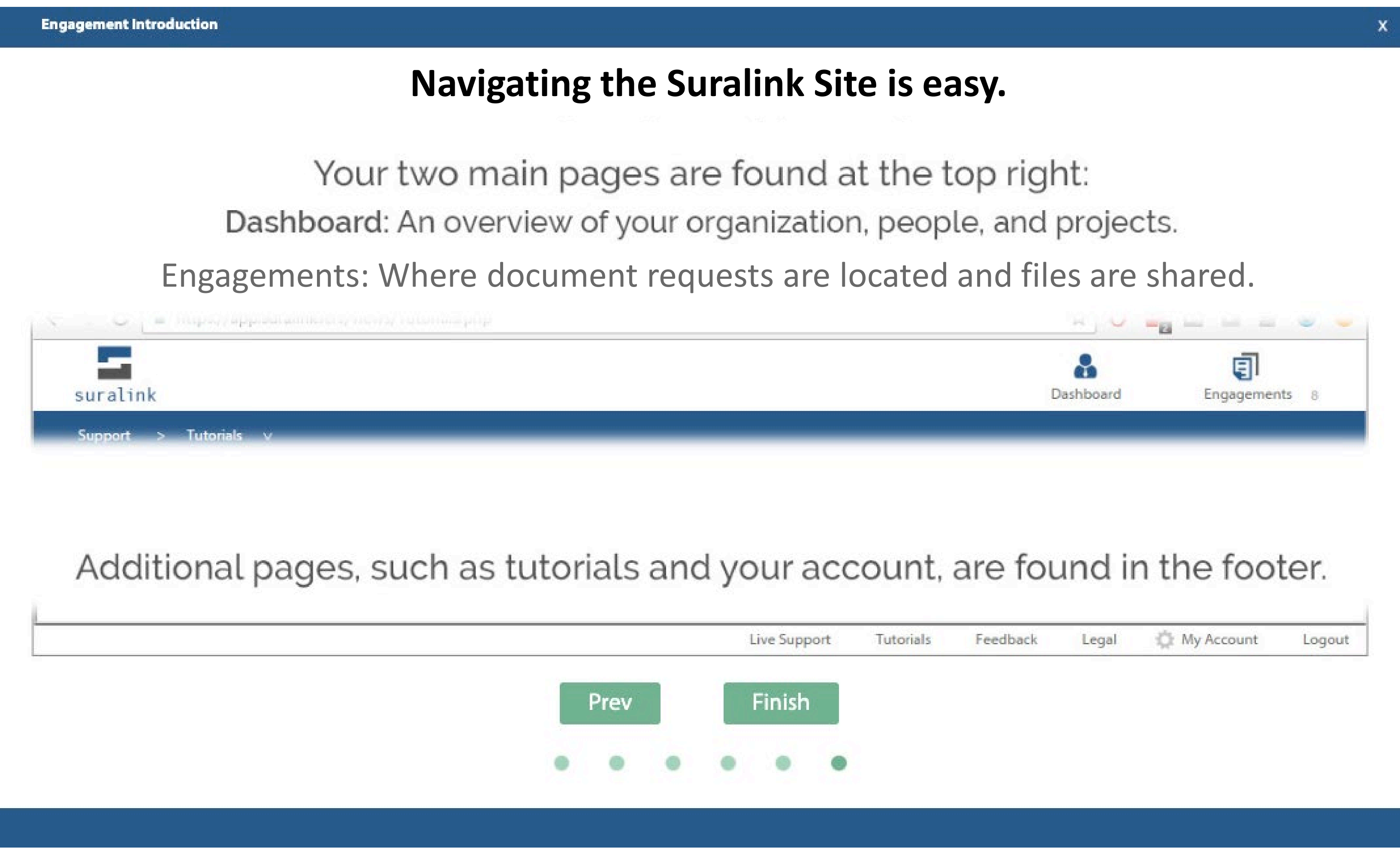
Suralink Client Portal

QUICKSTART GUIDE

Welcome!

Suralink combines document requests with a permanent client file portal for the easiest way to provide files.

This introduction guide will help you get started with a few of the basics. **Note:** ***The Suralink client portal is best accessed from a laptop or desktop computer through the Google Chrome browser; the site is not yet mobile optimized.***



This is a request.

Each request has a status and can hold files and comments.

Adding & Downloading files is easy.

Simply Drag and Drop your files onto the requests they apply to.

(That's it)

Or you can click the paperclip icon to select the file from your computer.

Each request includes **Firm Files** and **Client Files**. Firm Files are documents Warady & Davis LLP 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.**

NOTE: Files do not expire and there are no storage space/size limitations.

Engagement Introduction X

Each request has a lifecycle.

It begins as Outstanding, waiting for you to provide documents or information.
Once you do that the request becomes Fulfilled.
The firm can then either Accept or Return the request.
(Don't worry, Returned just means it needs a little more attention.)

Status Guide:

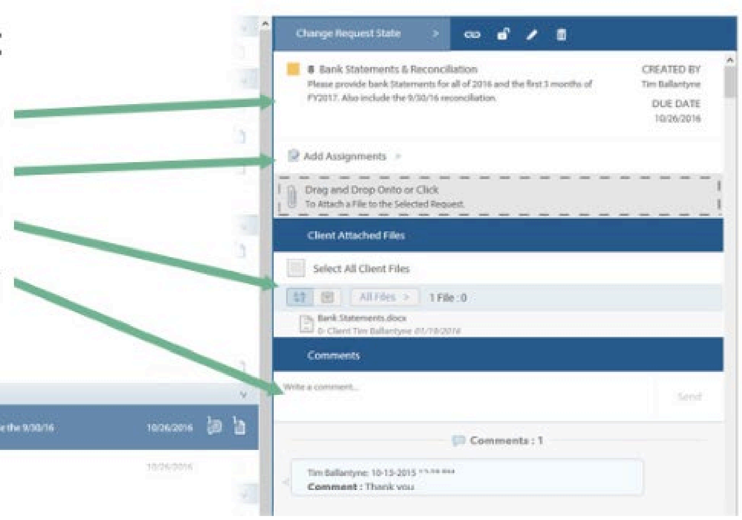
7 Ca	! 5 Su	✓ 2 En	✗ 9 AR
Outstanding	Fulfilled	Accepted	Returned

Each Request has detail.

When you click a request, a full detail of that request is shown on the right.

The Detail Area includes:

Name, Description, Status, Due Date
Add Assignments (to assign responsibility)
Client Files list
Comments and History



VIEW COMPLETE Client User Guide [HERE.]