AI-Powered

Complete Features

Every benefit and every feature of Integra for Audit & Accounting Firms, area by area.

BENEFITS

What your firm gains with Integra

One connected platform for sole practitioners, growing firms and multi-office practices. Upload once, prepare everything: bookkeeping, tax, audit and filing from the same data, with AI doing the groundwork.

Upload once

Clients upload once; the same data feeds bookkeeping, tax, audit and filing.

AI does the groundwork

AI agents read documents, match banks, propose entries and draft tests. People approve.

Reconciled automatically

Bank, ledgers, purchase data and tax statements matched, with differences flagged.

More clients per person

Less typing and chasing means the same team handles far more engagements.

No missed deadlines

A compliance calendar creates tasks and reminders for every client automatically.

Evidence behind every conclusion

Working papers link each figure to the page it came from, in a tamper-evident vault.

Every return from one record

GST, TDS, income tax, tax audit and ROC prepared from the same data, checked before filing.

Quality built in

Preparer, reviewer, partner and quality review sign-offs on every file.

Switch without retyping

Clients, past returns and balances move from your current software, checked in a parallel run.

Client data protected

Privacy walls between clients, digital signatures and a hash-chained audit trail.

CONTENTS

54 modules in 9 areas, one platform

Every part of your practice runs on one platform. Modules marked + come in optional packs.

Practice & Clients

- Practice Command Centre
- Client & Entity Registry
- Compliance Calendar & Reminders
- Engagements & Work Management
- Client Portal & Mobile
- Billing & Practice Finance
- Migration from Other Software

Intake & Evidence

- Document Intake
- AI Document Reading
- Bank Statement Intelligence
- Invoice & E-invoice Checks
- Evidence Vault

Accounting & Statements

- Client Bookkeeping
- Accounting Software Import
- Bank & Ledger Reconciliation
- Financial Statements
- CMA & Ratio Analysis
- Period Close Checks

GST & TDS

- GST Returns
- GST Reconciliation & ITC
- GST Registrations & Notices
- TDS & TCS Returns
- TDS Certificates & Forms

Income Tax

- Income Tax Computation
- Income Tax Returns+
- E-filing & E-verification+
- Notices & Assessments

Audit & Assurance

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

Specialised Services

- Corporate Secretarial
- XBRL
- Client Payroll & Labour Compliance
- Internal Audit
- Forensic Accounting+
- Transfer Pricing+
- ESG & BRSR+

AI & Automation

- Integra AI Workforce
- Three-way Reconciliation
- Anomaly Detection+
- Firm Analytics
- Deliverables & Exports
- Financial Advisory

Firm, Security & Support

- Rules, Updates & Validations
- Filing Centre & Connectors
- Identity & Digital Signing
- Users, Offices & Staff
- Privacy, KYC & Retention
- Backup, Offline & Support
- Multi-currency

+ Optional pack (Tax Returns, Forensic & Analytics or Specialist Assurance).

Practice & Clients

Practice Command Centre

One switchboard for every service line, client and due date.

- Single switchboard for every service
- Return-filing status by client and return
- Work in progress and pending returns
- Search by PAN, TAN, GSTIN, CIN or DIN
- Regulatory news and update feed
- Partner dashboard and risk flags
- Staff workload and peak-season planner

Client & Entity Registry

One client record shared by tax, GST, TDS, ROC, audit and billing.

- One client master for every service
- Individuals, HUFs, firms, LLPs, companies, trusts and societies
- PAN, TAN, GSTINs, CIN/LLPIN, DIN, Udyam, IEC, PF and ESI
- Directors, partners and signatories
- Client groups and families
- Partner remuneration flows to partners' returns
- Client-wise and bulk passwords
- Client 360 view

Compliance Calendar & Reminders

Due dates for every client turned into tasks and reminders automatically.

- Due dates from each client's registrations
- Automatic tasks for staff
- Reminders by email, SMS and WhatsApp
- Missing-document, birthday and DSC-expiry alerts
- Penalty estimates for delays
- Recurring jobs every year

Engagements & Work Management

Scope, team, independence and tasks for every engagement.

- Statutory, tax, GST, internal, bank and stock audits
- Certification, due diligence and retainers
- Client acceptance and continuance
- Independence and conflict declarations
- Engagement letters with e-sign
- Team, budget hours and milestones
- Tasks, checklists and dependencies
- Recurring engagements created each year

Client Portal & Mobile

A secure, branded workspace for every client, free.

- Document request lists with status
- Upload from phone and WhatsApp
- Computations, statements and filed returns to view
- Queries linked to the working paper or return line
- Approvals and representation letters with e-sign
- Free for every client

Billing & Practice Finance

Quotations, fee invoices, time and profit for every client.

- Fee quotations
- GST fee invoices and recurring retainers
- Receipts, outstanding and reminders
- Online payment links
- Timesheets per engagement
- Job profitability and realisation
- Engagement expenses billed to clients

Migration from Other Software

Move from your current practice software without retyping.

- Import from other practitioner software
- Clients, registrations and previous-year returns
- Balance sheets, 3CD, TDS and GST data
- Mapping report of every record
- Parallel run with differences listed
- Excel import and carry-forward to the next year

Intake & Evidence

Document Intake

Every document collected once, sorted by client and type.

- Bulk upload, email-in and WhatsApp-in
- Scanner and mobile camera capture
- Auto-sorting by client and document type
- Prepared-by-client (PBC) lists
- Client data export utility
- Duplicate detection

AI Document Reading

Invoices, statements and tax forms read into structured data.

- Purchase and sales invoices
- Bank statements
- Form 16, 26AS and AIS
- Salary slips and investment proofs
- Capital-gains and CAS statements
- Rent receipts and asset bills
- Confidence scores and human validation

Bank Statement Intelligence

Statements in any bank format read, categorised and analysed.

- PDF, Excel, CSV and MT940 statements
- Transaction categorisation
- Cash-flow patterns
- Related-party and unusual transactions
- Cash deposits above thresholds
- Consent-based bank data through an Account Aggregator partner

Invoice & E-invoice Checks

E-invoices, e-way bills and supplier GSTINs verified in bulk.

- IRN and signed QR verification
- E-way bill matching
- Duplicate invoice detection
- Supplier GSTIN status check
- Arithmetic checks

Evidence Vault

Every figure linked back to the page it came from.

- Figures linked to source page or ledger line
- Hashed, unchangeable documents
- Version history
- Retention schedules and legal holds
- Locked after sign-off

Accounting & Statements

Client Bookkeeping

Clients' books kept or reviewed on the same platform.

- Client books on Integra
- Read-only access when the client runs Integra
- Multi-client bookkeeping queue
- Learned categorisation rules per client
- Journal proposals with maker-checker
- Nothing posts without approval

Accounting Software Import

Trial balances and ledgers brought in from the client's software.

- Tally (XML, ODBC and TDL)
- Busy, Marg, QuickBooks and SAP Business One
- Other cloud accounting software
- Excel templates
- Trial balances, ledgers and vouchers

Accounting & Statements continued

Bank & Ledger Reconciliation

Bank, receivables and payables matched and confirmed.

- Bank and cash reconciliation
- Receivable and payable ageing
- Party balance confirmations sent and matched
- Difference tracking

Financial Statements

Trial balance to Schedule III statements and notes, automatically.

- Schedule III Divisions I, II and III
- Balance sheet, profit and loss, equity and notes
- Cash flow, indirect and direct
- Companies Act and income-tax depreciation
- Non-corporate, trust and LLP formats
- Multiple trading accounts with quantities
- Previous-year column and merged businesses
- Consolidated statements
- Export to PDF, Word, Excel and the ITR

CMA & Ratio Analysis

Bank credit data, projections and ratios for clients.

- CMA data for bank credit
- Historical and projected statements
- Fund flow, MPBF and working capital
- Ratio analysis and MIS packs

Period Close Checks

Suspense, variances and locks checked before reporting.

- Close checklist
- Suspense and unusual balances
- Variance against previous year
- Period lock

GST & TDS

GST Returns

Every GST return prepared, validated and filed in bulk.

- GSTR-1/IFF, 3B, 4, CMP-08, 5, 6, 7, 8, 9, 9C and ITC-04
- Monthly and QRMP
- GSTR-1 prepared from sales data
- Bulk filing and offline preparation
- Pre-scrutiny validation
- DSC, e-sign and EVC
- Multiple GSTINs and logins

GST Reconciliation & ITC

Purchases matched with GSTR-2A, 2B and IMS, credit protected.

- GSTR-2A/2B and IMS matching with books
- Accept, reject and pending actions
- AI-assisted fuzzy matching
- Cash, credit and liability ledgers
- ITC adjustments and DRC-03
- Supplier follow-up and scorecards
- Filed data pushed back to the books

GST Registrations & Notices

Registrations, refunds and notices tracked to closure.

- Registration and amendments
- LUT and refunds
- Scrutiny, demand and audit notices
- Replies with document bundles

GST & TDS continued

TDS & TCS Returns

Quarterly returns prepared from the books, with every check.

- 24Q, 26Q, 27Q and 27EQ
- Corrections and revised returns
- FVU generation and Form 27A
- TDS found automatically in accounting entries
- Challan matching and unadjusted balances
- PAN checks, higher-rate and short deduction
- Interest and late fee

TDS Certificates & Forms

Certificates, special TDS forms and declarations in one place.

- Form 16 and 16A generated and emailed
- Conso file, justification report and CSI
- 26QB, 26QC, 26QD and 26QE
- Lower-deduction certificates and 15G/15H
- TAN registration help
- SFT returns
- Challan e-payment

Income Tax

Income Tax Computation

Tax for every assessee, under every head, rule by rule.

- All heads of income
- Old and new regime comparison
- Presumptive tax, MAT/AMT and clubbing
- Capital gains with indexation and grandfathering
- Investment register
- Advance tax, interest and fees
- Salary-arrears relief and foreign tax credit
- Ready reckoner by year
- Old and new Income-tax Act mapped

Income Tax Returns TAX RETURNS PACK

Every ITR prepared in volume with schema checks.

- ITR 1 to 7
- Original, revised, belated, updated and defective
- Returns by legal heirs
- Error locator and schema checks before upload
- Bulk preparation
- AIS, 26AS and TIS import

E-filing & E-verification TAX RETURNS PACK

Returns filed, verified and followed up in bulk.

- E-filing through an authorised e-return intermediary
- DSC registration
- Aadhaar OTP and EVC e-verification in bulk
- PAN-Aadhaar link in bulk
- ITR-V and CPC receipt dates
- Bulk refund status
- Rectification and demand response

Notices & Assessments

Notices captured, answered and orders rechecked.

- Department emails and intimations read into each client
- Notice register with deadlines
- AI-drafted replies for review
- Hearing log and appeal forms
- Assessment orders recomputed and rectification drafted
- 15CA/15CB, trust and residency forms

Audit & Assurance

Planning & Risk

Materiality, risks and programmes for each engagement.

- Understanding the entity
- Overall, performance and trivial materiality
- Risk and fraud risk assessment
- Going concern and related parties
- Programme library mapped to Standards on Auditing
- Group and component audits

Testing & Sampling

Full-data tests and samples that can be repeated and explained.

- Full-population analytics
- Journal-entry testing
- Benford, duplicates and weekend postings
- Statistical and non-statistical sampling
- Vouching with tick marks
- External confirmations
- Analytical, cut-off and subsequent-event tests
- Physical verification on mobile with photo and geotag

Working Papers

A digital audit file with evidence and sign-off on every paper.

- Templates and lead schedules
- Cross-references
- Preparer and reviewer sign-off
- Review notes and clearance
- Roll-forward from last year
- File assembly and lock
- Read-only archive

Findings & Reports

Misstatements, letters and audit reports from templates.

- Misstatement summary
- Proposed adjustments sent to the client
- Unmodified and modified reports, EOM and KAM
- CARO and IFC annexures
- Board's report and notes templates
- Management and representation letters
- PDF conversion and DSC signing

Tax Audit & Certificates

Form 3CD and certificates prepared from the books.

- Form 3CA/3CB-3CD with clause data from books
- Automatic ratios and depreciation transfer
- TDS data import and error locator
- Upload with DSC and approval status
- 29B, 10CCB, 3CEB and trust audit forms
- Net worth, turnover and other certificates
- UDIN log per report
- Bank audit forms (LFAR)

Internal Controls & CARO

Control testing, IFC and CARO with evidence.

- Risk-control matrix library
- Walkthroughs, design and operating tests
- Deficiency evaluation
- IFC report support
- CARO clause-wise questionnaire
- Audit-trail (edit log) check of client software

Quality Review

Second-partner, hot and cold reviews before sign-off.

- Engagement quality review
- Preparer is never the sole reviewer
- Hot and cold file reviews
- Firm quality manual and monitoring
- Peer review and inspection readiness pack

Specialised Services

Corporate Secretarial

MCA forms, registers and board records for company clients.

- AOC-4, MGT-7/7A, ADT-1 and DIR-3 KYC
- DIR-12, DPT-3, MSME-1, BEN-2 and INC-20A
- LLP Form 8 and 11
- Company and director data by CIN and DIN
- Resolutions, notices and minutes
- Statutory registers and MOA/AOA templates
- SRN acknowledgements
- Secretarial audit and event tracker

XBRL

Financial statements tagged and validated for filing.

- AS and Ind AS taxonomy tagging
- Validation
- Instance file generation

Client Payroll & Labour Compliance

Payroll and statutory returns run for your clients.

- Salary structures, attendance and leave
- Loans, arrears, bonus and final settlement
- Bank transfer file
- PF ECR, ESI, PT and LWF returns
- Salary TDS to 24Q and Form 16
- Employee self-service

Internal Audit

Risk-based internal, concurrent and stock audits.

- Audit universe and risk-based plan
- Control testing
- Issue register and action taken
- Concurrent, stock and revenue audits
- Continuous monitoring for clients on Integra

Forensic Accounting

FORENSIC & ANALYTICS PACK

Fraud cases investigated with full data and custody records.

- Case management
- Data analytics
- Chain of custody
- Interview notes
- Fraud reporting forms

Transfer Pricing

SPECIALIST ASSURANCE PACK

Benchmarking and transfer pricing forms.

- Benchmarking support
- Form 3CEB
- Master file and country-by-country forms

ESG & BRSR

SPECIALIST ASSURANCE PACK

Sustainability data and reporting support.

- ESG data collection
- BRSR reporting support
- Assurance working papers

AI & Automation

Integra AI Workforce

AI that reads, matches and drafts, with people approving.

- Drafts working papers, notes and report wording
- Drafts notice replies and client emails
- Intake, reconciliation, bookkeeping and testing agents
- Every draft labelled until a person accepts it
- AI never posts, files or signs
- Protection against instructions hidden in documents

Three-way Reconciliation

Books, returns and tax statements tied out against each other.

- Books vs GST returns vs ITR turnover
- 26AS/AIS vs books vs ITR
- TDS certificates vs 26AS
- GSTR-1 vs 3B vs e-invoices

Anomaly Detection

FORENSIC & ANALYTICS PACK

Unusual entries flagged across clients, with reasons.

- Anomalies across books, bank and tax data
- Explainable flags
- Duplicate vendor payments
- Exceptions sent to working papers

Firm Analytics

Engagements, margins, staff and compliance at a glance.

- Engagement margin
- Staff billing efficiency
- Compliance rates
- Custom report builder

Deliverables & Exports

Firm-branded outputs, sent straight to clients.

- PDF, Word, Excel and portal files
- Firm-branded templates
- Email to clients from the software
- Bulk mailing of certificates and computations

Financial Advisory

Planning, projections and valuation support for clients.

- Tax planning
- Projections and MIS
- Valuation and due-diligence support

Firm, Security & Support

Rules, Updates & Validations

Rates, forms and due dates kept current, every year.

- Versioned rates, thresholds, forms and due dates
- Automatic online updates
- Committed update times for Budget and form changes
- Release notes in the product
- Validation and error locator for every return
- CA-verified accuracy tests on every release

Filing Centre & Connectors

Approved returns filed, acknowledged and stored.

- Filing queue with preparer, reviewer and partner approval
- GST through a GST Suvidha Provider
- Income tax through an e-return intermediary
- TRACES, MCA, UDIN, EPFO and ESIC prepared for guided portal steps
- Pause for OTP and DSC
- Acknowledgements stored and linked
- Connector health page

Firm, Security & Support continued

Identity & Digital Signing

Digital signatures, e-sign and secure login for every partner.

- DSC signing and Aadhaar e-sign
- DSC register with expiry alerts
- DSC purchase through a certifying partner
- Multi-factor login
- Maker-checker approvals

Users, Offices & Staff

Rights, offices and the firm's own staff in one place.

- Firm, branch and user hierarchy
- Rights per client and module
- Office-only or device rules
- Online work at client premises
- Staff attendance, leave and articleship register
- Staff payroll
- In-app activity log

Privacy, KYC & Retention

Client risk, consent and records handled by the rules.

- KYC and AML checks
- Client risk rating
- Ethics and independence checks
- Encrypted portal credential vault
- DPDP consent and data requests
- Retention and disposal

Backup, Offline & Support

Data safe, work possible offline and help when it matters.

- Cloud backup and restore
- Full data export
- Disaster recovery
- Offline preparation with sync
- Support desk inside the product
- Peak-season priority support

Multi-currency

Clients with foreign operations and currencies.

- Functional currencies
- Revaluation
- Multi-currency statements

integra

integraone.app

Any industry. Any country. Any device.

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