Cloud Audit Suite

The premiere solution for efficient and accurate audits

THOMSON REUTERS®

The industry's leading end-to-end audit solution

Cloud Audit Suite is an end-to-end solution providing accuracy and efficiency throughout the audit process. Confidently complete audits with a suite of tools, including the only online true confirmation service and integration with third-party data analytics. With cloud-based technology, the suite offers the advantage to work from anywhere, collaborate with colleagues in real time, and securely access your audit data.

More than 17,000 firms already rely on our audit solutions and leading audit methodology backed by experienced editors and authors. Easily find the information you need and help ensure your audits comply with professional standards and pass peer review.

Explore the suite

AdvanceFlow

Checkpoint® Engage
Audit and PCR (Preparation, Compilation, and Review

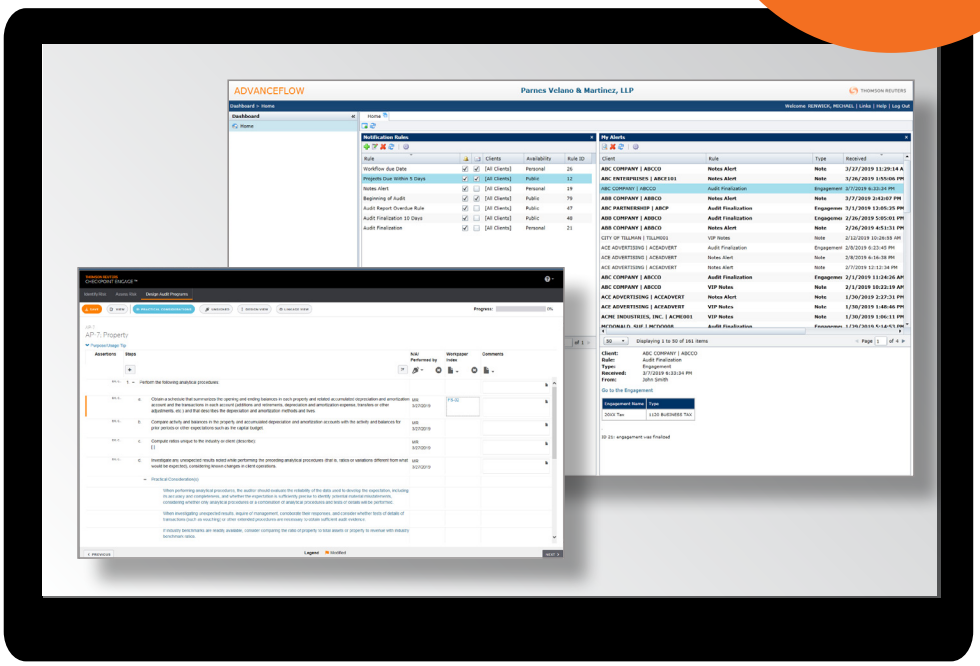
Thomson Reuters® Confirmation

AuditWatch

Checkpoint Edge

GoFileRoom

With Thomson Reuters Cloud Audit Suite, you'll enjoy the modern experience of the latest, most comprehensive audit workflow solution.

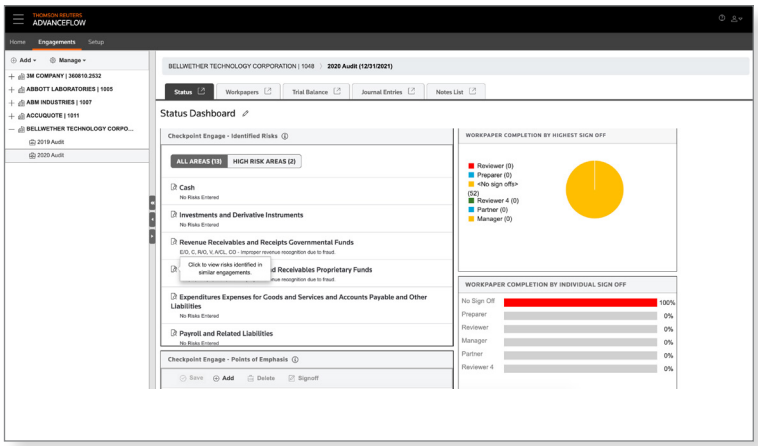


Cloud Audit Suite: AdvanceFlow

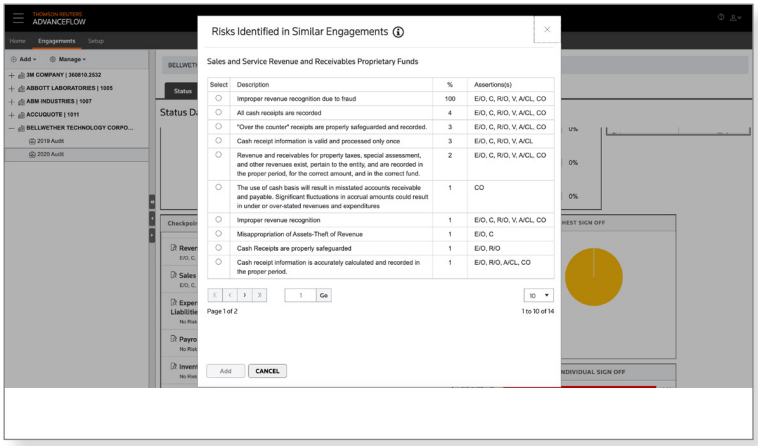
Cloud-based convenience meets enterprise-level power

AdvanceFlow is the most comprehensive cloud-based audit workflow management hub on the market with full trial balance capabilities, workpaper management, financial statement reporting functionality, and more. Easily manage your entire audit from a single source and communicate relevant information to clients, including status of work overall, workpaper signoff status and financial advice.

- Complete several tasks simultaneously and enjoy customization options that further increase workflow efficiencies with powerful workpaper management, enabled by templates that complete data-intense jobs easily
- Rely on AdvanceFlow from anywhere at any time with cloud-based access to get the tools and data you and your staff need without delay — no software downloads, updates, or versioning that impact productivity
- Get the sophisticated trial balance capabilities auditors need, even for large consolidation and fund clients. Busy staff can benefit from fast trial balance imports, cutting-edge filtering, and organizing capabilities that increase accuracy and speed
- Take advantage of consistent automated document retention policies with GoFileRoom — the tool of choice for accounting firms across the US. AdvanceFlow was specifically built to complement GoFileRoom, ensuring existing users will enjoy the familiar navigation, workflow, and security features, along with the additional power of AdvanceFlow.



AdvanceFlow dashboard provides an up-to-date visual of open items and upcoming activities across your engagements.



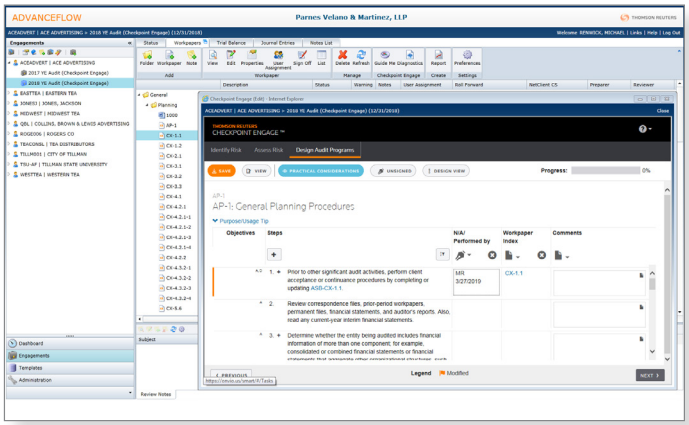
Using the new Identified Risks feature, see at-a-glance what risks you have tied to particular audit areas and those applicable assertions, risks identified in similar engagements, and more.

Cloud Audit Suite: Checkpoint Engage

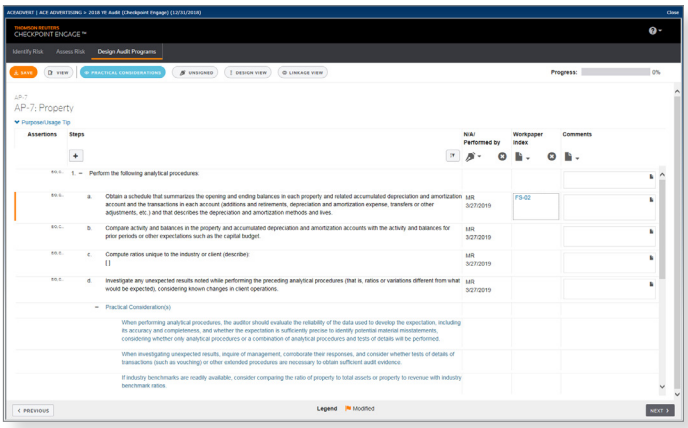
The next generation of audit engagements

Checkpoint Engage is an automated and risk-based methodology for tax and accounting firms to manage all types of engagements, including audits, reviews, compilations, and preparation. With detailed assistance at the point in time it's needed, auditors can gain confidence in the process, increase efficiency and deliver more value-add audits to clients.

- Instantly access audit data from any location with simplified workflows that eliminate the worry about transferring, backing up, restoring, or refreshing audit files
- Have the option to manage all engagements in the exact same way with the addition of Checkpoint Engage PCR (Preparation, Compilation, and Review)
- Access live data simultaneously fostering team transparency and confidence. Plus, coordinate multi-location audits - easily connecting global fieldwork with the real-time collaboration
- Enjoy unmatched flexibility to design a risk-based audit approach for any size engagement using a top-down risk-based workflow design. Plus, take advantage of expert guidance from the PPC content authors who have a combined 300 years of audit experience
- Manage version control issues with web-based audit planning workflow management that ensures you and your staff always have the latest version of a document
- Secure sensitive data confidently, employing multiple layers of digital and physical security that continually follow the latest best practices in data safety, including regular third-party audits that ensure data is protected from digital threats and attacks



Checkpoint Engage workpapers are within AdvanceFlow, so all your audit planning, testing, and documentation are in one place accessible anytime, anywhere.



Directly link your program steps to specific testing workpapers easily.

Cloud Audit Suite: Confirmation

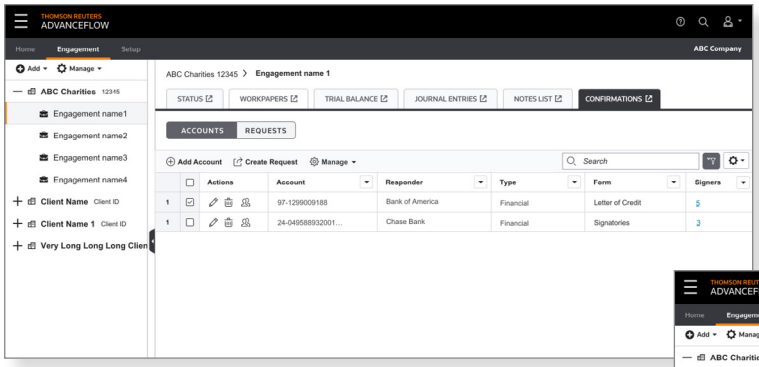
Easy, fast confirmations. Every time.

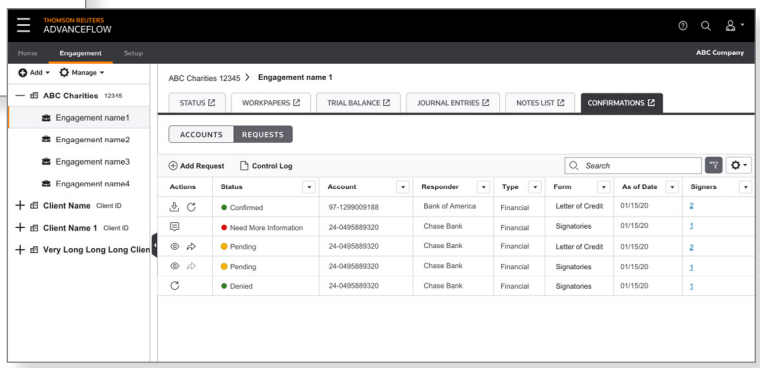
Confirmation provides an easy, fast, and secure way to send and receive confirmations to anyone, anywhere in the world. With our online solution, you can eliminate traditional, outdated methods that are prone to errors. Our growing validated network and internal procedures ensure users are who they say they are, reducing the risk of fraud. Only Confirmation provides a global network of validated responders, such as banks and law firms, that guarantee a response.

Available within the Thomson Reuters® Cloud Audit Suite, Confirmation delivers all the benefits of a seamless audit workflow from a single solution. Send, monitor, and receive electronic confirmations securely from AdvanceFlow, the same place you manage your audit engagements. Confirmation also works inside of Checkpoint® Engage. Link directly from the audit program requiring a confirmation to the new Confirmation dashboard in AdvanceFlow.

Discover the benefits of Confirmation

- Get a guaranteed response with automated follow up on the auditor's behalf
- Cut confirmation time from weeks to days
- Be confident the response you get is coming from a validated financial institution
- Save your clients time with a single, digital signer authorization
- Roll over client account information from year to year within a secure system





Thomson Reuters is the first and only provider to offer a true, end-to-end remote audit workflow, including embedded confirmations.

Cloud Audit Suite: AuditWatch

Get specialized audit training and consulting

AuditWatch is the leader in productivity that provides leading experts to train and consult on everything from audit process consulting to audit technology services. Let your firm focus on what it does best and rely on AuditWatch to deliver the training.

- Integrated curriculum tailored to audit professionals and CPA firms is available in three delivery options: Public live seminars, in-house seminars, and customized training. Plus, AuditWatch offers consulting and customized course development, as well as A&A Updates, PPC Methodology Essentials, and Peer Review Remediation
- Live seminars: Pave a path to professional growth for tax professionals and auditors at all levels with hands-on experts who teach practical, relevant, and innovative material in an engaging and easy-to-follow manner several times throughout the year.
- Consulting services: Improve each engagement with your clients and assess ways of becoming more productive with a personalized consulting service for your firm

"The AuditWatch material is so beneficial and I found the instructor's previous experience in the field of audit so valuable to the course."

— Tom Gawlik, Consultant
Lions Park LLC

"We do not have the capacity nor the time to come up with all of the solutions on our own, so we rely on Thomson Reuters to educate us and to keep us on our game."

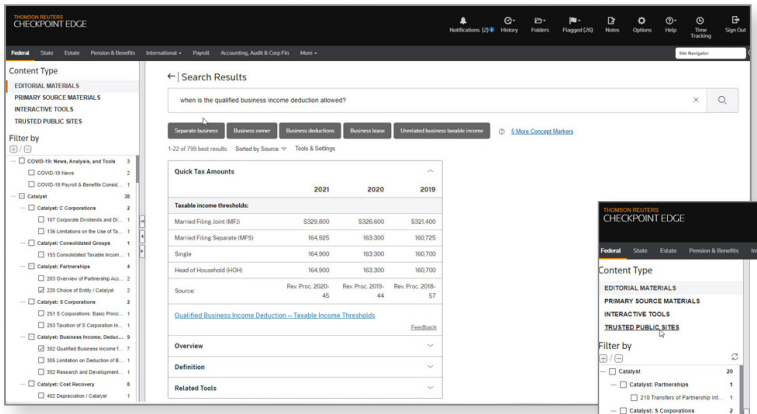
— Brian Donlan, Partner
Donlan, Goldman & Roth, P.C.

Cloud Audit Suite: Checkpoint Edge

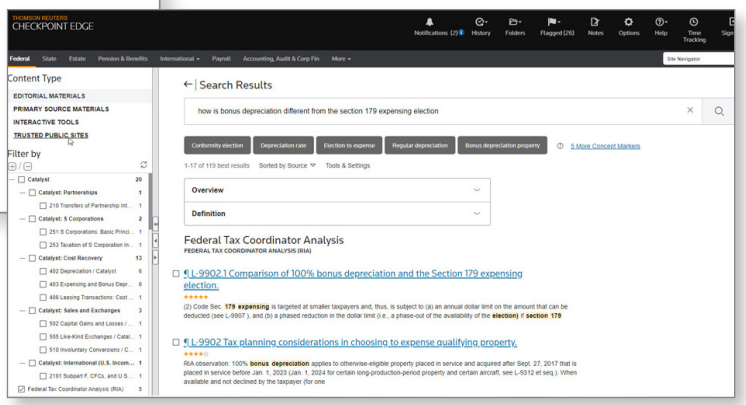
The most intelligent tax and accounting research platform ever

Checkpoint Edge is a research and guidance tool to help you find the information you need with embedded research and professional standards throughout your engagement process. Quickly search and find answers from simple questions to the most complex issues from trusted subject matters experts and source sites. Checkpoint Edge provides an immersive experience that delivers the latest in artificial intelligence (AI), cognitive computing, and machine learning technologies.

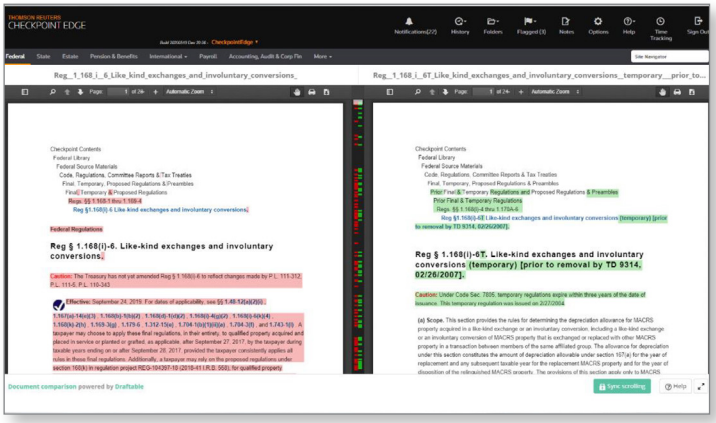
- Exceed client expectations by responding to clients with the right answer in less time. The intuitive and predicative search of Checkpoint Edge goes beyond results to suggest relevant expert insights and analysis.
- Save time on research and empower junior staff to find their own answers, freeing up senior staff to spend more time on billable activities.
- Rely on accurate content that is produced by knowledgeable teams of subject matter experts and updated frequently based on legislation changes and new developments.
- Simultaneously search Checkpoint and other trusted sources like IRS.gov, IRS Tax Map, Forms & Instructions, state-specific departments of revenue, AICPA, and the Big 4.



Snapshots provide you with quick answers and orient you to unfamiliar topics, so that you can propel your research forward without having to always scan through search results, open documents, and hunt for answers.



Checkpoint Edge provides a new form of rapid and interactive dialogue for users. Proprietary concept markers are AI-powered suggestions to help pivot your search or identify unconsidered scenarios to find the best answers.



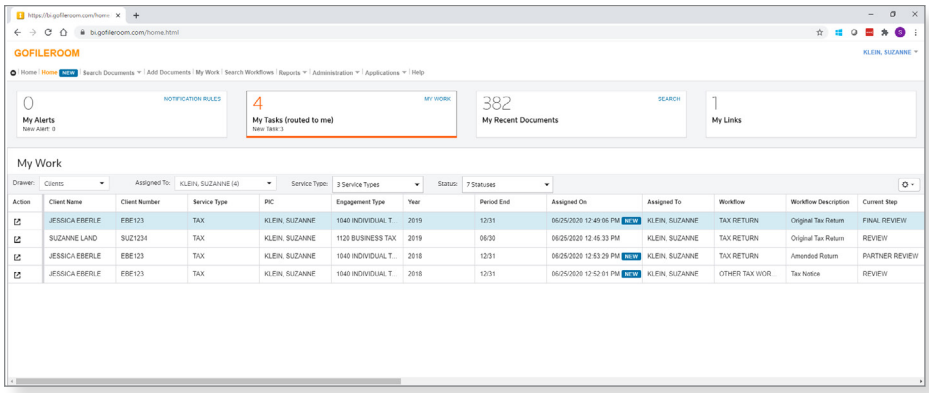
The document compare feature provides an easy way to accurately compare directly related official documents for select primary sources from the past six years, including the Internal Revenue Code, Treasury regulations, IRS rulings, procedures, and state statutes.

Cloud Audit Suite: GoFileRoom

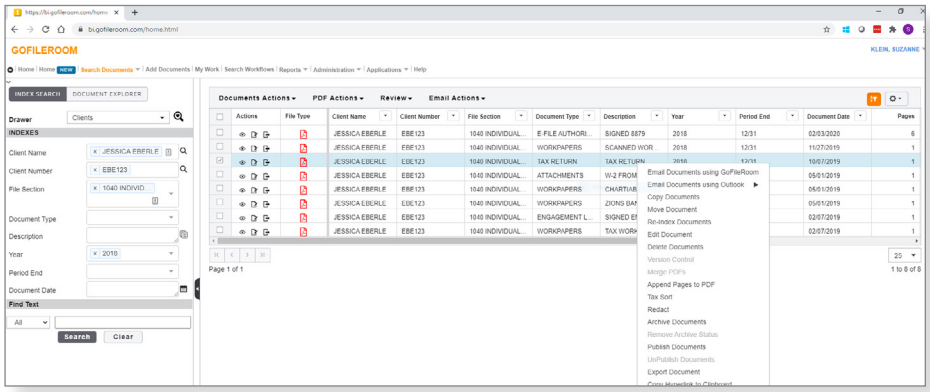
Access documents 24/7 with cloud-based storage

Thomson Reuters GoFileRoom is a cloud-based solution that combines document management, scanning, and workflow technologies into a single cloud-based solution to streamline your processes and create a truly paperless office. Easily collaborate with remote clients and staff with 24/7 access to documents that update in real time.

- GoFileRoom standardizes and organizes volumes of documents so you can efficiently share, route, and review files — from anywhere
- Maintain full control of your documents while ensuring their integrity using our advanced enterprise-level security features
- Reduce costs by eliminating paper files, storage fees, postage, and manual administrative tasks
- GoFileRoom works seamlessly with AdvanceFlow. Plus, with the GoFileRoom API, you can automate your day-to-day tasks and build workflows between GoFileRoom and other apps
- Add the optional FirmFlow module to instantly access your current work list, view future assignments, and route work through your business process, regardless of location



Dashboard-style home screen: View information, including alerts and notifications from different areas of GoFileRoom through a variety of user-friendly portlets.



Efficient search features: Locate documents quickly and easily with sophisticated search features.

Learn more about how cloud audit suite could help accelerate innovation and client satisfaction at your firm. Contact a sales representative today at 800-968-8900 or visit tax.tr.com/audit-in-the-cloud.

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