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AuditFile Introduces Add-In Tool for Microsoft Excel

This add-in extends AuditFile's integration with Microsoft Office and works in Excel 2016 for Mac, Excel 2016 or later, and Excel Online. AuditFile users can add the AuditFile Report Builder easily from the Add-Ins tab within Excel. In April, AuditFile...

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AuditFile

Cloud automation solution provider [AuditFile, Inc.](#) has launched its new AuditFile Report Builder, a free add-in for Excel available in the Microsoft Office Store. The new add-in gives A&A professionals greater flexibility in building dynamic financial statements, reports, schedules and other workpapers by linking directly to relevant data in the AuditFile trial balance tool. The Company is showcasing the new tool this week in booth #228 at the AICPA ENGAGE 2017 event in Las Vegas.

“This tool builds on our integration with Microsoft Office, as we continuously innovate to give audit professionals flexible solutions that match how they work today and how they will adapt to meet future demands,” said Founder and COO, Kevin Bong. “Customers can choose to use AuditFile’s built-in, one-click report builder for basic financials, or use this tool to design their own custom reports. The

feedback so far from our customers and the market on our direction with this solution has helped fuel our development.”

This add-in extends AuditFile’s integration with Microsoft Office and works in Excel 2016 for Mac, Excel 2016 or later, and Excel Online. AuditFile users can add the AuditFile Report Builder easily from the Add-Ins tab within Excel. In April, AuditFile announced that it joined the Microsoft Cloud Storage Partner Program and released integration with Microsoft Office Online for creating, editing and managing workpapers within AuditFile’s cloud environment.

The AuditFile Report Builder allows users to connect data from trial balances and leadsheets to Excel to dynamically create custom financial statements and reports, and automatically refresh that data when updates are made in AuditFile. For example, an AuditFile user can easily link a cell in an Excel financial statement or report template to a leadsheet balance, and all journal entries are automatically reflected when real-time updates are made to AuditFile’s trial balance tool.

The company will release a library of pre-built financial statement templates in conjunction with the AuditFile Report Builder to empower users to quickly create the most common reports. Professionals using AuditFile can also create their own library of custom templates that link to information in AuditFile, including prior and current year final account balances, prior year and current year final leadsheet balances, and program area balances (i.e. cash, A/R, investments, etc.).

AuditFile is an easy-to-use, scalable solution that combines workpaper and trial balance management, audit workflow, and methodology in an open platform that easily integrates with other cloud-based tools used in the firm. AuditFile’s secure audit automation solution gives practitioners all the tools needed to perform efficient, quality engagements for audits, reviews and compilations profitably, including:

- Real-time audit progress tracking mapped to the chosen audit program through easy-to-read dashboards and real-time notifications;
- Wiley Advantage Audit’s industry-specific modules with risk-based planning tools and audit program, including sample client letters;
- Integrated workflow linking planning, programs, workpapers, and the trial balance in one complete solution;
- And automated planning tools for key areas such as risk management, materiality, internal controls, and ratio analysis, that flow through to applicable program areas.

News

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