suralink FOR RS&F

REGISTERING YOUR ACCOUNT

You will receive a registration e-mail from Suralink Support or notifications@suralink.com. Once you receive the e-mail, go to the registration website by clicking the "Create Account" link in the e-mail

Make sure your first and last name are accurate. Enter a password in the "Create Password" field and confirm password in the "Verify Password" field. Click on the small button to verify, then click "Create Account".

To confirm your account, you will receive an email asking you to verify your account. Click the "Verify now" button to confirm a successful registration. Enter your login (e-mail address) and password created previously to access your portal. Click Login

ACCESSING UPLOADED DOCUMENTS

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 clicking on an Engagement from the list OR 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.

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. These are a way to track the documents your accounting firm needs you to provide.

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 RS&F advisor about individual requests as well as the history of that specific request.

UPLOADING A DOCUMENTS

Each request includes Firm Files and Client Files. Firm Files are documents your accounting firm provides to you. 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.

Client Files are the documents that you provide to your accounting firm. You can upload files to a request in two ways: Drag and drop the files onto the request or into the Detail Pane OR 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.

REQUEST STATUS

The status of each request is indicated by a specific color. Once you upload a document to a request, the status of that request automatically changes from "Outstanding" (gray) to "Fulfilled" (orange). After RS&F 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 RS&F's requirements.

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 RS&F —is logged in the history.

On the blue bar at the top is a Dashboard button, which gives you a summary of your engagement, as well as notifications on past due requests or items that require follow-up.

ON THE BOTTOM RIGHT ON YOUR SCREEN YOU WILL SEE LIVE SUPPORT AND TUTOIRALS BUTTONS. THESE HAVE A PDF AND VIDEOS ON HOW TO MANAGE SURALINK.

IF YOU NEED FURTHER ASSISTANCE, PLEASE EMAIL US AT PORTAL@RSANDF.COM OR CALL US AT (410) 581-0800. PLEASE ALLOW 24 HOURS FOR YOUR REQUEST TO BE FULFILLED.