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Advisors and Clients

Each product is a standalone solution hosted in the secure CaseWare Cloud, providing users with flexibility to choose the product or combination of products that best fits their particular needs as they engage in new ways of working, and giving them assurance that everyone involved will be working from one integrated workflow.

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As U.S. and Canadian accounting and auditing industries adapt to a new normal amid a changing world, where working in teams and engaging with clients must be done remotely, leading software provider CaseWare International Inc. has unveiled new technology solutions that enable accountants and auditors to work smarter, faster and more cohesively, both now and for the long term.

“The role of accountant and auditor will be more important than ever in a post-pandemic financial world, where people will need to place even greater trust in numbers and accountability,” said Ross Hampton, CaseWare Head of Business Development – Americas.

“As a result, the speed with which firms transition to this new way of working –

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support they need to shift their entire practice to the cloud.

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“We're addressing the needs of users at all stages of cloud adoption – from forward-thinking firms who are already in the cloud, to firms that are just starting to transition, and those that may want to start small,” Hampton explained. “Everyone needs to be thinking about how the accounting role integrates with the audit role, and how both of those activities engage with clients to ensure everyone is working from the same data, with one workflow and one process to minimize risk.”

Key features and benefits of the suite of products include:

CaseWare PBC Requests

- A new add-on to the CaseWare Cloud platform, CaseWare PBC Requests – a centralized client cloud portal that serves as an excellent introduction to the cloud – allows firms to seamlessly collaborate with clients, securely manage requests, and streamline workflow related to obtaining information.
- Users gain a two-way, real-time communication flow with clients to quickly and securely send signed letters and documentation, receive client files and respond to requests.
- Real-time electronic status updates provide improved workflow visibility, creating transparency and ensuring requests are not forgotten or missed.
- Client requests are automatically aligned with engagement status and platform integration ensures information is synched between the cloud engagement file and

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and tracked.

- Information is automatically updated throughout financial statements and tax returns, removing the need for multiple manual entries and reducing the likelihood for error.

CaseWare Audit

- An end-to-end, cloud-based audit solution, CaseWare Audit is securely hosted in CaseWare Cloud, removing risks associated with duplication of work and over or under auditing.
- Auditors leverage content to identify risk up front and optimize their audit workflow accordingly, performing only the work necessary with the ability to record and view engagement risk from anywhere within the file.
- Auditors have the ability to securely track all communications related to an audit file in one place, from initial assessment and interpretation, to risk identification, evidence gathering and reporting, eliminating the need to work with multiple email threads.
- Auditors are ensured a proper random sample for testing directly within an engagement.

CaseWare AnalyticsAI

- CaseWare AnalyticsAI provides the same artificial intelligence-based transactional analysis, tailored to reflect the way Canadian firms work and including Canadian templates for balance sheets and income statements.
- Easy-to-use analytic capabilities which can be integrated directly into Working Papers to allow auditors to perform analysis as part of their routine workflow.
- Entire data sets are quickly analyzed to find exceptions and identify areas of higher risk, allowing auditors to perform more accurate and thorough audits.

“Whether you’re an auditor looking for greater insights or an accountant working

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