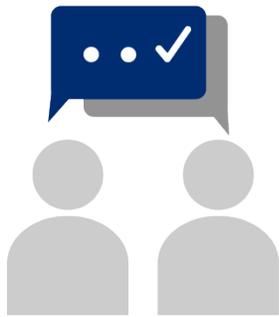# CaseWare
PBC Requests

Collaborate like never before.

PBC Requests is an add-on in our suite of job management tools within the CaseWare Cloud platform. The tool allows firms and individual engagement teams to seamlessly communicate with clients, securely manage client requests, and streamline the workflow of obtaining information from clients.
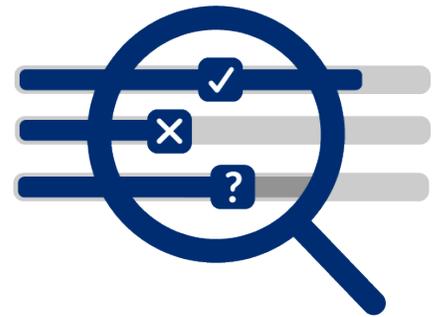
Enhanced client Communication

Easily and securely manage and track requests and files for clients in real time, in one location using the built-in query system. These requests can be aligned with the engagement status and sent and responded to individually or as a collection.

Platform Integration

Working directly within the engagement file, users are able to build and send information requests to clients. Using the "Receive" function, accepted documents and linked files are automatically added to the Document Manager within CaseWare Working Papers.

Improved Visibility

Easily manage the workflow and, similarly, client requests with automatic status tracking. These electronic status updates are delivered in real-time to create transparency.

CaseWare®

Key Features of CaseWare PBC Requests

Centralized Client Requests

Communicate with colleagues and clients in one location. With the built-in client query system, all communications and supporting documents are securely sent, received, and stored so client requests can be easily managed.
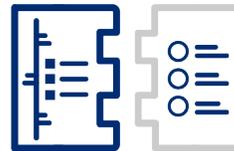
Customizable Content

Flexible content which can be used as-is or can be highly customized to meet the requirements of the firm and the engagement.

Request Tracking

Easily manage your workflow with automatic status tracking. The status of a client request will automatically update at relevant points throughout the engagement. For example, status updates are triggered when there is an outstanding client request, or when the client has responded.

Platform Integration

Work on the engagement using the embedded Working Papers browser or a separate browser. View the Documents Manager and cloud engagement file, side-by-side within Working Papers.

Receive Function

With a single click, users are able to set - at a template level - where the documents will go within the Working Papers file.

Timed Client Requests

Effectively align client requests with the engagement status. This can be done by sending multiple, grouped requests at once, or responding to requests individually.

To learn more about CaseWare PBC Requests or to receive a free personalized demo, visit caseware.com/ca/pbc-requests