



Workpaper Suite

The industry's first fully integrated
request-to-test solution



Work smarter, deliver faster and simplify how your team collaborates

Engagement workpapers are where your team's work comes together. But disconnected tools, manual processes, and outdated workflows are holding firms back.

That's why we created Workpaper Suite: to help engagement teams across audit, tax, and advisory streamline workpaper preparation, improve client collaboration, and reduce review cycles—without ever leaving Excel. In this guide, you'll discover how Workpaper Suite helps your team:

- Save time by automating tedious prep and review tasks
- Improve accuracy and reduce errors
- Collaborate in real time with clients through seamless Request List Management integration
- Scale your firm's capacity without adding hours

Whether you're managing multiple complex engagements or scaling your team across different service lines, Workpaper Suite is built to meet you where you work and take the pressure off busy professionals.



The challenges facing today's engagement teams

Engagement teams are under constant pressure to do more with less. But outdated tools and disconnected workflows are slowing them down.

Here are the biggest challenges they're facing today:



Manual work eats up valuable time

Organizing, formatting, and linking documents takes hours away from high-value work.



Disjointed systems cause delays

Management of PBC (or client) requests and engagement workpapers often happens in separate tools, creating version control issues and slowing collaboration.



Engagements run over budget and behind schedule

Missed deadlines and extra hours hurt realization and strain client relationships.



Limited visibility increases risk

When files are spread across platforms and team members, it's harder to keep teams aligned and maintain data security.

For firms trying to grow, these inefficiencies become more than just a workflow issue—they become a capacity and profitability problem.



The solution: introducing Workpaper Suite

Workpaper Suite is Suralink's Excel-based solution designed to simplify how engagement teams manage, prepare, and review workpapers—without changing the way they already work.

Built to reduce manual effort and streamline the most time-consuming parts of the engagement process, Workpaper Suite helps your team stay organized, move faster, and collaborate more effectively.

What makes Workpaper Suite different?



Works directly in Excel

No need to switch systems or learn a new interface. The add-in lives in the tool your team already knows and uses every day.



Automates repetitive tasks

Eliminate time spent data matching, formatting, and organizing documents. Workpaper Suite auto-syncs support files and populates workpapers, saving hours on every engagement.



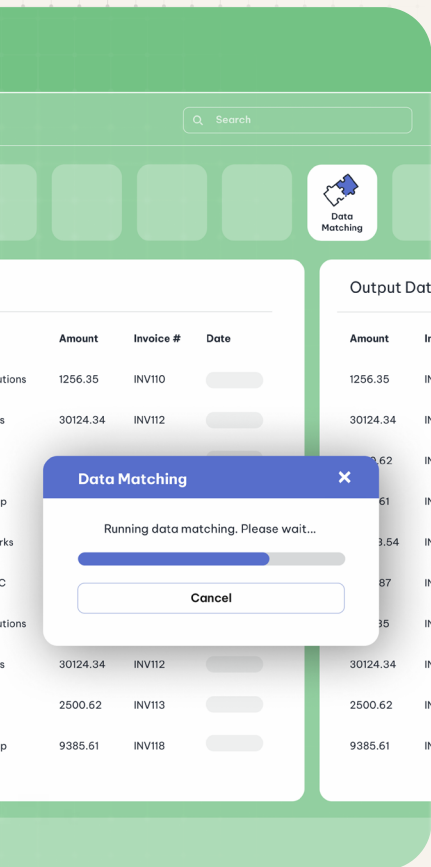
Reduces errors and boosts accuracy

Cloud-based syncing, built-in checks, and streamlined file linking reduce the risk of misfiled, outdated, or missing documents during review.



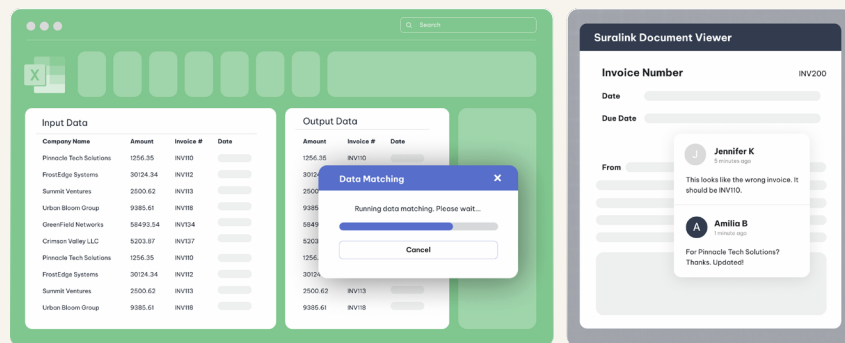
Compatible with any workpaper software

Whether your firm uses Caseware, CCH, or no formal workpaper platform at all, Workpaper Suite integrates seamlessly—no IT lift required.



The real difference maker? Improved client collaboration.

Client communication is one of the most critical and often painful parts of any engagement. Disconnected email threads, missing documents, and unclear follow-ups slow down progress and increase frustration for both your team and your clients.



Workpaper Suite changes that by connecting your engagement workpapers directly to your client request workflows, right within Excel. Engagement teams can reference support documents, respond to client requests, and clarify questions—all in real time, without leaving their workflow or bouncing between tools.

The Result

Faster turnaround on requests, clearer communication, and a smoother, more professional client experience from start to finish.

Workpaper Suite brings structure, automation, and clarity to engagement work so your team can spend less time chasing documents and more time delivering value.



Key benefits for engagement teams

Workpaper Suite was built to give engagement teams the clarity, efficiency, and control they need to deliver high-quality work—without the chaos.



1 Reclaim hours across every engagement

Automate time-consuming tasks like document linking, formatting, and tracking while reducing the risk of human error in the process.

2 Keep everything organized and ready

Auto-synced files and built-in structure ensure your workpapers are always up to date, version-controlled, and easy to review.

3 Streamline review cycles

Reviewers can verify support, leave comments, and sign off faster with everything clearly linked and traceable. No more hunting for documents.

4 Protect client data and maintain compliance

With cloud-based syncing and reduced reliance on local file storage, teams can better safeguard sensitive documents and support regulatory requirements.

5 Maximize capacity across the team

Eliminate workflow friction and free up capacity to take on more clients, more engagements, or more complex work without additional headcount.



What your clients experience



While Workpaper Suite is built for engagement teams, its impact extends all the way to your clients. By streamlining the behind-the-scenes work, your team can provide a smoother, faster, and more responsive client experience throughout every engagement.

Here's how your clients benefit:

1 Fewer delays and faster turnaround

With documents automatically linked and review-ready, your team spends less time going back and forth—and more time moving work forward.

2 Clearer communication and fewer surprises

Embedded commenting and real-time updates help your team ask the right questions at the right time. Without email chains or missed messages.

3 Reduced burden on the client

Engagements will always require follow-ups, but WorkPaper Suite helps make that process less painful. By organizing files more effectively and enabling in-context communication, your team can reduce the number of duplicate requests and make it easier for clients to respond quickly and accurately.

4 A more polished and professional experience

Organized, efficient workflows give your clients confidence in your process. Your team works smarter behind the scenes, and your clients feel the difference.



Start delivering smarter engagements with Workpaper Suite

Workpaper Suite isn't just a product. It's a better way to work.

By embedding automation, structure, and collaboration directly into Excel, your team can spend less time organizing and reviewing—and more time delivering insights, building client trust, and scaling your firm's impact.

Workpaper Suite helps you:

- **Improve accuracy and efficiency**
- **Elevate your clients' experience**
- **Improve client collaboration**
- **Maximize your team's capacity**
- **Reduce review cycles and risk**

Ready to see it in action?



Let us show you how Workpaper Suite fits your workflow and drives real results! Scan the QR code or click the link below to book a demo.

