

CLOUD ACCOUNTING & REPORTING

Management Reporting

Real-time visibility into your numbers, powered by cloud accounting — so you always know exactly where your business stands.

One fixed monthly fee covers your cloud accounting software, your bookkeeping oversight, and the reports that tell you what's really going on:

£1,500

avg. overlooked tax deductions we find



WHY REAL-TIME REPORTING

Live financial data, whenever you need it

We use an industry-leading cloud accounting system giving you instant access to your numbers, from any device, at any time. Here's what that means for you:

24/7 access

Up-to-date financial information and reports from any device, anywhere — including your phone.

Always up to date

Real-time records mean you're always making decisions on today's numbers, not last quarter's.

Faster invoicing

Simple, customised sales invoicing — email invoices with click-and-pay to get paid quicker.

Automatic bank feeds

Your bank accounts feed directly into the system, keeping everything reconciled without the admin.

Financial dashboard

A fully customisable screen showing the key numbers you need to run your business, at a glance.

Instant reports

At the touch of a button, get up-to-date reports on how your business is performing.

Secure & backed up

Sleep at night knowing your financial data is always secure and backed up automatically.

Maintenance-free

No downtime — software upgrades are installed automatically, so there's nothing for you to manage.

THE SCOPE OF THE SERVICE

What's included when we manage your reporting

One fixed monthly fee, built around what your business actually needs — not a package you have to fit into.

Every reporting cycle, to keep your numbers precise

- ✓ Dedicated account manager as your single point of contact
- ✓ Review & reconcile your bank accounts
- ✓ Bookkeeping health check for errors or omissions
- ✓ Full periodical management reporting, with trend comparisons
- ✓ Dashboard built around your key numbers
- ✓ Accruals & prepayments handled correctly
- ✓ Fixed asset register maintained, depreciation posted
- ✓ Tax deduction review — commonly overlooked expenses reclaimed

Popular add-ons

- ✓ Payroll — PAYE scheme set-up & monthly payroll run
- ✓ Cash flow forecasting & budgeting
- ✓ VAT return completion