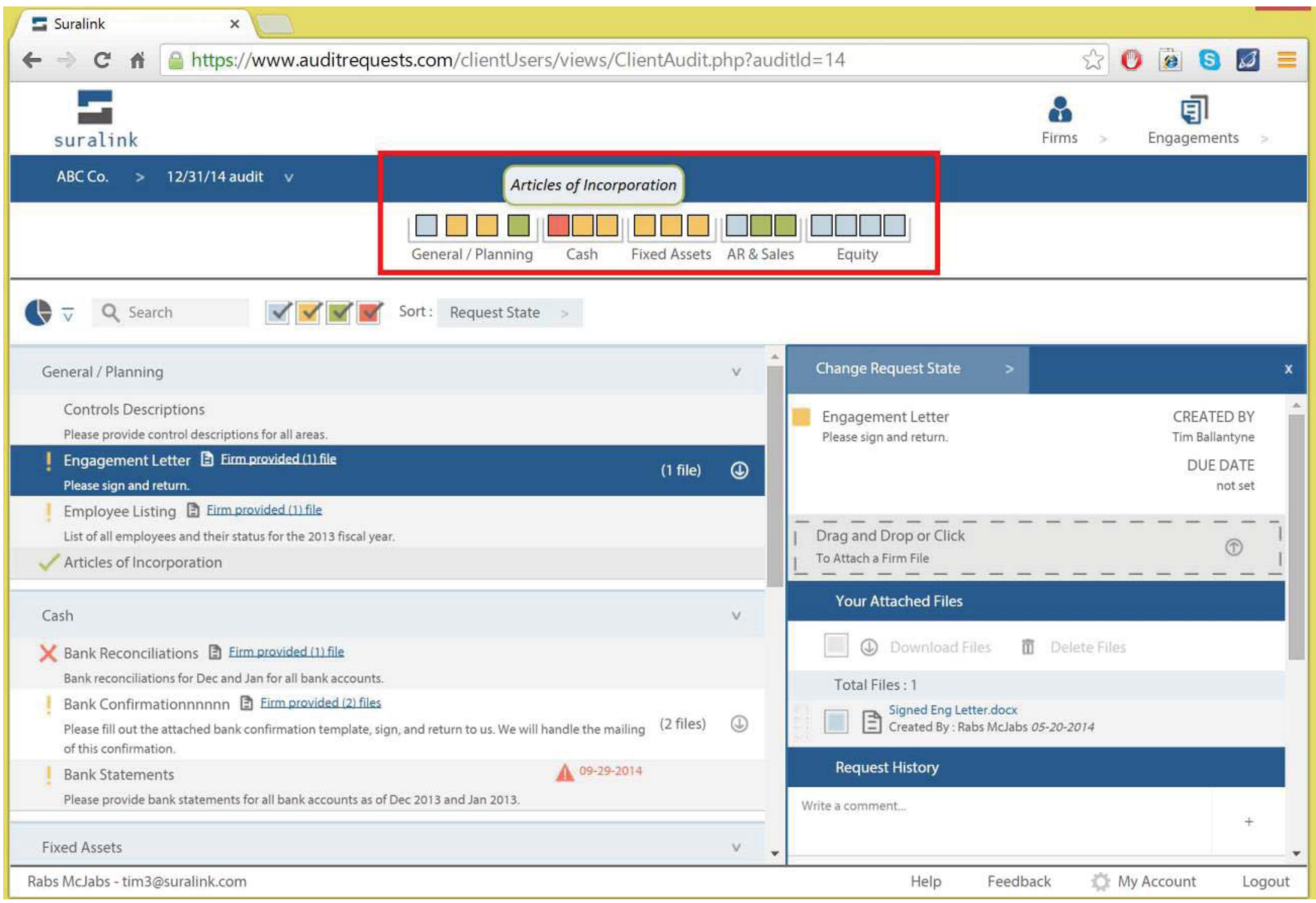
03 The sort drop-down box will sort requests based on the criteria selected



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.

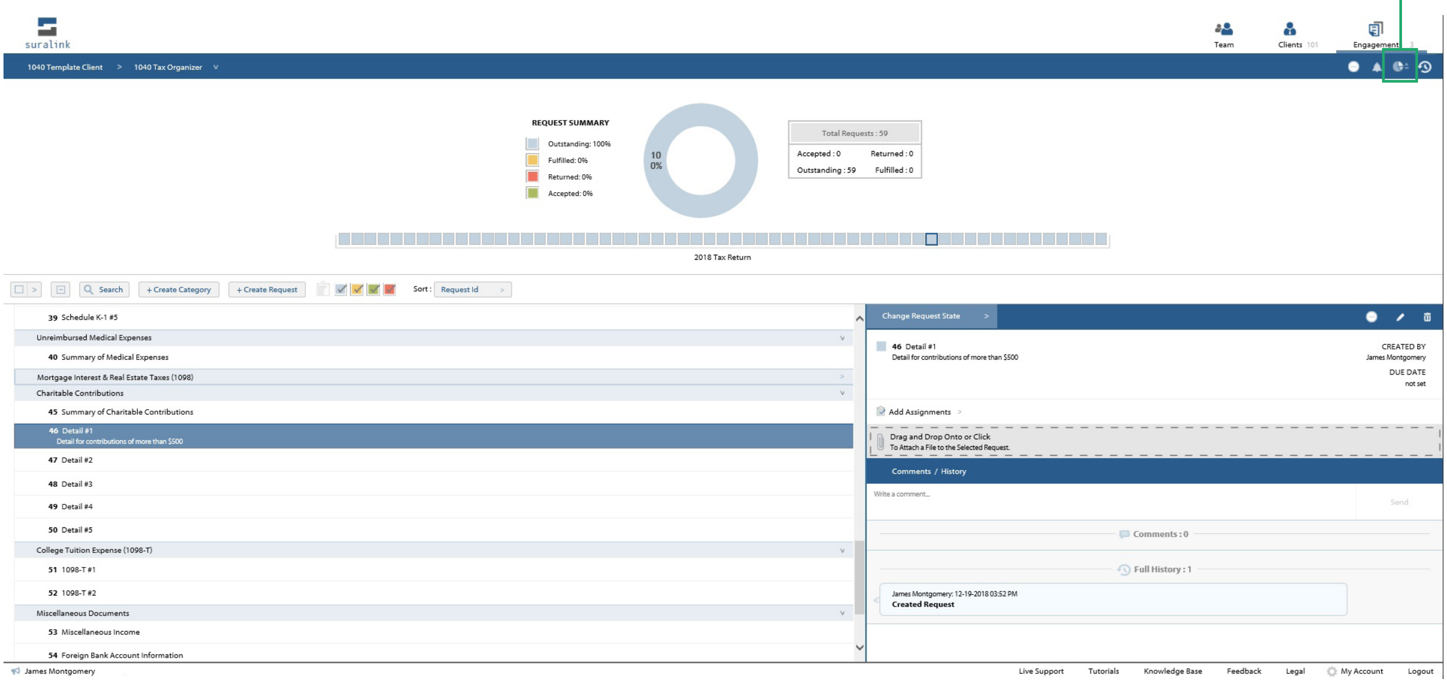
You can see the different categories and the requests that are in each category. Each box represents a request and the color of the box represents that request's status. Hovering over a box displays the name of the request, and clicking the box selects the request in the request line item section.



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.