What's new in Audit Assistant 26.2

Last updated 19 November 2026



Audit Assistant 26.2 is a major update and brings new ways to work with your jobs, introduces clients and a brand new sharing centre. Here's a quick look at each new feature, with links to the full documentation. Where a guide isn't ready yet, more information is coming soon.

Sharing Centre

The Sharing Centre is one place where your client finds everything you've shared with them: pages to answer, requests to reply to, and shared files from your Document Vault. Each contact gets their own link, and you can see who's on a page and follow their progress without leaving the job.

- Sharing Center brings all the sharing and requests into one place for your clients.
- Everything is now in once place for each of your clients
- Set how long a share lasts, and whether your client can edit or only view.

- Send requests and request more information more than once.
- See your contacts viewing a page and when they were last there.
- Improved controls in accepting a page your client has submitted, or reopen it.
- Turn on identity verification for tighter security controls.

See all the Sharing Centre guides

Watch the video

SharePoint Improvements

We've made improvements to our SharePoint integration adding more reliable points when a SharePoint file is locked. We also now take a copy of the SharePoint file at the time the file is locked to ensure it never can be changed or access denied accessing the file from a stale SharePoint authenticated user. Other Improvements:

- SharePoint is the default attachment type once you're connected.
- Browse any site or drive you can open, and switch between them.
- Upload new files straight into SharePoint from Audit Assistant.
- Files lock to their version, with a copy saved, when you conclude or review.
- A **New version available** badge and **Update to Latest** let you take a newer version.

See all the SharePoint guides

Watch the video

Clients, Entities and Custom Fields

Audit Assistant has introduced the concept of Clients. Clients were previously jobs and we have slowly been transitioning to the term jobs to better describe a audit file in preparation for redefining a client. A client in Audit Assistant now represents a group of jobs and can contain contacts, entities as well as all the jobs it relates to.

- A new clients page sits alongside the jobs page.
- A client can have several jobs, of the same job type or different ones.

- Each year's job is finalised and kept as its own read-only copy so everything is accessible from the client.
- A client can have several entities, with a job for each one, all kept together under the client.
- Merge two clients that are the same organisation, so all their jobs sit together.
- A new contacts page, laid out to match the rest of Audit Assistant.
- Add your own custom fields to jobs, clients and contacts.

Read the Clients guide

Read the Custom fields guide

Watch the video

Multi-Subsidiary Trial Balance

When your client is part of a group, you can now reference multiple entities on the trial balance. Add the parent and the other entities the audit covers, import the whole group, then filter, group and consolidate the trial balance by entity.

- Add the parent, subsidiaries, branches, joint operations, joint ventures and associates.
- Import the whole group from one file, or one file per entity.
- Use a combined trial balance with an entity column, or a consolidation worksheet with a column for each entity.
- Show or hide entities, and group accounts within an entity or across entities.
- See the consolidated view: each entity, the aggregated total, consolidation adjustments and the consolidated figure.

Read the Multi-Subsidiary Trial Balance guide

Watch the video

New Formatting Options

Your annotations can now hold more than plain text. Add an image or a screenshot snip right beside your work, and format your notes with bulleted and numbered lists.

- Add images to comments, follow ups and review notes with a button, by pasting a snip, or by dragging them in.
- Resize and move images in the note.
- Open a saved image to zoom in and rotate it.
- Use bulleted and numbered lists in comments, follow ups, review notes, key issues, point forwards, management points, disclosures, journal entries and requests.
- Bold, italic, underline and links, with keyboard shortcuts.

Read the New Formatting Options guide

Watch the video

Multiple Cross-references

Link one comment to multiple cross references with a easier way to select a individual step on a work paper.

- Add a cross reference with the **#** button in the toolbar, or type **#** anywhere in your note.
- Point to a whole page, or choose a single step.
- Link back, so the comment shows on the page it references (Introduced in 26.1)
- Works in comments, review notes, follow ups and other annotations, and in risks.

Read the cross references guide

Watch the video

Job Improvements

A set of smaller improvements that make everyday work on a job quicker and clearer.

- The sidebar shows the status of each unconcluded page: started, in progress, or completed and waiting to be concluded.
- Pages with active review notes show a review note icon in the sidebar.
- Jobs now support multiple currencies, so each job shows the right currency and currency symbol.

- Add your own custom assessed inherent risks on the risk form.
- Copy steps, and text you've selected within a step.

Watch the video

Document Vault

The Document Vault is a place to keep files that aren't attached directly to an audit file. You can attach a file from it to a job at any time, now or later. Some people may know this as permanent files.

- Keep files at the firm level, against a client, or shared with your client through the Sharing Centre.
- Files live year on year in Document Vault
- Files added to the Document Vault are not added to the audit file automatically and can be added & selected when you need them on any attachment

Read the Document Vault guide

Watch the video