FOR BOOKKEEPERS & FINANCE TEAMS

Know which clients need you first.

Less time finding the issue.
More time helping the client.

One place to see which clients need attention, what is missing and what comes next. Less switching between client files. More time for useful work.

FICTIONAL PRACTICE SNAPSHOT

Harbour Heating	**VAT review due soon** Fictional deadline / two documents missing
Example Business	**€8,400 overdue** Open the evidence / review the next step
Cedar Garden Care	**Supplier bill due** Prioritise the client review

Built in Cork. In development. Public demos use fictional data.

ONE PORTFOLIO. CLEAR NEXT ACTIONS.

Review the exceptions. Find the right client faster.

Kintreo Practice is being built to save bookkeepers and accountants time moving between individual client accounts, spreadsheets, task lists and messages.

Start with who needs attention

The intended portfolio view brings client priorities together: an approaching return, missing documents, an overdue balance or work waiting to be invoiced. Start with the client who needs action.

Understand the reason

Open the client and review the supporting information. See what is missing, which period or task is involved and what a useful next step would be. Keep answers grounded in that client’s authorised records.

Keep Sage, Xero and professional judgement

Practice is intended to sit above supported accounting and operational tools. It does not replace the accounting ledger, your expertise or the software used to prepare and file returns.

Coordinate the next step

The intended workflow lets the team identify an owner, request specific information and track progress. A prepared message or completed checklist must not be confused with a filed return.

DEADLINE INTELLIGENCE - INTENDED CAPABILITY

The right obligation. For the right client.

Our intention is to bring relevant deadlines into the client-priority view, so the team can see what is approaching without opening every client file.

VAT and Revenue-related deadlines

We intend to link deadline tracking to authoritative Revenue information and, where permitted and technically supported, authorised client-specific information. Direct Revenue or ROS connectivity is not live or guaranteed.

RBO submissions and updates

We intend to track applicable beneficial-ownership filing and update tasks separately from tax returns. RBO is a separate register and filing process, not a Revenue tax return or a blanket annual reminder.

Context before an alert

The intended design records the client, obligation, relevant period or triggering event, deadline source and responsible person. Applicability and any changed deadline require review rather than assumptions.

Remind, prepare and confirm

The goal is to flag approaching work, highlight missing information and track the next action. Filing remains in the appropriate authorised system unless a future supported filing capability is explicitly introduced.

Planned capability, not live compliance monitoring or automatic filing. Official reference points: revenue.ie/en/tax-professionals/calendar/ and rbo.gov.ie/faqs/. No endorsement or partnership is implied.

ILLUSTRATIVE WORKFLOW

VAT review approaching. See what is missing.

Example: Harbour Heating has a fictional VAT-preparation deadline in seven days. A supplier invoice copy and an expense receipt are missing. This is a demo scenario, not a statutory due date.

1. Spot the client in the portfolio

See the VAT-preparation item alongside the practice’s other priorities. The aim is to direct attention without manually checking every client’s accounts.

2. Open the evidence

Review the relevant client records and the two missing documents: supplier invoice DEMO-B202 and expense receipt DEMO-E17.

3. Prepare a focused request

Prepare a query asking for those specific documents. In the public demo this is a local simulation; nothing is sent, filed, calculated or paid.

4. Track progress through to confirmation

The intended live workflow distinguishes waiting for information, ready for review and confirmed completion. A drafted query does not resolve the deadline.

The time-saving opportunity

For illustration: two minutes less checking across 30 clients would free one hour per review round. This is a hypothetical efficiency example, not measured performance or a guaranteed saving.

EXPLORE THE IDEA. HELP SHAPE THE PRODUCT.

See the direction. Try the demo.

Explore today

The public demo uses fictional data. Compare four businesses, open client records and explore a VAT-preparation checklist and simulated owner handoff.

What we are building towards

A shared client-priority view, authorised source records, team ownership and deadline tracking. Revenue-linked deadline support and RBO task tracking are intended capabilities, not live connections.

A controlled pilot

Live access depends on tested connections, client permissions, security and agreed onboarding. Available functions will be confirmed before you join. Demo actions do not send messages, file returns or change accounting records.

Practice pricing and client allowances are being finalised. Registration creates no subscription.

Explore Practice / register interest

kintreo.com | ronan@kintreo.com