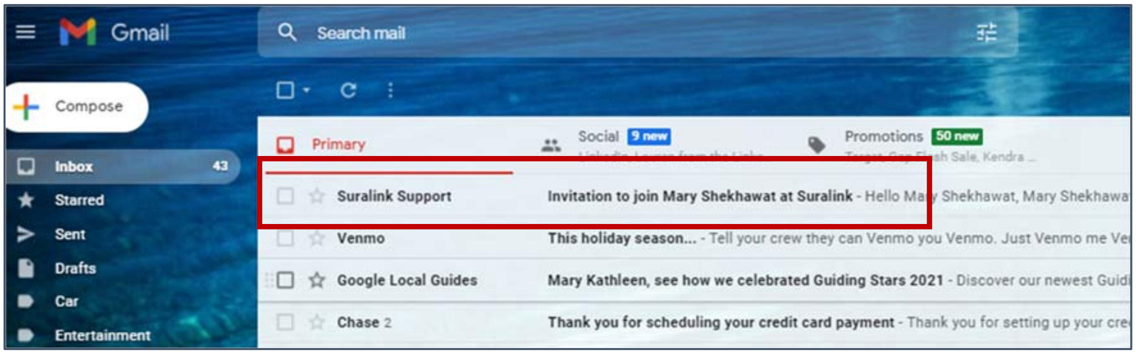
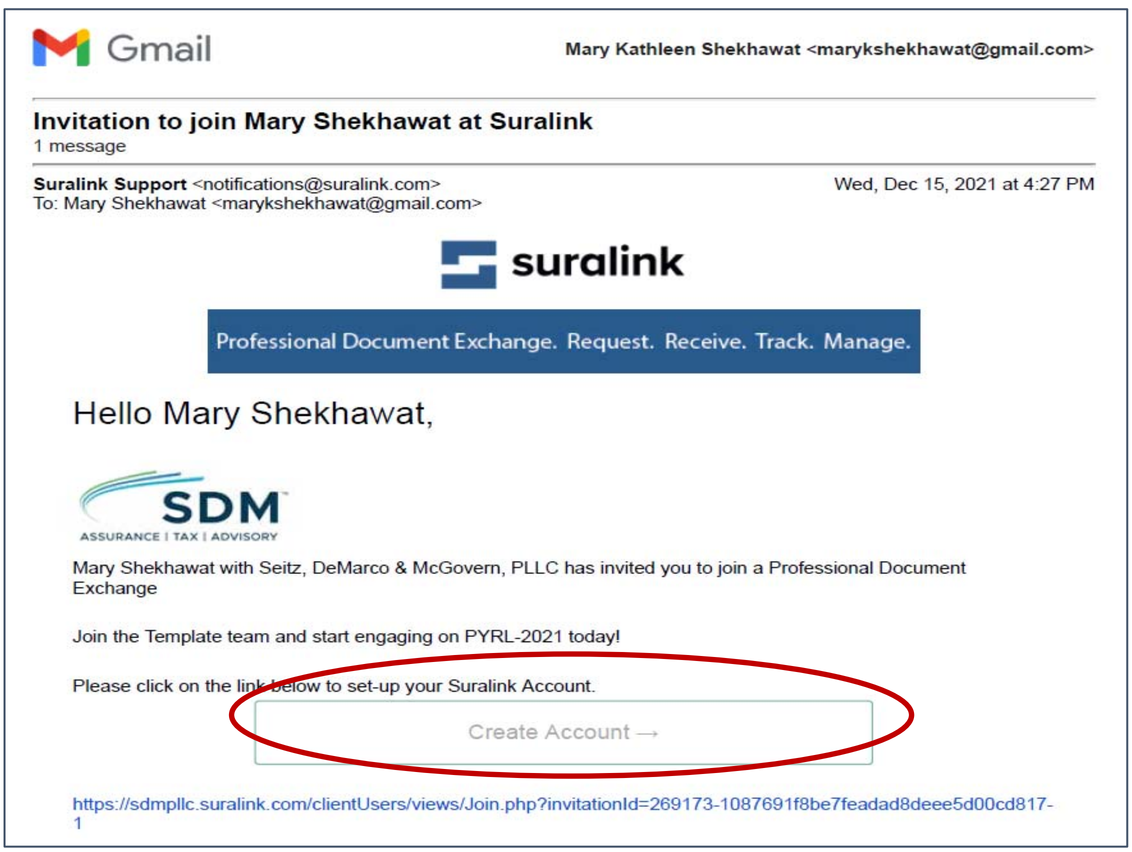
How to Setup Your Suralink Account

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.



Gmail — Mary Kathleen Shekhawat <marykshekhawat@gmail.com>

Invitation to join Mary Shekhawat at Suralink
1 message

Suralink Support <notifications@suralink.com> — Wed, Dec 15, 2021 at 4:27 PM
To: Mary Shekhawat <marykshekhawat@gmail.com>

suralink

Professional Document Exchange. Request. Receive. Track. Manage.

Hello Mary Shekhawat,

SDM ASSURANCE | TAX | ADVISORY

Mary Shekhawat with Seitz, DeMarco & McGovern, PLLC has invited you to join a Professional Document Exchange

Join the Template team and start engaging on PYRL-2021 today!

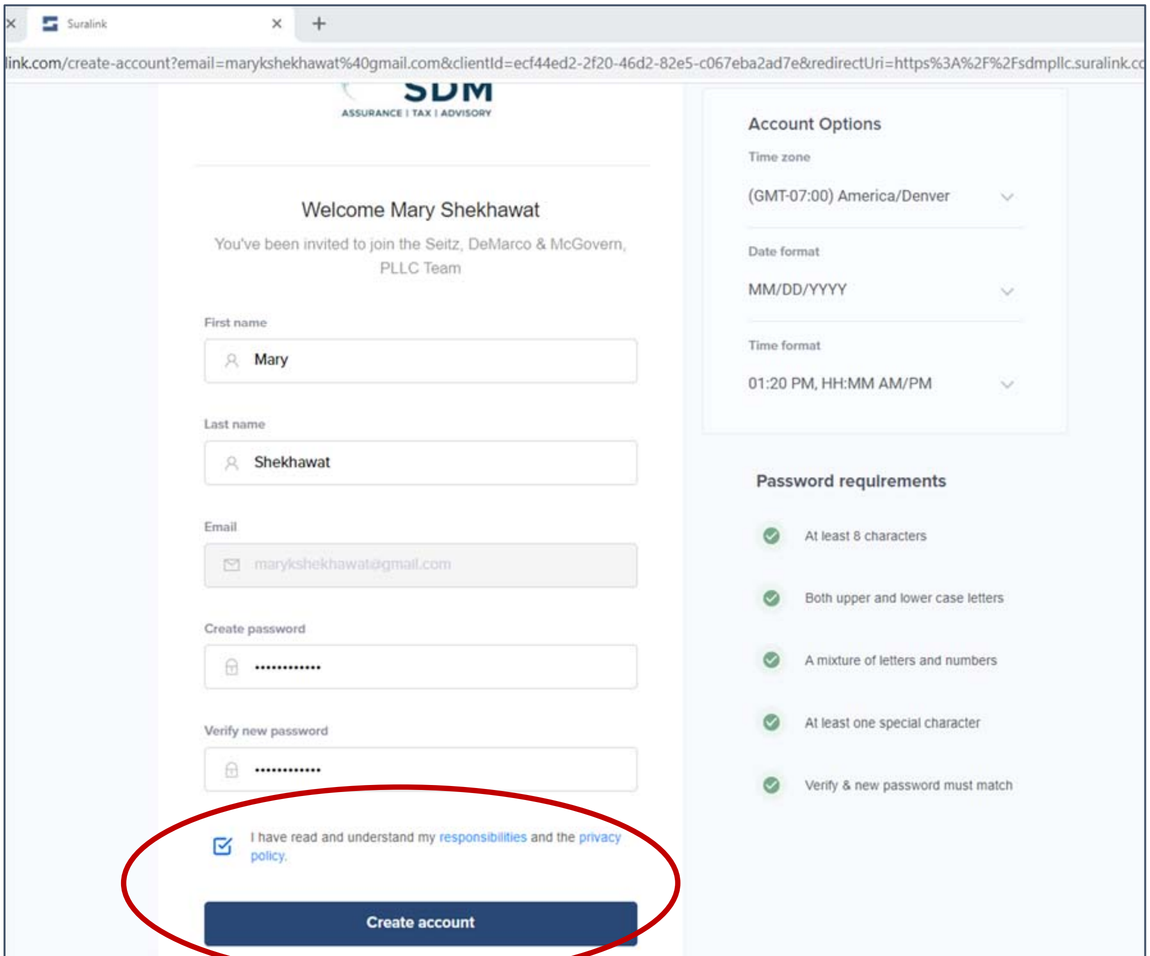
Please click on the link below to set-up your Suralink Account.

Create Account →

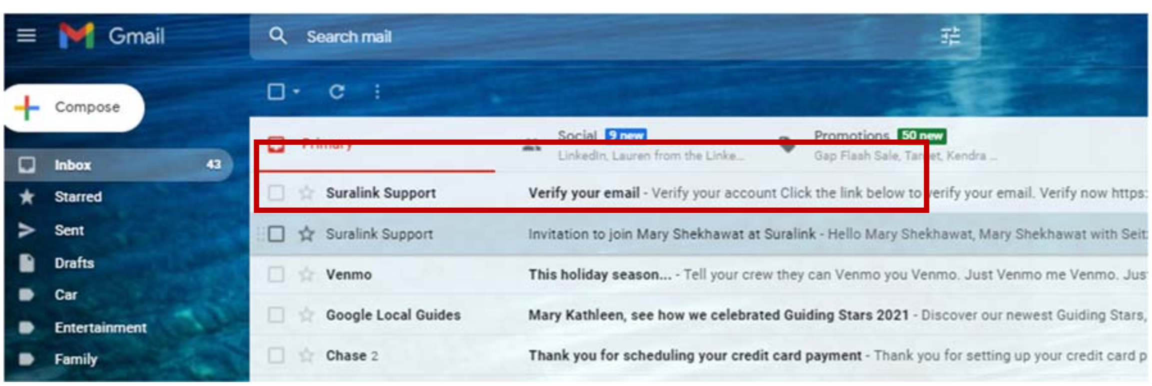
https://sdmpllc.suralink.com/clientUsers/views/Join.php?invitationId=269173-1087691f8be7feadad8deee5d00cd817-1

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.



4. **You will receive an email to verify your account from Suralink Support (**[**notifications@suralink.com**](mailto: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>

suralink

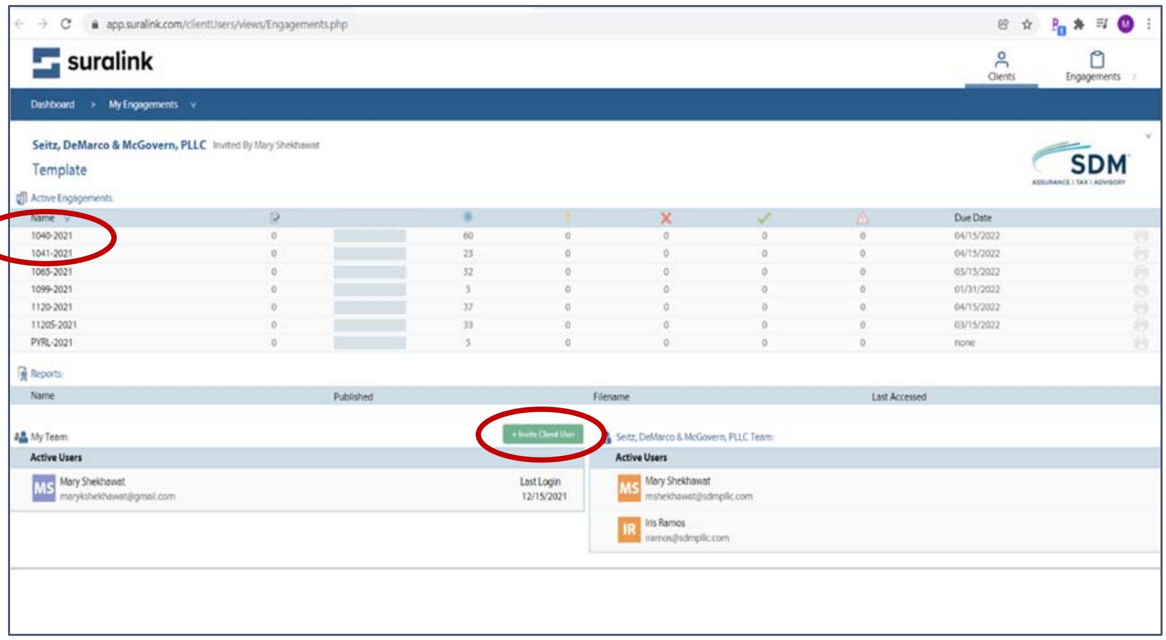
Verify your account

Click the link below to verify your email.

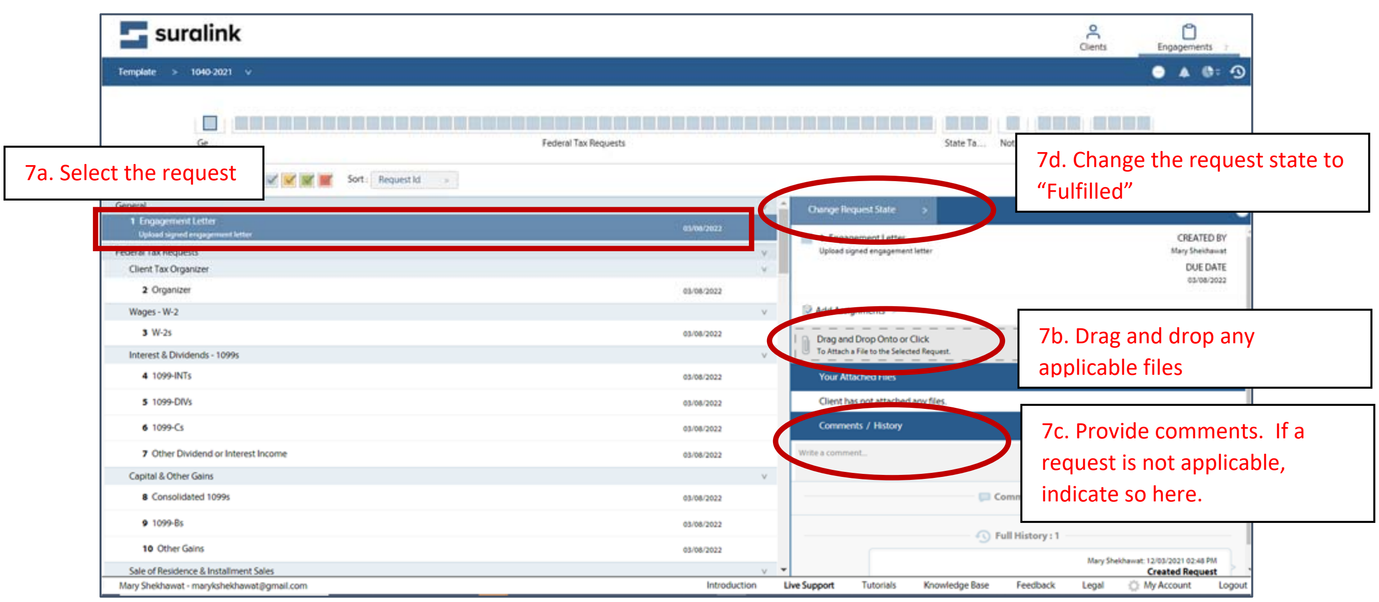
Verify now

https://auth-gateway.suralink.com/user/email/verify?email=
marykshekhawat%40gmail.com&token=hgRRJvrZJEdo8LRNyTZSEdcSavzOT6
wB&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

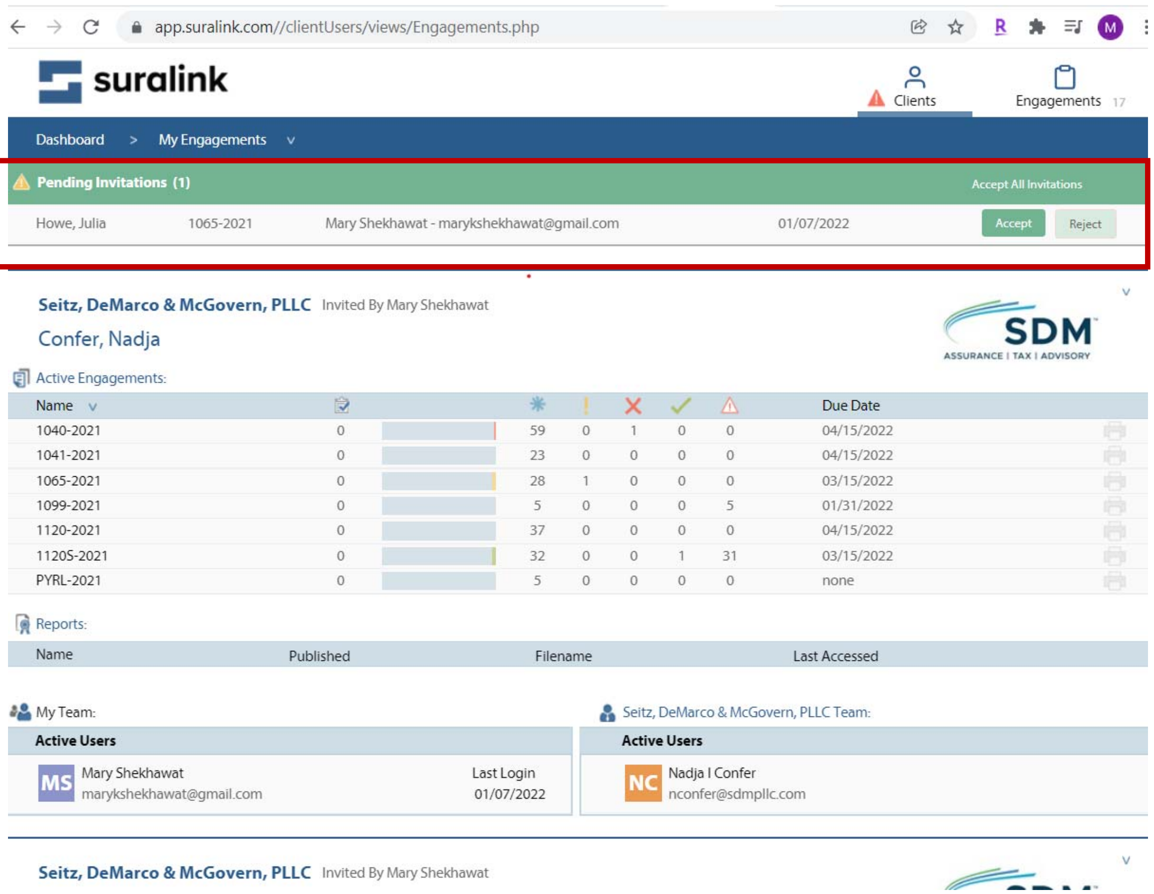
6. Once you are logged in, you will see the Dashboard screen. **To access the engagement you are working on, click on the respective name.** If you are the client admin, you can add additional users by clicking on the green "+ Invite Client User".



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".



8. 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.



9. **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]