

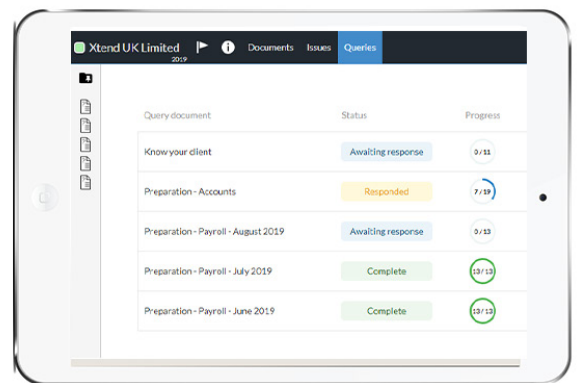
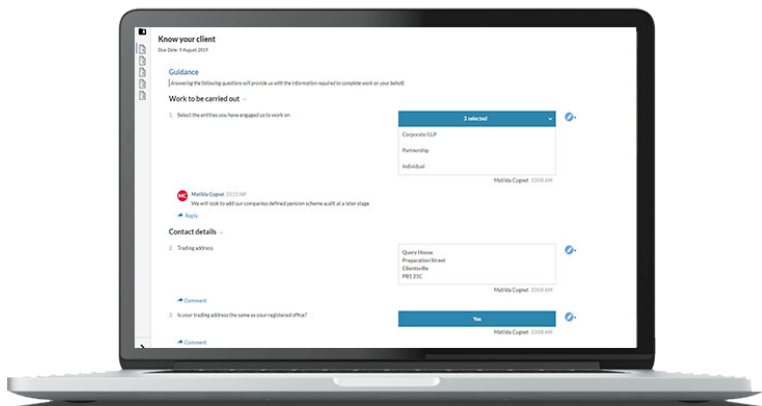


Xtend

The intelligent choice for client collaboration

Collaboration between your staff and clients can reach new levels of efficiency and productivity thanks to CaseWare Xtend. Communicate with clients using intelligent questionnaires easily and securely. With the ability to send and manage multiple requests our centralised file management system provides a single location for all your client data and files with bank level security built in.

*Streamline time consuming work, enhance data security and create greater relationships between staff and clients*



### Key features



Assignment to Contacts



Query Dashboard



Audit Trail



Intelligent Questions



Integration

## Key benefits



### Tailorable Requests

Use pre-determined or create your own information requests and save them as a firm template



### Email Efficiency

Removes the requirement to send multiple emails requesting further information



### Intelligent Templates

Intelligently tailors questions a user sees and removes irrelevant questions



### Information Tracking

Staff can easily identify areas of outstanding information without the large email threads



### Information Storage

Using a centralised file management system documents can be filed into an engagement file

## Why the Cloud?

Cloud technology is changing accounting software and how accountants are working. Cloud platforms make data and software accessible from anywhere, anytime from any device without the need for a central hub.

Promoting greater collaboration is clearly key for accounting firms looking to impress prospects or retain clients and the cloud has great advantages when it comes to promoting real-time collaboration by allowing firms to review, comment on and sign off files at the same time.

CaseWare's Cloud platform allows sensitive data to be transferred securely online through cloud-based add-on tools, essential in this post GDPR world.