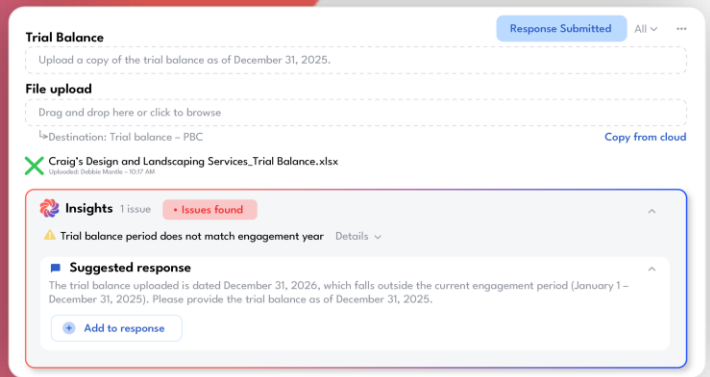


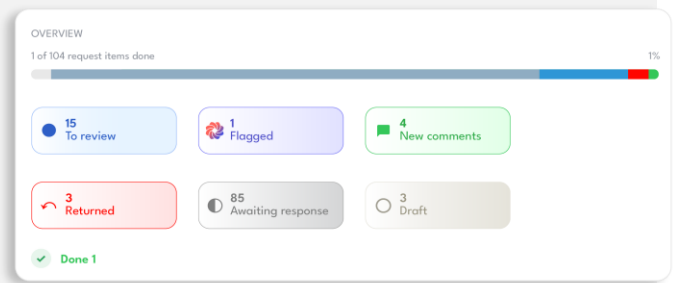
Client Requests

The PBC capability inside your Caseware Cloud engagement, where auditors collaborate with clients throughout the audit. It helps teams create, send, and validate requests faster, with AI support built in.



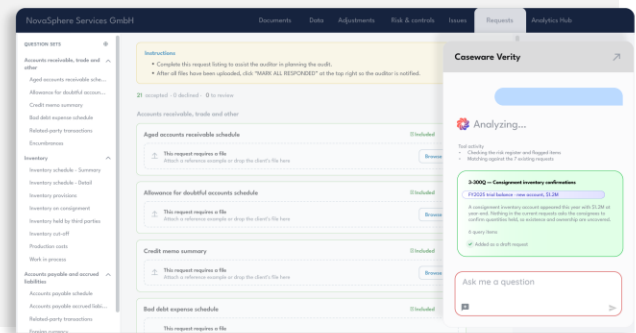
An Agentic PBC Workflow

The new Requests experience replaces legacy Queries with a system that tracks progress automatically from Draft to Accepted, backed by a full audit trail. AI agents work throughout, helping create requests and validate client responses along the way.



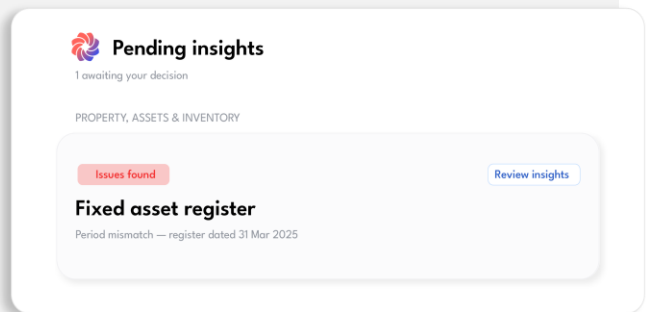
Caseware Verity Request Agent: Build Requests Faster

The Caseware Verity Request Agent drafts a full request set from templates and engagement data, or turns a plain language ask into a ready to send request. Auditors review every draft first.



Caseware Verity Response Agent: Validate Submissions Instantly

The Caseware Verity Response Agent reviews client submissions on demand, checking that each response addresses the request, is complete, readable, and includes the right number of documents, then drafts suggested replies.



Start using Caseware Verity Requests today

Create and Assign Requests

Start from prior year, a firm template, or a quick description, and the Caseware Verity Request Agent gets you a working PBC draft. From there, link each response to a specific engagement folder or checklist procedure, and set due dates before sending.

Send with Clarity

Assign items, add a due date and send. Clients receive branded notifications and a status-first portal showing what is assigned, due and ready for action.

Collect Client Evidence

Clients upload files or add text responses to their assigned items, then submit. Statuses update automatically, giving engagement teams a current view of progress.

Validate the Response

Click Start Reviewing and the Caseware Verity Response Agent checks the submission right away, flagging anything that's off before you open the file yourself.

Follow Up or Accept

When Caseware Verity finds an issue, it drafts a response for review. Return the item for follow-up, or accept it and the evidence lands exactly where you linked it, with every transition recorded.

Caseware Verity

Harness the power of frontier AI models directly in your workflow. Caseware Verity, your trusted AI engagement navigator operates across your workflow, understanding context and applying firm methodology so you can act with confidence.



Hello, Quinn

How can I help you today?

Ask me a question



Caseware is the leading global provider of cloud-enabled solutions for audit, assurance, financial reporting and data analytics for accounting firms, corporations and government regulators. Caseware's innovative tools and platforms help more than half a million users in 130 countries work smarter, dig deeper and see further as they transform insights into impact. For more information, visit caseware.com.