



# OnPoint Collaborate

Secure, effective collaboration  
around PBC documents and  
requests

## OnPoint Collaborate

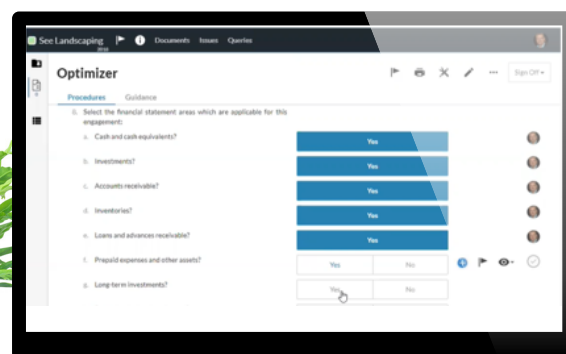
PBC documents and requests are often accompanied by administrative challenges in gathering information from clients, like back-and-forth email conversations that tend to live in one staff member's inbox. Lack of a standard way to manage PBC documents can lead to inefficiencies throughout the process and limit visibility into the status of requests.

Designed to foster more effective and secure collaboration, OnPoint Collaborate, part of the OnPoint A&A Suite powered by CaseWare Cloud, standardizes how firms manage PBC documents, from initial requests to final wrap up. Unlike traditional methods of PBC document management, OnPoint Collaborate creates a single, central project for all parties involved, with only the appropriate access and rights granted for each participant, whether part of the firm or the client team. In addition, firms can either start quickly with predefined templates or configure their own templates to ensure a consistent approach and smooth process for everyone.

**Configure your own templates to optimize in areas of focus for the engagement while omitting areas of irrelevance.**

OnPoint Collaborate enables firms to collaborate and communicate with clients more effectively in real-time, by offering features including:

- A single, centralized and easily accessible location to manage client files and requests
- Automatic updates; nothing needs to be downloaded or installed on a company computer
- Integration with CaseWare Working Papers to help firms moving their assurance services to the cloud
- Easy drag and drop of documents to outside engagement management tools
- When using OnPoint PCR, OnPoint Collaborate tools are seamlessly embedded into preparation, compilation and review methodology to help optimize those engagements



Call 855.855.5CPA or learn more at [CPA.com/OnPointCollaborate](https://CPA.com/OnPointCollaborate)

# OnPoint Collaborate

Keep engagement momentum moving forward

OnPoint Collaborate offers an environment that reduces the time and effort in gathering data and documentation from clients through benefits that include:



### **Establish a Consistent Approach with Firm-Wide Templates:**

Configure requests to your liking to establish a foundational approach for PBC documents.



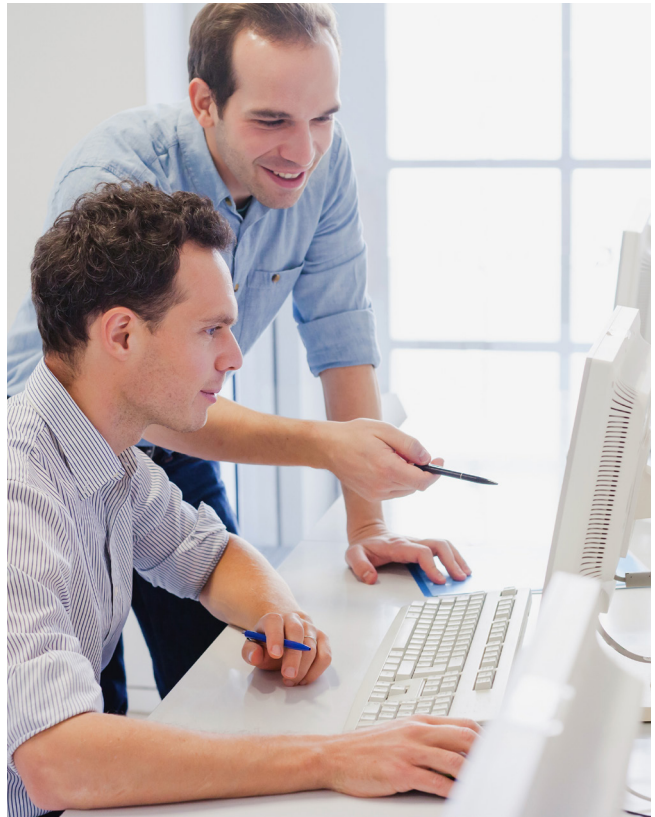
### **Streamlined Communications that Reduce Email:**

Drive the process forward through online transparency instead of back and forth, one-off emails.



### **Customized Client Requests:**

Questions seen by clients can be intelligently tailored in or out based on how the client responds.



### **Heightened Visibility into Status of Requests:**

Instantly see and track what requests have been fulfilled, which are outstanding, and what questions have been asked in response to requests.

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