

# AdvanceFlow

An engagement manager for today's needs

Thomson Reuters AdvanceFlow® is the most comprehensive cloud-based engagement management tool with full trial balance capabilities, workpaper management, financial statement reporting functionality, and more. Manage all types of engagements, including audit, accounting, tax, and advisory.

## Elevate your practice with time-saving features

- **Client Communications** allows you to streamline the information request process with the ability to send and track client communications right from AdvanceFlow.
- **Preview** feature enables you to view documents without opening their native applications.
- **Roll forward** feature provides engagement information, reporting periods, dates and indexing, trial balance, and workpaper settings for the subsequent year's audit file.
- **Seamless data flow** with Thomson Reuters solutions helps you confidently complete engagements faster without duplicative data entry.

## Easily manage your entire audit

- Organize your engagements, workpapers, files, trial balances, reports, and notes.
- Always access the latest version of your trial balance, audit programs, and workpapers with real-time updates.
- Collaborate in real time with your staff and clients on the same engagement at the same time without syncing issues.
- Track status of work and workpaper sign-off.
- Securely send, monitor, and receive electronic confirmations right from AdvanceFlow.

AdvanceFlow brings a new level of convenience as part of Cloud Audit Suite, an end-to-end solution to easily manage your entire engagement from a single source, including audit confirmations. Built on cloud-based technology, you can collaborate with colleagues and clients on even the most complex jobs with engagements and workpapers that update in real time.



### Sophisticated trial balance capabilities

Easily prepare financial statements. The working trial balance is powerful, even for large consolidation and fund clients. Get the job done quickly and accurately with fast imports and customizable filters.

Receive a daily newsletter to track the most relevant news



### Powerful workpaper management

Manage even the most data-intensive engagement with drag-and-drop organization, customizable views, and a list to easily find and check the status of workpapers.

Enhanced multi-tasking capabilities enable you and your colleagues to perform several tasks at once without waiting for the prior process to finish.



### Microsoft Office integration

Create audit workpapers, financial statements, or lead sheets in Excel and Word using the AdvanceFlow tool bar.



### Redesigned audit experience

- Maximize your work space
- Track due dates with the engagement dashboard
- Notifications for tasks assigned to you

**Looking for a seamless workflow?** AdvanceFlow integrates with Checkpoint Engage, Confirmation, GoSystem Tax® RS, UltraTax CS®, a variety of third-party applications, and the Microsoft® Office suite of products.

Contact us at **800-968-8900** or [tax.tr.com/audit-in-the-cloud](https://tax.tr.com/audit-in-the-cloud).