One hub for the whole practice, from *first booking* to *filed return*

A simple SaaS by CueDev, built for UK tax advisors. It turns calendar bookings into client files, researches prospects before you speak to them, reads every receipt your clients send, calculates VAT to HMRC rules, and gives each client a live portal so they stop emailing you for updates.

1. **Onboard** — Bookings arrive from Calendly or Cal.com and become clients in one click.
2. **Research** — A briefing on the prospect lands in your workspace before the call.
3. **Process** — Invoices are scanned, read and posted to the right ledger category.
4. **Comply** — Standard, reduced, zero-rated and exempt VAT handled exactly.
5. **Share** — Clients see their figures, history and filing progress in their own portal.

Module 1

Prospecting and onboarding without retyping anything

New clients come from your existing booking tools. Their details are captured once, at the moment they book, and carried through to the client file.

1 Connect your calendar

When a prospect books, the platform captures their name, company, contact details, meeting time and intake answers automatically.

Calendly · Cal.com · Brevo

2 See it on your dashboard

Upcoming meetings appear in date order with the company name, phone number and what the prospect wants to discuss.

3 Convert in one click

After a successful consultation, one action turns the prospect into an active client file. No contact details are entered twice.

4 Add clients manually when needed

For referrals, phone enquiries and existing clients, enter company registration, VAT number and reporting periods directly.

app.cuedev.com/meetings

CueDev

- Dashboard
- **Meetings**
- Clients
- Documents
- VAT periods
- Reports & analysis
- Integrations
- Settings

Upcoming meetings

Synced from Calendly · 3 today

Booked this week	Briefings ready	Converted this month	Conversion rate
11	9	6	54%

Today, 14:30	Harbour Lane Joinery Ltd	Dan Whitmore · 0117 496 0223	VAT registration advice	Convert to client
Today, 16:00	Fern & Co Interiors	Priya Nair · 020 7946 0114	Year-end accounts	Briefing ready

Module 2

Walk into every call already briefed

Before a consultation starts, the platform researches the prospect and delivers a short dossier to your workspace.

- Company title, industry and a short summary of how that industry works
- Sector, website domain and VAT registration status
- Links found online: website, LinkedIn, Facebook and other profiles
- Industry-specific tax considerations worth raising on the call

All of this is enriched automatically from the booking details and delivered minutes before the meeting, so the context is fresh, not filed away.

Pre-call briefing — Call in 12 minutes

Harbour Lane Joinery Ltd

Industry: Construction and joinery · Bristol

Sector	Domain
Carpentry and fit-out	**harbourlanejoinery.co.uk**

VAT status	Estimated turnover
Not registered	**£85k – £120k**

Small joinery firms bill per project, buy timber and fixings on trade accounts and often work under CIS as subcontractors. Cash flow is seasonal and many sit near the VAT threshold.

Website · LinkedIn · Facebook · Companies House

> Turnover is close to the VAT registration threshold. Worth discussing timing and the Flat Rate Scheme.

Module 3

Invoices read, categorised and totalled for you

Clients upload receipts through their portal or forward them by email. The platform extracts the figures, assigns a chart-of-accounts category and rolls everything into period summaries.

Client sends a document

Portal upload or email forwarding, with an optional note explaining the expense.

→

OCR reads it, AI categorises it

The document is scanned and the AI fetches the key data, assigns the ledger category and VAT treatment, then posts it to the accounts once you approve.

- Vendor and date
- Line-item descriptions
- Net, VAT and gross totals
- Suggested category, held for approval

→

Ledger and periods update

Matched to a UK chart-of-accounts category with the right VAT treatment, then added to monthly, quarterly and yearly summaries.

Treatment	Rate	Typically applied to
Standard rate	20%	General commercial expenses, professional fees, most taxable supplies
Reduced rate	5%	Qualifying energy, power and domestic utility services
Zero rate	0%	Zero-rated goods, exports and qualifying food supplies
Exempt	—	Financial services, insurance and medical transactions kept out of the VAT figures

Module 4

VAT calculated exactly as HMRC expects

The same formulas run across every client account, and you can drill from a quarterly liability figure down to the individual receipt behind it.

Adding VAT to a net price

Gross = Net × (1 + rate)

At 20%: £100.00 × 1.20 = **£120.00 gross**

Extracting VAT from a gross price

Net = Gross ÷ (1 + rate)
VAT = Gross − Net

At 20%: £120.00 ÷ 1.20 = **£100.00 net**, VAT **£20.00**

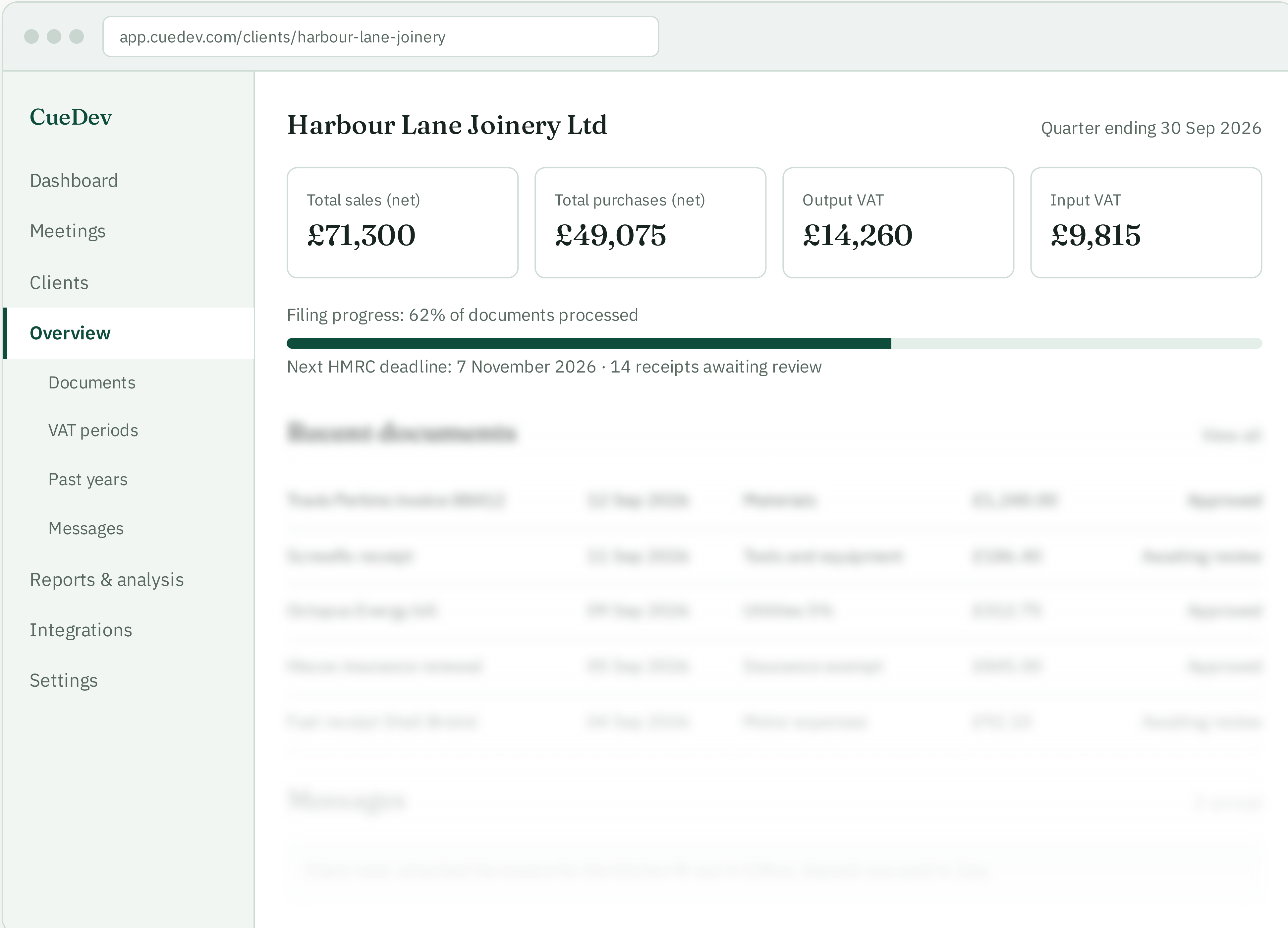
Output VAT collected on sales		Input VAT paid on purchases		Net VAT payable this quarter
£14,260	−	£9,815	=	£4,445

Illustrative figures. A negative result shows as a reclaim from HMRC. Quarterly totals feed Making Tax Digital submissions directly.

Module 5

A portal that answers the client's questions before they ask

Every client gets a secure login showing their current position, filing progress and full history, plus a place to send new documents.



Historical archive

Closed years, past filings and archived quarterly reports, always accessible.

Financial breakdown

Inputs, outputs, net and gross totals shown plainly, without jargon.

Live tracking

Current period, rates applied, filing progress and upcoming deadlines.

Document vault

Upload receipts, attach notes and message the assigned advisor securely.

What changes for the practice

Calendar sync, pre-call research, document parsing, VAT calculation and client portals in a single system, so the advisor's time goes to advice rather than administration.

Fewer entry errors

Details are captured once at the source and never retyped.

Billable hours back

Receipt sorting, categorising and period totals happen automatically.

Compliance built in

HMRC formulas and all four VAT treatments applied consistently.

Happier clients

Self-service visibility replaces status-update emails.