

Audit preparation and evidence gathering

Automates audit preparation by systematically gathering financial documents, reconciling accounts, and organizing evidence folders for auditor review. Reduces manual preparation time by 70% and ensures complete documentation compliance.

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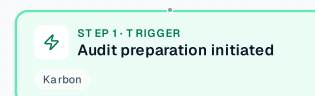


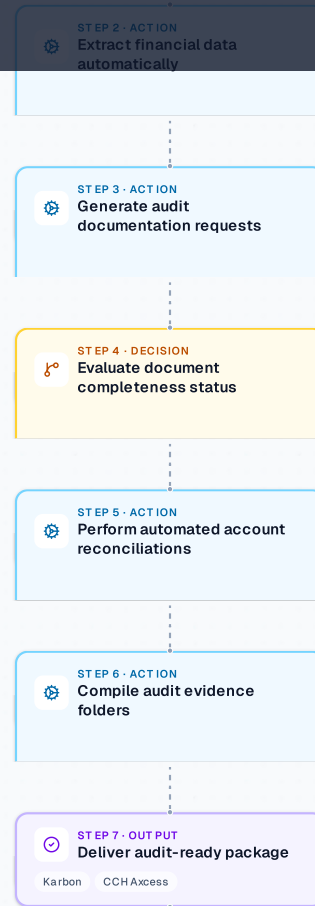
WORKFLOW TRIGGER

Audit notification received or audit season deadline approaches

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

Audit preparation initiated

Workflow triggers when audit notification is received or predefined audit preparation date arrives. System creates new audit case in workflow

2

 ACTION

Extract financial data automatically

Pulls trial balance, general ledger, and financial statements from accounting systems. Creates standardized audit data package with current and prior year comparisons.

QuickBooks

Xero

3

 ACTION

Generate audit documentation requests

Creates customized document request lists based on audit type and client industry. Sends automated requests to clients through secure document portal.

Canopy

4

 DECISION

Evaluate document completeness status

Checks if all required supporting documents have been received and validates document formats. Routes to different paths based on completion percentage.

Canopy

5

 ACTION

Perform automated account reconciliations

AI Business OS

Runs bank reconciliations, AR/AP aging analysis, and variance analysis between periods. Flags unusual transactions and discrepancies for review.

QuickBooks

Xero

CCH Axcess

6

 ACTION

Compile audit evidence folders

Organizes all financial data, supporting documents, and reconciliations into structured audit folders. Creates index and cross-references for auditor navigation.

CCH Axcess

Canopy

7

 OUTPUT

Deliver audit-ready package

Generates complete audit preparation summary with organized evidence folders, outstanding items list, and audit trail documentation. Notifies audit team of readiness status.

Karbon

CCH Axcess



Outputs

- Complete audit evidence folders
- Account reconciliation reports



Key Metrics

- Audit preparation time reduction
- Document completeness percentage
- Reconciliation accuracy rate



Tools & Integrations

- Karbon
- QuickBooks
- Xero
- Canopy
- CCH Axxess



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