

Workpaper Suite & Request List Management: Better Together

Why it Matters to Your Firm

Save time. Reduce errors. Stay in sync.

- ✓ **Native integration** between Workpaper Suite and Request List Management offers real-time syncing of PBCs directly into Excel, giving teams instant access to support docs and a more streamlined review process.
- ✓ **Automated data extraction** and accurate sample testing accelerate prep work while minimizing compliance risks.
- ✓ **Add pinned and tagged comments** directly to PBCs from your workpapers to improve reviewer efficiency and simplify client follow-up across teams.

Why it Matters to Your Clients

Less back-and-forth. More clarity. A better experience.

- ✓ **With linked files and comments stored securely** in one place, clients aren't stuck resending documents or answering the same questions twice.
- ✓ **Pinned comments provide contextual clarity**, making it easier for clients to respond accurately and stay aligned with your team.
- ✓ **A smoother process** builds trust and keeps your engagements moving forward.

The Outcome: End-to-End Engagement Efficiency

The connection between Request List Management and Workpaper Suite unlocks a more intelligent and connected engagement workflow for your team and clients:

- ✓ Teams work faster and smarter in Excel with direct access to client docs.
- ✓ Reviewers benefit from better visibility, fewer errors, and easier collaboration.
- ✓ Clients enjoy a more polished experience with less confusion and more clarity.



Ready to run more efficient, accurate, and scalable engagements—from kickoff to close?

See how it all comes together in a demo.