

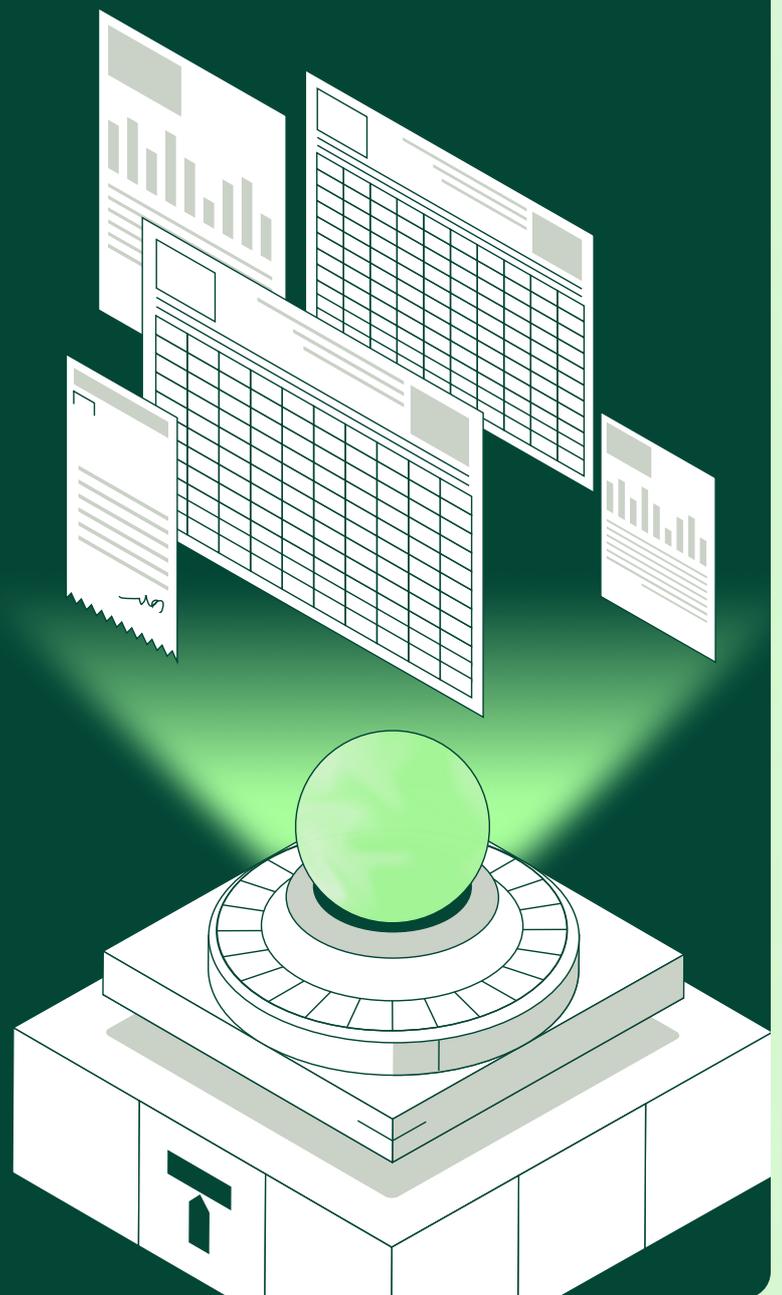


TRULLION

eBook

Modernizing audit technology:

How to build a connected, cloud-native stack

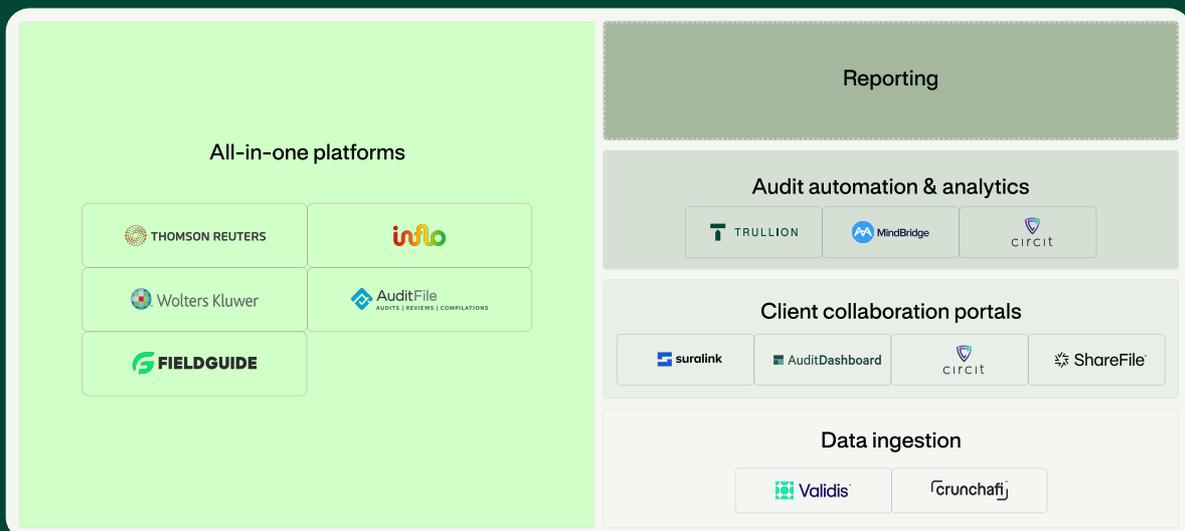


Introduction: Building the modern audit tech stack

Audit technology is evolving fast – not because of hype, but because of the necessities of modern work. Clients expect transparency. Regulators want stronger documentation. Teams need reliable systems that can handle growing complexity without adding headcount.

For many firms, the foundation isn't built for this reality. Legacy servers, static spreadsheets, and fragmented workflows slow down the very processes automation is meant to improve. Cloud-based, connected tools change that. They replace manual uploads with continuous integrations, and static files with live, traceable data. Instead of juggling disjointed systems, firms operate within one shared audit environment that's faster, cleaner, and easier to govern at scale.

This eBook explores how leading firms are assembling their modern audit tech stacks and uniting cloud-native tools for data ingestion, client collaboration, audit automation, and reporting to deliver more accurate, efficient, and transparent audits.



Cloud-native data ingestion: The foundation for accuracy

AI may define the next decade of audit innovation, but data defines the success of AI. Too many firms still build their tech stacks on shaky foundations: manual client uploads, inconsistent spreadsheets, and fragmented ledgers that erode efficiency and accuracy.

Our 2025 State of Audit Efficiency [report](#) found that nearly 50% of auditors cite data reconciliation as their biggest challenge,

with 70% spending 5–20 hours a week on it during busy season. That's time lost to wrangling spreadsheets and chasing email chains instead of analyzing financials.

Inefficiency is just the start. Bad data cascades into the rest of the audit process – undermining insights, skewing AI outputs, and eroding the ROI from recent technological investments.

How cloud-native tools set a strong foundation

The first step of any audit is data collection and preparation. Traditionally, this meant endless client back-and-forth, hunting through disparate systems, and manually stitching together files from scattered sources. Today, cloud-based data tools streamline that process – helping auditors collect, clean, and structure large volumes of information quickly and accurately.

“



The success of AI starts with the data beneath it – clean, standardized and consistent. Cloud-native, interoperable systems unite firms and clients around one live, centralized dataset, ensuring automation is built on quality, consistency, and real-time collaboration.”

– **Michael Turner**, CEO of Validis

Here's what to look for:

1 Data ingestion

What it does: Extracts financial data (general ledger, AR/AP, trial balance) directly from ERP or accounting systems.

Cloud advantage:

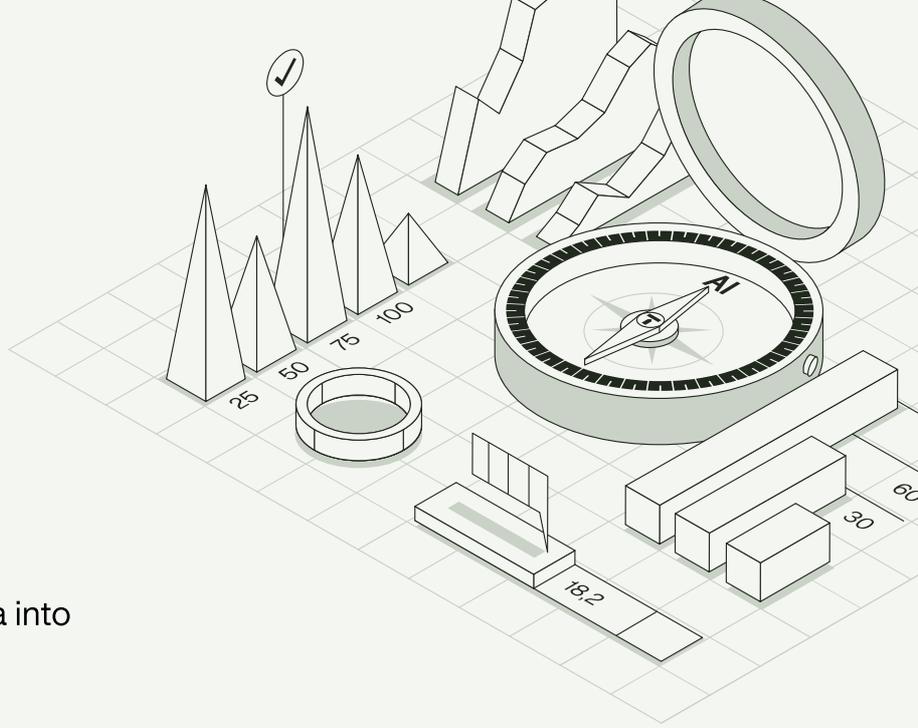
- ✓ **Efficiency:** One-click connectivity to dozens of ERP/accounting packages – no coding required.
- ✓ **Reliability at scale:** Continuous, automated feeds replace one-off manual uploads.
- ✓ **Accuracy:** Eliminates manual entry and file transfer errors.
- ✓ **Integrity:** Pulling directly from the source ensures completeness and reliability.

2 Data standardization

What it does: Transforms client data into a consistent, audit-ready format.

Cloud advantage:

- ✓ **Consistency:** Standardized datasets let firms benchmark across clients, entities, and regions without duplicating effort.
- ✓ **Accuracy:** Automated cleansing reduces human error and adapts as clients grow or systems change.
- ✓ **Scalability:** Firms can handle different data structures seamlessly – something on-prem setups struggle to scale.



3 Outputs and integrations

What it does: Connects prepared data into audit software, advanced analytics platforms, or AI engines.

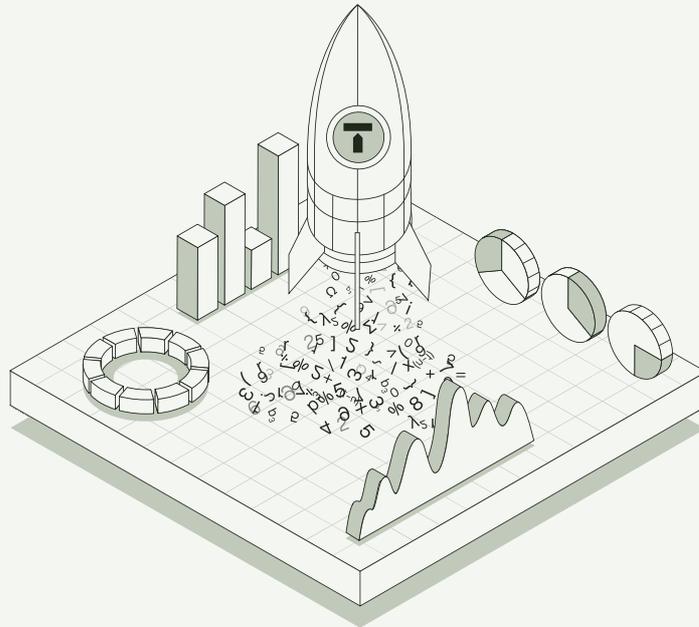
Cloud advantage:

- ✓ **End-to-end workflows:** No redundant file transfers or middleware – data flows directly into the tools auditors use every day.
- ✓ **Enhanced insights:** Real-time feeds fuel anomaly detection and predictive analytics that on-prem systems can't support.
- ✓ **Future-proofing:** Cloud platforms update automatically, ensuring compatibility with emerging AI capabilities.

Why cloud beats on-prem, every time

Cloud data tools don't just digitize old processes – they fundamentally transform them. They enable efficiency, accuracy, and scalability that siloed on-prem solutions can't touch.

- ✓ **Anywhere access:** Auditors and clients can work from the same real-time data set, wherever they are. This not only speeds up audits but also reduces version-control issues and miscommunication.
- ✓ **Continuous updates:** With cloud, software upgrades happen automatically in the background, with no downtime or IT intervention required. Firms always have access to the latest features, security patches, and compliance updates without the disruption of scheduling manual installs or system overhauls.
- ✓ **Enterprise-grade security:** Unlike on-prem systems that depend on limited budgets and manual patching, cloud platforms deliver continuously improving protection. They run on redundant data centers across multiple regions for built-in resilience, and safeguard data with end-to-end encryption, multifactor authentication, and strict role-based access controls.



Marketplace snapshot: What's available today

Cloud data tools are now a critical part of the audit tech stack. Each solution takes a slightly different approach, and firms should evaluate them based on their size, client base, and workflows. Here's how the leading providers compare:



Best for: Large and mid-tier audit firms, banks, and financial institutions that need deep ERP connectivity and flexibility of outputs.

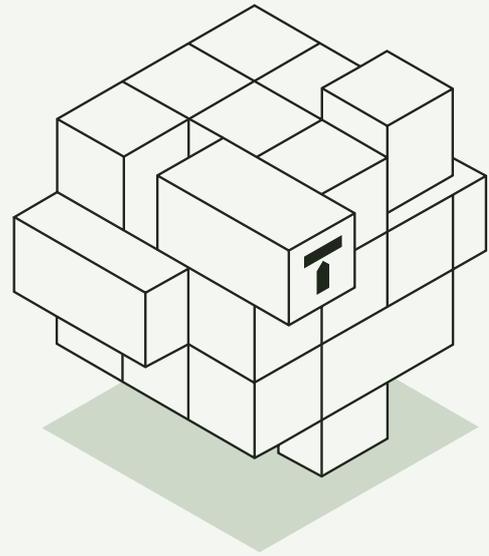
Strengths: Validis automates client data extraction and standardization. It connects with 30+ ERP systems and helps firms collect, clean, and reuse data efficiently, making it particularly useful for firms managing high audit volumes. Automated metrics support Reviews and Compilations, and API integrations with audit tools and Excel outputs enable flexible workflows. Validis is currently used by 18 of the top 25 CPA firms in audit.



Best for: Firms that prioritize security and need flexible, out-of-the-box ingestion.

Strengths: Crunchafi offers a cloud-first approach with a strong focus on data integrity and security. It simplifies data extraction from client systems and transforms it into standardized, audit-ready formats. Its emphasis on reducing compliance risk makes it well-suited for firms in regulated industries.

Considerations: While Crunchafi excels in ingestion and preparation, its functionality is narrower compared to platforms with built-in analytics or workflow tools.



Specialized vs built-in solutions

Many all-in-one platforms like Inflo now include built-in data ingestion. The choice between specialized tools and all-in-one platforms comes down to the needs of your firm.

All-in-one platforms offer several advantages:

- ✓ **Unified data governance:** Centralized data structures make it easier to ensure integrity, with fewer resources.
- ✓ **Simpler IT management:** Working with a single provider means fewer integrations and (in theory) less pressure on IT teams.
- ✓ **Vendor consolidation:** Managing fewer vendors often translates to cost savings and clearer accountability.

On the other hand, specialized tools deliver distinct benefits:

- ✓ **Purpose-built:** Deeper capabilities enable specialized tools to handle more complex or unique use cases.
- ✓ **Interoperability:** By design, specialized tools are more modular and integrate with a wider range of systems.
- ✓ **Customizable:** In today's complex data environment, auditors need flexibility. Specialized tools are better equipped to adapt to whatever clients throw at them.

For many firms, the right answer isn't choosing one over the other. Specialized solutions can integrate seamlessly with all-in-one platforms, creating a hybrid stack that balances governance with adaptability.

Conclusion:

Build your audit tech stack from the data up

Data is the foundation of the modern audit, and the best way to ensure that data is clean, structured, and usable is a cloud-based data ingestion tool. When audit firms get this layer right, everything downstream – client collaboration portals, automation and analytics, reporting – works as intended, delivering high-quality audits at scale.

Cloud-first PBC: Transparency and control for clients and auditors

For many firms, client collaboration is still stuck in the past: spreadsheets, email chains, and shared drives that create version sprawl, missed files, and endless back-and-forth.

Cloud-based PBC (Prepared-by-Client) portals bring structure and transparency. They provide a shared workspace for document requests and uploads, replacing fragmented communication with one secure, auditable hub.

Here's what to look for:

1 PBC requests

What it does: Centralized automation for document requests, in a portal that all stakeholders can access.

Cloud advantage:

- ✓ **Transparency:** Everyone can see what's been submitted and what's still outstanding.
- ✓ **Efficiency:** Eliminates the need for endless email chains and manual follow-ups.
- ✓ **Security:** Sensitive data is exchanged securely, reducing risk.

2 Secure file sharing

What it does: Provides an organized, transparent system for sending, receiving, and tracking files.

Cloud advantage:

- ✓ **Ease of use:** Clients can upload directly, without bouncing attachments around.
- ✓ **Stronger safeguards:** Files are shared via private, role-based access links rather than email.

3 E-signature

What it does: Digitizes signed approvals, confirmations, and agreements.

Cloud advantage:

- ✓ **Efficiency:** Reduces turnaround time on sign-offs.
- ✓ **Cost savings:** Cuts out printing, mailing, and physical storage.
- ✓ **Accuracy:** Minimizes errors with pre-defined signature fields and automated tracking.

4 Collaboration dashboard

What it does: Acts as the single source of truth for audit communications, requests, and documents.

Cloud advantage:

- ✓ **Visibility:** Real-time view of requests, due dates, and statuses.
- ✓ **Communication:** Keeps everyone aligned without scattered emails or DMs.

Marketplace snapshot

Collaboration portals vary in depth, scalability, and focus. Here are some of the leading options:

suralink

Best for: Firms needing enterprise-grade collaboration with rich features and integrations.

Strengths: Dynamic request lists, real-time engagement tracking, and a modern, client-friendly UX. Widely adopted and battle-tested.

Considerations: As a feature-rich platform, it may be more than some smaller firms need.

AuditDashboard

Best for: Firms looking for a cost-effective, scalable portal with a strong communications backbone.

Strengths: Centralized hub for assurance, tax, and advisory engagements, designed to deliver a consistent client experience at scale.

Considerations: Focuses on communication and request management, but with fewer advanced automation features.

circuit

Best for: Firms prioritizing automation of audit confirmations and real-time client collaboration.

Strengths: Purpose-built for auditors with secure, automated bank and third-party confirmations, as well as a client-friendly portal for requests and file exchange.

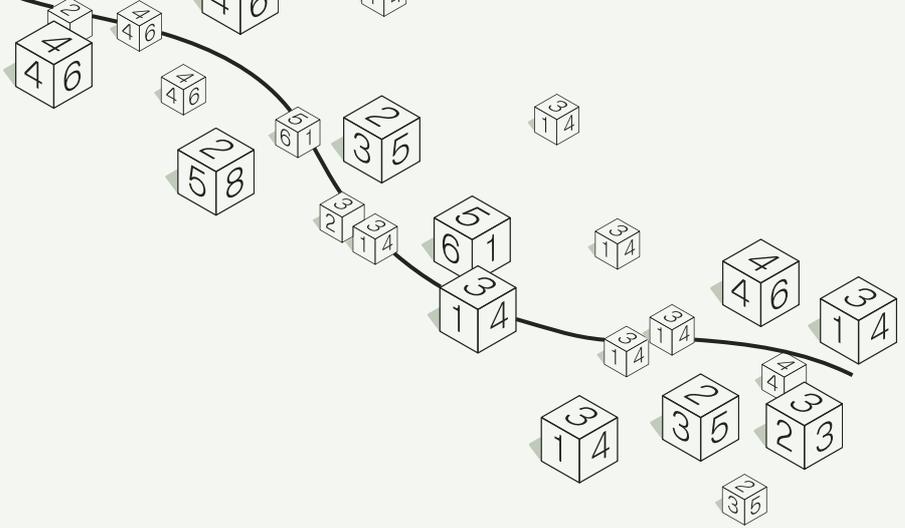
Considerations: Strongest in confirmation workflows. Firms seeking a broader suite of practice management tools may need to pair it with other platforms.

ShareFile™

Best for: Firms in highly regulated industries that require airtight security and compliance.

Strengths: Secure document exchange with industry-specific workflows for accounting, financial services, healthcare, and legal.

Considerations: Strong on security and compliance, but less specialized for audit workflows compared to competitors.



Specialized vs built-in solutions

Many all-in-one engagement platforms now bundle client collaboration portals alongside data ingestion tools. For firms, the decision often comes down to whether to rely on these built-in features within a single engagement suite or adopt specialized providers for each function.

All-in-one platforms offer several advantages:

- ✓ **Unified workflows:** Client engagement, requests, and reporting, and even data ingestion are housed under a single umbrella.
- ✓ **Simpler vendor management:** One contract and one IT relationship can mean fewer integration headaches.
- ✓ **Consistent client experience:** Built-in portals and connectors create a standardized interface across assurance, advisory, and more.

Specialized vendors bring a different set of strengths:

- ✓ **Depth of functionality:** Purpose-built portals tend to offer richer features for requests, confirmations, and tracking.
- ✓ **Flexibility:** Specialized tools integrate across a wide range of other systems and can evolve faster with new capabilities.
- ✓ **User experience:** With a narrower product focus, many specialized vendors optimize for intuitive, client-friendly design.

Many firms find value in a hybrid approach — using all-in-one platforms as the backbone for engagement management and data workflows, while integrating specialized portals where deeper functionality or client experience is a priority.

Conclusion: The front door to every audit

Cloud-first portals set the tone for audit efficiency and trust. For firms, this translates into faster engagements, smoother communication, and stronger client relationships.

Audit automation and analytics: Turning data into actionable insights

After client data and supporting documentation are in place, audit automation tools help teams test, verify, and analyze information at scale.

By automating repetitive audit steps – such as tests of details, tests of operating effectiveness, recalculations, confirmations, and substantive testing – these tools help teams focus on high-risk areas and surface deeper insights with less effort.

Here's what to look for:

1 Test of details

What it does: Automates testing of specific transactions and balances to verify completeness and accuracy, saving hours of manual work.

Cloud advantage:

- ✓ **Continuous testing:** Runs procedures automatically on live, connected data rather than static files.
- ✓ **Smarter sampling:** Prioritizes higher-risk transactions using AI logic, reducing wasted effort.
- ✓ **Traceability:** Every test links back to the source document, simplifying review and sign-off.

2 Financial statement review

What it does: Uses AI and advanced analytics to verify key balances, calculations, and disclosures across statements.

Cloud advantage:

- ✓ **Instant validation:** Automated recalculations and cross-checks run continuously as data changes.
- ✓ **Anomaly detection:** AI models flag inconsistencies and unusual variances for immediate review.
- ✓ **Scalability:** Handles multi-entity or multi-period analyses beyond the limits of legacy desktop tools.

3 Confirmations

What it does: Automates balance and transaction confirmations with third parties (e.g., banks, suppliers, customers).

Cloud advantage:

- ✓ **Secure integrations:** Connects directly to banks and counterparties via APIs, eliminating manual outreach.
- ✓ **Status visibility:** Real-time dashboards track every confirmation request from initiation to response.
- ✓ **Regulatory readiness:** Automatically stores confirmations and metadata to meet audit trail requirements.

4 Data analytics

What it does: Leverages AI to identify trends, patterns, and anomalies that shape a more focused audit plan and risk assessment

Cloud advantage:

- ✓ **Full-population testing:** Able to examine 100% of transactions rather than limited samples, without more overhead resources.
- ✓ **Dynamic risk modeling:** Continuously updates risk assessments as new data flows in.
- ✓ **Deeper insights:** Visualizes patterns across entities or periods for faster, evidence-based decision-making.

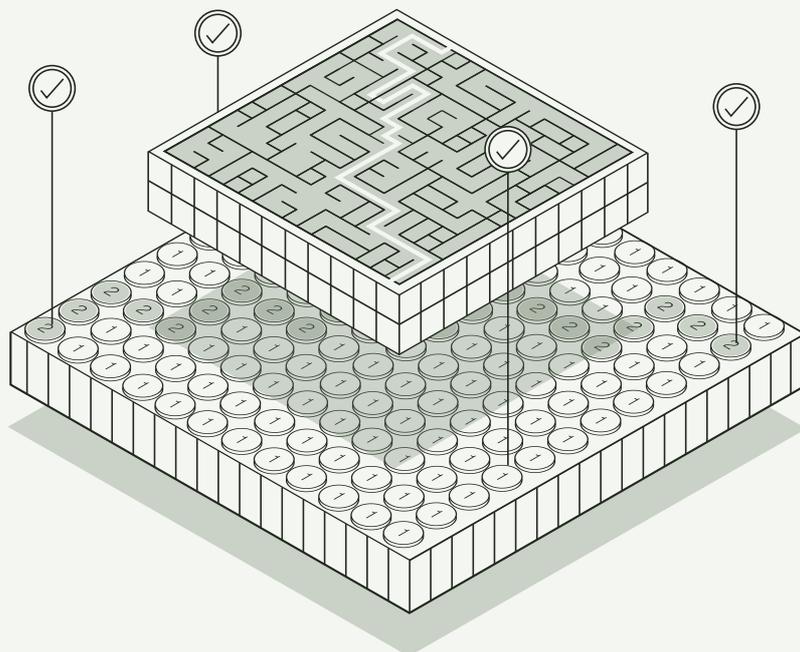
5 Embedded compliance intelligence

What it does: Integrates up-to-date standards directly into workflows, giving auditors instant access to guidance and interpretations while performing testing and documentation.

Cloud advantage:

- ✓ **Embedded research and citations:** Instantly reference relevant standards without leaving the platform.
- ✓ **Real-time updates:** Automatically applies regulatory and standard changes across all active engagements.
- ✓ **Context-aware guidance:** Surfaces applicable rules or disclosures based on the client's workflow and risk profile.

Consistency at scale: Ensures all teams use the same authoritative source, supporting firm-wide standardization and compliance.



Marketplace snapshot



Best for: Firms seeking a unified, cloud-native audit automation platform that spans data extraction, matching, validation, and review – with enterprise-grade auditability and oversight.

Strengths: Trullion is an AI-powered audit and accounting platform that connects directly to client systems, extracting and structuring data into one workspace. The platform automates core audit procedures such as tests of details, roll-forwards, and reconciliations. Every result links back to source evidence for complete traceability, supported by real-time collaboration, customizable templates, and governance controls. An upcoming partnership with Thomson Reuters will embed regulatory intelligence directly into Trullion's platform – enabling auditors to access and apply up-to-date guidance.

Considerations: Trullion's automation delivers the greatest value when firms fully adopt its cloud-native workflows, which may involve larger learning curves for teams used to desktop tools. As with any automation system, accuracy depends on input quality and governance discipline, and highly customized environments may need additional connector setup for seamless integration.



Best for: Firms focused on automating confirmations and external evidence collection, particularly those handling sensitive data or requiring secure, API-based connectivity with banks and third parties.

Strengths: Purpose-built around data integrity, Circuit strengthens one of the highest-risk areas of the audit: external verification. It's a fully cloud-native platform built for real-time evidence collection, and securely connects to banks, fintechs, and counterparties. Circuit automates confirmations and evidence retrieval with minimal manual effort, and its dashboards give teams full visibility into request statuses and response tracking.

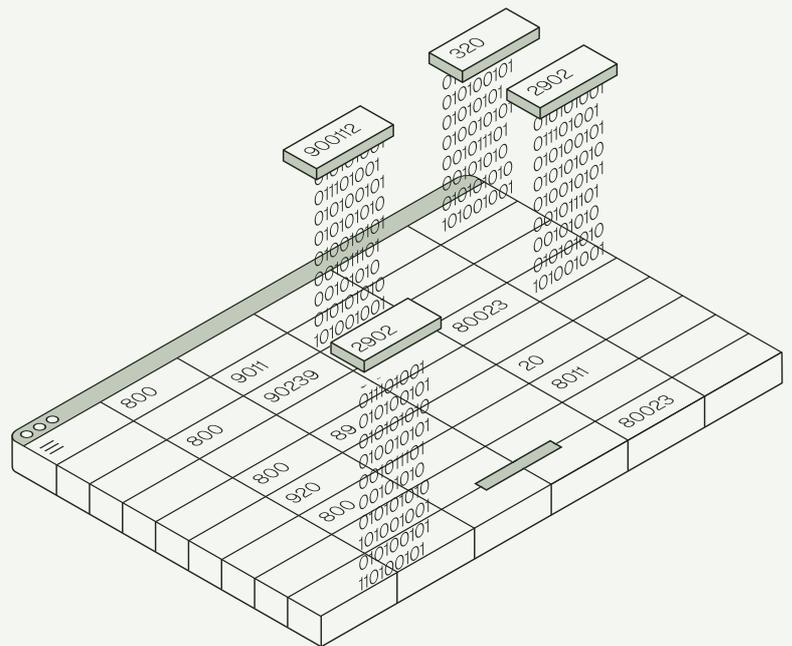
Considerations: Circuit's scope centers on confirmations and evidence gathering rather than broader audit testing or analytics. Its performance depends on counterparties' API readiness and response times, which can vary by region or institution. Integration into a firm's broader audit stack may require additional configuration.



Best for: Firms seeking to enhance audit quality through AI-driven anomaly detection and risk analytics across large datasets.

Strengths: MindBridge is a cloud-based analytics platform that uses AI and statistical modeling to assess risk and identify anomalies across complete data populations. Its SaaS delivery enables continuous updates, scalability, and easy access for distributed teams. Visual dashboards and machine learning models help auditors pinpoint trends, irregularities, and potential fraud indicators, supporting faster and more accurate risk assessment across engagements.

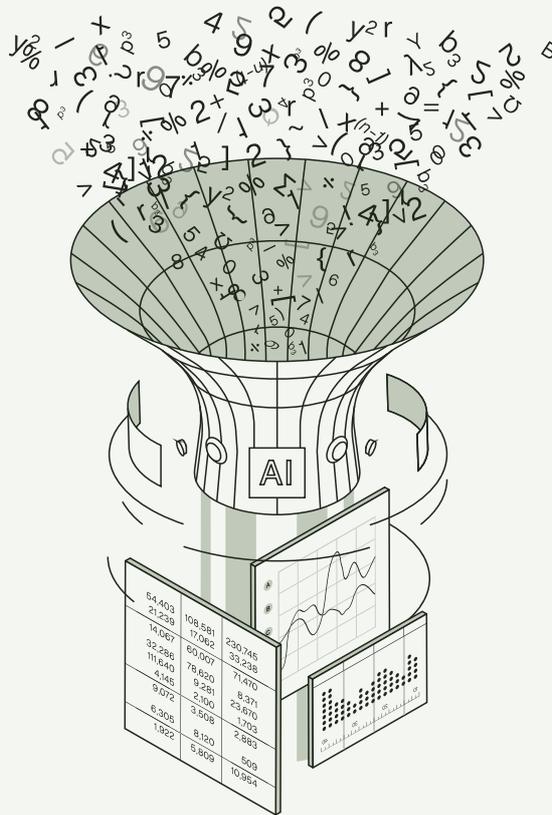
Considerations: MindBridge functions as an advanced analytics layer rather than a full audit workflow solution. Initial setup and data mapping can require effort, particularly for firms without standardized data pipelines. Its insights are most impactful when integrated with other cloud audit tools that execute testing and documentation, creating a complete, end-to-end assurance ecosystem.



Conclusion: From automation to assured accuracy

Modern audit automation accelerates testing while raising precision. By combining AI-driven analysis with connected, cloud-based data and documentation, auditors can validate entire populations of transactions in minutes, not days.

When integrated into a unified audit stack, automation doesn't just save time. It also delivers measurable accuracy, at scale.



Cloud-based reporting: Turning findings into clarity and confidence

Reporting is the part of the audit everyone sees – and often, the part that still lags behind. Despite major advances in automation and analytics, too many firms still rely on Word and Excel to assemble complex findings by hand.

Cloud-based reporting tools transform this final stage of the audit by merging automation, visualization, and collaboration. They deliver reports that are both compliant and compelling.

Here's what to look for:

1 Customizable report templates

What it does: Provides a library of pre-built, editable templates for deliverables like audit opinions, financial statements, and management letters.

Cloud advantage:

- ✓ **Centralized management:** Templates live in one secure location and update firm-wide instantly – no installs or version confusion.
- ✓ **Consistency:** Everyone works from the same approved formats, eliminating copy-paste errors or lag and manual rework of file-based templates.
- ✓ **Automatic compliance:** Regulatory changes and style updates flow through to every template without manual patching or re-distribution.

2 Data-driven insights and visualizations

What it does: Integrates charts, graphs, and dashboards directly into reports, transforming dense audit data into intuitive visuals.

Cloud advantage:

- ✓ **Dynamic updates:** Visuals refresh automatically whenever source data changes.
- ✓ **Shared intelligence:** Stakeholders can access reports through secure links instead of static attachments.
- ✓ **Deeper analysis:** Unlike on-prem systems, cloud tools connect live to analytics and AI engines for richer insights.

3 Collaboration and review functionality

What it does: Enables multiple team members to edit, comment, and track changes simultaneously within one shared, cloud-based workspace.

Cloud advantage:

- ✓ **Real-time collaboration:** Everyone works in the same document – eliminating bottlenecks, version chaos, and scattered attachments.
- ✓ **Built-in audit trails:** Every edit is logged automatically, creating a complete trail of versions and approvals.
- ✓ **Faster approvals:** Reviewers can comment and approve instantly, reducing cycle time across teams.

4 Compliance and regulatory reporting

What it does: Embeds regulatory frameworks and quality-control checks directly into reporting workflows.

Cloud advantage:

- ✓ **Automated validation:** Reports are checked in real time against standards like ASC and IFRS.
- ✓ **Centralized oversight:** Audit leaders can monitor compliance activity across engagements without accessing local files.
- ✓ **Lower risk exposure:** Centralized controls and versioning reduce the chance of outdated or noncompliant templates slipping through.

5 Integrations

What it does: Connects reporting directly to audit management systems, workpapers, and analytics platforms – automatically pulling in the latest data and commentary.

Cloud advantage:

- ✓ **Effortless data flow:** Reports pull live data automatically from connected systems.
- ✓ **Accuracy at scale:** Every number links back to real-time source data, cutting manual reconciliations.
- ✓ **Unified ecosystem:** Unlike on-prem setups, cloud platforms integrate easily with APIs, analytics, and AI tools across the stack.

Marketplace snapshot

Standalone audit reporting tools remain rare. Most capabilities are built into all-in-one engagement platforms such as Inflo and Wolters Kluwer's CCH suite. Until then, firms should evaluate how deeply their current platforms support template customization, automation, and real-time collaboration.

These are the building blocks of modern reporting. Leading firms are already enhancing their platform-based reporting modules with custom dashboards and visualization layers.

Build vs. buy: How firms are modernizing reporting

Building in-house: Some firms develop their own reporting frameworks using tools like Power BI or proprietary templates layered over engagement software. This offers full control over design, data visualization, and analytical depth, but requires ongoing resources for maintenance and security.

Buying platform-based solutions: Most firms currently opt for this. All-in-one suites with native reporting modules provide immediate setup, compliance assurance, and IT simplicity – but may limit customization for complex or specialized audits.

Go hybrid: A growing number of firms are combining the two: using built-in, platform-generated templates for standard deliverables and augmenting them with custom visualization layers for more advanced analytics or client dashboards. This hybrid model ensures both efficiency and differentiation.

No matter which route your firm takes, the goal is the same: ensure your reporting system integrates well with the rest of your audit ecosystem – from data ingestion to automation – so the story in the report always reflects the evidence behind it.

Conclusion: From manual reporting to intelligent assurance

When data, automation, and collaboration come together in the cloud, reporting shifts from a task to an advantage. Firms move faster. Auditors focus on delivering quality insights. Clients get transparency, and regulators see traceability built in from the start.

Intelligent assurance starts by rethinking the reporting process from the ground up.

Modern audit adoption: Where to start and what to prioritize

The audit technology landscape has never been more crowded – and never more promising. Every vendor promises efficiency and integrations, so look for a few foundational characteristics that signal long-term value:

- ✓ **Cloud-first architecture.** Cloud-based tools deliver real-time collaboration, automatic updates, and enterprise-grade security – without the overhead of maintaining on-prem systems.
- ✓ **Open APIs and interoperability.** Your firm’s ecosystem will only keep expanding. Choosing tools with open APIs ensures your data can flow freely between platforms – whether that’s your engagement software, analytics layer, or AI-driven automation.
- ✓ **A culture of innovation.** Choose vendors that don’t just meet today’s requirements, but also ones that invest in tomorrow’s capabilities. Frequent updates, transparent roadmaps, and user-driven product development are signs of a partner that will help your firm stay adaptive.

A step-by-step approach

Transforming your audit stack doesn’t require a massive overhaul. Start with a clear, structured process and build momentum from there.

1 Identify internal champions

Find the people in your firm who are curious, tech-savvy, and trusted by their peers. They’ll drive adoption, advocate for smart change, and help bridge the gap between audit and IT.

2 Map your current landscape

List every tool in use. How are they used? Where do they overlap? Which ones create friction? This audit of your audit tech will highlight duplication and opportunities for integration.



“You really need that cross-section across the firm of people who have exposure to things we’re not as familiar with... Maybe a tool isn’t as applicable to me, but someone in our government practice sees a huge use case for it.”

– **David Rich**, Senior Manager at Clark Schaefer Hackett

3 Define what success looks like

Clarify the firm's biggest pain points and translate them into measurable goals: faster fieldwork turnaround, cleaner client data, fewer review notes. These become your evaluation criteria for new solutions.

4 Prioritize high-impact areas

Don't wait for a "perfect" stack. Start where inefficiency costs the most time or quality. For many firms, it's the areas where automation yields instant results: data ingestion, client collaboration, and document matching.

5 Choose partners, not just products.

Look for vendors that are responsive, transparent, and aligned with your firm's roadmap. The best solutions grow with you, offering flexible integrations and evolving feature sets that adapt to your firm's maturity.



"Think of modern technology providers as an extension of your own team. Who's on Customer Success? Who's running your training? The world is changing quickly with AI. What does their roadmap look like? Make sure it's strong, make sure they're delivering on their promises."

– **Dudley Gould**, VP Business Development at Circuit

Conclusion: The connected future of audit

Firms are already overhauling their tools for the cloud era – assembling connected ecosystems that link data, automation, and analytics into one continuous workflow. Those who moved first are already seeing the results: faster fieldwork, cleaner data, and higher quality output.

Each success compounds. Each integration unlocks another layer of efficiency. Every component of the audit stack, from ingestion to reporting, works better when it's designed to work together.

Start with the data. Build on open, cloud-native foundations. Choose partners who innovate as fast as you do. Soon, you'll have more than just a new stack. You'll have a new standard for how your firm operates.

Case study: Baker Tilly's cloud audit stack

When Baker Tilly set out to modernize their audit process, their biggest challenge wasn't audit quality. It was document sprawl. Each engagement meant juggling thousands of files, from client spreadsheets to PDF statements, with limited automation to tie it all together.

They solved it by adopting a modular, best-in-breed cloud stack:

- **Validis** for automated data ingestion and standardization
- **Suralink** for client collaboration and document exchange
- **Trullion** for AI-powered matching and financial validation

Together, these solutions created a **cloud-connected workflow** where data and documentation flow from source systems to audit testing.

Automating the test of details in the cloud: One of the most transformative outcomes of Baker Tilly's tech stack has been in automating tests of details: procedures like revenue, expense, and payroll testing that traditionally rely on manual sampling and PDF-based support.

With automation, Baker Tilly's auditors can now perform full-population matching of transactional data directly to supporting evidence, vastly improving efficiency and coverage.

Here's how it works:

- ✓ **Data ingestion and cleansing:** Auditors start by using Validis to extract and prepare large datasets directly from client accounting systems. This ensures every transaction is complete, consistent, and ready for testing.
- ✓ **Managing third-party documents:** The cleansed transactional data is then paired with third-party documentation stored in Suralink. This centralized platform ensures secure access, version control, and transparency across engagement teams.
- ✓ **Automated matching and testing:** In Trullion, auditors create a workbook tailored to the engagement and financial period. They define which fields to align, which document types to use, and how to handle exceptions. Trullion then executes the match, automatically linking each transaction to its corresponding supporting document. Once built, these workbooks can be saved and reused, standardizing procedures across clients and engagements.

The result is a testing process that replaces hours of manual work with automated precision. Auditors gain full traceability from source data to supporting evidence, enabling faster reviews, higher coverage, and stronger assurance.





For more information



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