



*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**.*

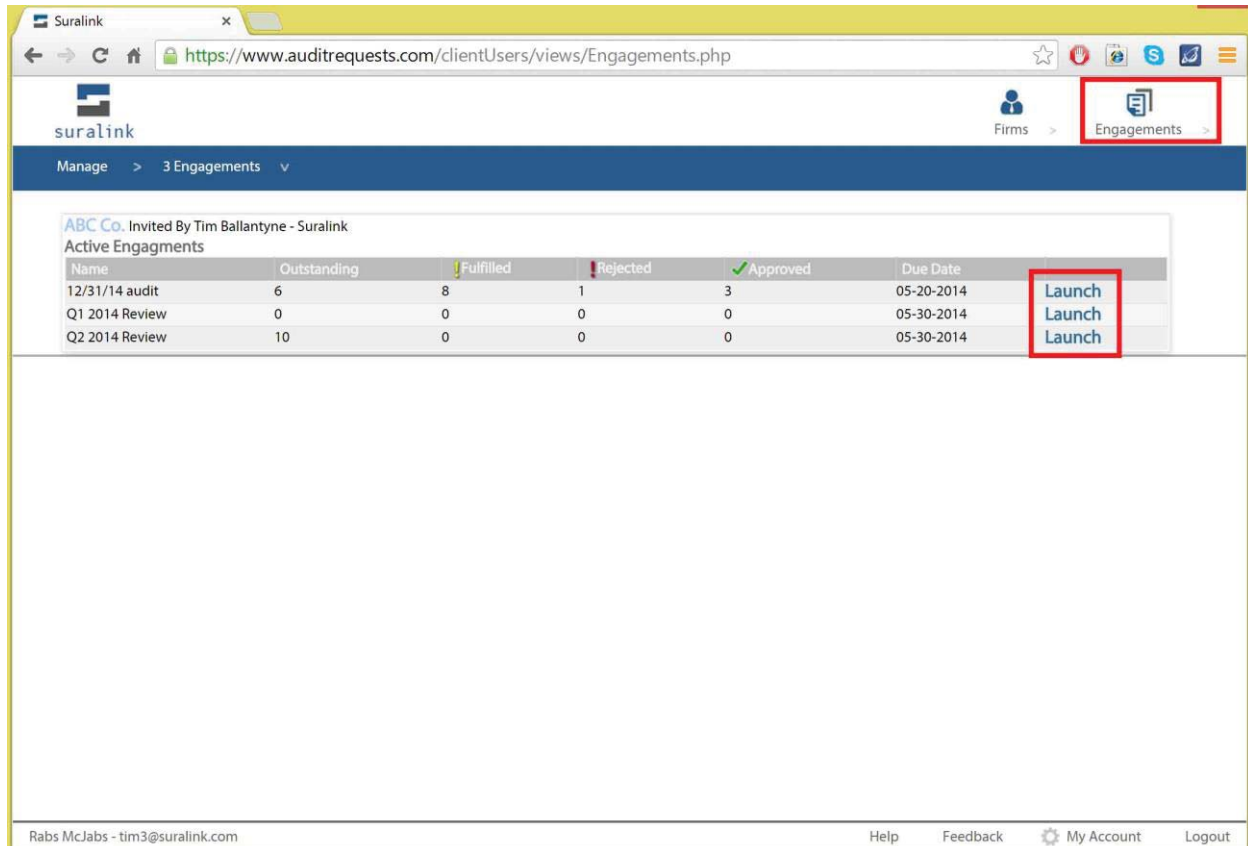
If you have any questions at all, please don't hesitate to reach out us at support@suralink.com. We want your experience with Suralink to be as seamless as possible. Additionally, if there is something you would like the system to do that it currently does not, please let us know!

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.

1. 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:

1. Click the “Launch” button next to that engagement’s name.
2. Pointing 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 web application interface. The browser address bar displays <https://www.auditrequests.com/clientUsers/views/Engagements.php>. The page header includes the Suralink logo and navigation links for 'Firms' and 'Engagements'. The 'Engagements' link is highlighted with a red box. Below the header, a blue bar indicates 'Manage > 3 Engagements'. The main content area displays a table of 'Active Engagements' for 'ABC Co. Invited By Tim Ballantyne - Suralink'. The table has columns for Name, Outstanding, Fulfilled, Rejected, Approved, and Due Date. The 'Launch' button next to the '12/31/14 audit' row is highlighted with a red box.

Name	Outstanding	Fulfilled	Rejected	Approved	Due Date	Launch
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

Footer: Rabs McJabs - tim3@suralink.com | Help | Feedback | My Account | Logout

2. 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 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, a breadcrumb trail shows "ABC Co. > 12/31/14 audit". A filter bar contains 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 is divided into two columns. The left column lists request items under the "General / Planning" category. The "Engagement Letter" item is highlighted with a red box. It includes a warning icon, the text "Engagement Letter", a file icon, "Firm provided (1) file", and "Please sign and return." with a "(1 file)" indicator and a download icon. Other items listed include "Employee Listing" and "Articles of Incorporation".

The right column shows a "Change Request State" modal window. It contains a list of request items, including "Engagement Letter" with a "Please sign and return." instruction. It also displays "CREATED BY: Tim Ballantyne" and "DUE DATE: not set". Below this, there is a "Drag and Drop or Click To Attach a Firm File" area and a "Your Attached Files" section showing "Signed Eng Letter.docx" with a download icon and "Created By: Rabs McJabs 05-20-2014".

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

3. 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 main content area on the left lists various request categories: General / Planning, Cash, Fixed Assets, AR & Sales, and Equity. Under 'General / Planning', items include 'Engagement Letter' (with a file icon and 'Firm provided (1) file'), 'Employee Listing' (with a file icon and 'Firm provided (1) file'), and 'Articles of Incorporation'. Under 'Cash', items include 'Bank Reconciliations' (with a file icon and 'Firm provided (1) file'), 'Bank Confirmationnnnnnn' (with a file icon and 'Firm provided (2) files'), and 'Bank Statements' (with a red warning icon and '09-29-2014').

A red box highlights the 'Change Request State' pane on the right. This pane contains the following information:

- Engagement Letter**: Please sign and return.
- CREATED BY**: Tim Ballantyne
- DUE DATE**: not set
- Drag and Drop or Click To Attach a Firm File**: A dashed box for file upload.
- Your Attached Files**: A section with 'Download Files' and 'Delete Files' buttons.
- Total Files : 1**: A list showing 'Signed Eng Letter.docx' created by 'Rabs McJabs 05-20-2014'.
- Request History**: A section with a 'Write a comment...' text area and a '+' button.

The bottom of the screen shows the user 'Rabs McJabs - tim3@suralink.com' and navigation links for 'Help', 'Feedback', 'My Account', and 'Logout'.

4. Firm Files

Each request has Firm files and Client Files:

Firm files are documents the Firm provides to you, the client (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” as highlighted below. Clicking this link will allow you to download the files.

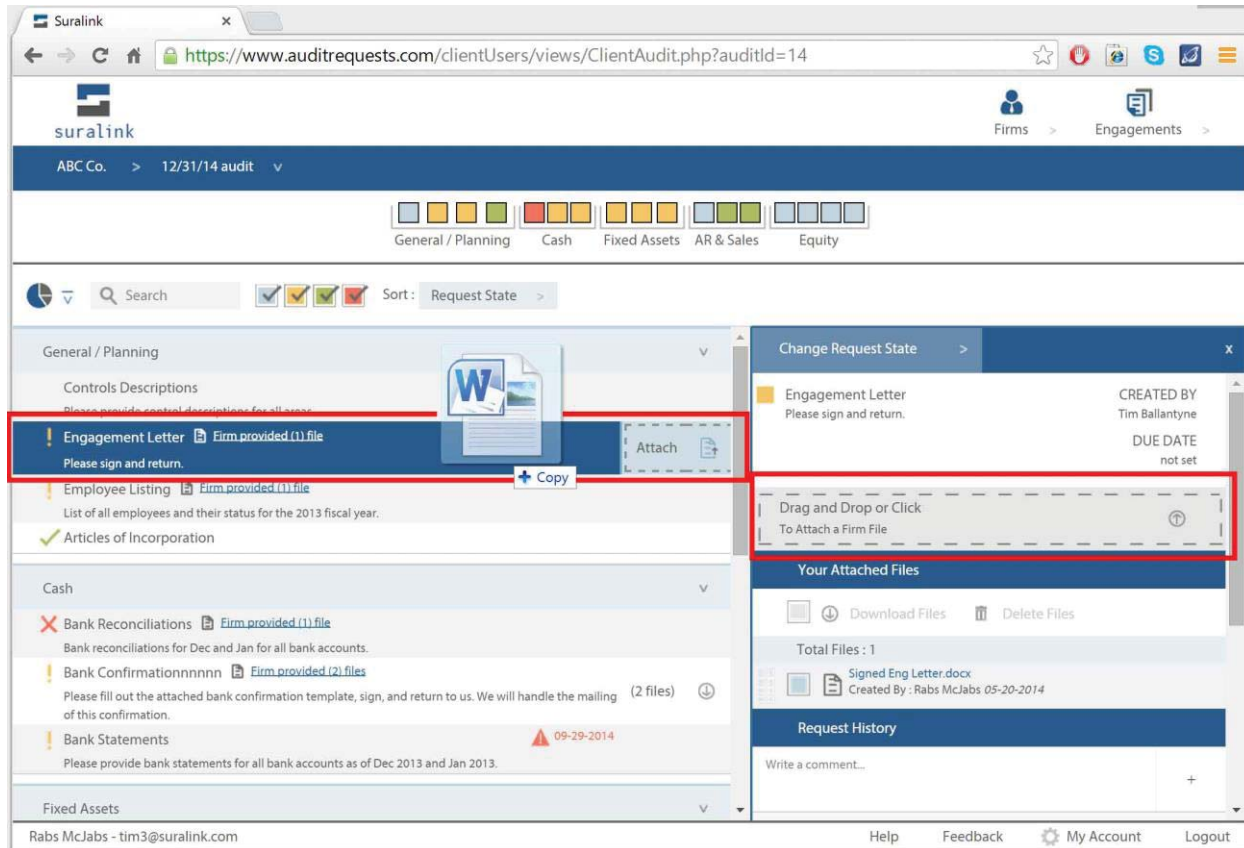
The screenshot displays the Suralink web application interface. The browser address bar shows the URL: <https://www.auditrequests.com/clientUsers/views/ClientAudit.php?auditId=14>. The application header includes the Suralink logo and navigation links for "Firms" and "Engagements". Below the header, a breadcrumb trail shows "ABC Co." and "12/31/14 audit". A filter bar at the top allows selection of 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 requests under the "General / Planning" category. The "Engagement Letter" request is highlighted, showing a blue link "Firm provided (1) file" which is circled in red. Other requests include "Employee Listing" (Firm provided (1) file) and "Articles of Incorporation". The "Cash" category shows "Bank Reconciliations" (Firm provided (1) file), "Bank Confirmationnnnnn" (Firm provided (2) files), and "Bank Statements" (09-29-2014). A right-hand sidebar titled "Change Request State" shows the "Engagement Letter" request, created by Tim Ballantyne, with a "DUE DATE" of "not set". Below this, a "Your Attached Files" section shows a total of 1 file: "Signed Eng Letter.docx" created by Rabs McJabs on 05-20-2014. A "Request History" section at the bottom of the sidebar includes a "Write a comment..." field.

5. 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:**

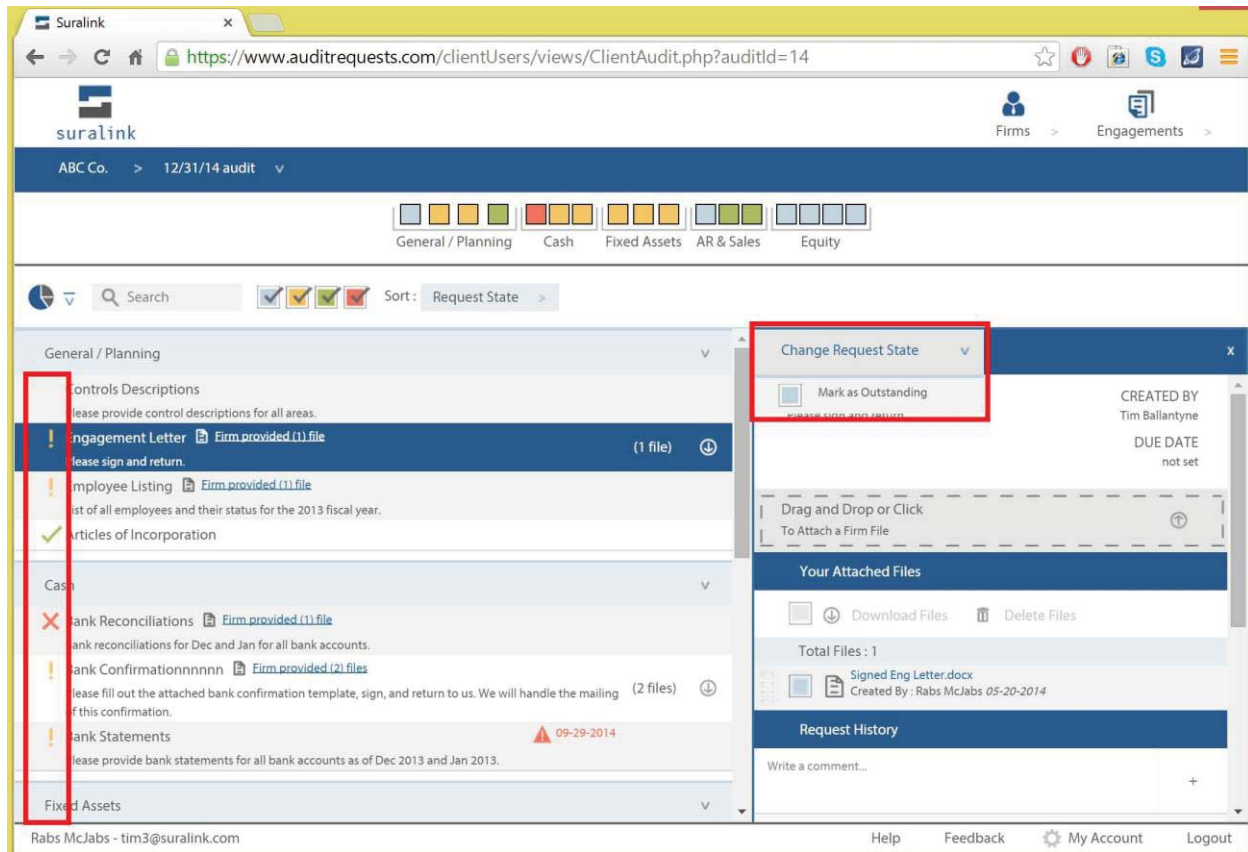
1. Drag and drop the files onto the request line item, or into the detail pane (area's highlighted below).
2. Click the upload area of either the request line item or the detail pane to select files from their computer to upload.



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

6. 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.

7. 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...”

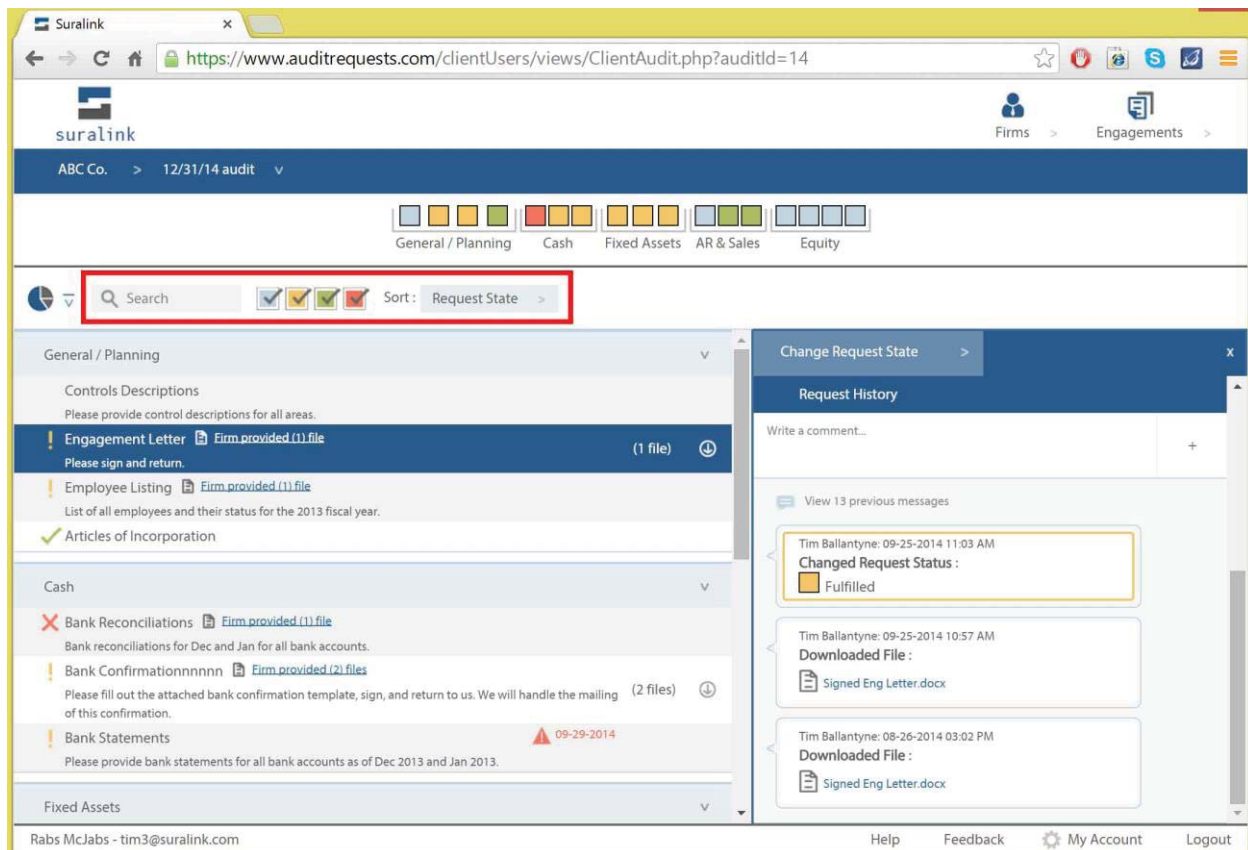
You may add a comment to provide additional instructions to a file that has been uploaded, to ask for clarification, or to communicate anything related to that request or its files.

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, user navigation links for "Firms" and "Engagements", and a breadcrumb trail: "ABC Co. > 12/31/14 audit >". Below the header, 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 is divided into sections for "General / Planning", "Cash", and "Fixed Assets". The "General / Planning" section is currently selected and shows a list of requests, including "Engagement Letter" (1 file), "Employee Listing" (1 file), and "Articles of Incorporation". The "Cash" section shows "Bank Reconciliations" (1 file), "Bank Confirmationnnnnn" (2 files), and "Bank Statements" (1 file). The "Fixed Assets" section is also visible. On the right side, a "Change Request State" modal is open, displaying the "Request History" for the selected request. The history shows three entries: "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", and "Tim Ballantyne: 08-26-2014 03:02 PM Downloaded File : Signed Eng Letter.docx". A red box highlights the "Request History" section. At the bottom of the page, there are links for "Help", "Feedback", "My Account", and "Logout".

8. 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.

- The **search bar** will search request name and description
- The **filter boxes** with checkmarks will hide or show requests for the request state selected (outstanding, fulfilled, accepted, rejected)
- The **sort dropdown box** will sort requests based on the criteria selected



9. Quick View Bar

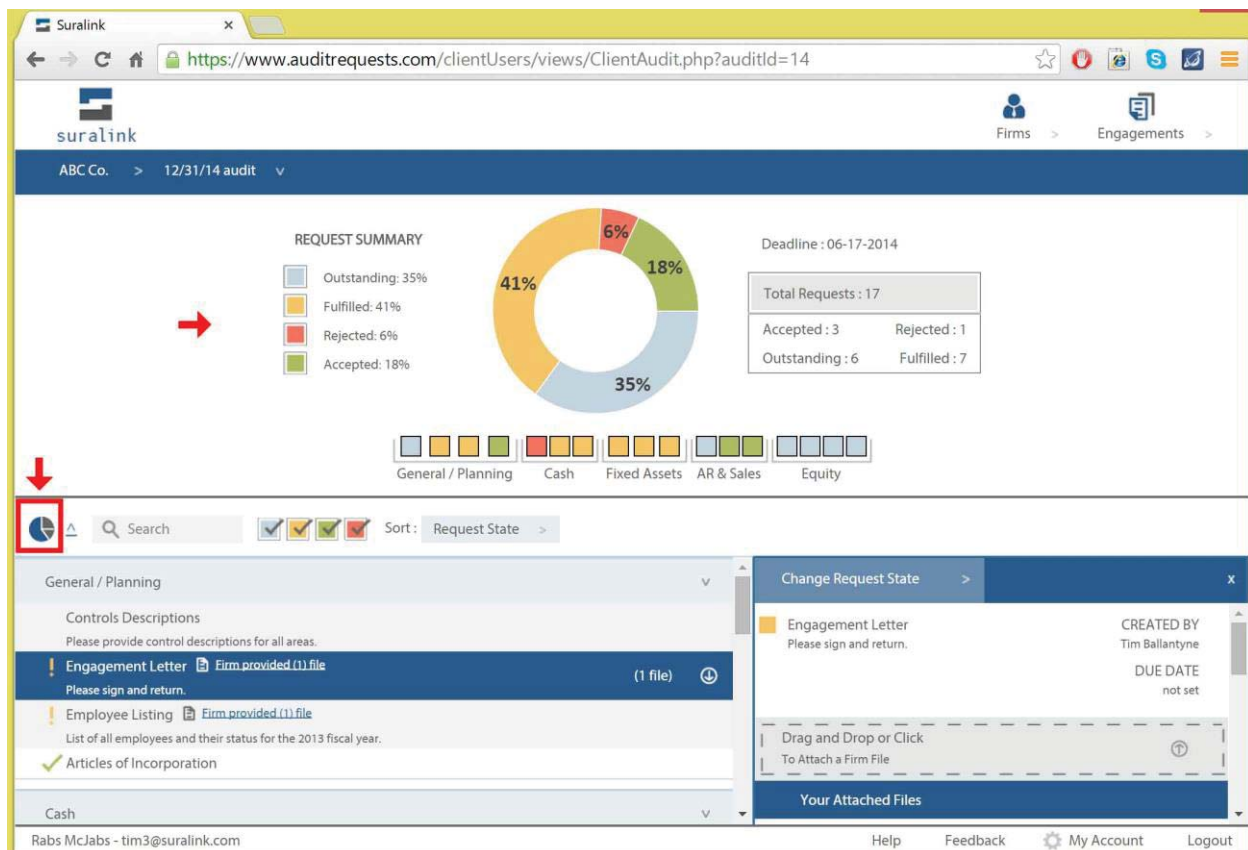
Across the top of the page is the **Quick View Bar**. This section provides a different way to display the same requests that you see down in the request line item section.

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 requests status. **Mousing over** 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, the 'Quick View Bar' is highlighted with a red box. It contains a dropdown menu labeled 'Articles of Incorporation' and a row of colored boxes representing different request categories: General / Planning (blue), Cash (orange), Fixed Assets (green), AR & Sales (red), and Equity (grey). Below the Quick View 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 (1 file), Bank Confirmationnnnnn (2 files), and Bank Statements (09-29-2014)), and 'Fixed Assets'. The right column shows a 'Change Request State' dialog box. It contains a list of requests: 'Engagement Letter' (Please sign and return., CREATED BY: Tim Ballantyne, DUE DATE: not set) and a section for 'Your Attached Files' showing 'Signed Eng Letter.docx' (Created By: Rabs McJabs 05-20-2014). At the bottom, there is a 'Request History' section with a comment field.

10. 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. 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.** Thank you!