

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

Guidance Assessing the following questions will provide us with the information required to complete work on p	our behalf.			d UK Limited 🏲 👔 Documents Iss 2019		
Work to be carried out						
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Key features





Key benefits



Email Efficiency

Removes the requirement to send multiple emails requesting further information



Intelligent Templates

Intelligently tailors questions a user sees and removes irrelevant questions



Tailorable Requests

Use pre-determined or create

your own information requests

and save them as a firm template

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.