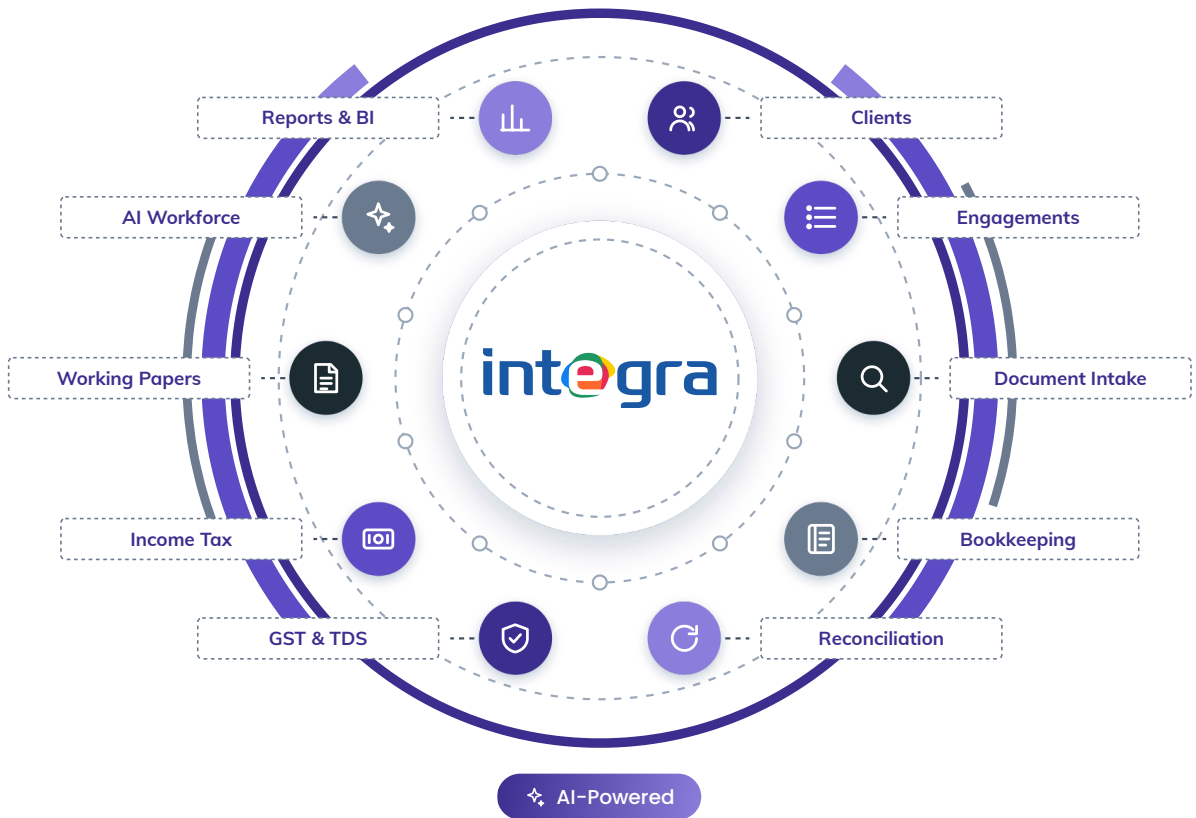
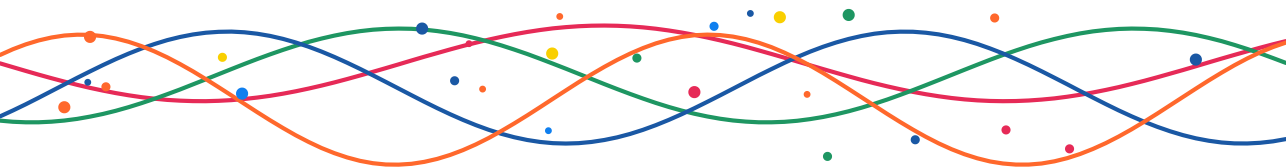


INTEGRA FOR AUDIT & ACCOUNTING FIRMS



Upload once, prepare everything



Clients, documents, bookkeeping, tax, audit, filing and evidence, connected in one system with AI doing the groundwork.

Built for audit and accounting firms of every size, in any country, on any device.

● Sole Practitioners

● Small Firms

● Mid-size Firms

● Multi-office Firms

Why Integra

Most firms re-type the same client data for bookkeeping, GST, income tax and audit. Integra captures it once and reuses it everywhere, so the same team serves far more clients.

Less manual work, more billable time

From scattered files to one connected firm

Without Integra

- Due dates tracked in spreadsheets
- Documents chased by phone and email
- Working papers spread across folders
- Invoices and statements typed in by hand
- Review points lost in email threads
- Fees billed late and followed up by hand
- Same data re-entered for tax, books and audit

With Integra for Audit & Accounting Firms

- ✓ A compliance calendar creates tasks for every client
- ✓ Request lists with client uploads and auto reminders
- ✓ One digital audit file, linked to the trial balance
- ✓ AI reads documents into structured data
- ✓ Review notes and sign-off on every paper
- ✓ Invoices, payment links and reminders from the job
- ✓ Upload once, reused for every service

The solution

The Audit pack adds what is specific to audit, tax and accounting firms. Ledger, documents, workflow, AI, signing and messaging come from the shared Integra core, so nothing is built twice.

Your firm at the centre, the Integra core around it



Upload once, prepare everything

Clients upload once. Integra reads, reconciles and prepares the books, the tax and the audit file from the same data, and your team reviews and signs.

From upload to acknowledgement



Onboard

KYC, conflict checks and an engagement letter signed online.



Upload and read

Documents uploaded once and read by AI, field by field.



Reconcile

Bank, ledgers, purchase data and tax statements matched.



Prepare the books

Balanced entries proposed and posted after approval.



Compute tax

GST, TDS and income tax worked out from the same data.



Test and document

Risk-based tests and samples with evidence on every paper.



Review and sign

Preparer, reviewer, partner and quality review sign-off.



File and archive

Filed through your authorised access, acknowledged and locked.

Less manual work

AI agents do the reading, matching and first drafts. Your team spends its time on judgement, not typing.

Do more with the team you have



AI Workforce

Agents for intake, reconciliation, bookkeeping, tax and testing, within limits you set.



Automatic matching

Bank lines, invoices, purchase data and tax statements matched by rules and AI.



Automatic compliance tasks

Due dates create tasks and reminders for staff and clients on their own.



See where time goes

Timesheets and margins show which clients take more time than they pay for.

Everything a firm runs on

45 modules in 8 areas. Switch on what you need today and add the rest as your firm grows.



Practice & Clients

Every client, engagement and due date.

- Command Centre
- Client Registry
- Compliance Calendar
- Timesheets & Billing
- Engagements
- Client Portal



Intake & Evidence

Upload once, read by AI, kept as evidence.

- Document Intake
- AI Document Reading
- Bank Statements
- Invoice Checks
- E-invoice Checks
- Evidence Vault



Accounting & Reconciliation

Books prepared, matched and closed.

- Bookkeeping
- Journal Proposals
- Bank Reconciliation
- Ledger Reconciliation
- Financial Statements
- Close Checks



Tax & Compliance

Every return, prepared from the same data.

- GST & VAT
- TDS & TCS
- Direct Tax
- Income Tax Returns
- Notices
- Filing & Acknowledgements



Audit & Assurance

Plan by risk, trace every conclusion.

- Planning & Risk
- Findings & Reports
- Testing & Sampling
- Internal Controls
- Working Papers
- Quality Review



Specialised Services

More services from the same platform.

- Secretarial
- Forensic Accounting
- Internal Audit
- Transfer Pricing
- Payroll Audit
- ESG Assurance



AI & Intelligence

AI that prepares, people who decide.

- AI Workforce
- Deliverables
- Anomaly Detection
- Firm Analytics
- Regulatory Rules
- Advisory



Security & Trust

Client data protected, every action recorded.

- Privacy Walls
- Data Retention
- Digital Signing
- Audit Trail
- KYC & AML
- Multi-currency

Connected firm

Tax portals, banks, accounting software and signatures connect to the same clients and engagements.

Works with the tools your firm already uses

Connected to everything around your firm



Tax portals

Portal data downloaded for matching, and filings submitted through your authorised access.



Bank feeds

Client bank statements fetched or imported and read automatically.



Accounting software

Trial balances and ledgers imported from your clients' accounting software.



Digital signatures

Digital signature certificates and e-sign for returns, reports and letters.



Client portal

Clients upload documents, answer questions and approve, free for every client.



Email, SMS & WhatsApp

Document requests and due-date reminders where clients read them.



Privacy walls

Each client's data walled off, with a hash-chained record of every action.



Multiple offices

Run several offices and partners on one platform with firm-wide reports.

Integra AI

AI built into every module. It suggests, people decide.

Smarter every day, with people in control



Intake Agent

Reads invoices, statements and ledgers and flags low-confidence fields.



Reconciliation Agent

Matches bank lines, invoices and tax statements and explains differences.



Bookkeeping Agent

Proposes balanced entries for accruals, depreciation and provisions.



Testing Agent

Runs journal tests and flags unusual entries for the audit team.



AI suggests, people decide. AI never posts, files or signs on its own.

Your path to a connected firm



Let's build your connected firm

Tell us how your firm works and we will show you Integra running your engagements, compliance and billing.

Talk to us

Present in India, Sri Lanka, Singapore and Saudi Arabia



INDIA

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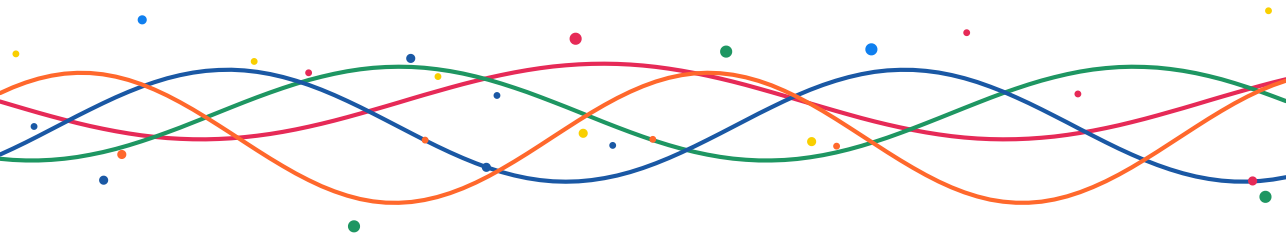
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integra

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Any industry. Any country. Any device.

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