



CASE STUDY

# Organizing Tax Documentation for Preparers & Clients



## JDS Professional Group by the Numbers

- 1+** Years as a Suralink client
- 10** Audit users
- 10** Tax users
- 8-100+** Documents per tax engagement
- 50%** Reduction in time spent managing some engagements



## THE COMPANY:

### QUALITY, TIMELY SERVICES

JDS Professional Group is a Denver-based accounting and consulting firm providing services to business clients, organizations, and institutions in the Rocky Mountain region and nationally since 1983. The firm's goal is to provide quality, timely services to its clients through a commitment to organizational and individual professional excellence.

## THE CHALLENGE:

### SORTING AND ORGANIZING TAX INFORMATION

The tax team at JDS Professional Group was using a client portal to send and receive client documentation. However, that portal did not allow preparers to sort the information they received in an organized manner.

Additionally, while some clients would use the portal, others would send files using a variety of different methods: email, flash drives, or even CDs. Regardless of the method, the team at JDS would essentially receive a mass upload of documents—and in large entity engagements where clients would send upwards of 100+ documents—this lack of organization would quickly become overwhelming.

“We didn’t have the ability to track the documents clients sent,” says Peter Ordelleide, Tax Manager at JDS. “Clients would give us documents, but there was no way to say ‘yes’ or ‘no’ this is or isn’t what we needed. It was just a digital shoe-box of documents.”

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## THE SOLUTION: SURALINK PBC AUTOMATION

The audit team at JDS was already using Suralink. So when the tax team started expressing some of their challenges, the audit team recommended they look at Suralink as a solution.

Based on that recommendation, the tax team decided to implement Suralink. “It was very easy to set up,” says Jon Luedders, Tax Manager at JDS. “We watched a few tutorial videos and set up a personal account to see what our clients would experience. In the beginning, I had a few interactions with the support team and they were always able to answer our questions.”

The first year, JDS created the document request lists and then had the preparers go through and customize them for their clients. Now, after JDS’s second busy season with Suralink, the process is running smoothly.

“The ability to customize engagements for specific clients has been a huge help,” says Ordelheide. “This was our second busy season with Suralink and it went really well. We just send the client a link. It’s a great way to get information from clients in an organized way.”





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**Peter Ordelleide**

Tax Manager

JDS Professional Group



## THE RESULTS: BETTER ORGANIZATION AND IMPROVED EFFICIENCY

The tax team at JDS primarily uses Suralink for entity and trust returns. In the past, the tax team would send out an email in January to all business clients with the PBC. With Suralink, they're now able to simply rollover the previous year's list before the engagement starts so the client knows exactly what they need to provide.

"The biggest difference is the way we communicate with clients when gathering information," says Luedders. "For example, we just rollover lists. Clients know what they provided the year before and can compare it. It really boils down to having a simple list of things the client needs to provide in one place—instead of in a bunch of emails that are hard to find."

Ultimately, Suralink has increased efficiency and organization for JDS. "We use Suralink everyday—both in the office and remote. And it's made us more efficient," says Ordeltelheide. "We have clients that may upload 100 documents, and if those documents are coming to us in an organized way that we can easily download into folders and categories, it makes our lives much easier. Our preparers have been as much as 50% more efficient when it comes to organizing some engagements now that we're using Suralink."

It's also more efficient for clients. "Clients figure it out really quickly and love it," says Luedders. "They can just drag and drop files. It's very simple for them to use."



**THE CONCLUSION:**  
SURALINKS  
SUPPORTS MORE  
ORGANIZED  
ENGAGEMENTS

With two busy seasons with Suralink complete, the JDS tax team has increased efficiency and improved communication with clients. “It’s been much smoother than what we’ve done in the past,” says Luedders. “Suralink is the best solution I’ve seen from an organization standpoint.”

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**Peter Ordelheide**

Tax Manager  
JDS Professional Group





Suralink is the leader in request list and document management, helping businesses simplify the document exchange process while improving the client experience.

The company's cloud-based application integrates a dynamic request list and assignment workflow solution with a secure file hosting platform to serve as a single location for client interaction. Suralink's technology, combined with its industry expertise, helps more than 350 clients in North America and the UK ensure security, simplicity, transparency, and accountability throughout the document exchange process.

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