

Client View Guide

SURALINK TUTORIAL

Suralink Tutorial
Client View

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WELCOME!

Welcome to the Suralink platform. This tutorial will help you become familiar with the platform'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 to us at support@suralink.com.

LEGAL NOTICE:

This guide is intended for clients and clients of firms who have purchased the Suralink Professional Document Exchange system only.

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01.

LOGGING IN - CLIENTS PAGE

When you first log in, you will be brought to the Clients page. You will see a list of engagements for your company. You can launch an engagement by:

1. Clicking on an Engagement from the list or
2. Hovering your mouse over the “Engagements” button in the top right of the window, and clicking on the engagement you want to launch from the dropdown list.

The screenshot shows the Suralink interface for a client named ABC Co. The main area displays a table of Active Engagements with columns for Name, various status indicators, and Due Date. A dropdown menu is open under the 'Engagements' button in the top right, listing various engagement types such as 401(k) Plan, 103b Audit, Annual Financial Audit, etc. Below the table, there are sections for Reports, My Team, and Active Users.

Name	5	20	12	7	43	0	Due Date
401(k) Plan	5	20	12	7	43	0	01-01-2026
403b Audit	6	24	7	0	15	0	01-01-2026
Annual Financial Audit	0	27	10	3	6	0	01-01-2026
Defined Contribution Plan Audit	0	2	3	0	77	0	01-01-2026
Q1 Audit	14	40	28	0	14	0	01-01-2026
SOC 2 Type 1	3	2	3	2	75	0	01-01-2026
Tax Return	28	26	12	12	32	0	01-01-2026

Name	Published	Filename	Last Accessed
Completed Tax Return	10-29-2020	2 files	10-29-2020 by ABC Co. CFO
SOC 2 - Final Report	10-29-2020	ABC Co. SOC 2 Report.txt	10-29-2020 by ABC Co. CFO
Financial Audit Report - Final	10-29-2020	3 files	10-29-2020 by ABC Co. CFO
ABC Co. 401(k)	10-29-2020	ABC Co. 401(k) Final.txt	10-29-2020 by ABC Co. CFO
403b Audit Final Report	10-29-2020	4 files	10-29-2020 by ABC Co. CFO

Active Users	Last Login
ABC Co. CFO ryan.smith@suralink.com	10-29-2020
ABC Co. Audit Manager auditmanager@abcco.com	10-29-2020
ABC Co. Tax Manager taxmanager@abcco.com	10-29-2020
ABC Co. IT Manager itmanager@abcco.com	10-29-2020

Active Users	Last Login
CPA Manager ryan.smith@suralink.com	10-29-2020
CPA Partner ryan.smith@suralink.com	10-29-2020
CPA Staff ryan.smith@suralink.com	10-29-2020



02.

REQUEST LINE ITEMS

After launching an engagement you will be directed to the **Request List page**: a dynamic request list integrated with a secure file portal. On this page, you'll see a list of Request Line Items (also referred to as "requests"). These are a way to track the documents your accounting firm needs you to provide. You would normally see these items in a spreadsheet request list provided by your firm.

The screenshot displays the Suralink interface for a client engagement. At the top, the Suralink logo is visible, along with navigation options for 'Clients' and 'Engagements'. The client name 'ABC Co.' and the engagement type 'Annual Financial Audit' are shown. Below this, a horizontal bar categorizes request items into General, Cash, A/R & Sales, Inventory, Fixed Assets, Accounts Payable, and Taxes. A search bar and a 'Sort: Request Id' dropdown are present above a table of request items. The first item, '1 Inquiries', is highlighted with a red box. To the right, a detailed view of this item is shown, including a 'Change Request State' dropdown, 'Add Assignments' button, a file upload area, and a 'Your Attached Files' section containing a file named 'ABC Co. Documentation.doc'. A 'Comments / History' section shows a comment from the CPA Manager dated 12/29/2020 01:59 PM, stating: 'Comment: Thank you for the clarification. I am gathering the documentation now.' Below this, another comment from the CPA Manager dated 12/29/2020 10:59 AM is visible, stating: 'Comment: Please provide Descriptions of management's approach for identifying and valuing obsolete inventory. Please include a schedule of all'.



03.

REQUEST DETAIL PANE

When a request is selected, a detail of that request is displayed in the Detail Pane. This area shows the details of the request and provides another way to access files. It also includes a comments section where you can communicate with your accounting firm about individual requests as well as the history of that specific request.

The screenshot displays the Suralink web application interface. At the top, the 'suralink' logo is on the left, and 'Clients' and 'Engagements 12' are on the right. Below the header, a navigation bar shows 'ABC Co.' and 'Annual Financial Audit'. A category filter bar includes 'General', 'Cash', 'A/R & Sales', 'Inventory', 'Fixed Assets', 'Accounts Payable', and 'Taxes'. A search bar and a 'Sort: Request Id' dropdown are also present.

The main content area shows a list of requests. The first request, '1 Inquiries', is selected. The 'Request Detail Pane' is open on the right, showing details for '1 Inquiries'. It includes a 'Change Request State' dropdown, 'CREATED BY' (CPA Manager), and 'DUE DATE' (12-31-2020). There is an 'Add Assignments' button and a 'Drag and Drop' area for attaching files. Under 'Your Attached Files', there is one file: '1 File - 0.01 Kb' (ABC Co. Documentation.txt). The 'Comments / History' section shows two comments: one from ABC Co. CFO and one from CPA Manager.

Request ID	Description	Date
1	Inquiries	12-31-2020
2	CEO Initial Inquiries	12-31-2020
3	CFO Initial Inquiries	12-31-2020
4	Employee Schedule	12-31-2020
5	Legal Expenses	12-31-2020
6	BOD Minutes	12-31-2020
7	Officer & Director List	12-31-2020
8	Control Environment Questionnaire	12-31-2020
9	IT general controls process	12-31-2020
10	Bank Confirms	12-31-2020
11	Bank Statements	12-31-2020
12	Bank Account list	12-31-2020
13	Bank Recs	12-31-2020
14	AR Aging	12-31-2020
15	AR Confirms	12-31-2020
16	ADA Calc	12-31-2020

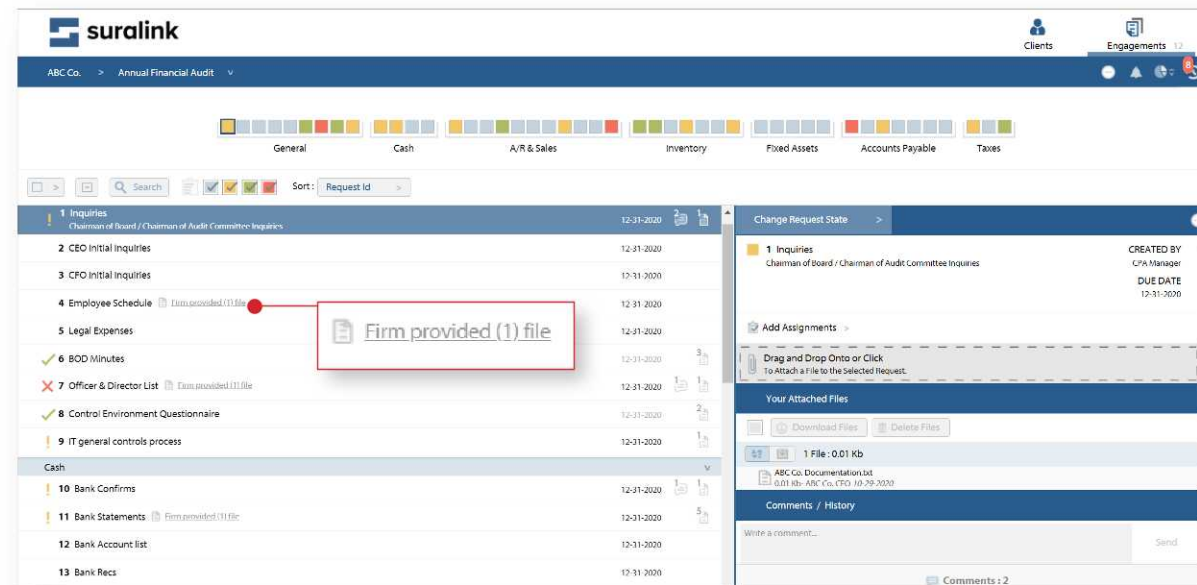


04.

FIRM FILES

Each request includes **Firm Files** and **Client Files**. Firm Files are documents your accounting firm provides to you. Documents provided by the firm may include: documents for your own records, a list of selections, or a template that you will need to complete and return.

If the firm has provided a file for a specific request, you will see a blue link on the request that says, “**Firm provided (x) files.**” Clicking this link will allow you to download the files.





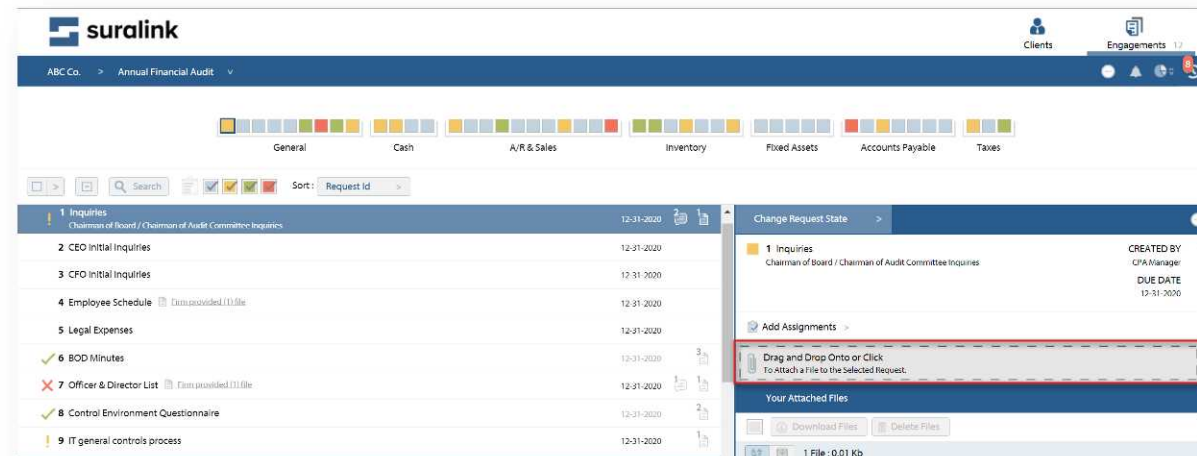
05.

CLIENT FILES

Client Files are the documents that you provide to your accounting firm. You can upload files to a request in two ways:

1. Drag and drop the files onto the request or into the Detail Pane.
2. Click the upload area on either the request or the Detail Pane to select files from your computer to upload.

Once uploaded, the documents stay attached to the request throughout the engagement. Your accounting firm can now easily access your documents for testing.





06.

REQUEST STATUS

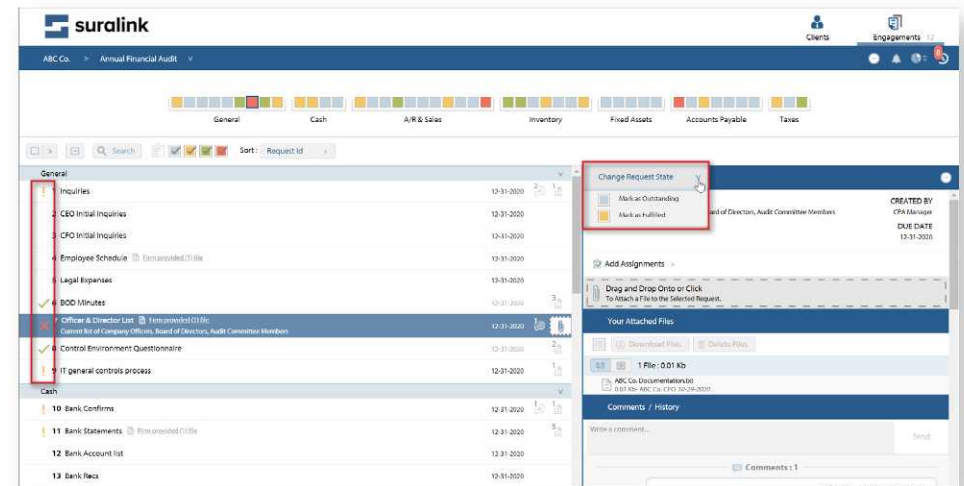
The status of each request is indicated by a specific color and can be changed in the Detail Pane view. Additionally, once you upload a document to a request, the status of that request automatically changes from “Outstanding” (gray) to “Fulfilled” (orange). After the firm evaluates the documents, they can change the request status to either “Accepted” (green) or “Rejected” (red) depending on if the documents you provided meet the firm’s requirements.

NOTE:

You, as a Client User, can only change the status of requests between “Outstanding” and “Fulfilled.”

Users from your accounting firm can change requests to any status.

- Outstanding:** This is the default status; requests that are “Outstanding” (gray) require action from you.
- Fulfilled:** This is the status after you, the client, have provided the necessary documents.
- Accepted:** This is the status of a completed request that does not require any additional action.
- Rejected:** This is the status of a request that does not meet your accounting firm’s requirements and needs additional action from you. Your accounting firm should provide an explanation of why the request was rejected in the Detail Pane.



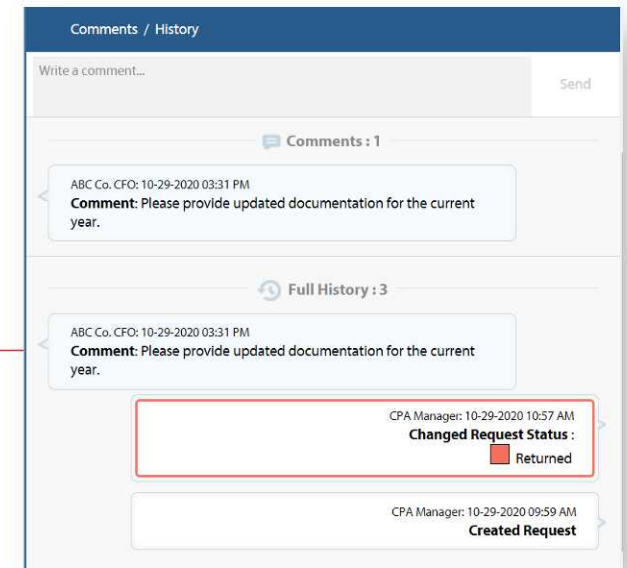
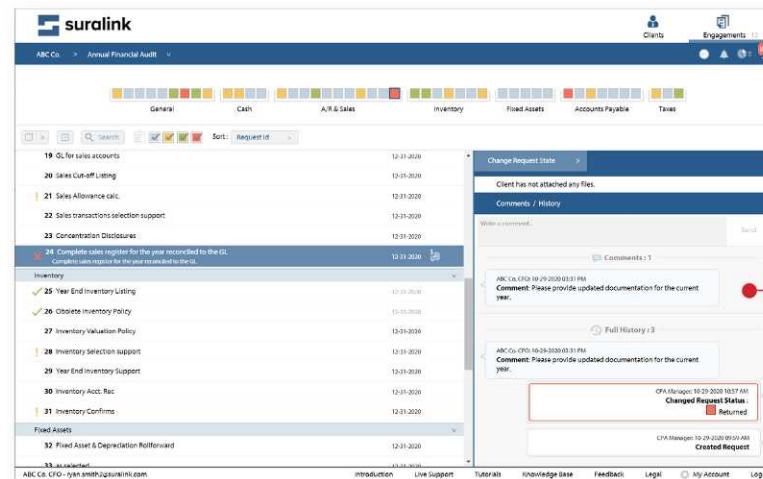


07.

COMMENTS AND HISTORY

Each request has a section that displays both the complete history of that request in addition to any comments associated with that request. Any action taken on a request—either by you or your accounting firm—is logged in the history. This includes everything from creating the request to uploading files and much more.

At any time, you or your accounting firm can add a comment to provide additional instructions or insight about a request. Examples of comments include asking for clarification about a request and communicating anything related to that request or its files. To leave a comment, simply type that comment in the box that says, “Write a comment.”





08.

SEARCHING AND SORTING

Located above the requests, the Search, Filter, and Sort features can be used to quickly find what you are looking for.

- The Search bar will search request names and descriptions.
- The Filter boxes (multi-colored boxes with checkmarks in them) will hide or show requests based on the selected Request Statuses (e.g., “Outstanding,” “Fulfilled,” “Accepted,” or “Rejected”).
- The Sort dropdown box sorts requests based on the criteria selected.

The screenshot displays the Suralink Client View interface. At the top, there is a navigation bar with the Suralink logo, the client name 'ABC Co.', and the engagement type 'Annual Financial Audit'. Below this, there are filter boxes for various categories: General, Cash, A/R & Sales, Inventory, Fixed Assets, Accounts Payable, and Taxes. A search bar and a sort dropdown menu (set to 'Request Id') are highlighted with a red box. The main area shows a list of requests, including 'Inquiries', 'CEO Initial Inquiries', 'CFO Initial Inquiries', 'Employee Schedule', 'Legal Expenses', 'BOD Minutes', 'Officer & Director List', 'Control Environment Questionnaire', and 'IT general controls process'. A detailed view of a selected request is shown on the right, including the request name, date, and a section for 'Your Attached Files' with a file named '1 File - 0.01 Kb'.

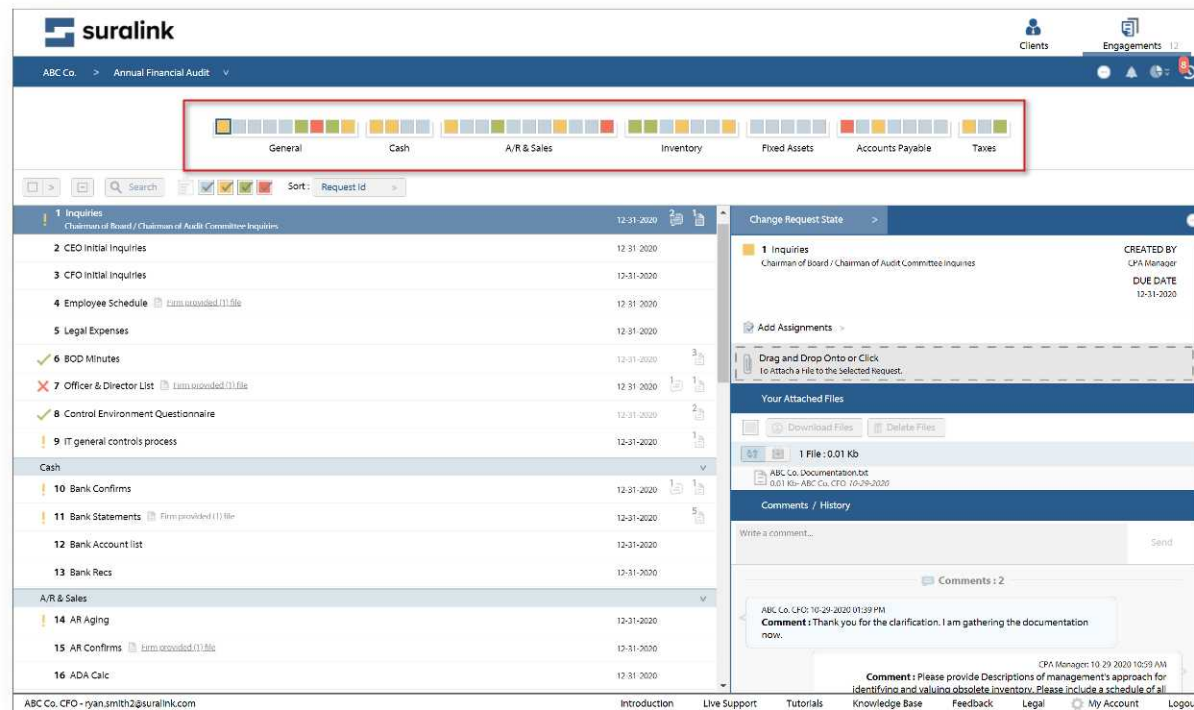


09.

QUICK VIEW BAR

Across the top of the page is the Quick View bar. This section displays the same requests you see in the Request Line Items section.

Each box represents a request and the color of the box represents that request's status. Mousing over a box displays the name of the request, and clicking the box selects the request in the Request Line Items section





10.

DASHBOARD

The Dashboard gives you a summary of your engagement, as well as notifications on past due requests or items that require follow-up. This section can be expanded or minimized with the Dashboard button.

The screenshot shows the Suralink dashboard for 'ABC Co. > Annual Financial Audit'. At the top right, there are navigation icons for 'Clients' and 'Engagements', with a red box highlighting the 'Engagements' icon. The main dashboard area features a 'REQUEST SUMMARY' section with a donut chart and a table of request counts. Below this is a category bar for various financial items. A table lists 11 inquiries, with details for the first one expanded on the right side.

Status	Percentage
Outstanding	60%
Fulfilled	21%
Returned	6%
Accepted	13%

Category	Count
Total Requests	45
Accepted	6
Returned	3
Outstanding	27
Fulfilled	10

ID	Description	Date
1	Inquiries	12-31-2020
2	CEO Initial Inquiries	12-31-2020
3	CFO Initial Inquiries	12-31-2020
4	Employee Schedule	12-31-2020
5	Legal Expenses	12-31-2020
6	BOD Minutes	12-31-2020
7	Officer & Director List	12-31-2020
8	Control Environment Questionnaire	12-31-2020
9	IT general controls process	12-31-2020
10	Bank Confirms	12-31-2020
11	Bank Statements	12-31-2020

Field	Value
Request Title	Chairman of Board / Chairman of Audit Committee Inquiries
Created By	CPA Manager
Due Date	12-31-2020



Thanks for completing our tutorial! We wish you the best of luck as you begin using Suralink and are confident that it will help you increase efficiency and improve the client experience.

Contact us at support@suralink.com or through our live chat option in the platform if you have any questions.