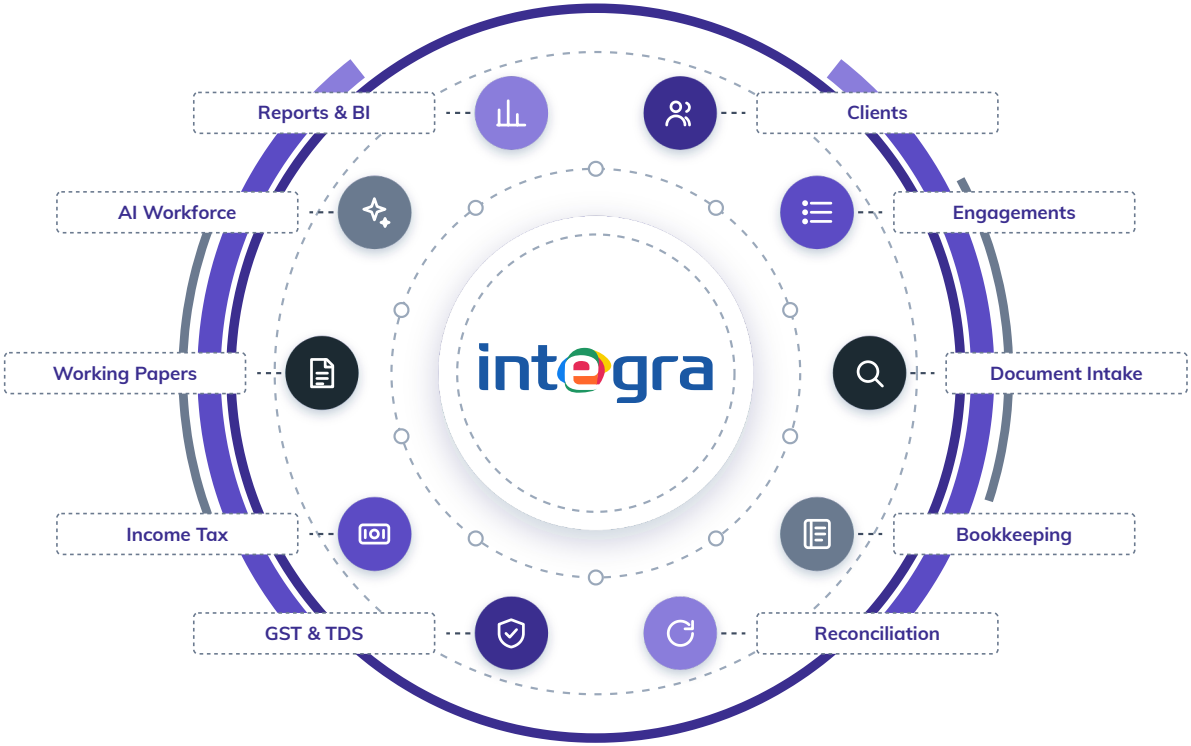
INTEGRA FOR AUDIT & ACCOUNTING FIRMS



AI-Powered

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.

From scattered files to one connected firm

Without Integra	With Integra for Audit & Accounting Firms
– Due dates tracked in spreadsheets	A compliance calendar creates tasks for every client
– Documents chased by phone and email	Request lists with client uploads and auto reminders
– Working papers spread across folders	One digital audit file, linked to the trial balance
– Invoices and statements typed in by hand	AI reads documents into structured data
– Review points lost in email threads	Review notes and sign-off on every paper
– Switching software means retyping years of data	Clients, past returns and balances migrated, checked in a parallel run
– Same data re-entered for tax, books and audit	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

54 modules in 9 areas, from GST and income tax to audit, ROC and payroll. Switch on what you need today and add the rest as your firm grows.

Practice & Clients

Every client, engagement and due date.

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

Intake & Evidence

Upload once, read by AI, kept as evidence.

- Document Intake
- E-invoice Checks
- AI Document Reading
- Evidence Vault
- Bank Statements
- Tally & Excel Import

Accounting & Statements

Books prepared, matched and turned into statements.

- Client Bookkeeping
- CMA & Ratios
- Bank & Ledger Matching
- Close Checks
- Schedule III Statements
- Three-way Reconciliation

GST, TDS & Income Tax

Every return, prepared from the same data.

- GST Returns & 2B Matching
- Tax Computation
- TDS & TCS Returns
- ITR & E-verification
- Form 16 & 16A
- Notices & Assessments

Audit & Assurance

Plan by risk, trace every conclusion.

- Planning & Risk
- Testing & Sampling
- Working Papers
- Audit Reports & CARO
- Tax Audit & Certificates
- Quality Review

Specialised Services

More services from the same platform.

- ROC & MCA Forms
- XBRL
- Client Payroll & PF/ESI
- Internal Audit
- Forensic Accounting
- Transfer Pricing & ESG

AI & Automation

AI that prepares, people who decide.

- AI Workforce
- Anomaly Detection
- Rules & Auto Updates
- Deliverables
- Firm Analytics
- Advisory

Firm, Security & Support

Filing, signing, access and help in one place.

- Filing Centre
- Digital Signing & DSC
- Users & Offices
- KYC & Privacy
- Backup & Offline
- Peak-season Support

Connected firm

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

Connected to everything around your firm

Tax portals

GST through a GST Suvidha Provider, income tax through an e-return intermediary; other portals guided step by step.

Bank statements

Any bank format imported and read, or fetched with client consent through an Account Aggregator partner.

Accounting software

Trial balances, ledgers and vouchers imported from Tally, Busy, Marg and other 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

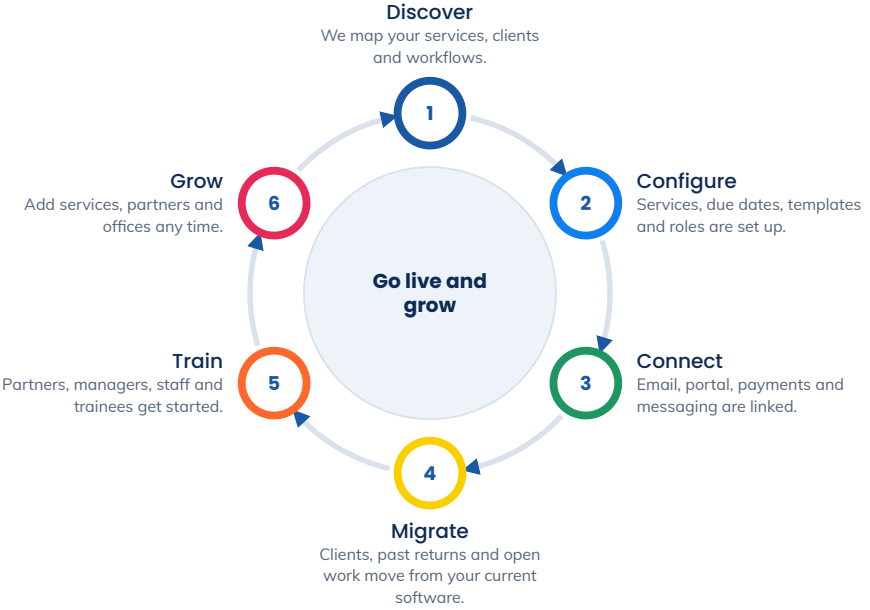
Proposes balanced entries for accruals, depreciation and provisions.

Testing Agent

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

AI suggests, people decide. AI never posts, files or signs; opinions, signatures and UDIN stay with your CA.

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.

Present in India, Sri Lanka, Singapore and Saudi Arabia

INDIA

Developer of Integra

Incien IT Solutions Pvt Ltd

19/41, Circular Road, United India Colony,
Kodambakkam, Chennai, Tamil Nadu 600024

+91 75400 88770
+91 98848 41484
+91 78248 18877

info@incien.com

SRI LANKA

Authorised partner

RRAA One Technologies Pvt Ltd

20/6, Abeyrathne Mawatha,
Boralesgamuwa 10290

+94 77 278 5577
+94 77 862 7722
+94 77 027 2299

info@rraaone.com

SINGAPORE

Authorised partner

ITree Solutions Pte Ltd

22 Sin Ming Lane, #06-76 Midview City,
Singapore 573969

+65 9005 7861

contact@itreesolutions.sg

SAUDI ARABIA

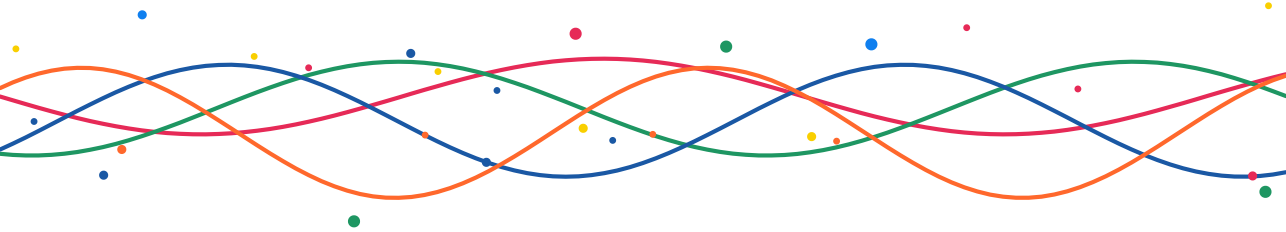
Authorised partner

Onexea Establishment

7637 Al Muharas, 3874 Al Hazm,
Riyadh 14964, Kingdom of Saudi Arabia

+966 50 789 2989
+966 55 110 0118

info@onexea.com



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Any industry. Any country. Any device.

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