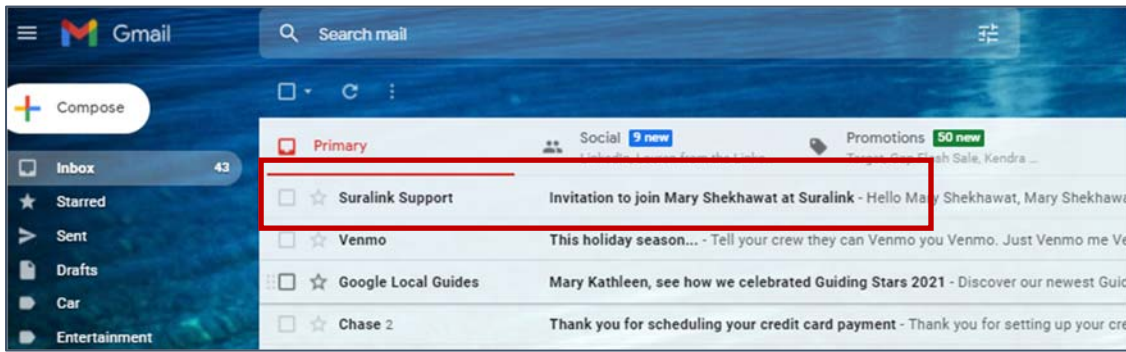
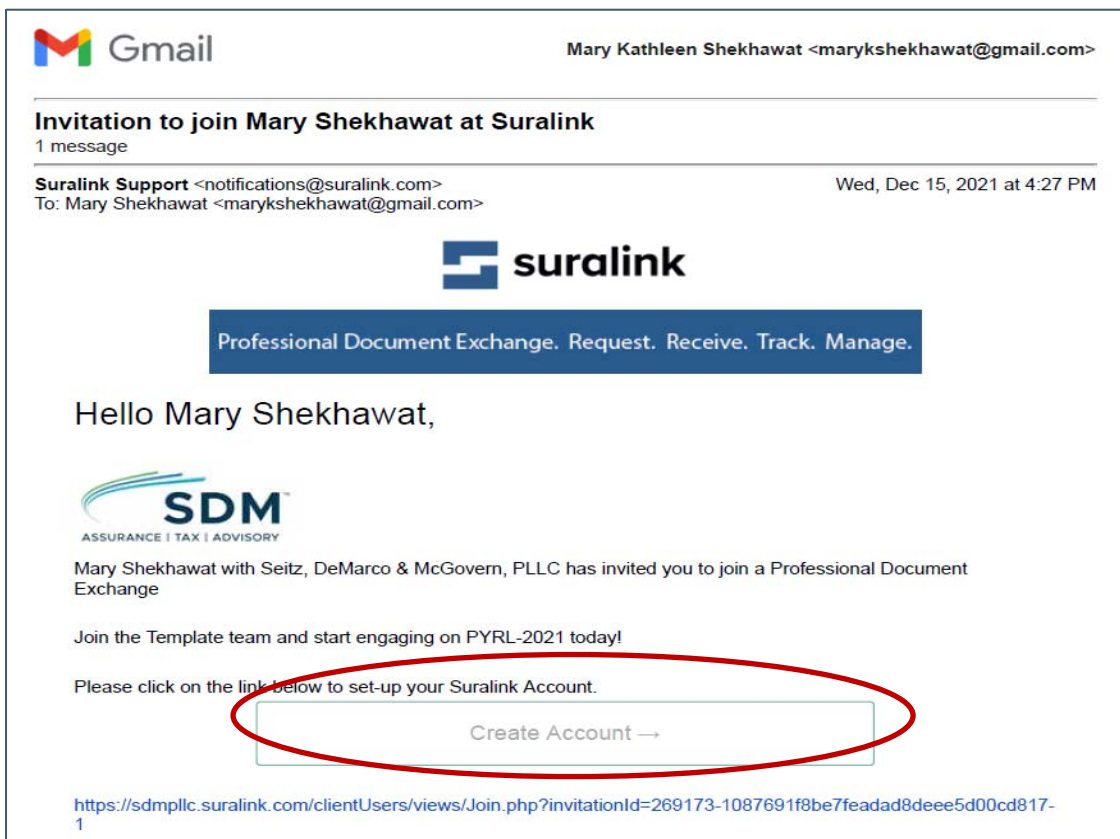


How to Setup Your Suralink Account

1. You will receive an email from Suralink Support (notifications@suralink.com), similar to the email below. Please check your junk or promotions folders if you do not see the email.



2. Click on the “Create Account” button in the email. There is a separate link below the button to copy and paste into your browser if the site fails to launch.

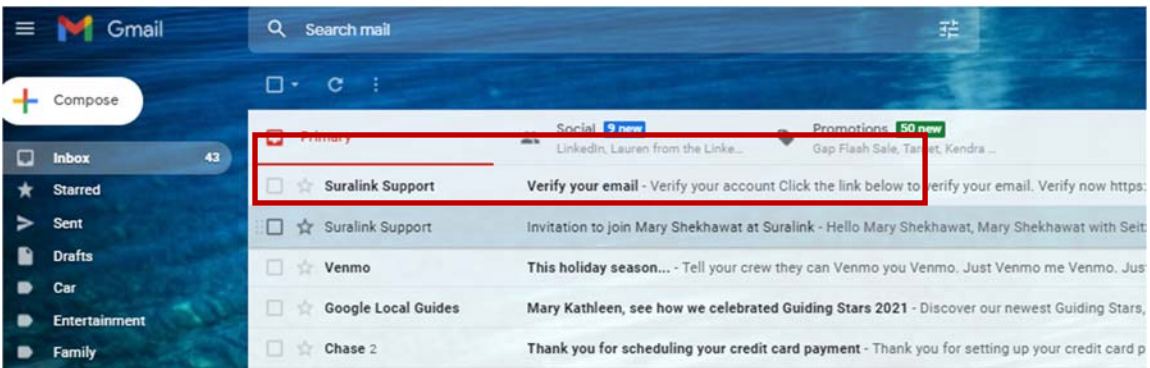


3. Set up a password, check the privacy policy and click “Create account”. The user name to your account will be your email address. See the image below for password requirements. Please


keep your password in a secure place. SDM does not have the ability to change your password for you.

The screenshot shows the Suralink account creation interface. At the top, it says "Welcome Mary Shekhawat" and "You've been invited to join the Seitz, DeMarco & McGovern, PLLC Team". The form includes fields for "First name" (Mary), "Last name" (Shekhawat), "Email" (maryshekhawat@gmail.com), "Create password" (masked with dots), and "Verify new password" (masked with dots). To the right, there are "Account Options" for Time zone (GMT-07:00 America/Denver), Date format (MM/DD/YYYY), and Time format (01:20 PM, HH:MM AM/PM). Below that are "Password requirements" with five green checkmarks: "At least 8 characters", "Both upper and lower case letters", "A mixture of letters and numbers", "At least one special character", and "Verify & new password must match". At the bottom, a checkbox is checked with the text "I have read and understand my responsibilities and the privacy policy." A red circle highlights this checkbox and the "Create account" button below it.

4. You will receive an email to verify your account from Suralink Support (notifications@suralink.com), similar to the email below. Please check your junk or promotions folders if you do not see the email.





5. Click on the blue link in the email to verify your account. Copy and paste the link into your browser if the site fails to launch.

 Gmail Mary Kathleen Shekhawat <marykshekhawat@gmail.com>

Verify your email
1 message

Suralink Support <notifications@suralink.com> Wed, Dec 15, 2021 at 4:32 PM
To: Mary Shekhawat <marykshekhawat@gmail.com>





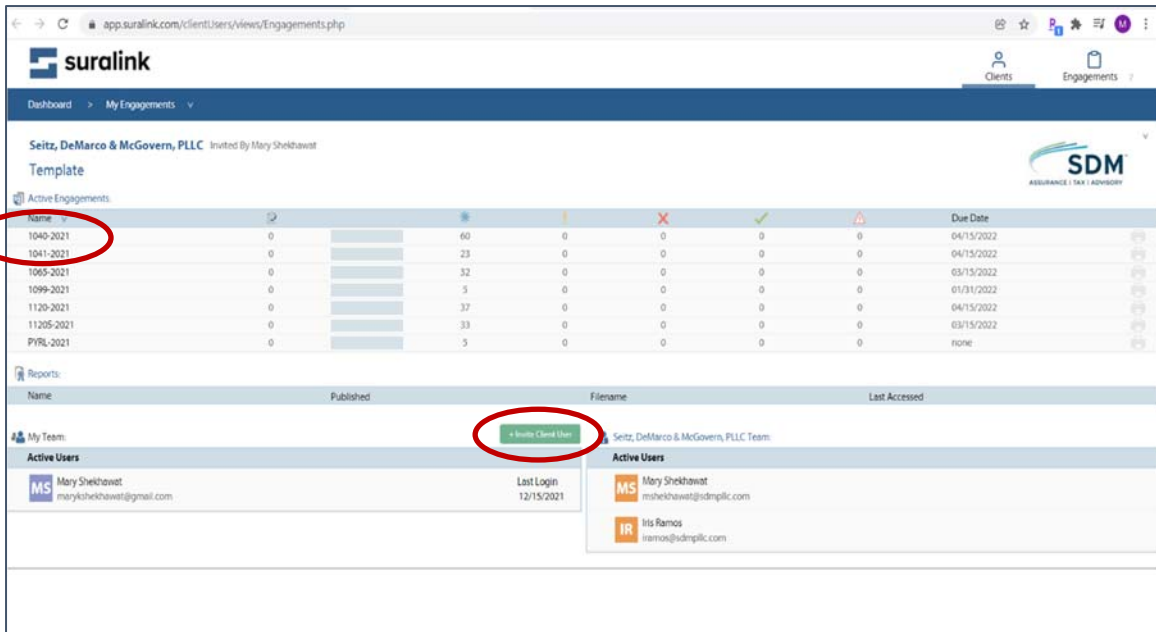
Verify your account

Click the link below to verify your email.

Verify now

<https://auth-gateway.suralink.com/user/email/verify?email=marykshekhawat%40gmail.com&token=hgRRJvrZJEdo8LRNyTZSEdcSavzOT6wB&clientId=ecf44ed2-2f20-46d2-82e5-c067eba2ad7e&redirectUri=https%3A%2F%2Fsdmpllc.suralink.com%2Fscripts%2Fviews%2FWelcome.php&state=%7B%22inviteId%22%3A%228446b856-6885-48aa-a1d4-f34ff4f4b611%22%2C%22inviteHash%22%3A%22269173-1087691f8be7feadad8deee5d00cd817-1%22%7D>

6. Once you are logged in, you will see the Dashboard screen. **To access the engagement you are working on, click on the respective name.** If you are the client admin, you can add additional users by clicking on the green “+ Invite Client User”.



7. Once you access the engagement, you will see a list of requested documents needed in order to complete your engagement. In the left hand navigation pane, **click on the specific request you're are working on.** Once selected, you will see a description of the request, history, and any comments on the right hand pane. **Drag and drop applicable files, and add any comments about those files and/or the request. Mark the request “Fulfilled”.** If the request is not applicable, note that in the comments, and mark the request “Fulfilled”.

7a. Select the request

7b. Drag and drop any applicable files

7c. Provide comments. If a request is not applicable, indicate so here.

7d. Change the request state to “Fulfilled”

- If you received more than one Suralink invitation, you only need one login. You can accept the additional invitations on the “My Engagements” screen. There will be a green banner at the top of the page with the words “Accept All Invitations”. Alternatively, you can accept the invitation for each client account.

The screenshot shows the Suralink client portal interface. At the top, there is a navigation bar with the Suralink logo and a 'My Engagements' dropdown menu. A green banner at the top of the main content area contains the text 'Pending Invitations (1)' and an 'Accept All Invitations' button. Below this banner, a table lists the pending invitation details:

Name	Client ID	Invited By	Invitation Date	Actions
Howe, Julia	1065-2021	Mary Shekhawat - maryshekhawat@gmail.com	01/07/2022	Accept Reject

Below the invitation, the client information for 'Seitz, DeMarco & McGovern, PLLC' is displayed, including the name of the user 'Confer, Nadja' and the SDM logo. A table of 'Active Engagements' is shown with columns for Name, Due Date, and various status indicators. Below this, there is a 'Reports' section and a 'My Team' section showing active users for both the client and the user's team.

- For additional information about how to navigate the client view, please click on the link below, and, as always, please reach out to your SDM client service professional with any questions or concerns!

[Suralink Client Tutorial](#)