Document Requests and Sharing in BNN Bridge

How can I share documents in BNN Bridge?

There are three ways to share documents in BNN Bridge. We will touch on each of these methods in this document.

Document Upload is for **10401 and 1041 clients**, and uses information from the prior year's return to create the list of required documents.

Instructions begin on the next page.

Files/File Cabinet can be used by **all clients,** however, it is best practice to utilize the Request Lists and Document Upload.

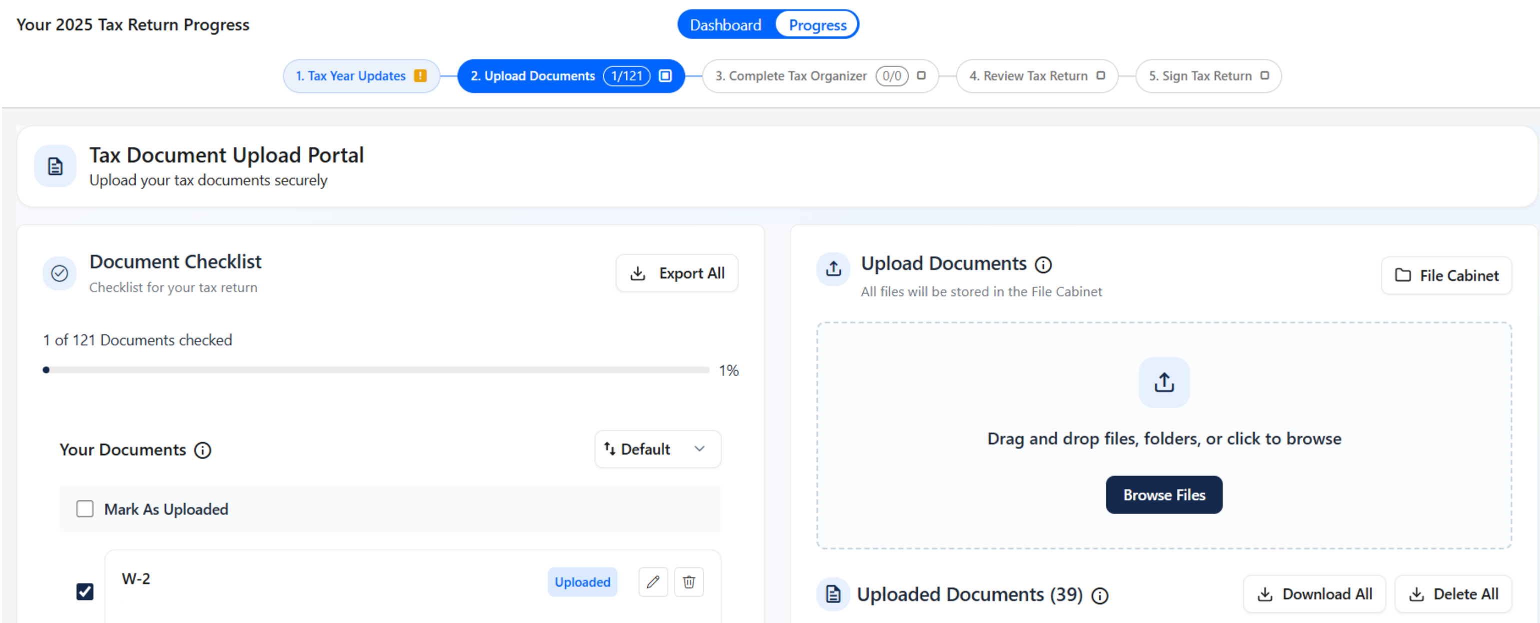
Instructions begin on page 3.

Request Lists are used to organize engagement document requests, track completion, manage comments, assign responsibilities, and collect attachments. This will replace email, Suralink, and SafeSend. **Tax entity and Audit clients** will be primarily using this format for request lists and document sharing.

Instructions begin on page 4.

Document Upload

Document Upload is a simple window that allows you to see everything you owe BNN in order for the engagement team to complete your tax return.



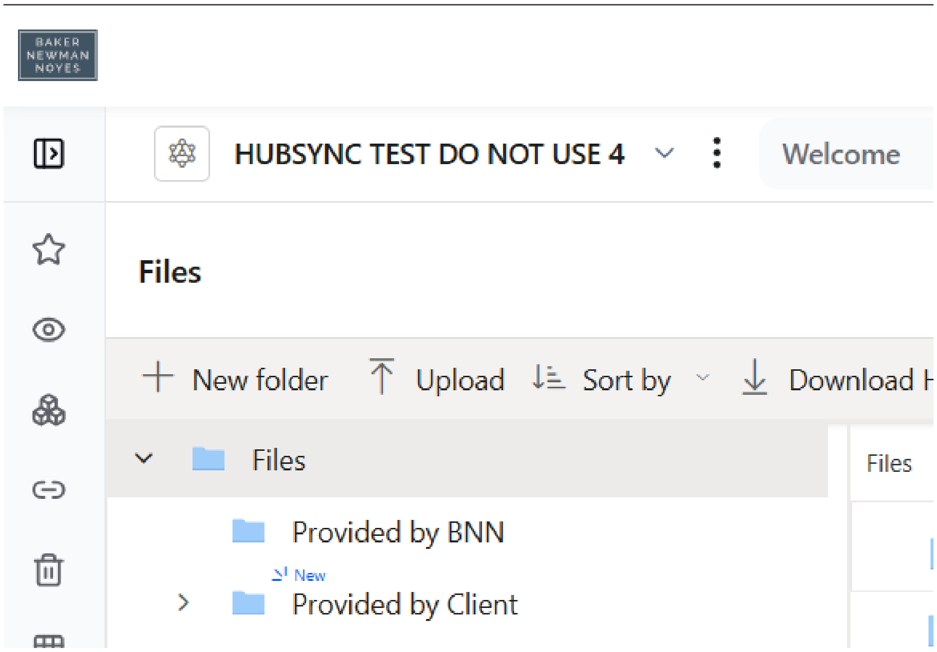
You can add files by dragging and dropping files from one window on your computer into the Upload Documents area on the right. You can also use 'Browse Files' to open your File Explorer and choose which documents you want to add from there. All files that you upload here are saved in the File Cabinet tab in BNN Bridge.

You are not limited to the documents that you upload here! Please note that the ‘Add New Item’ button at the bottom left will be for BNN use only.

Files/Filing Cabinet

The Files or Filing Cabinet tab can also be used to share documents. While uploading directly to the Request list is the preferred upload method for materials, we understand if you need a general area to drop files into.

Make sure when you are dropping files, you are putting them into the **Provided by Client** folder.



You can drag and drop from other windows into the folder.

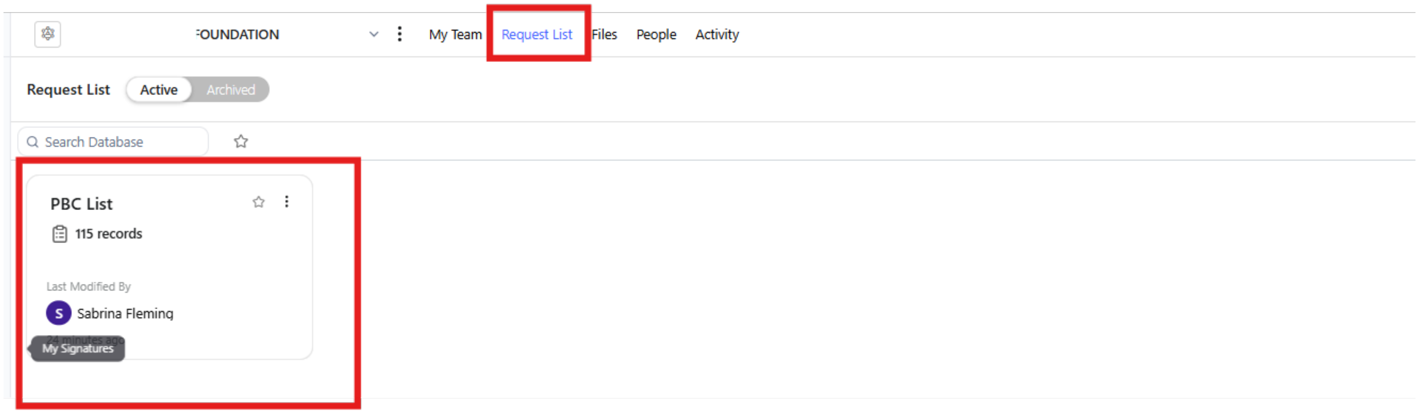
You can also use the Upload button to add files.

Accessing the Request List

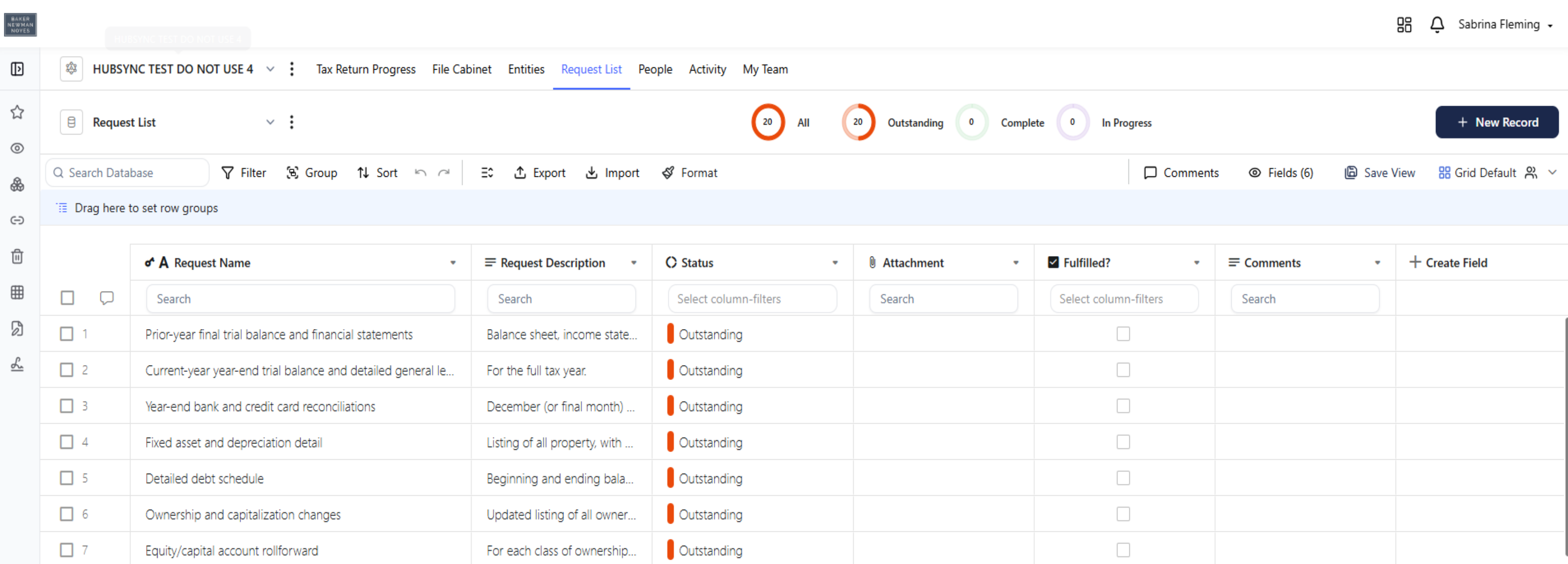
Unless you have already begun working on a request list in Suralink with your engagement team, you should see a new, untouched request list waiting for you in HubSync.

Go to the Request List tab at the top of the Workspace.

You should see a request list there. Click this. Please note yours will likely have a different name than the one below!



You will see a request list ready for you! Please keep in mind that the screenshot below may look different than the one you are working in.



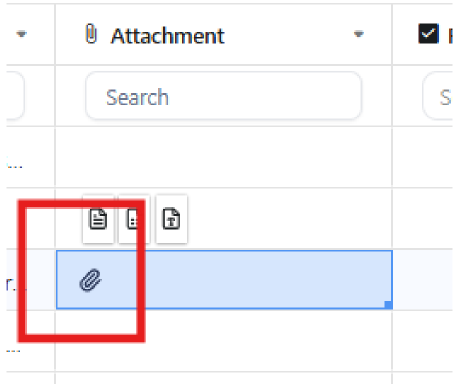
In the Request List

Workflow

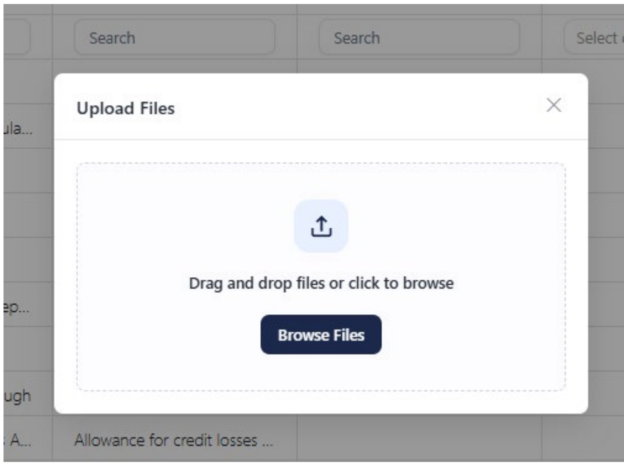
1. You upload an attachment to the applicable request row.
2. **For Audit Clients** - Mark the item as Fulfilled when you complete a request.
   NOTE: Uploading a document does not automatically complete the request! Always ensure to mark as fulfilled when you feel this is ready for the BNN engagement team.
3. Internal BNN team reviews the uploaded document.
4. BNN team updates the status.
5. If more information is needed, the team comments on the row or updates the status accordingly.

Adding Attachments

You can add an attachment by hovering over the attachment column of your desired row and clicking the paperclip button. This will bring you to a pop-up window.

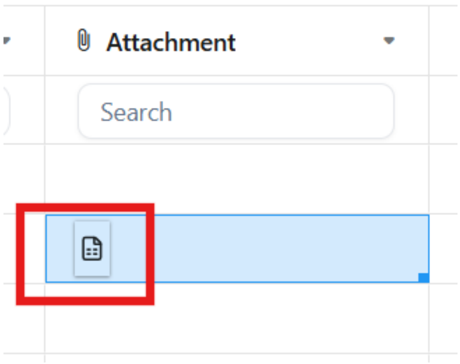


The pop-up window will look like the screenshot to the right. Click Browse Files. This will open your File Explorer.



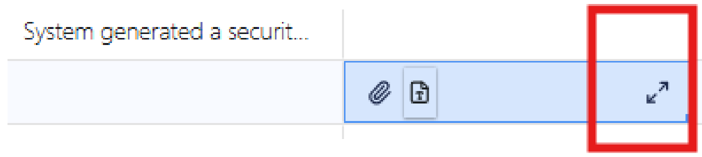
Once your file(s) are uploaded, you will see a small icon in the Attachment column of the row you added to. If you hover over the icon, you will be able to see the name of the uploaded file. BNN Bridge accepts nearly all file types of all sizes.

You can also drag and drop into the Request List by dragging your file into the desired cell in the Attachment column.

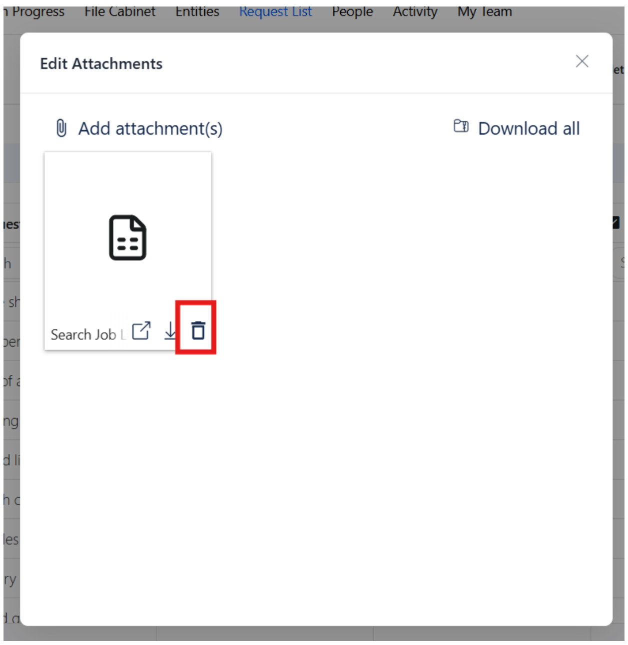


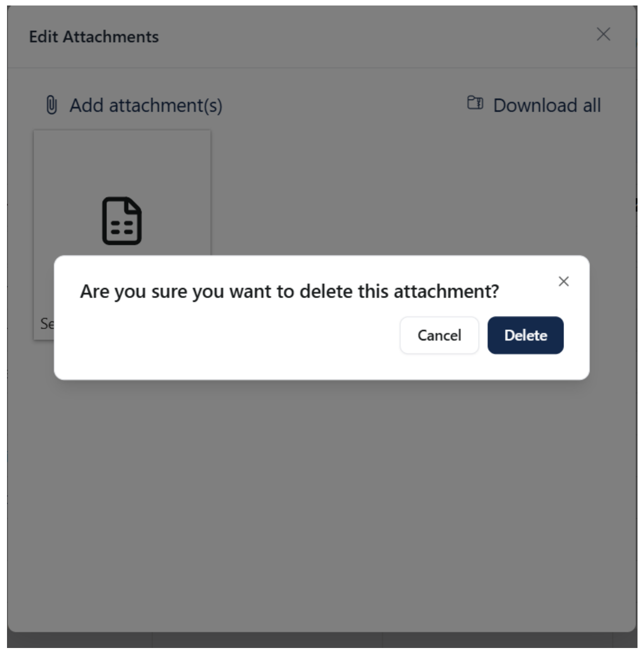
Deleting Attachments

Click on the arrow button within the cell that has the attachment you wish to delete. This will open a pop up box with in the Request List.



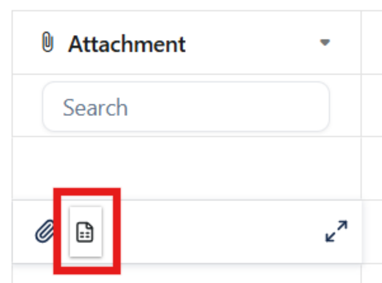
If you hover over the attachment, you will see three icons pop up. To delete the attachment, use the trash can icon. Then, confirm that you want to delete the attachment.

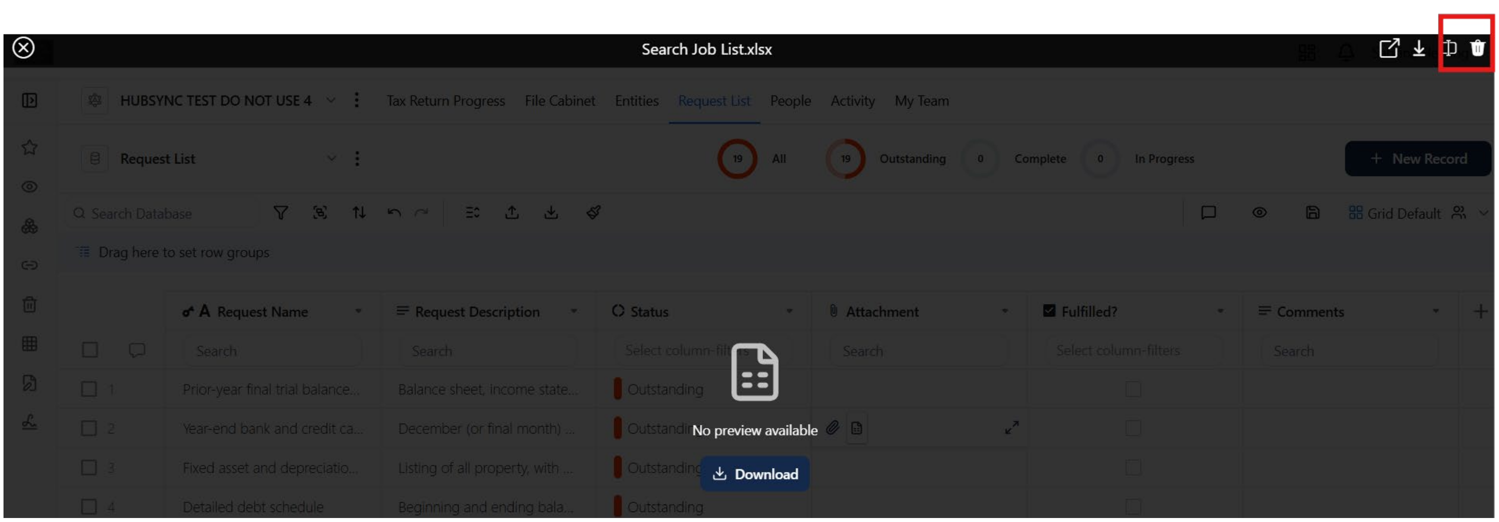




Another way to delete attachments is by clicking on the attachment icon that you want to delete.

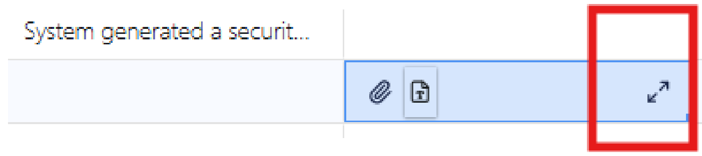
This will open the document (you may not always be able to preview). Click the trash can icon at the top right of the screen to delete the attachment.



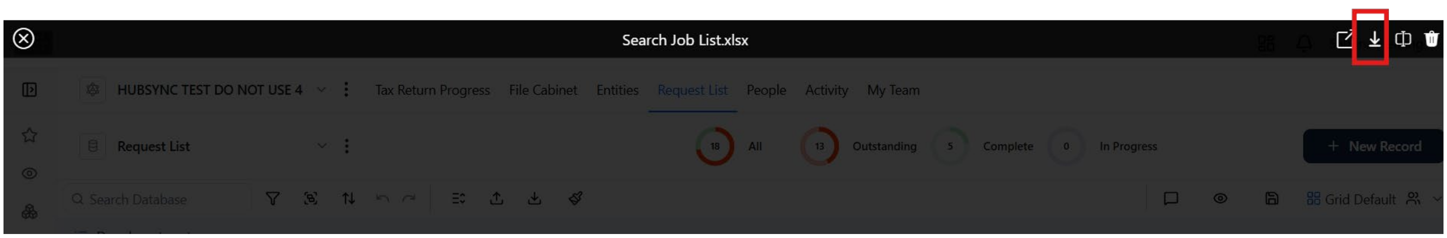


Saving and Downloading Files

All files uploaded to the Request List will be saved in the File Cabinet tab of your workspace. You can also download your attachments by clicking the arrow icon of the desired attachment cell, and using the download buttons in the pop out window.

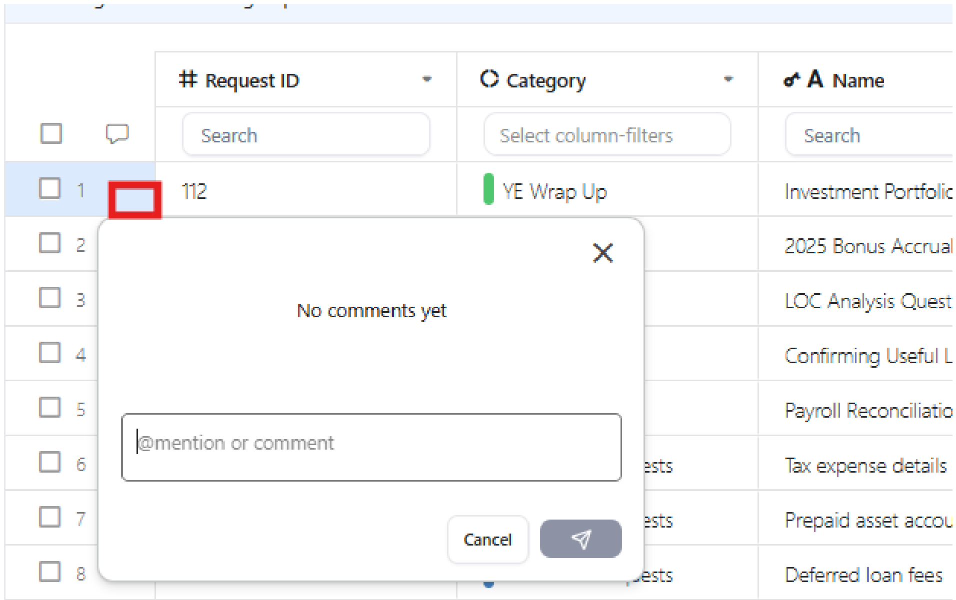


You can also click on the attachment icon and download at the top right corner.



Comments and Communication

There is a chat box icon to the right of each row number. Click that box to add a comment. This comment will apply to the whole row. It is not like Excel where you can comment on each cell.



The threaded comment feature should be used for request-specific communication. Comments allow users to ask questions, respond, tag others, and maintain a dated conversation history. Threaded comments provide more structure than a plain text comment column because they capture who said what, when it was said, and allow @mentions and notifications. Use @mentions when a specific person needs to respond so they can get notified!

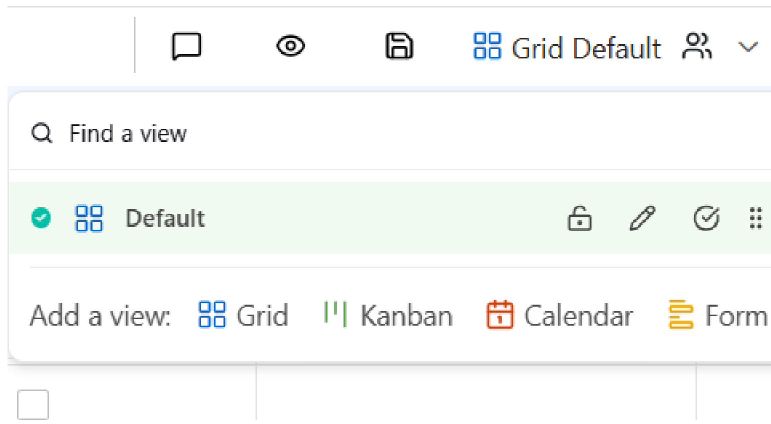
Advanced Functionality

If you are feeling comfortable with Request Lists and want to hear about other features within it, continue reading!

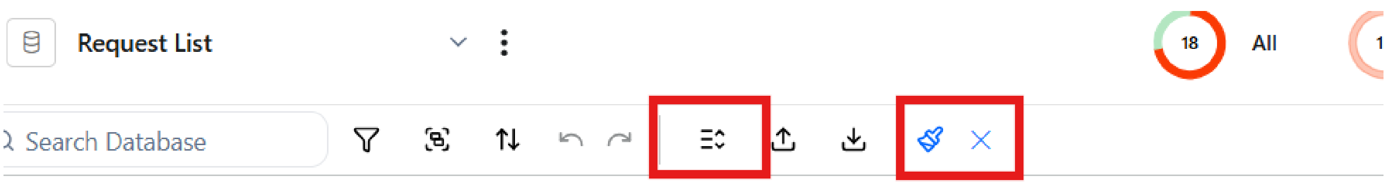
View Options

The grid view is the primary request list view. Users can sort, filter, group, and edit request list rows.

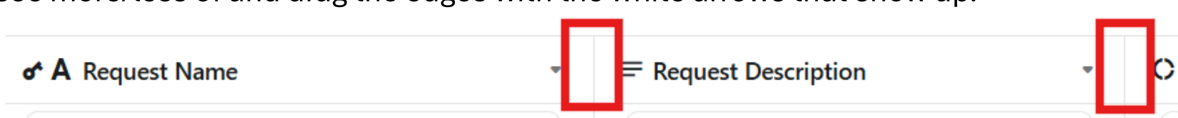
Users can create personal views for their own working preferences. Workspace administrators can modify and save default views that affect all users, so admins should be careful when saving changes to the default view.



You can also change the font, size , and other aspects of the Request List using the paintbrush icon. You can change the row height by using the button with the lines and arrow.

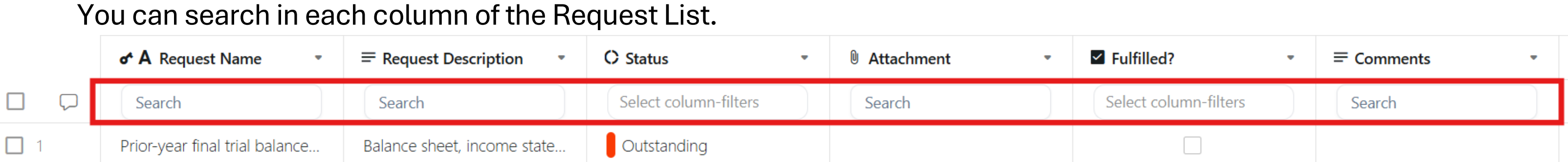


You can also make columns larger or smaller by hovering your mouse over the edges of the column you want to see more/less of and drag the edges with the white arrows that show up.

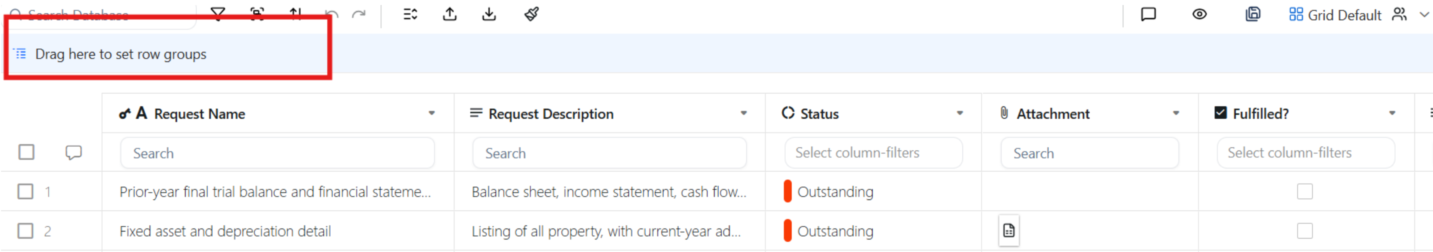


Sort and Search

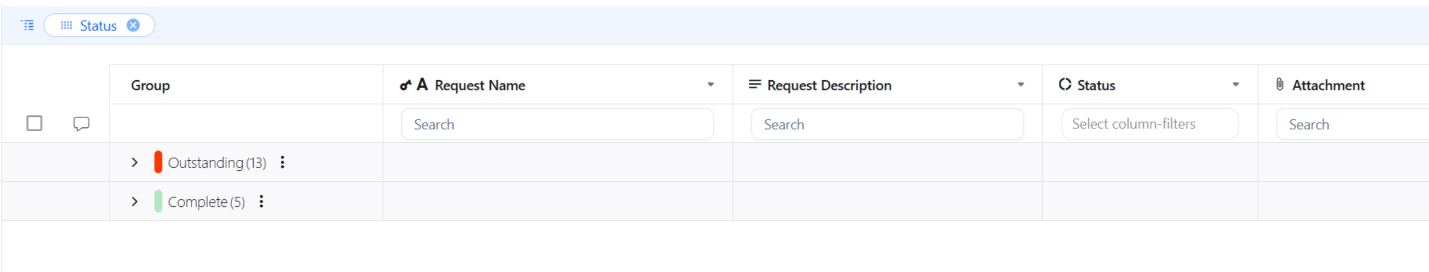
You can search in each column of the Request List.



You can sort by clicking on the column header and an arrow will appear, showing it is sorting alphabetically or numerically from lowest to highest, or highest to lowest. You can also drag and drop columns into the ‘Drag here to set row groups’ area.

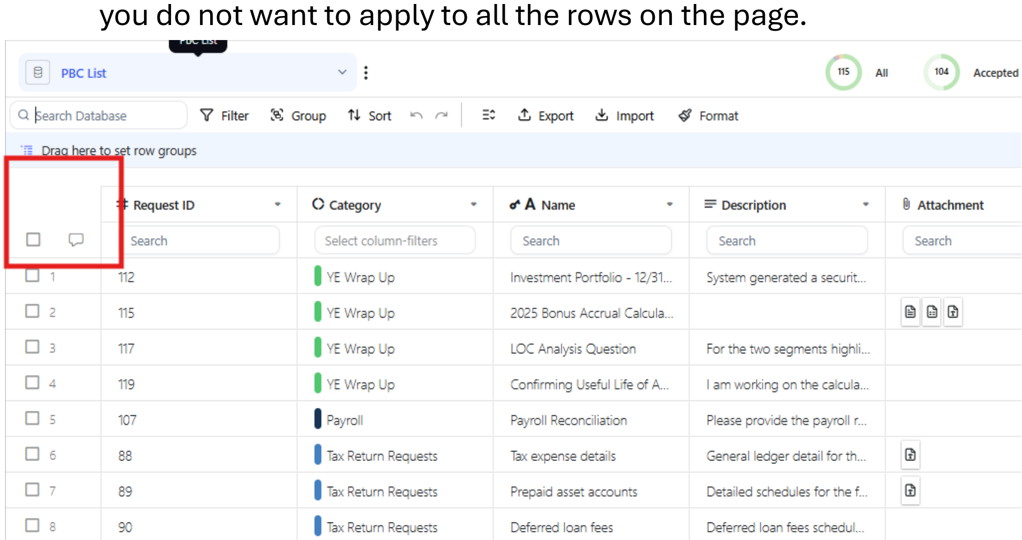


The example below is using Status as the sorting group.

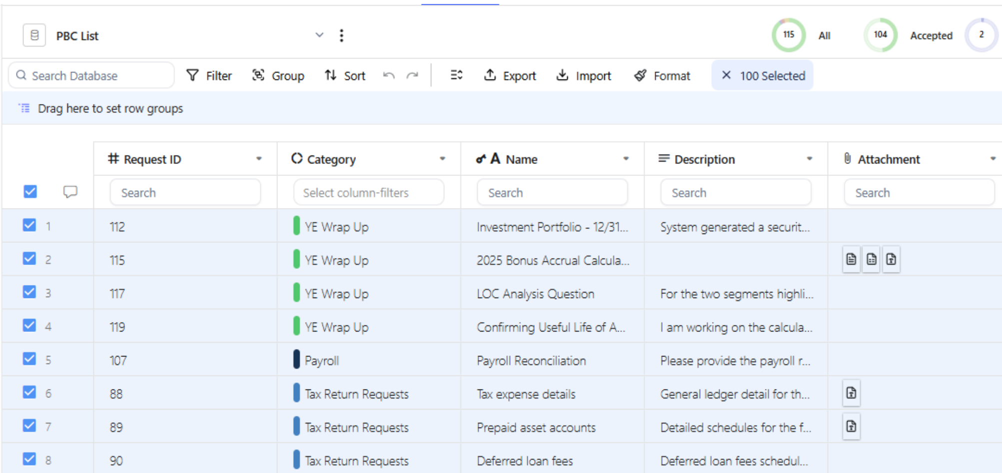


Bulk Action

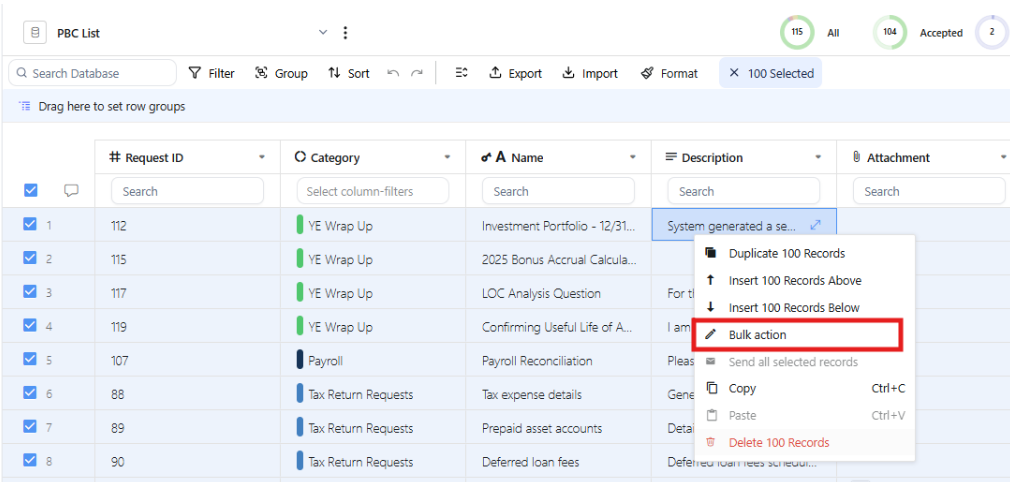
1. Click the checkbox on the top left to choose all the rows on the page.
   NOTE: This does not choose all the rows in the Request List. It is per page and there are 100 rows per page.
   NOTE: You can also click the individual checkboxes for the rows you want to apply the change to if you do not want to apply to all the rows on the page.



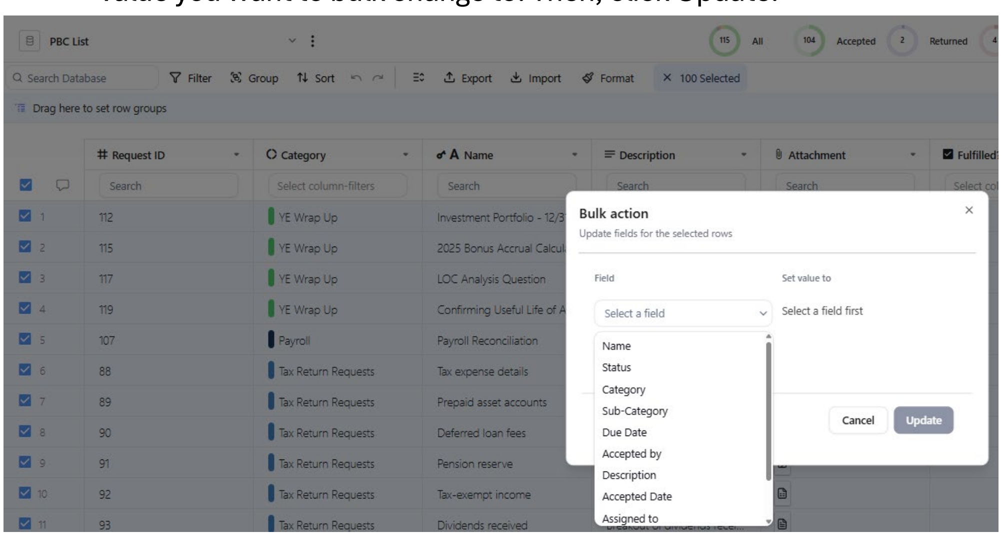
2. Right click on any selected row. The row you click should be blue.



3. Click Bulk Action



4. Choose the field (x-axis/column) you want to bulk action within the selected checkboxes. Then, set the value you want to bulk change to. Then, click Update.



5. You may have to refresh the page to see your changes!