
The TaxOrch product manual

Fourteen chapters, each a walkthrough on real screens with sample data: what to click, what changes, and where TaxOrch stops and says so.

Printed from taxorch.com/manual on 30 September 2026.

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Every screen was captured from the running product on the sample workspace Northbridge Tax Partners (sample); every name, figure and date on them is sample data. Features marked In development, Preview or Beta are not to be relied on. The online manual at taxorch.com/manual is the current version.

Getting started with TaxOrch

TaxOrch runs in the browser at app.taxorch.com and on the mobile app. This chapter takes a new account from sign-up to a working workspace in about ten minutes, using the same sample workspace the rest of the manual shows: Northbridge Tax Partners (sample).

4 min read · New users on any plan, and the person setting up a firm's workspace.

Nothing in setup files anything or moves money. Every step can be repeated, and the guided start keeps track of what is done.

1 Create your account and choose a plan

Go to app.taxorch.com/sign-up, enter your email and a password, and choose a plan. Starter (\$20 a month) is for one person with straightforward taxes; Professional (\$100) adds several income streams, cross-border questions and bookkeeping; Business (\$200) adds team access, client workspaces with review and an audit log.

Firms that want TaxOrch under their own name, logo and web address ask about the White-label licence; it has no published price.

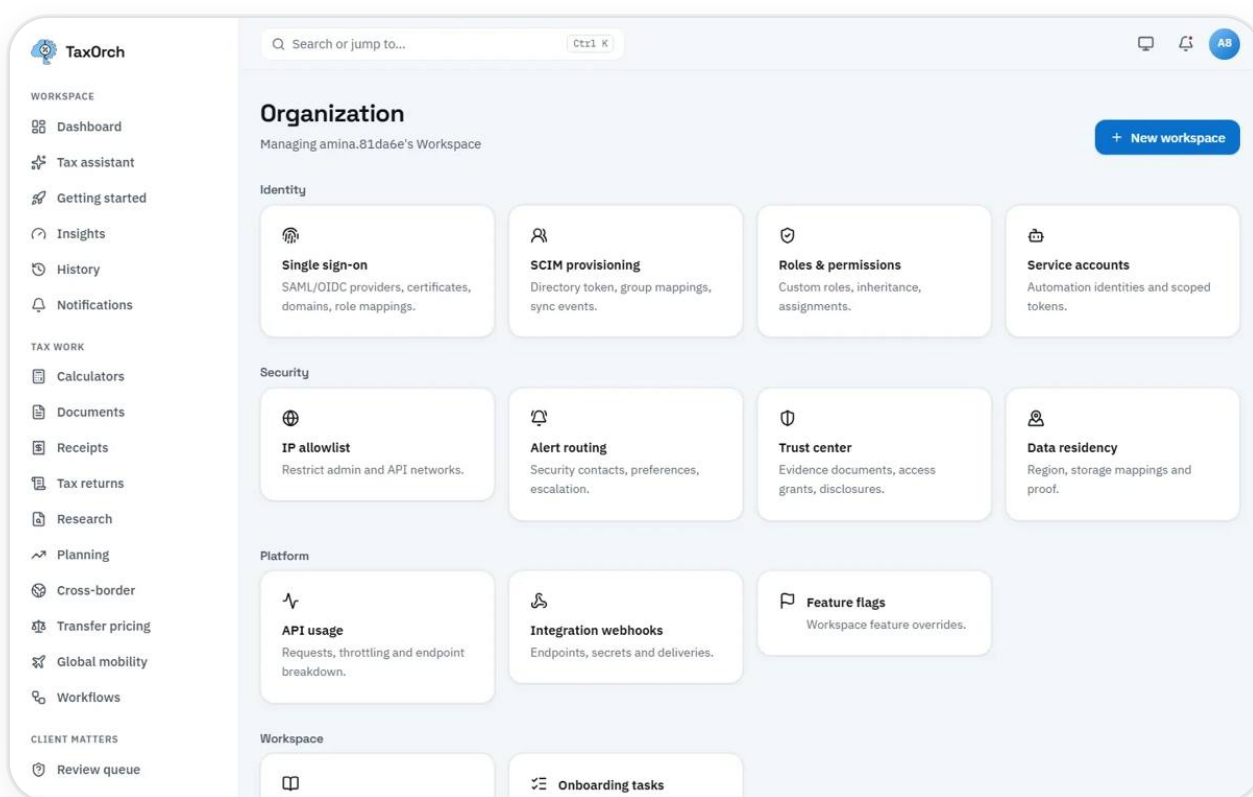
What changed

You are signed in to a new workspace with your plan shown on the dashboard.

2 Open the organisation page and name your workspace

From the sidebar choose Organisation. This page groups everything an administrator sets once: identity (single sign-on, SCIM provisioning, roles and permissions, service accounts), security (IP allowlist, alert routing, trust centre, data residency), platform (API usage, webhooks, feature flags) and the workspace itself.

On Starter and Professional most of these cards stay read-only; they matter from Business upwards and are covered in chapter 11.



The organisation page: identity, security, platform and workspace settings on one screen.

What changed

The workspace name appears under the page title, and a New workspace button lets a firm add more.

3 Set your profile, language and security

Open Settings from your avatar. The Profile tab holds your name and contact details; Preferences holds the language used for emails, notifications and answers where a checked translation exists; Security holds two-step verification and your sessions.

Turning on two-step verification takes one minute and is shown in chapter 11.

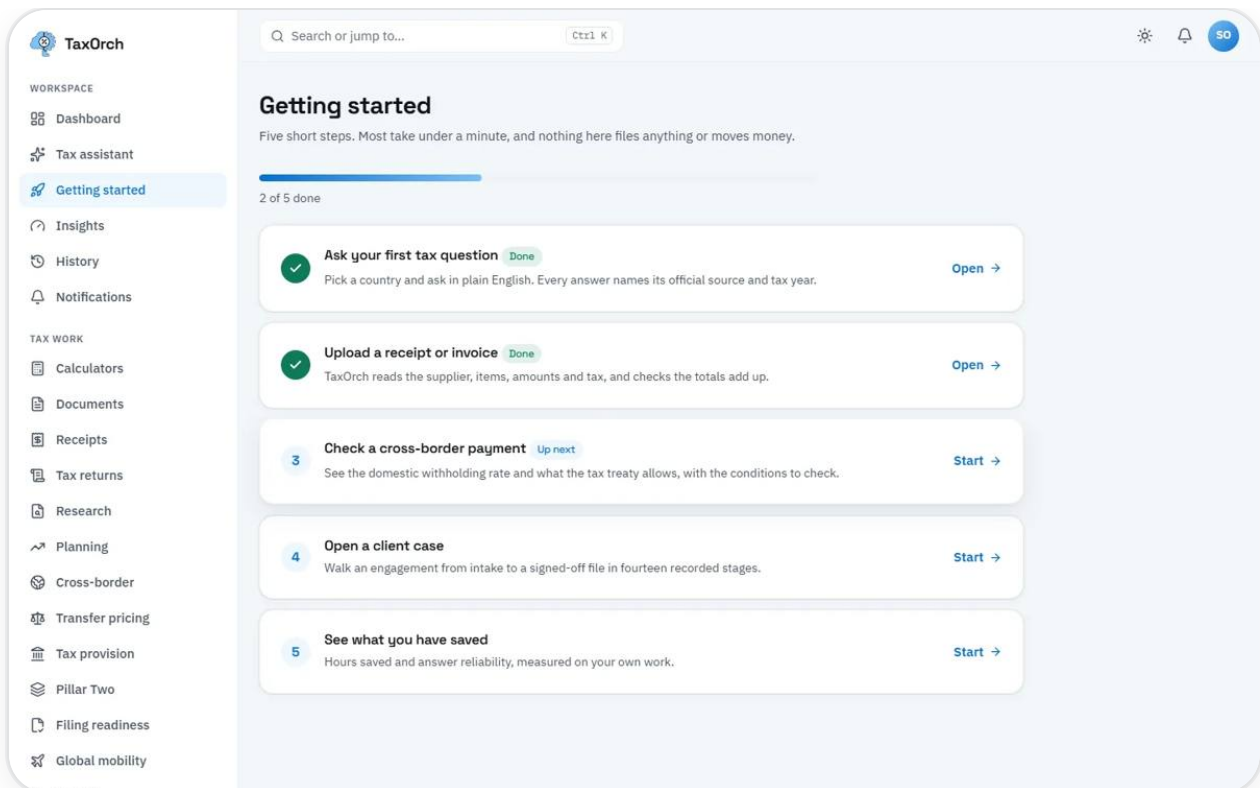
What changed

Your initials appear on the avatar in the top right and notifications start arriving under the bell.

4 Work through the five-step guided start

Choose Getting started in the sidebar. The five steps are: ask your first tax question, upload a receipt or invoice, check a cross-border payment, open a client case, and see what you have saved. Each one opens the real screen; the progress bar fills as you finish them.

On the sample workspace two of five are done: a question has been asked and a receipt has been read. The next step, a cross-border payment, is marked Up next.



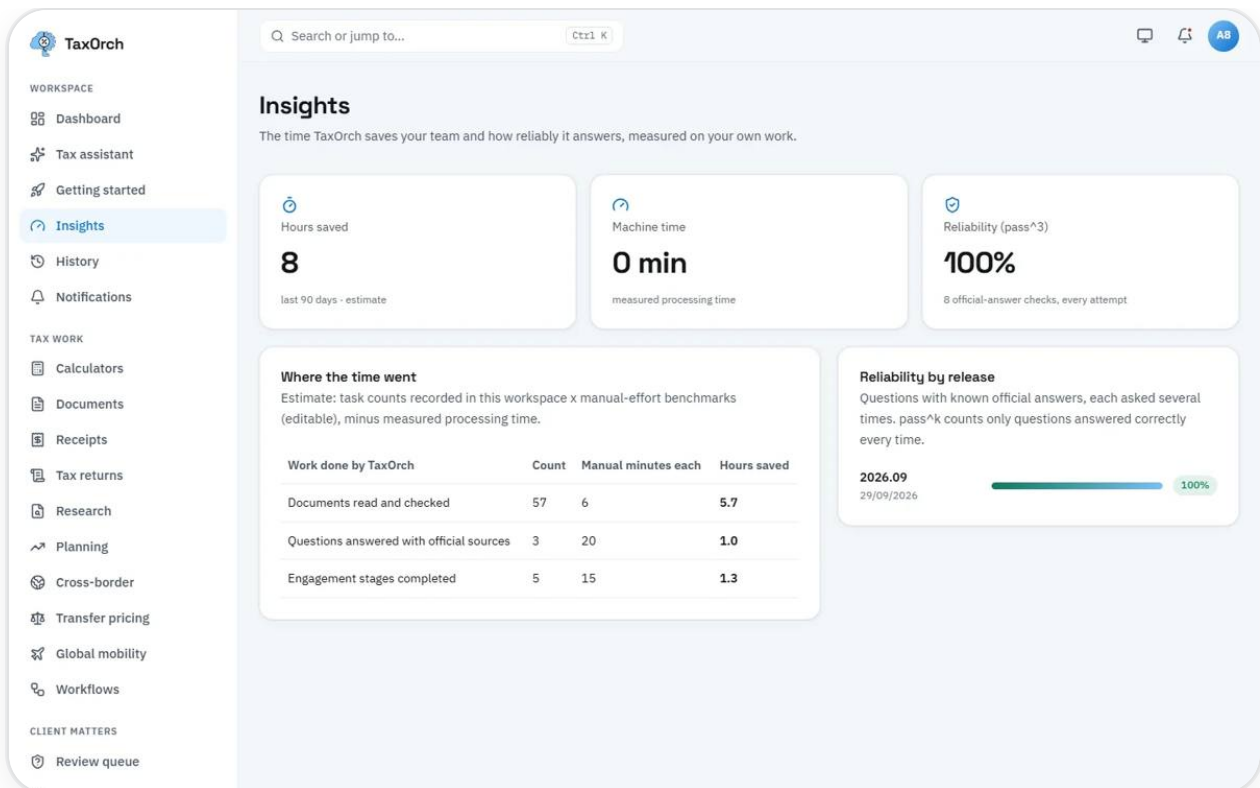
Getting started: five short steps, two done, the cross-border check up next.

What changed

The progress bar reads 2 of 5 done; each finished step shows a green tick and an Open link back to its screen.

5 Check what you have saved

The Insights page turns the work recorded in your workspace into hours saved, measured processing time and answer reliability by release. Hours saved is an estimate: task counts multiplied by editable manual-effort benchmarks, minus measured machine time, and the screen says so.



Insights: where the time went, with the benchmarks that produced the estimate shown next to each count.

What changed

The table lists documents read and checked, questions answered with official sources and engagement stages completed, each with its count.

Tips

- Press Ctrl K anywhere to search or jump to a page.
- The theme switch in the top bar changes between light and dark; every screen in this manual exists in both.
- A firm on Business can invite the whole team before any client work starts; roles are set per person (chapter 11).

Limits

- There is no free trial. Plans are monthly and start at \$20.
- Self-service password change is not available yet; the Security tab says to contact support from the email on your account.
- Hours saved is an estimate from editable benchmarks, not a measurement of your team's time.

Related

[Plans and pricing \(/pricing\)](/pricing)

[See it working \(/see-it-working\)](/see-it-working)

[AI tax software for accounting firms \(/ai-tax-software-for-accounting-firms\)](/ai-tax-software-for-accounting-firms)

Ask the tax assistant

The tax assistant answers questions about rates, deductions, filing obligations and cross-border situations. Every answer names the official source it rests on and the tax year it applies to. Where TaxOrch cannot answer from a verified source, it refuses and says why.

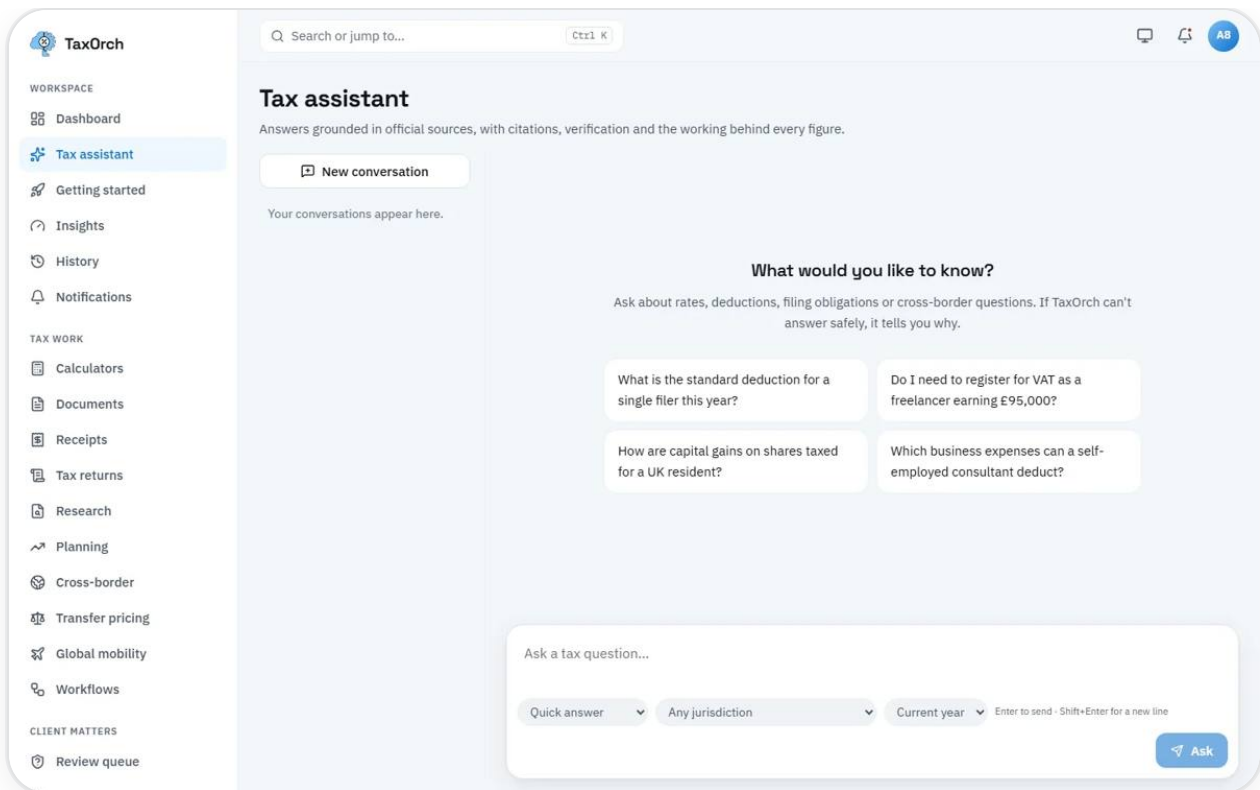
8 min read · Everyone. Individuals asking about their own taxes, and staff checking a rate before it goes into a file.

Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

1 Open the assistant and pick a jurisdiction

Choose Tax assistant in the sidebar. The box at the bottom takes a question in plain English. Three controls sit under it: the answer mode (Quick answer), the jurisdiction (Any jurisdiction, or a country) and the tax year (Current year by default).

Setting the country narrows the answer to that country's rules and its sources. Four example questions are offered on an empty conversation.



A new conversation: example questions, and the mode, jurisdiction and tax year controls under the question box.

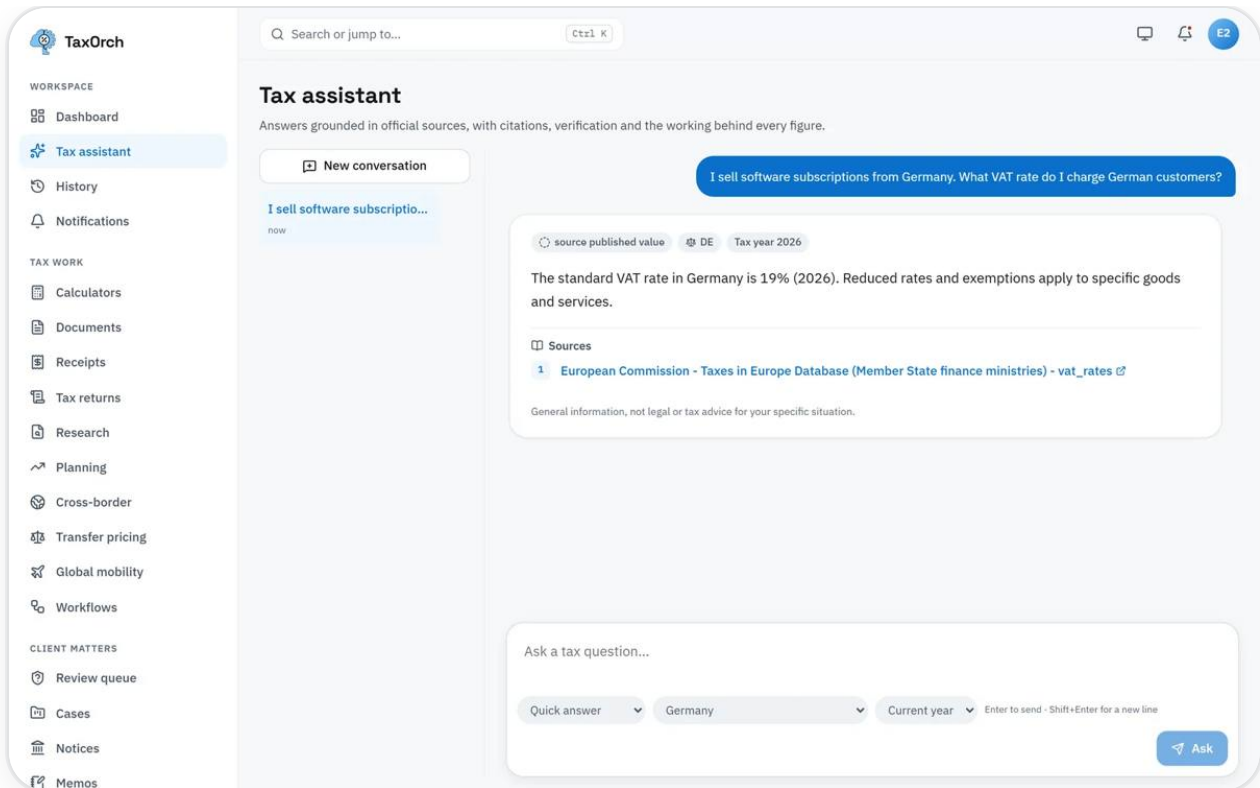
What changed

A New conversation button and the empty history column appear on the left.

2 Ask a question and read the answer

Ask: I sell software subscriptions from Germany. What VAT rate do I charge German customers? With Germany selected, TaxOrch answers that the standard VAT rate in Germany is 19% (2026), that reduced rates and exemptions apply to specific goods and services, and cites the European Commission's Taxes in Europe Database.

Three badges sit above the answer: the verification level (here, source published value), the country (DE) and the tax year (2026). The source link opens the official page.



Germany VAT: 19% (2026), cited to the European Commission's Taxes in Europe Database.

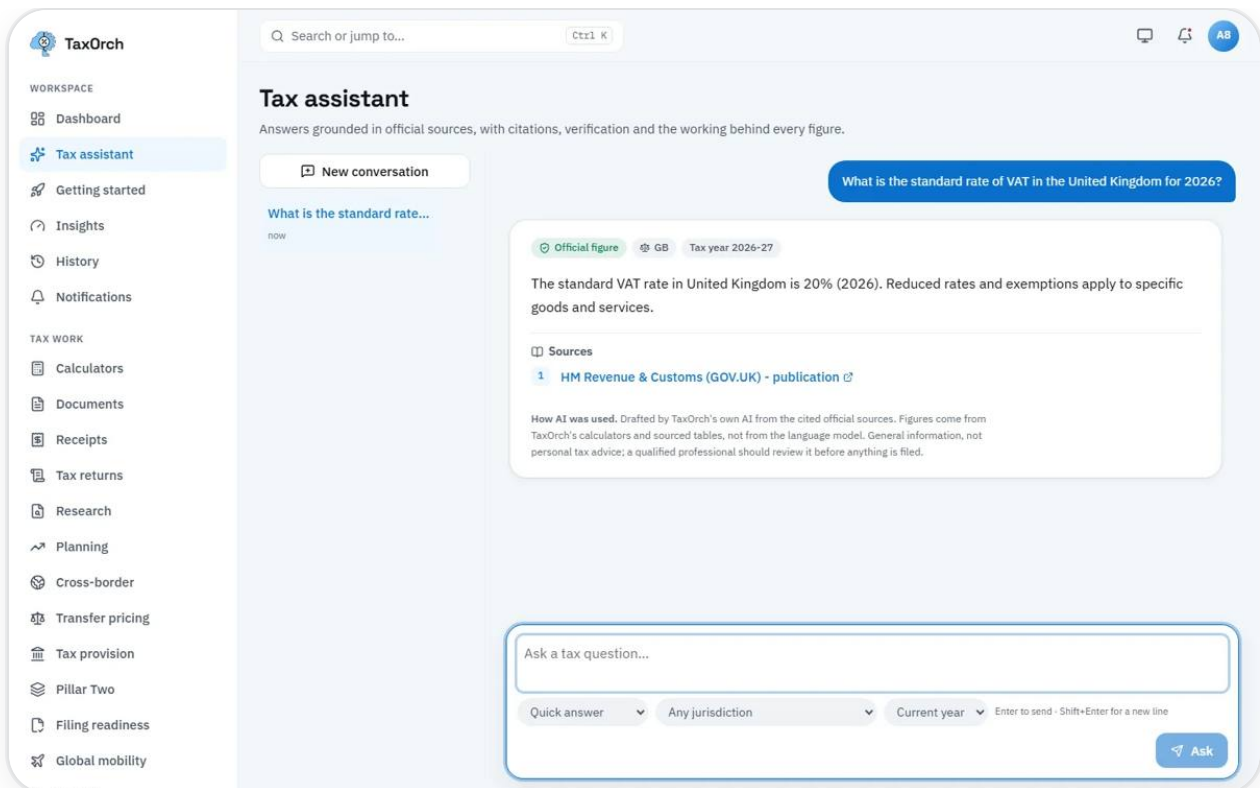
What changed

The conversation appears in the history column with its first words as the title.

3 Read the verification badges and the AI disclosure

Official figure (green) means the value was checked against the cited official publication. Source published value means the figure is taken from a published official table. Not verified for this year and No verified source yet mean TaxOrch will not give a figure.

Under each answer, How AI was used states that the answer was drafted from the cited official sources and that figures come from TaxOrch's calculators and sourced tables, not from the language model. The UK VAT answer shows all of this: Official figure, GB, tax year 2026-27, cited to HM Revenue & Customs.



An Official figure badge, the HMRC source, and the How AI was used disclosure under the answer.

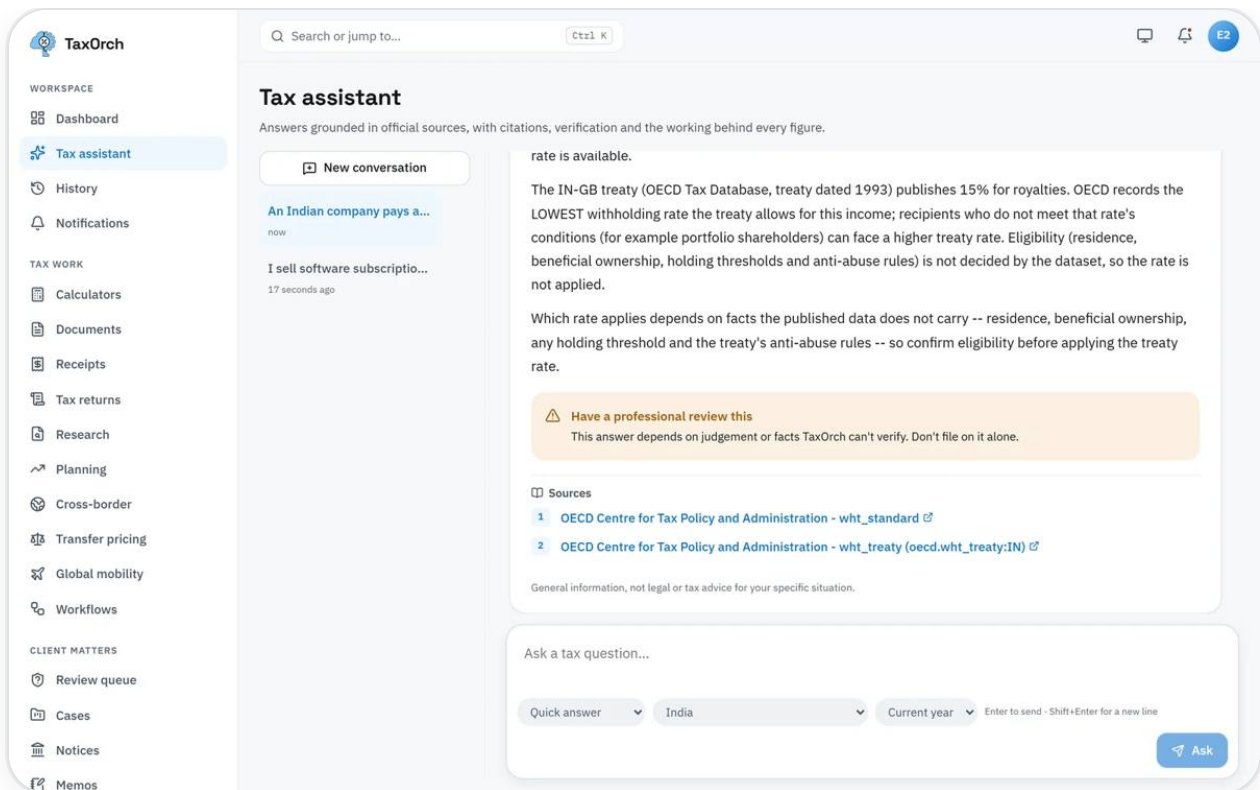
What changed

Answers with a green Official figure badge carry the disclosure footer; the general-information line appears on every answer.

4 Follow up, and notice when a professional review is advised

A follow-up in the same conversation keeps the topic. Ask about an Indian company paying royalties to a UK company: TaxOrch gives India's 20% domestic rate on royalties paid to non-residents, the 15% rate the India-UK treaty publishes, and explains that residence, beneficial ownership, holding thresholds and anti-abuse rules are not decided by the dataset, so the treaty rate is not applied.

Because the outcome depends on facts TaxOrch cannot verify, the answer carries a Have a professional review this notice: do not file on it alone. Two OECD sources are cited.



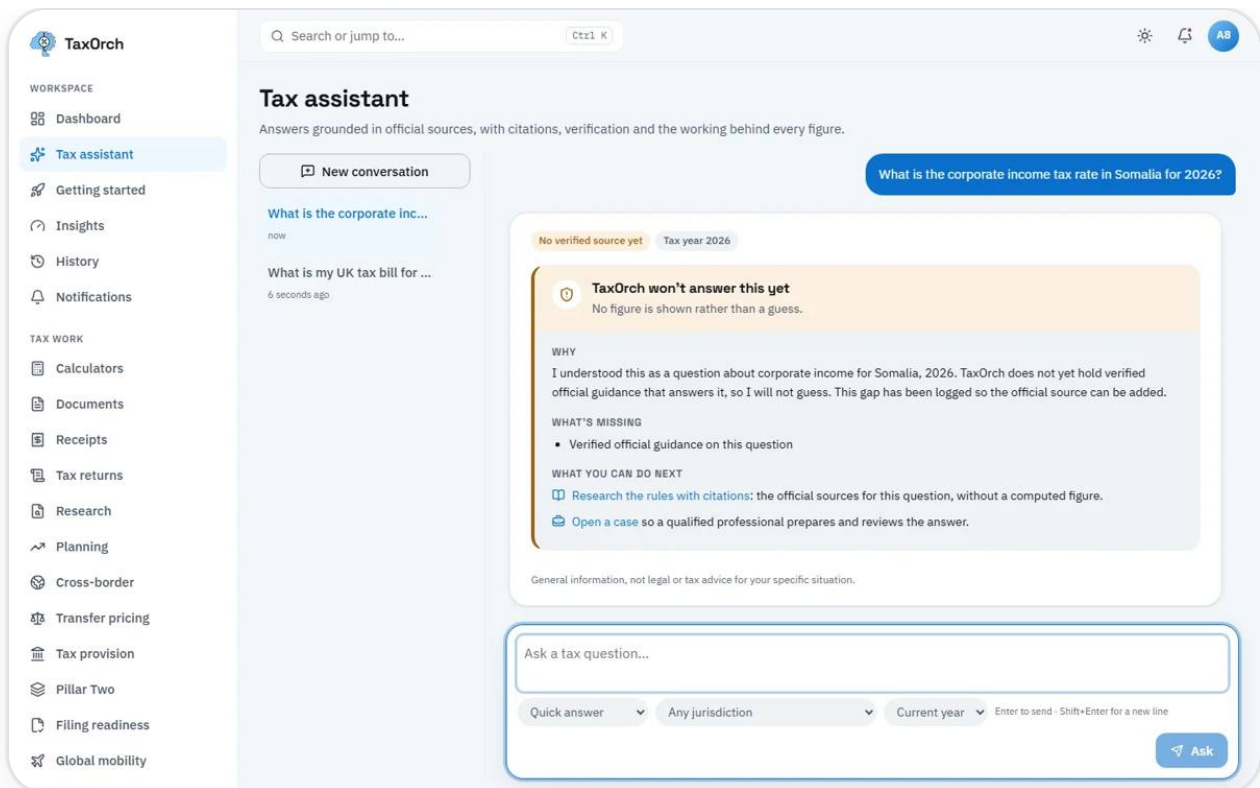
India to UK royalties: the treaty rate, the conditions that decide whether it applies, and the review notice.

What changed

The review notice appears inside the answer card, above the sources.

5 What a refusal looks like, and why

Ask for the corporate income tax rate in Somalia for 2026. TaxOrch answers: TaxOrch won't answer this yet. No figure is shown rather than a guess. The panel explains why (no verified official guidance is held for that question), what is missing, and what you can do next: research the rules with citations without a computed figure, or open a case so a qualified professional prepares and reviews the answer. The gap is logged so the source can be added.



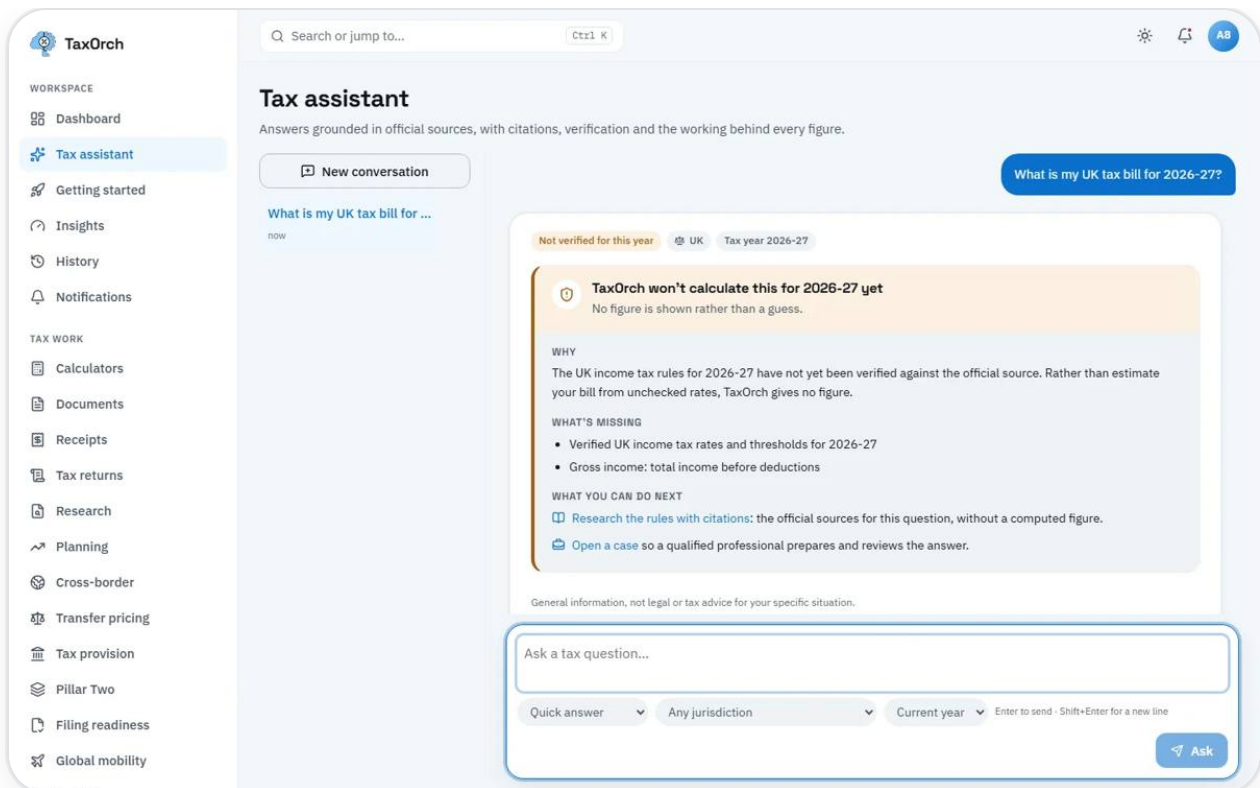
A refusal: no verified source for Somalia 2026, so no figure, with the reason and what to do next.

What changed

The badge reads No verified source yet and the answer card holds a refusal panel instead of a figure.

6 A refusal for an unverified tax year

The same happens when the rules for a year have not yet been verified. Ask for your UK tax bill for 2026-27 and TaxOrch says it won't calculate this for 2026-27 yet: the UK income tax rules for that year have not been verified against the official source, so it gives no figure rather than estimating from unchecked rates. Under What's missing it lists the verified rates and thresholds and your gross income.



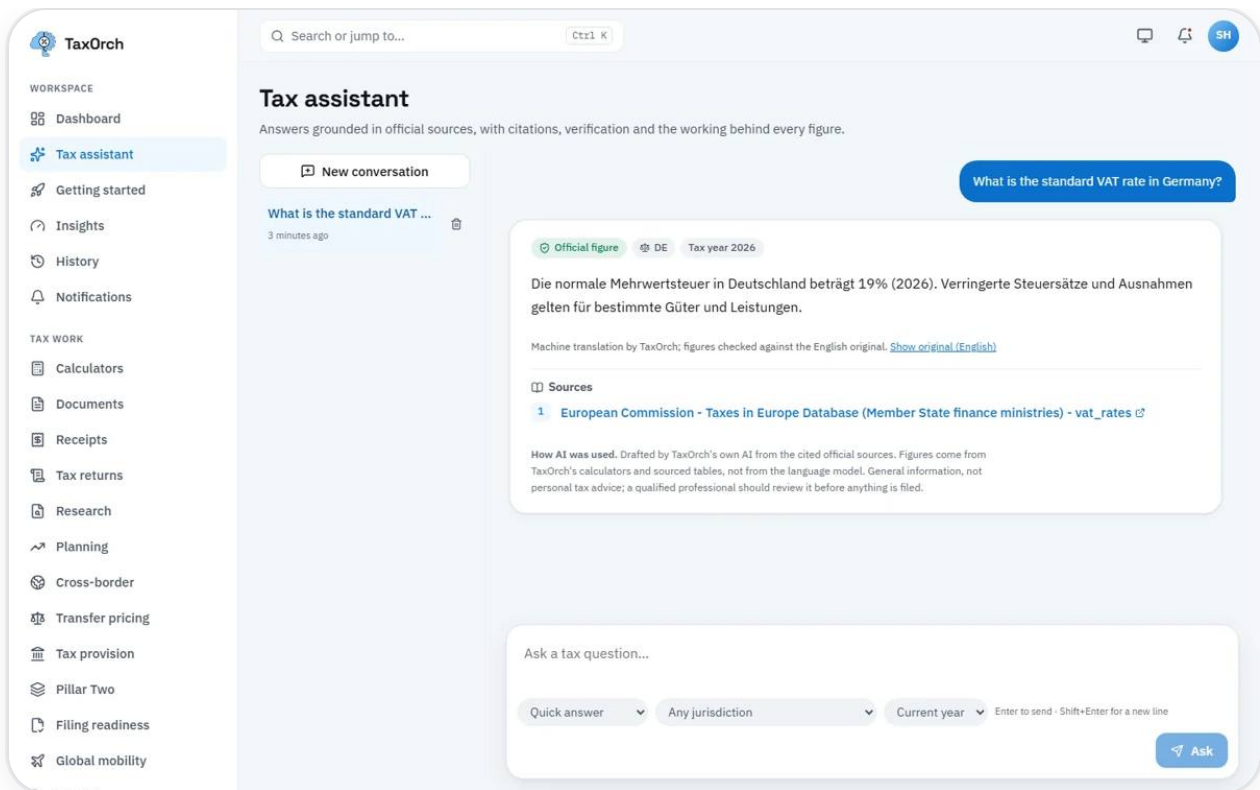
Not verified for this year: UK 2026-27 income tax is refused until the rules are verified.

What changed

The badge reads Not verified for this year, with UK and Tax year 2026-27 beside it.

7 Read an answer in another language (In development)

With a preferred language set, an answer whose translation has been checked is shown translated. The German VAT answer appears in German with the line Machine translation by TaxOrch; figures checked against the English original, and a link to show the original. App menus stay in English. Multilingual support is in development: only answers with a checked translation are shown translated.



The same answer in German, marked as a checked machine translation, with the English original one click away.

What changed

A translation note and a Show original (English) link appear between the answer and the sources.

8 Find earlier conversations and use Research for longer questions

Every conversation is kept in the column on the left and on the History page, newest first, with a bin icon to delete one. For a question that needs legislation, guidance and case law rather than a single figure, use Research: it takes a question, a jurisdiction and an area, and keeps its own history of what was asked and when.

Tax research
Search legislation, guidance and case law. Every statement is tied to the source it came from.

Research question

e.g. When does the substantial shareholding exemption apply to a disposal?

Jurisdiction **Area**

Any Any **Research**

History

QUESTION	JURISDICTION	ASKED
Can a UK sole trader claim working-from-home costs, and what flat rates apply?	GB	29 Sept 2026, 0:12
Can a UK sole trader claim working-from-home costs, and what flat rates apply?	GB	29 Sept 2026, 0:08
Can a UK sole trader claim working-from-home costs, and what flat rates apply?	GB	29 Sept 2026, 0:00

Research: a question, a jurisdiction and an area, with the history of earlier questions below.

What changed

Each research run is added to the History table with its jurisdiction and the time it was asked.

Tips

- Set the jurisdiction before asking; Any jurisdiction is right for a comparison, a country is right for a rate.
- Click the source link and keep the page open: the cited section is what a reviewer will want to see.
- Use the thumbs under a mobile answer, or the Refuse and Release answer actions in the review queue, to feed back on an answer.

Limits

- TaxOrch answers only where it holds a verified official value. Everything else is refused with the reason; a refusal is the intended behaviour, not an error.
- Answers with a professional-review notice depend on facts TaxOrch cannot verify. They are not a basis for filing.
- Translated answers are in development and menus stay in English.
- Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

Related

[AI tax research with citations \(/ai-tax-research-with-citations\)](#)

[AI tax software without hallucinations \(/ai-tax-software-without-hallucinations\)](#)

[VAT rates by country \(/vat-rates-by-country\)](#)

[The AI tax assistant feature \(/features/ai-tax-assistant\)](#)

Documents and receipts

TaxOrch reads what you upload: tax forms and statements on the Documents page, receipts and invoices on the Receipts page. It pulls out the parties, dates, items and amounts, checks the totals add up, and marks anything it is not sure of for a person to confirm before the figure is used anywhere.

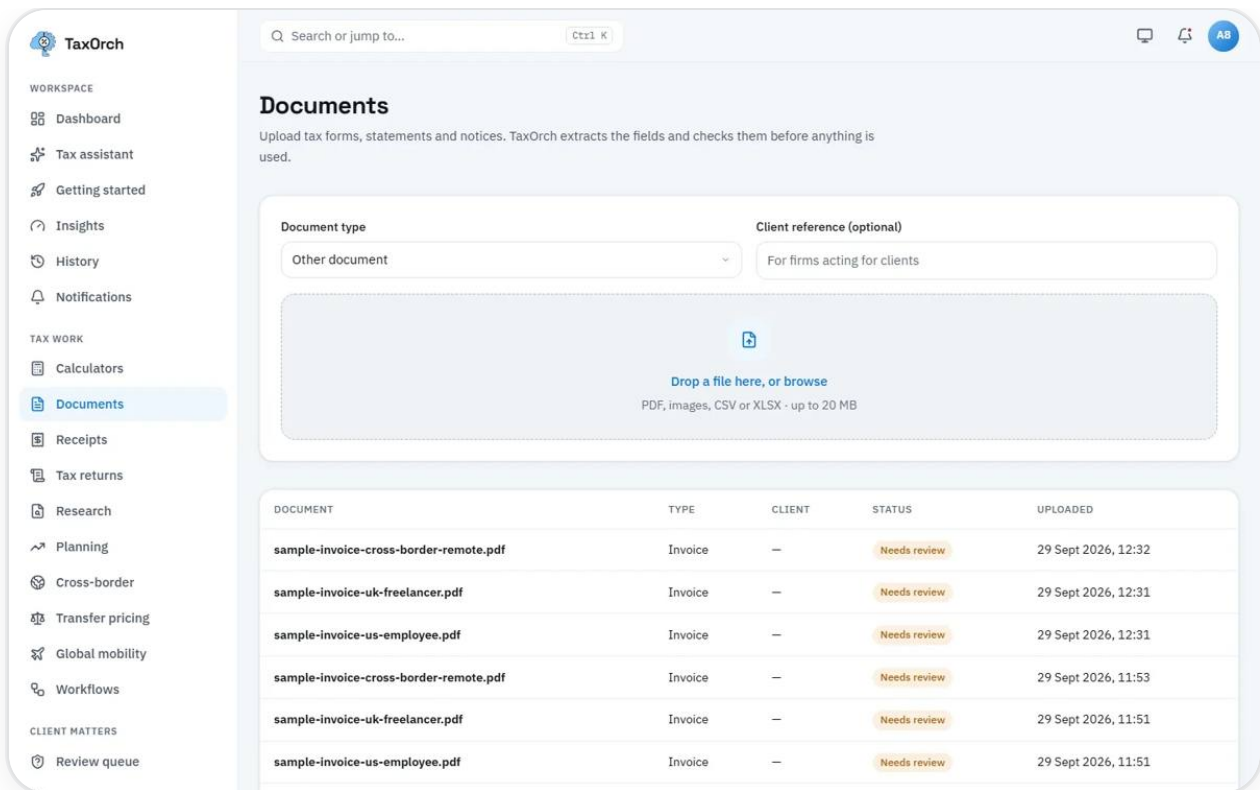
4 min read · Anyone with paperwork: individuals, bookkeepers, and firm staff collecting client documents.

Amounts come only from the figures printed on the document. Nothing unclear flows silently into a calculation.

1 Upload a document

Choose Documents. Pick the document type (or leave Other document), add a client reference if you are a firm acting for clients, and drop the file. PDF, images, CSV and XLSX are accepted up to 20 MB. Each upload appears in the table below with its type, client, status and time.

On the sample workspace, three sample invoices have been uploaded twice and every row shows Needs review.



Documents: type, optional client reference, the drop zone, and each upload with its status.

What changed

A new row appears at the top of the table with status Needs review until someone checks it.

2 Scan receipts and invoices

Choose Receipts. Drop photos or PDFs (up to 20 MB each). TaxOrch reads the vendor, date, amount and tax, suggests a category, and keeps a verifiable record. The table shows every receipt with its vendor, date, category, status and total in the document's currency, and Export CSV downloads the list.

VENDOR	DATE	CATEGORY	STATUS	TOTAL
DE Business Services Ltd	19 Sept 2026	Office	Needs review	€3,301.66
GB Business Services Ltd	18 Sept 2026	Office	Needs review	£2,577.60
US Business Services Ltd	4 Sept 2026	Office	Needs review	US\$1,611.00
DE Business Services Ltd	10 Sept 2026	Office	Needs review	€3,301.66
GB Business Services Ltd	20 Sept 2026	Office	Needs review	£2,577.60
US Business Services Ltd	14 Sept 2026	Office	Needs review	US\$1,611.00
DE Business Services Ltd	7 Sept 2026	Office	Needs review	€3,301.66
GB Business Services Ltd	4 Sept 2026	Office	Needs review	£2,577.60

Receipts: vendor, date, suggested category, status and total, in the currency on the document.

What changed

The receipt appears in the table with its suggested category and a Needs review status.

3 See what was read and where each figure came from

Open a receipt. The header shows the vendor, date and total; the panel What this receipt is lists the document type, who was paid, who paid, what was bought, what it was for, the billing period and the suggested category, each described by TaxOrch and checked against the document.

Four actions sit at the top: Re-read, Verify, Send to books and Finalise. The status stays Needs review until you confirm the flagged fields and finalise.

TaxOrch

WORKSPACE

- Dashboard
- Tax assistant
- History
- Notifications

TAX WORK

- Calculators
- Documents
- Receipts**
- Tax returns
- Research
- Planning
- Cross-border
- Transfer pricing
- Global mobility
- Workflows

CLIENT MATTERS

- Review queue
- Cases
- Notices
- Memos

Search or jump to... Ctrl K

Receipts > GB Business Services Ltd

GB Business Services Ltd

Needs review 4 Sept 2026 · £1,933.20

Re-read Verify Send to books Finalise

Read successfully. Check the values below, fix anything wrong and save.

What this receipt is
Described by TaxOrch and checked against the document. Amounts come only from the figures printed on it.

Document	Invoice
Paid to	GB Business Services Ltd
Paid by	Wanjiru Designs Ltd
What was bought	Monthly office rent, IT support retainer, Printer toner cartridges, Courier services, Accounting software subscription
What it was for	Monthly expenses and services for Wanjiru Designs Ltd
Billing period	—
Suggested category	Office
Business use	Please confirm

Confirm business use
Mark whether this was bought for your business. Only business costs can be claimed as expenses; personal purchases cannot.

Recurring cost

Receipt uploaded
invoice-gb.pdf

One invoice read: parties, items, purpose and category, with business use waiting for confirmation.

What changed

Fields TaxOrch could not decide show a Please confirm marker, and a Confirm business use notice explains why it matters.

4 Confirm uncertain figures and send to books

Anything marked Please confirm needs a person: here, whether the purchase was for the business, and whether it is a recurring cost. Fix anything wrong, then Verify records that a person checked it, Send to books proposes the ledger entry (nothing posts without approval, chapter 7), and Finalise closes the receipt.

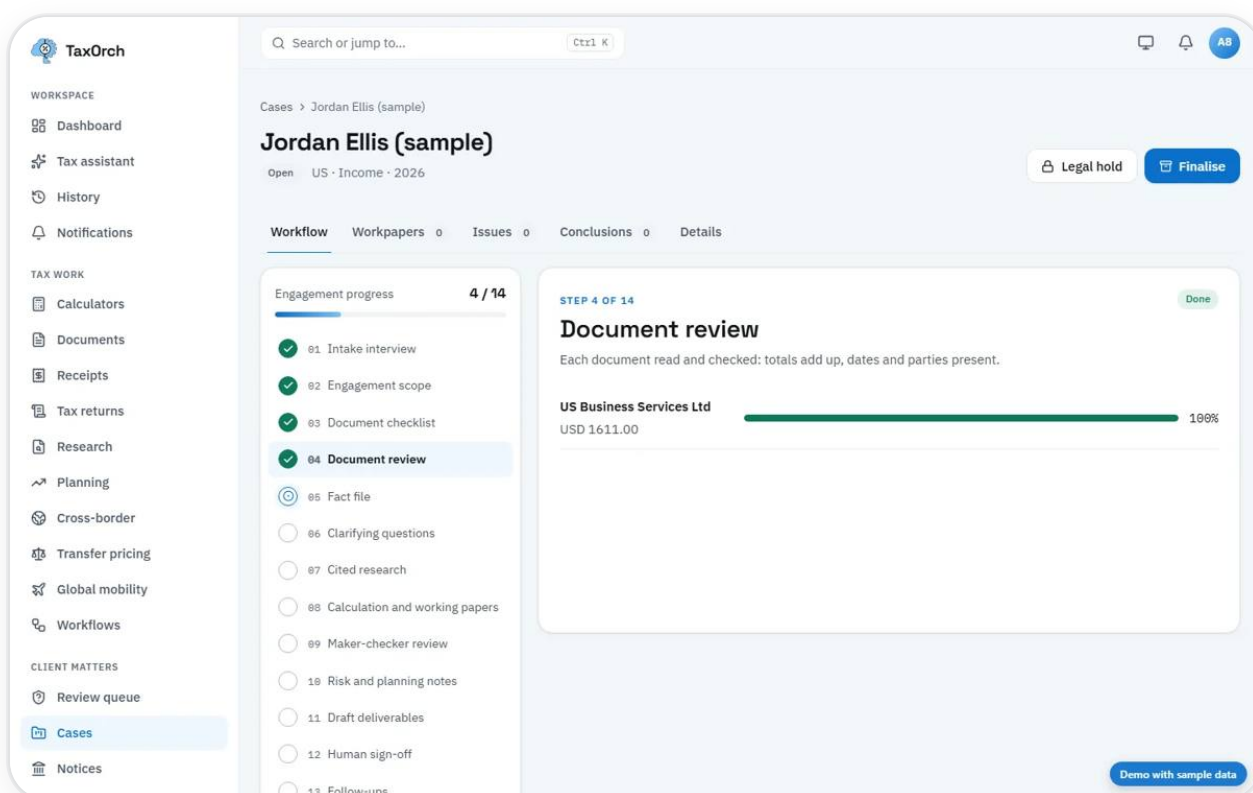
What changed

The status changes from Needs review to verified, and the receipt can be sent to the books.

5 Track what is missing on an engagement

Inside a client case, the Document checklist step lists what a practitioner asks for in that country, and the Document review step shows each document read and checked: totals add up, dates and parties present. On Jordan Ellis (sample), a US expense document of USD 1,611.00 has been read in full.

The client portal (chapter 5) shows the same list to the client, with what has arrived and what is still requested.



Document review inside a case: each document read and checked, with the engagement progress on the left.

What changed

The step shows Done and the engagement progress advances to 4 of 14.

Tips

- Photograph receipts straight on and in good light; a flattened invoice reads better than a folded one.

- Set the document type when you know it: it tells TaxOrch which fields to look for.
- Use the client reference on every upload if you act for several clients; it keeps documents with the right engagement.

Limits

- Reading accuracy has been measured on text documents; scanned or noisy W-2, K-1 and T4 forms are not yet measured.
- TaxOrch marks what it is unsure of; it does not decide business use or deductibility for you.
- Documents are stored privately per workspace and reachable only by signed-in members of that workspace.

Related

[AI tax document intake \(/ai-tax-document-intake\)](/ai-tax-document-intake)

[AI bookkeeping review \(/ai-bookkeeping-review\)](/ai-bookkeeping-review)

[Document upload feature \(/features/document-upload\)](/features/document-upload)

Run a client engagement

A case is one client, one country, one tax type and one year. It moves through fourteen recorded stages, and each stage leaves a workpaper that links every fact to its evidence and every figure to its source. This chapter walks Jordan Ellis (sample), a US individual income case for 2026, from opening to a sealed audit trail.

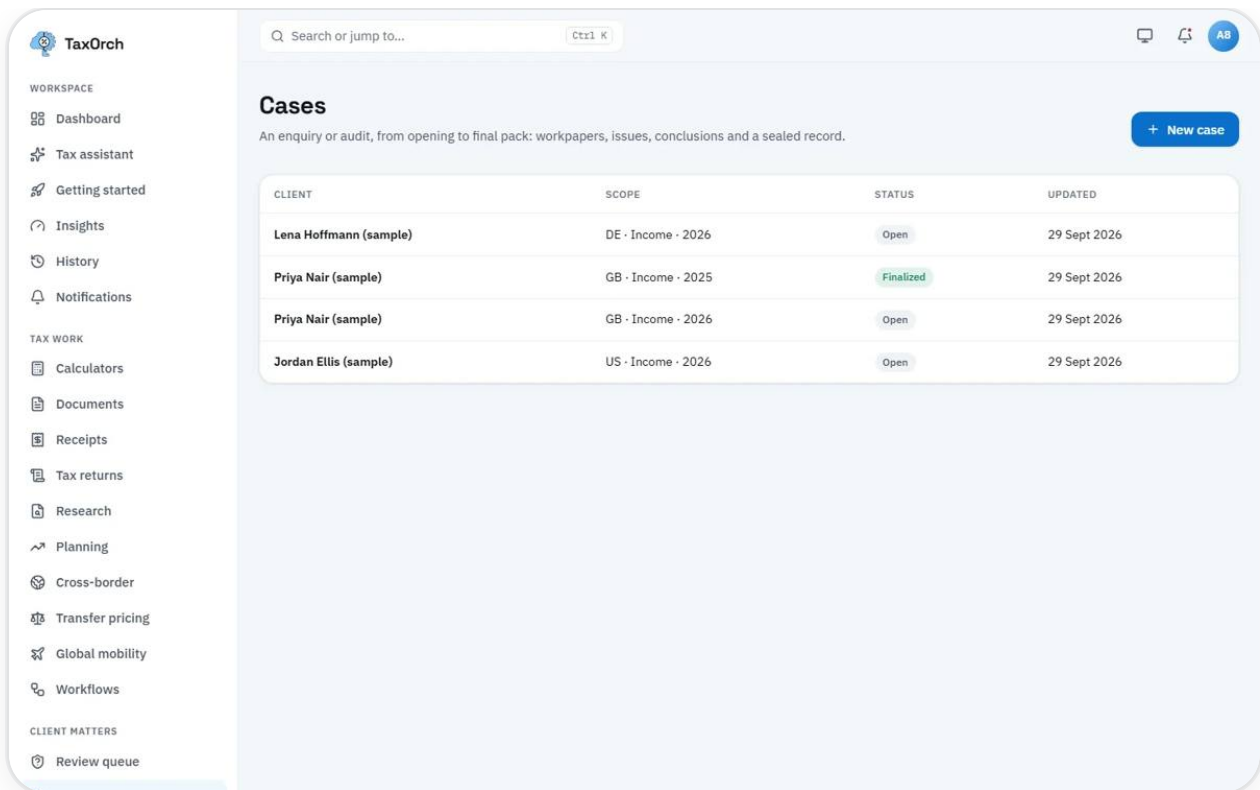
12 min read · Accounting firms and finance teams on the Business plan. Preparers, reviewers and the partner who signs off.

The honest part first: the sample case reaches sign-off with an uncertified calculation. Where TaxOrch has not certified the rules for a country and year, the calculation step declines and the workpapers carry no computed tax figure. A professional prepares the figures.

1

Open the case list and create a case

Choose Cases. The list shows each client, its scope (country, tax type, year), status and last update. New case opens a client with those four fields. The sample workspace holds Lena Hoffmann (sample) for Germany, two Priya Nair (sample) cases for the UK (2025 finalised, 2026 open) and Jordan Ellis (sample) for the US.



Cases: client, scope, status and last update, with New case in the corner.

What changed

The new case appears with status Open; its Workflow tab shows engagement progress 0 of 14.

2 Intake interview (workflow step 1)

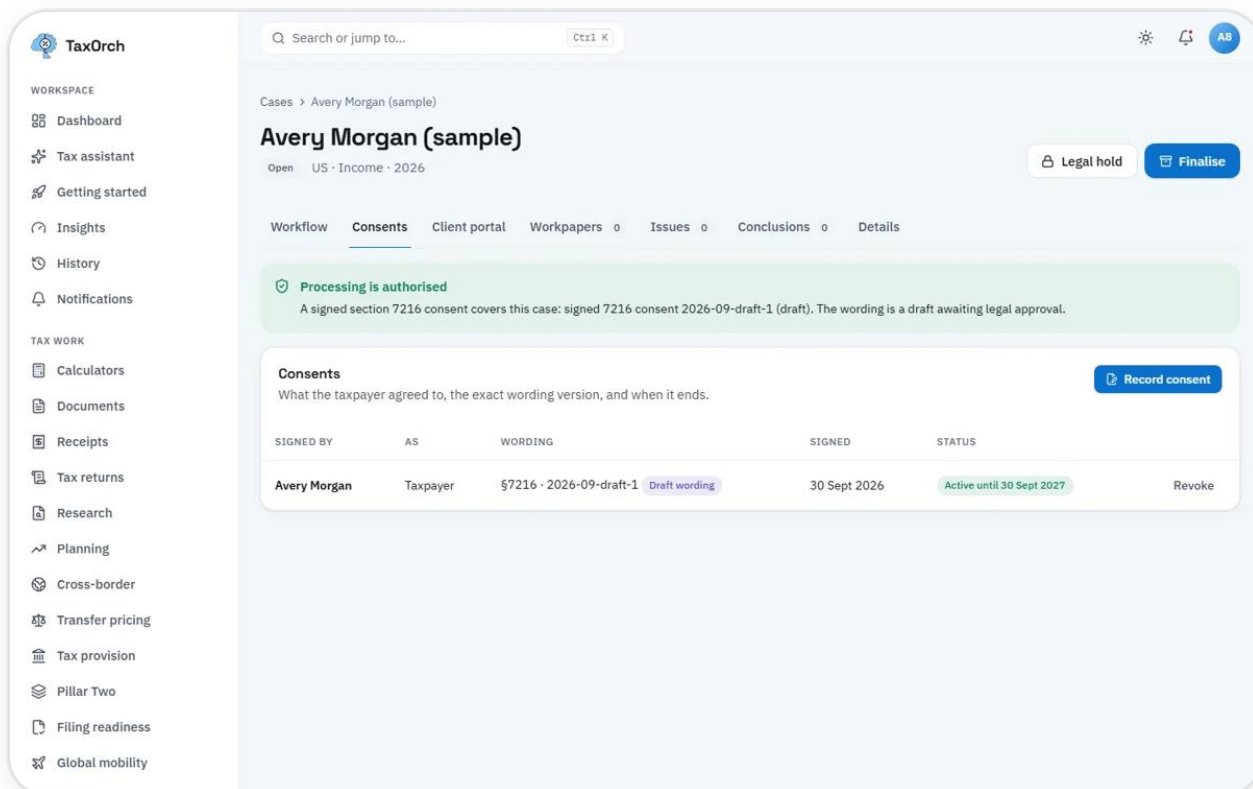
The intake interview asks the client's questions for that country: filing status, income, residence. Answers are recorded as facts with their origin (client answer, intake). Step 2, Engagement scope, records what the engagement covers and confirms it with the client.

What changed

Steps 01 and 02 show green ticks; the fact file starts to fill with client answers.

3 Record the taxpayer's consent (US) (workflow step 2)

A US engagement uses the client's information only under a signed section 7216 consent. On the Consents tab, Record consent stores who signed, in what capacity, the exact wording version and when it ends. Avery Morgan (sample) has a 7216 consent active until 30 September 2027; the banner reads Processing is authorised. The wording carries a Draft wording badge because it is awaiting legal approval.



A recorded 7216 consent: signer, wording version, signature date and the date it ends.

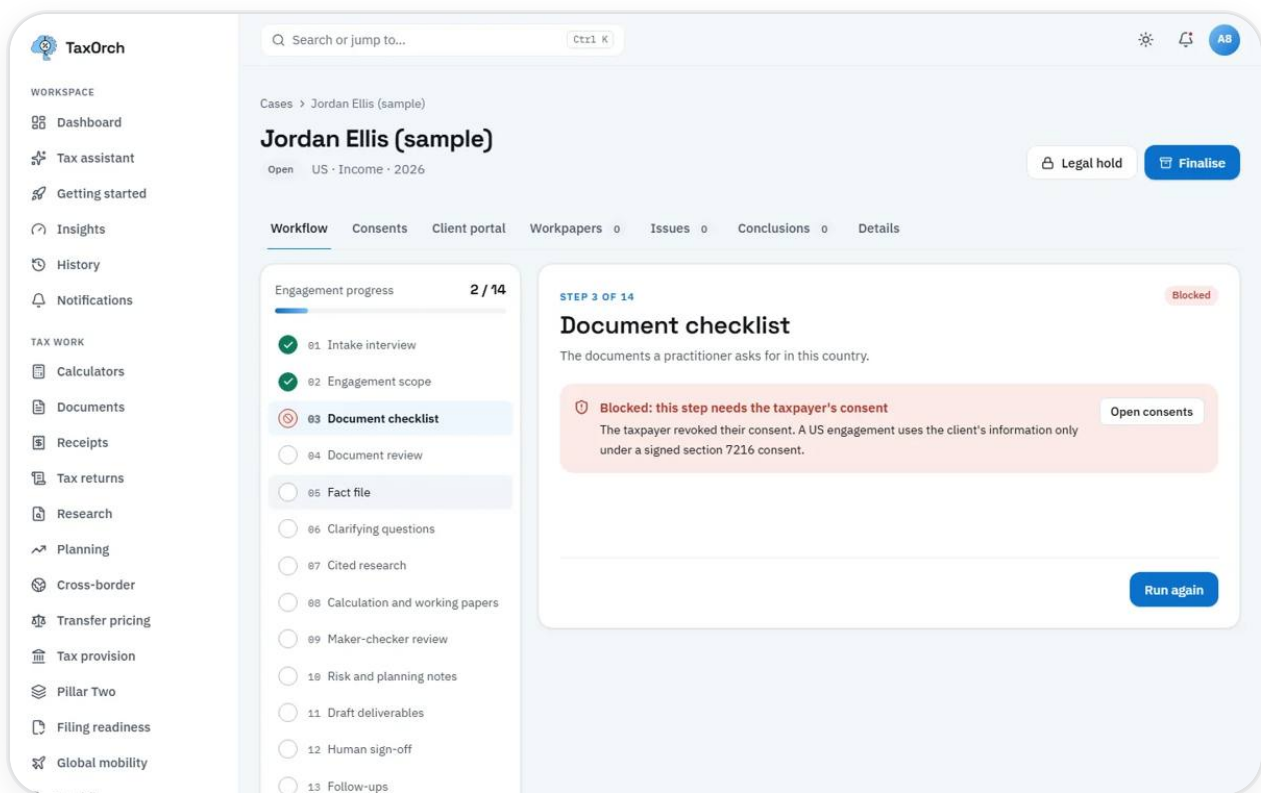
What changed

The Consents tab shows the consent as active and the workflow is allowed to use the client's information.

4 Document checklist, and what happens without consent (workflow step 3)

The checklist lists the documents a practitioner asks for in that country. If the consent is missing or revoked, the step is blocked: the screen says Blocked: this

step needs the taxpayer's consent, explains why, and offers Open consents and Run again. Nothing proceeds until consent is recorded.



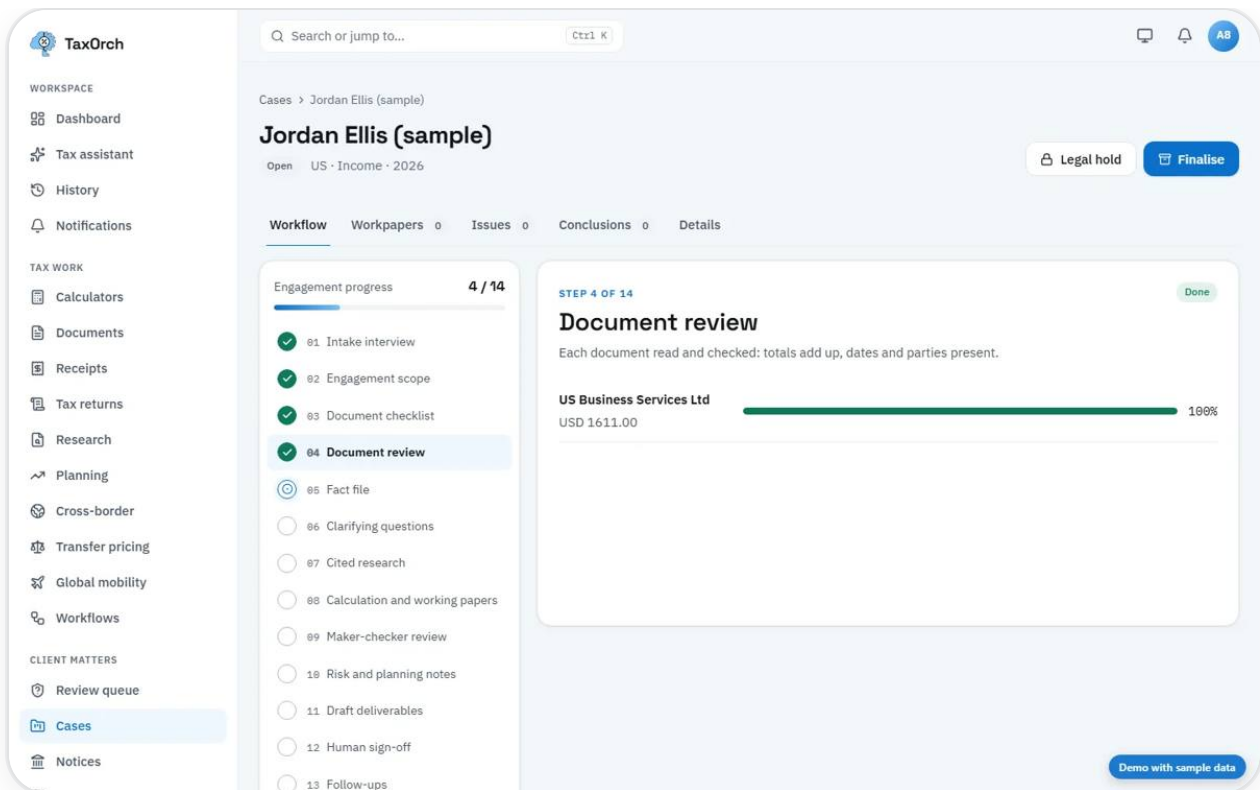
Step 3 blocked: the consent was revoked, so the checklist will not run until it is recorded again.

What changed

Step 03 shows a red blocked marker and progress stays at 2 of 14.

5 Document review (workflow step 4)

Each document on the checklist is read and checked: totals add up, dates and parties present. On Jordan Ellis (sample), one US expense document of USD 1,611.00 is read to 100 percent. Chapter 3 covers the reading itself.



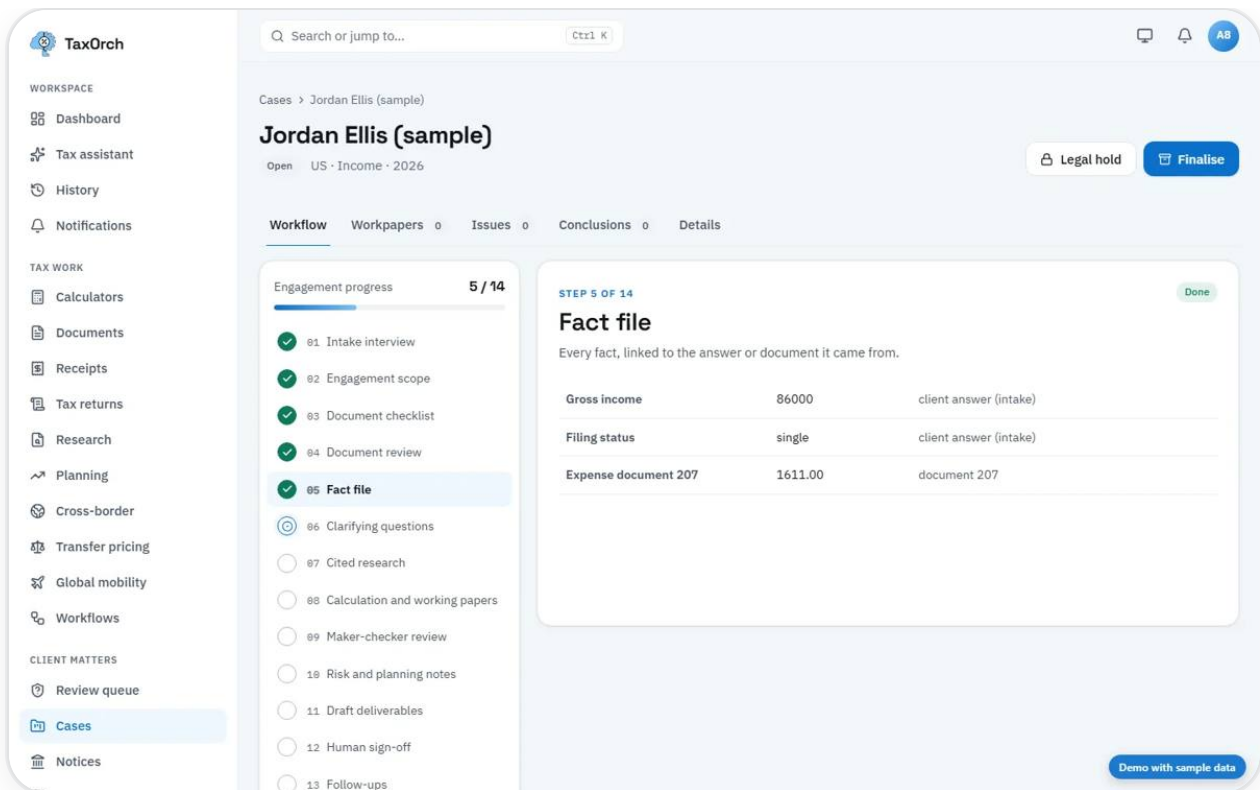
Document review done: one document, fully read.

What changed

Step 04 is Done and progress reads 4 of 14.

6 Fact file (workflow step 5)

Every fact is listed with its value and where it came from. On the sample case: gross income 86,000 and filing status single from the intake, and expense document 207 for 1,611.00 from the document. A reviewer can follow each line back to its evidence.



The fact file: each fact, its value, and the answer or document it came from.

What changed

Step 05 is Done; step 06, Clarifying questions, becomes current.

7 Clarifying questions (workflow step 6)

Where the facts leave a gap, TaxOrch drafts the questions to put to the client and records the answers as new facts. Open questions stay visible as a risk note later, and a filing-readiness check counts them.

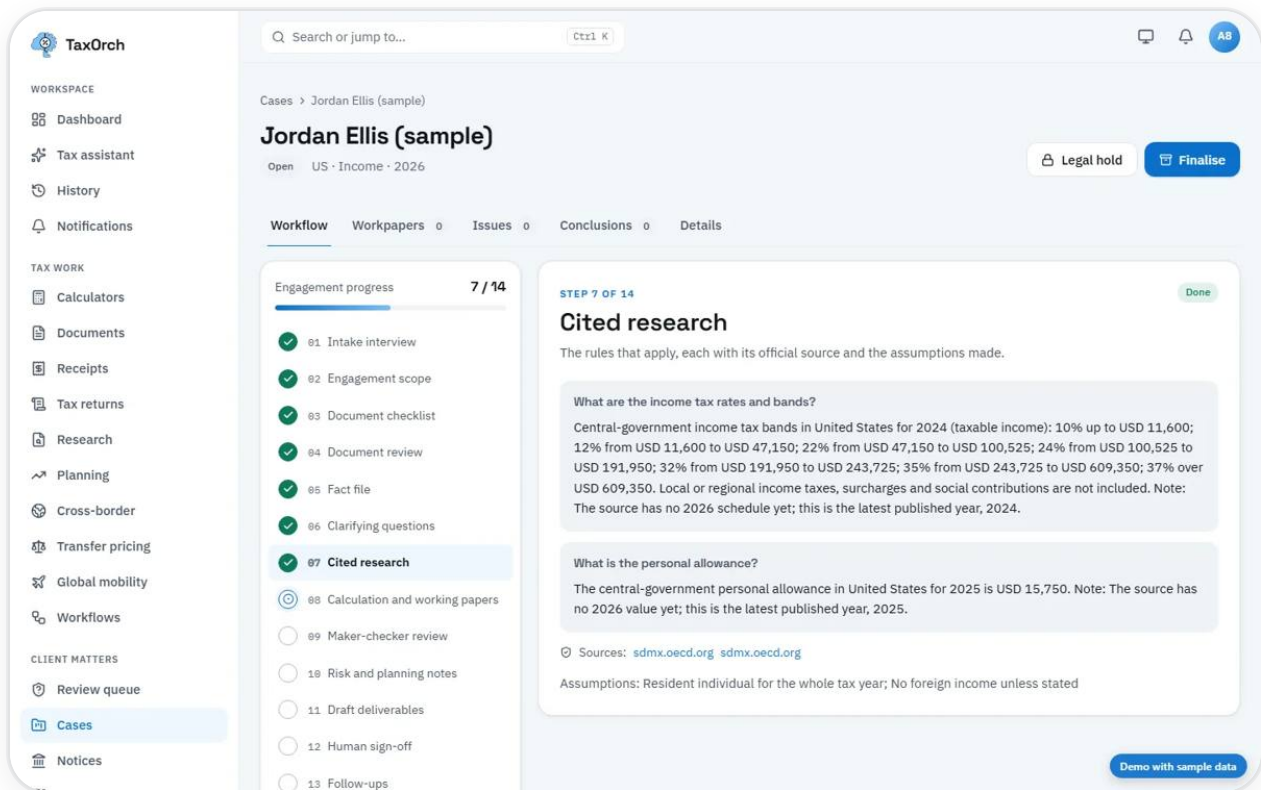
What changed

Step 06 is Done; questions still open are carried into the risk notes.

8 Cited research (workflow step 7)

The rules that apply are researched with their official source and the assumptions made. For the US case: central-government income tax bands for 2024 (the latest published year, which the screen states) and the personal

allowance for 2025, each cited to the OECD, with assumptions listed (resident individual for the whole year, no foreign income unless stated).



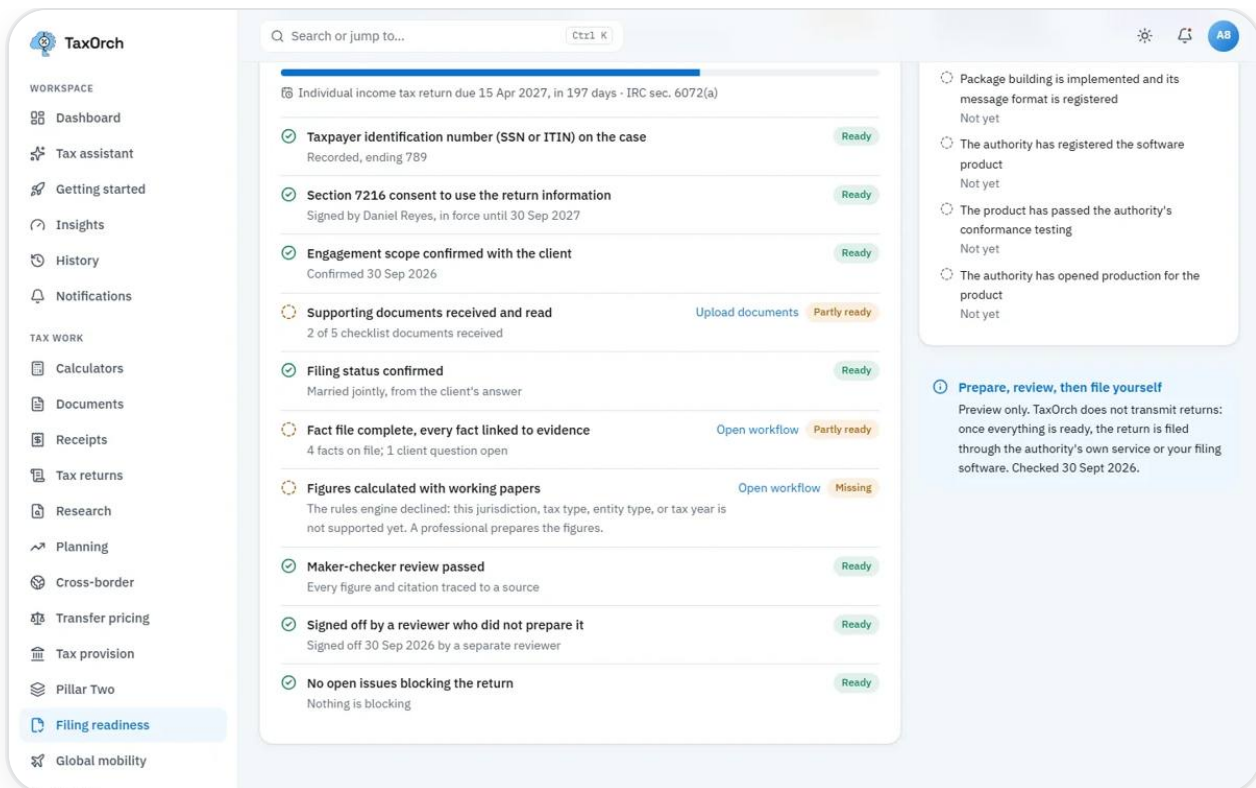
Cited research: the bands, the allowance, the sources and the assumptions, with the latest published year named.

What changed

Step 07 is Done and the sources appear under the research card.

9 Calculation and working papers, declined until rules are certified (workflow step 8)

TaxOrch computes a figure only from certified rules for that jurisdiction, tax type, entity type and year. Where they are not certified, the step declines. The filing-readiness view for Daniel Reyes (sample) shows the effect: Figures calculated with working papers is Missing, with the reason The rules engine declined: this jurisdiction, tax type, entity type, or tax year is not supported yet. A professional prepares the figures.



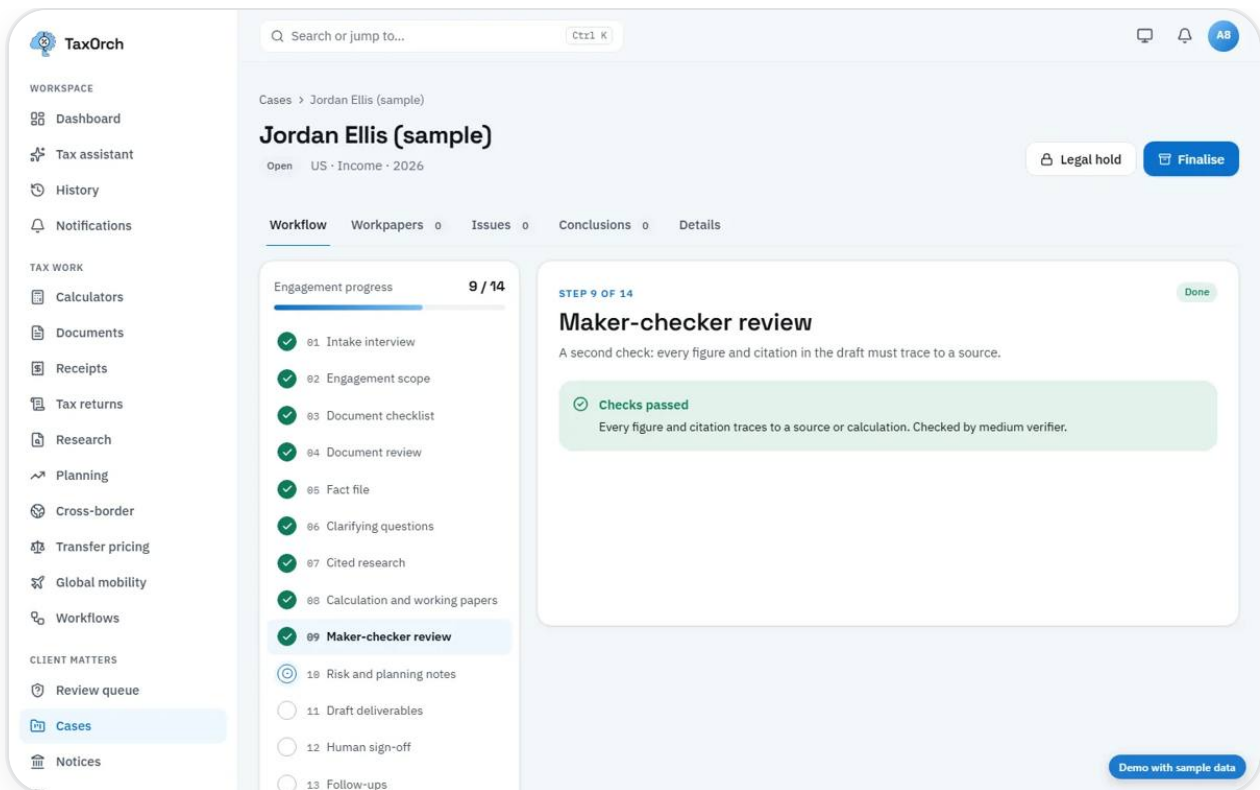
The calculation declined honestly: the readiness check names it Missing and says why.

What changed

Step 08 completes without a computed tax figure; the risk notes record it as High.

10 Maker-checker review (workflow step 9)

A second check confirms that every figure and citation in the draft traces to a source or calculation. On the sample case it passes: Checks passed, checked by the medium verifier. Answers the platform would not release on its own go to the Review queue, where each one names why it stopped, what it needs, when it is due and who has claimed it.



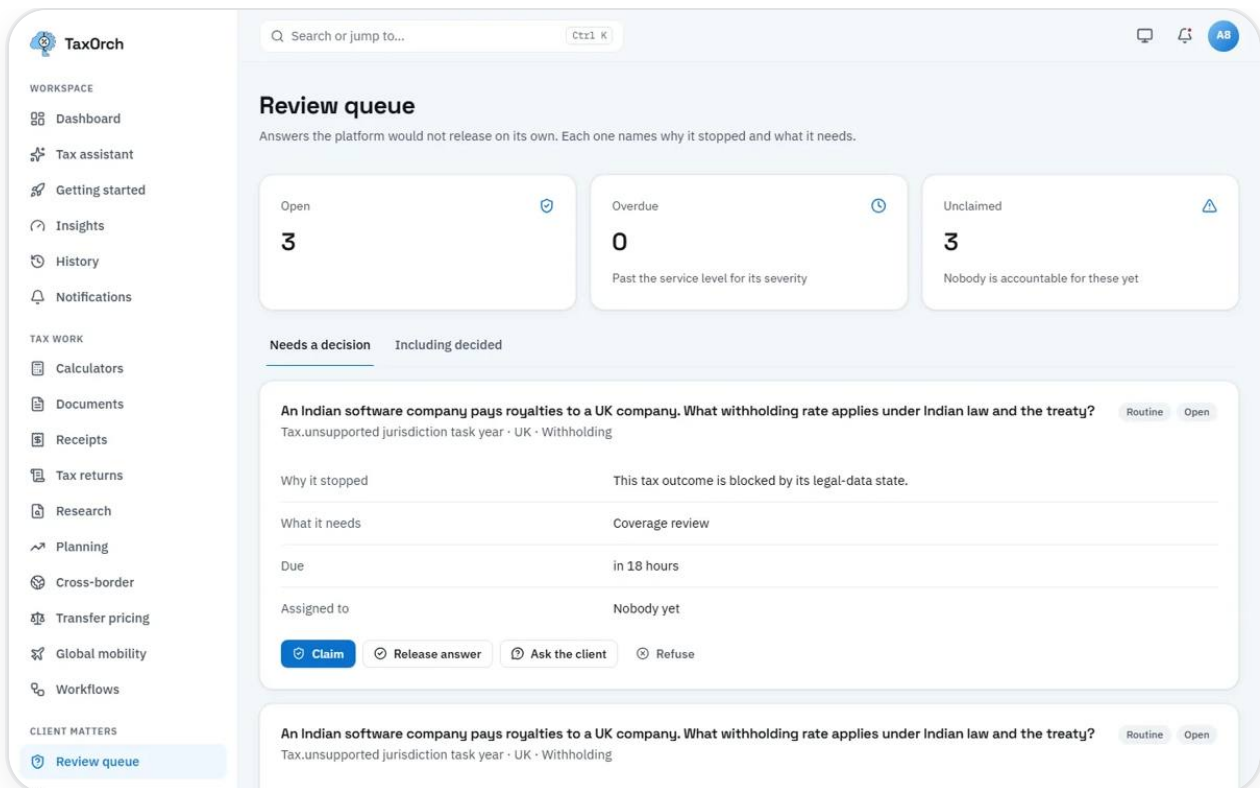
Maker-checker review passed: every figure and citation traces to a source or calculation.

What changed

Step 09 is Done; anything that did not pass would appear in the Review queue with a Claim button.

11 The review queue

The queue shows open, overdue and unclaimed items. Each card names the question, why it stopped (for example, a tax outcome blocked by its legal-data state), what it needs (coverage review), when it is due and who is assigned. The actions are Claim, Release answer, Ask the client and Refuse.



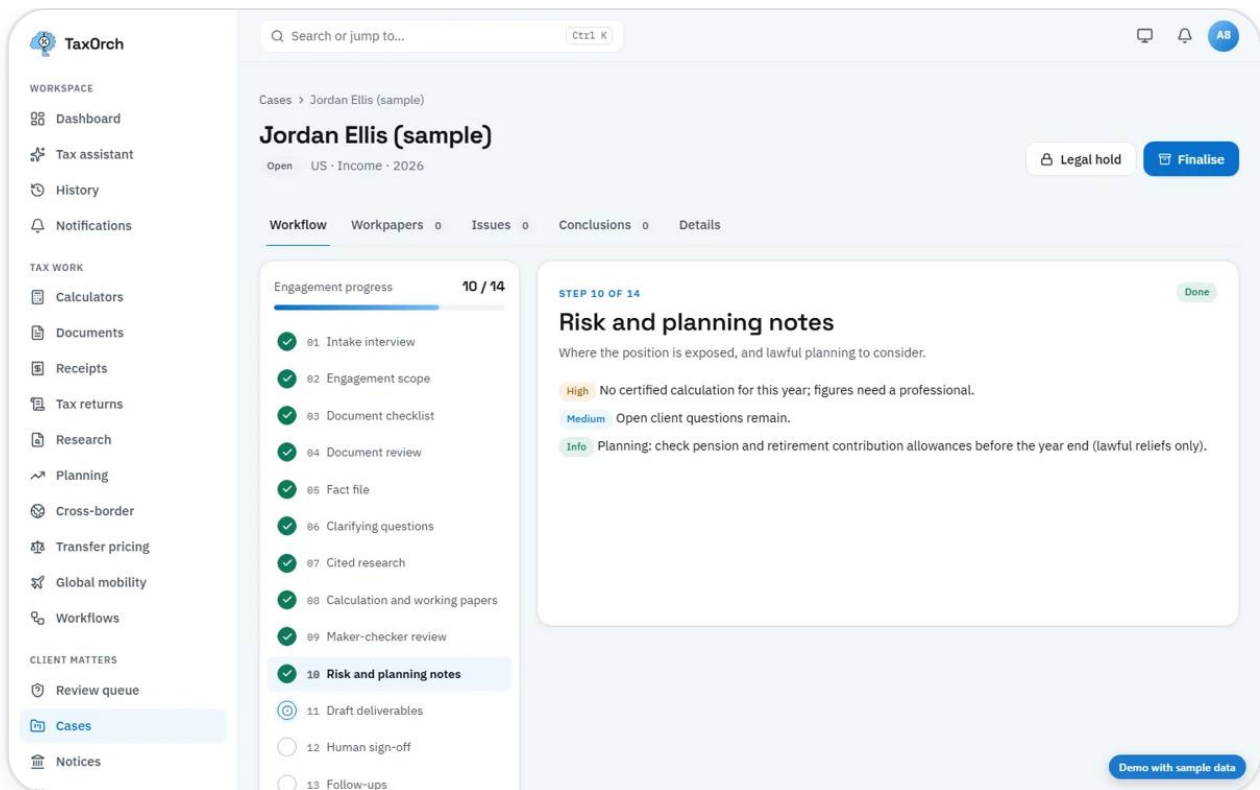
The review queue: why each answer stopped, what it needs, and who is accountable.

What changed

Claiming an item puts your name under Assigned to and starts the service-level clock.

12 Risk and planning notes (workflow step 10)

Where the position is exposed, and lawful planning to consider. The sample case carries three notes: High, no certified calculation for this year, figures need a professional; Medium, open client questions remain; Info, check pension and retirement contribution allowances before the year end (lawful reliefs only).



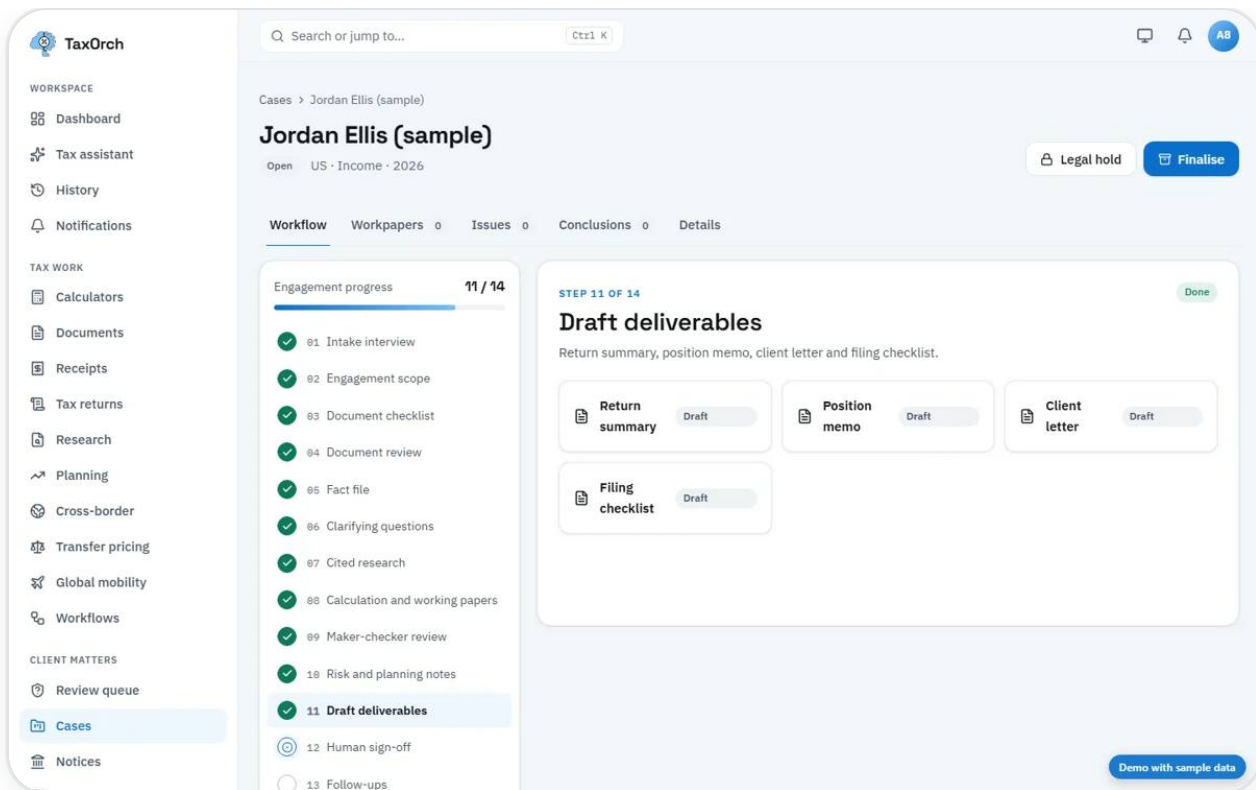
Risk and planning notes, graded High, Medium and Info.

What changed

Step 10 is Done and the High note is what will hold sign-off for a qualified reviewer.

13 Draft deliverables (workflow step 11)

Four drafts are produced from the checked facts and research: a return summary, a position memo, a client letter and a filing checklist. All four carry a Draft badge. Wording is a draft for a professional to review before it is sent; nothing is sent from this step.



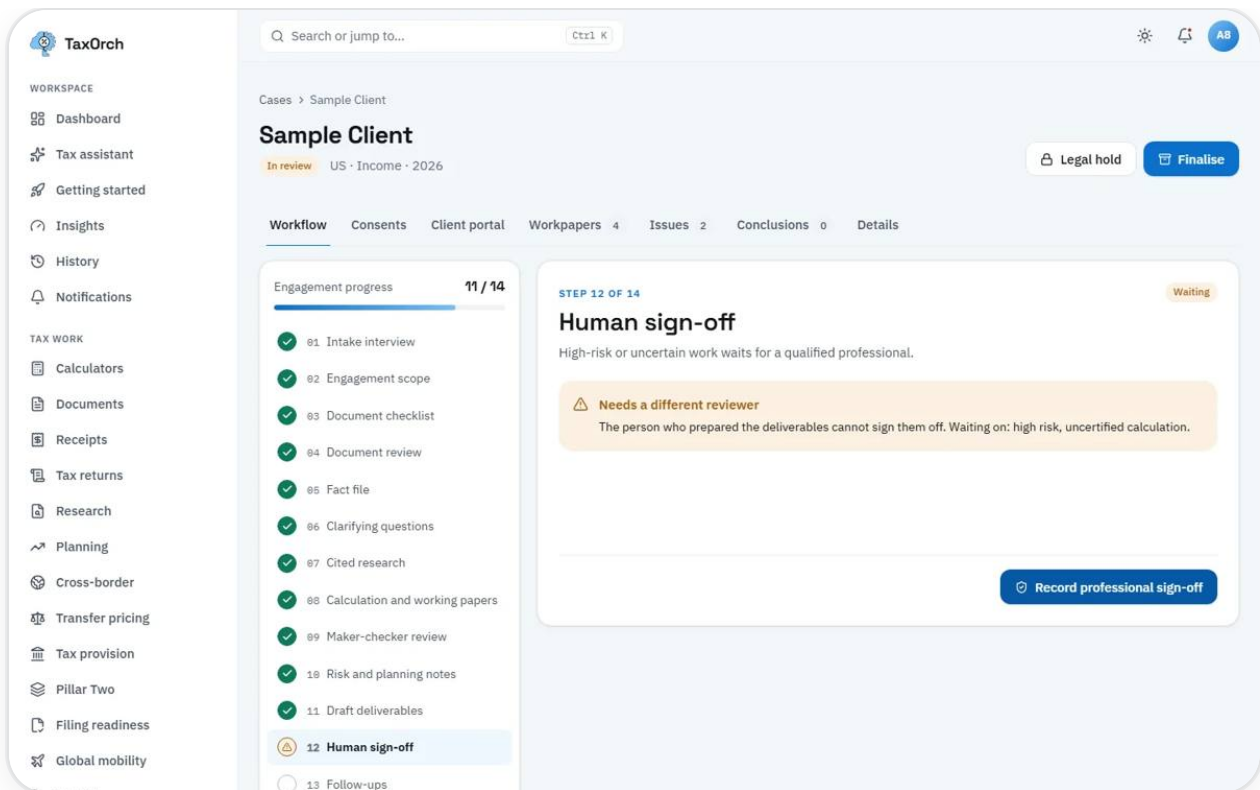
Draft deliverables: return summary, position memo, client letter and filing checklist.

What changed

Step 11 is Done; the Workpapers tab count rises as the drafts are stored.

14 Human sign-off by a separate reviewer (workflow step 12)

High-risk or uncertain work waits for a qualified professional. The person who prepared the deliverables cannot sign them off: on the Sample Client case the step reads Needs a different reviewer and states what it is waiting on (high risk, uncertified calculation). A different reviewer records the sign-off; on Jordan Ellis (sample) the step then reads Signed off.



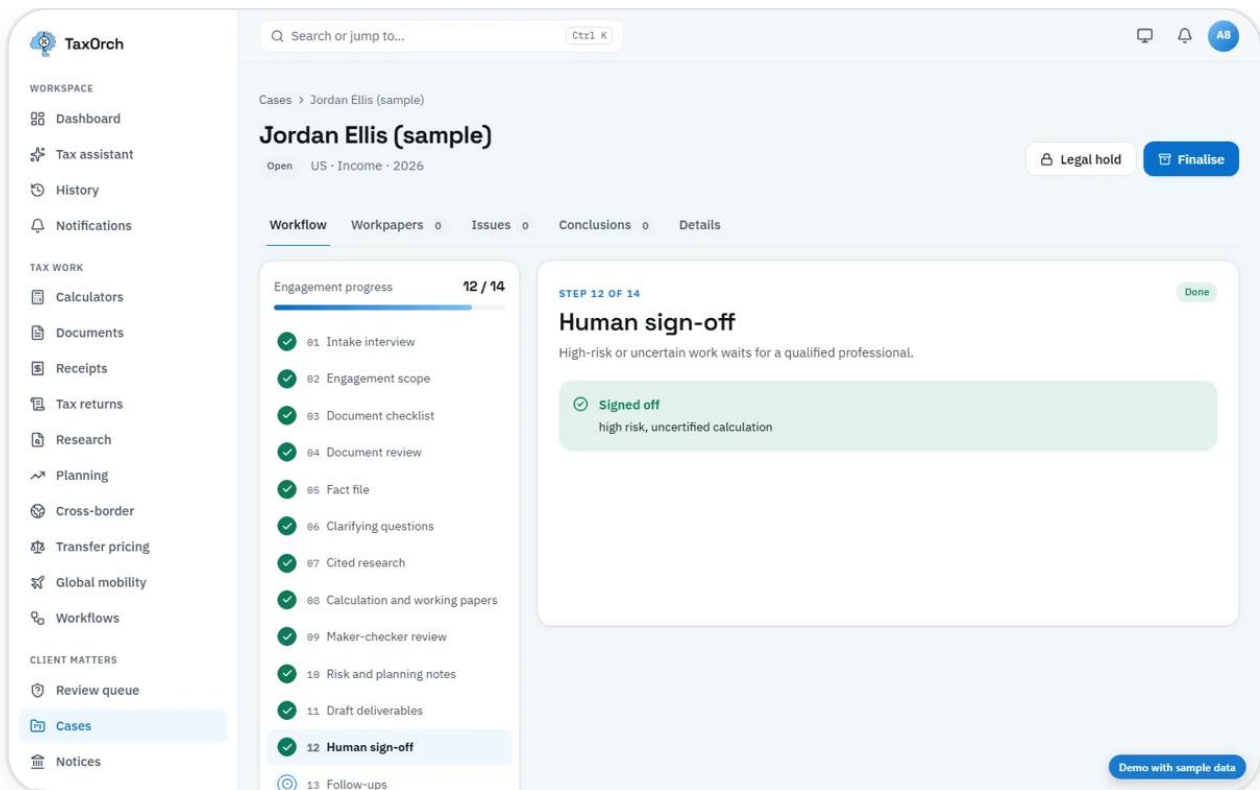
Sign-off refused to the preparer: a different reviewer has to record it.

What changed

Once a separate reviewer signs, step 12 shows Signed off with the reason it needed a professional.

15 The signed-off state

After the separate reviewer records it, the step shows Signed off with the grounds (high risk, uncertified calculation). The case status changes to In review and the sign-off is recorded in the audit trail with who signed and when.



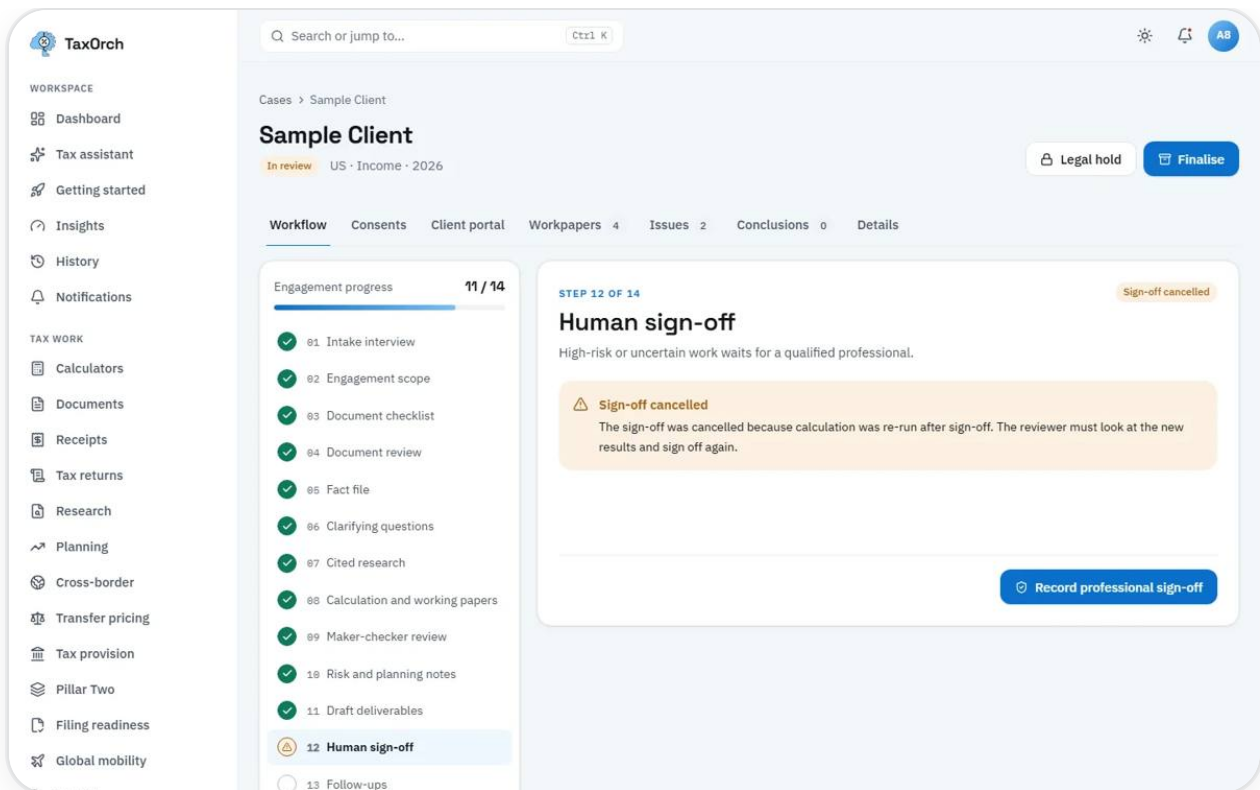
Signed off by a separate reviewer, with the grounds recorded.

What changed

Step 12 is Done and step 13, Follow-ups, becomes current.

16 What happens if a step is re-run after sign-off

A sign-off is only valid for the work it covered. If the calculation is re-run afterwards, the sign-off is cancelled: the step reads Sign-off cancelled, the calculation was re-run after sign-off, and the reviewer must look at the new results and sign off again. Nothing signed can quietly change underneath the signature.



Sign-off cancelled by a later re-run: the reviewer has to look again.

What changed

The step badge changes from Done to Sign-off cancelled and the case drops back to waiting for review.

17 Follow-ups (workflow step 13)

Follow-ups record what happens after sign-off: documents still to arrive, deadlines to meet, questions the client owes. They feed the Deadlines calendar (chapter 10) and the client portal (chapter 5).

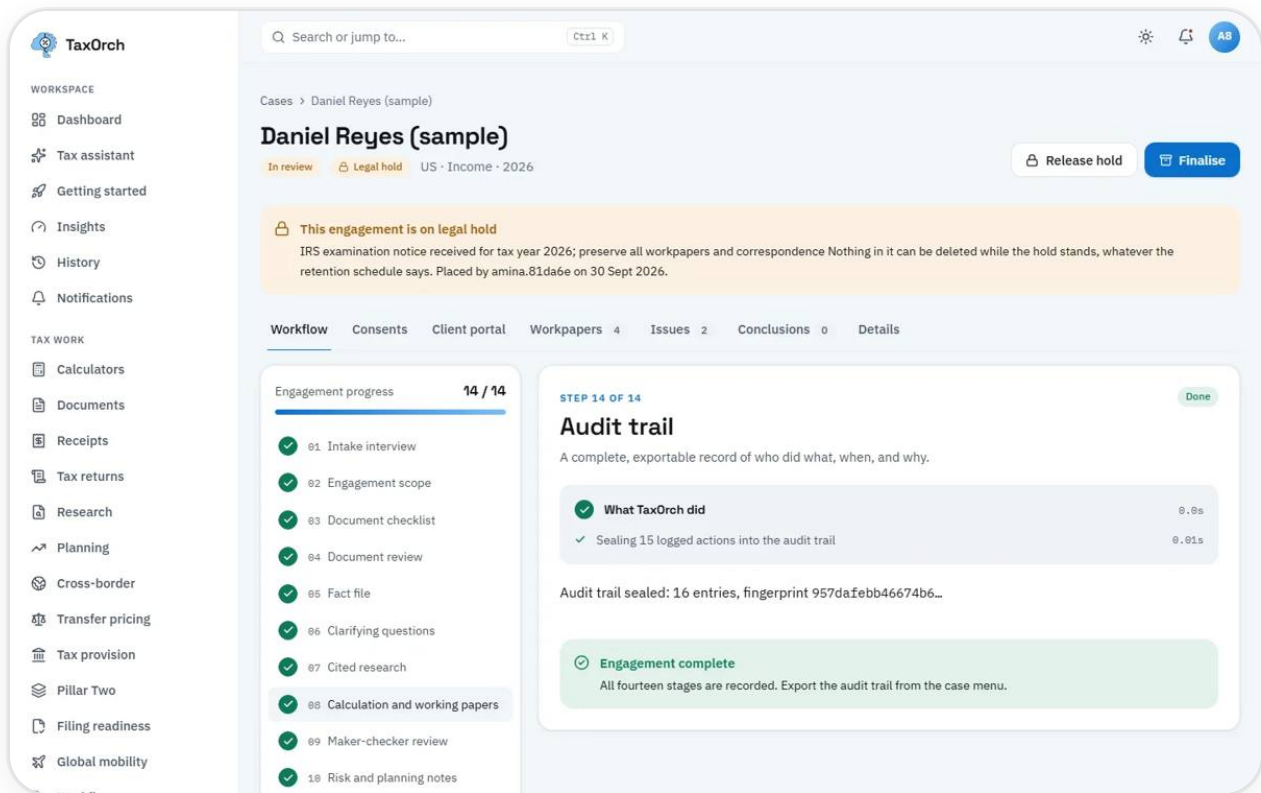
What changed

Step 13 is Done; open follow-ups appear on the calendar for that client.

18 Audit trail, export and legal hold (workflow step 14)

The final step seals every logged action into an audit trail with a fingerprint. On Daniel Reyes (sample): 16 entries sealed, the engagement complete, and Export

the audit trail from the case menu. This case is also on legal hold: an IRS examination notice was received, so nothing in it can be deleted while the hold stands, whatever the retention schedule says. The hold names who placed it and when.



Fourteen of fourteen: the audit trail sealed, and the whole engagement under legal hold.

What changed

Progress reads 14 of 14, the audit trail fingerprint is shown, and the case can be finalised.

Tips

- Record the 7216 consent before the checklist, or the workflow will stop at step 3.
- Keep preparer and reviewer as different people from the start; the sign-off step will insist on it anyway.
- Put a case on legal hold the day a notice arrives; the hold overrides every retention period.
- Export the audit trail at finalisation and store it with the file.

Limits

- Where the rules for a country and year are not certified, step 8 declines and the workpapers carry no computed tax figure. A professional prepares the figures.
- Consent wording is a draft awaiting legal approval; the badge on the consent says so.
- TaxOrch does not file returns or execute payments. Deliverables are drafts marked as not filed.
- Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

Related

[Automated tax workpapers \(/automated-tax-workpapers\)](/automated-tax-workpapers)

[Tax review and sign-off \(/tax-review-and-sign-off\)](/tax-review-and-sign-off)

[IRS section 7216 consent \(/irs-section-7216-consent\)](/irs-section-7216-consent)

[Tax audit trail software \(/tax-audit-trail-software\)](/tax-audit-trail-software)

The client portal

Every case has a Client portal tab. From it the firm invites the client, requests documents and sees what has arrived. The client signs in to a portal that shows only their own requests and, later, what the firm issues to them. This chapter follows Priya Nair (sample), a UK income case for 2026.

3 min read · Firms on the Business plan, and their clients.

1 Invite the client

On the case, open Client portal and choose Invite client. The Client access table shows who can open the portal, what they can do (view and send documents), since when, and whether they have joined. Priya Nair joined on 30 September 2026. Revoke removes access at once.

Priya Nair (sample)
Open GB · Income · 2026

Workflow Consents **Client portal** Workpapers 0 Issues 0 Conclusions 0 Details

Client access
Who can open Priya Nair (sample)'s portal to see requests and send documents. [Invite client](#)

PERSON	CAN	SINCE	STATUS
Priya Nair priya.nair@8b4b1@example.com	Can view and send documents	30 Sept 2026	Joined Revoke

Documents requested
3 awaiting the client, 2 received to check. The client sees this same list in their portal. [Request documents](#)

DOCUMENT	REQUESTED	DUE	STATUS
P60 end-of-year certificate Sent by the client: P60-2025-26-Priya-Nair-sample.pdf	30 Sept 2026	14 Oct 2026	Received, being checked
P11D benefits statement	30 Sept 2026	14 Oct 2026	Requested
Self-employment income and expense records	30 Sept 2026	14 Oct 2026	Requested
Bank interest statements Sent by the client: Bank-interest-2025-26-sample.pdf	30 Sept 2026	14 Oct 2026	Received, being checked
Prior Self Assessment return (SA302)	30 Sept 2026	14 Oct 2026	Requested

The firm's view: who has portal access, and the document requests with their status.

What changed

The client appears under Client access with status Joined once they accept.

2 Request documents

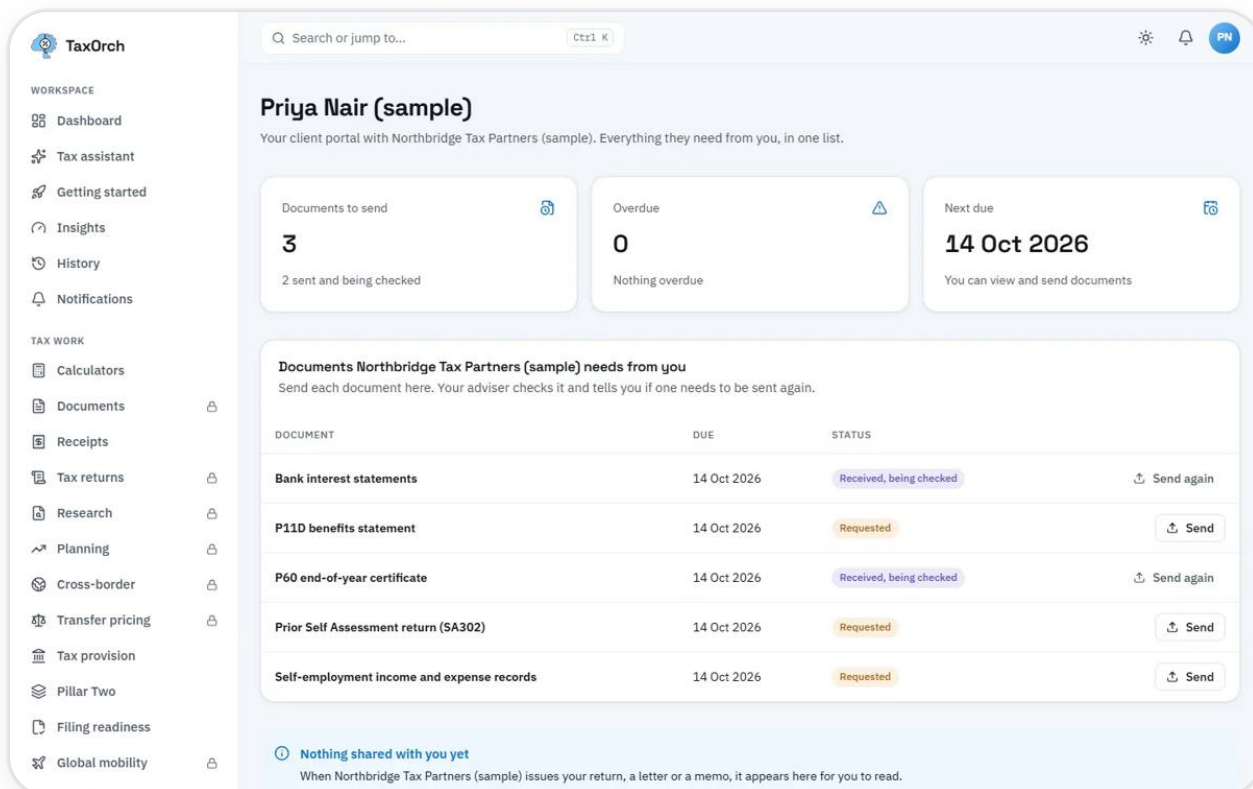
Request documents adds items to the list with a due date. On the sample case five are requested for 14 October 2026: a P60 end-of-year certificate, a P11D benefits statement, self-employment income and expense records, bank interest statements and the prior Self Assessment return (SA302). The heading counts three awaiting the client and two received to check.

What changed

Each request shows Requested until the client sends it, then Received, being checked.

3 What the client sees

The client's portal opens on their name with three tiles: documents to send, overdue, and the next due date. Below is the same list the firm sees, with a Send button on each request and Send again on anything already received. A note explains that when the firm issues a return, a letter or a memo, it appears here to read. Work pages the client is not allowed to see are locked in the sidebar.



The client's view: what is needed, by when, and a Send button on each request.

What changed

After the client sends a file, the firm's list shows Received, being checked with the file name under the request.

4 Files arriving

A received file is named under its request (for example P60-2025-26-Priya-Nair-sample.pdf) and goes into document review in the engagement. If it is unreadable or the wrong document, the firm marks it and the client sees Send again.

What changed

The received document appears on the engagement's document checklist and the review step can run.

Tips

- Set a due date the client can meet; the portal shows Overdue once it passes.
- Request everything at once; the client sees one list, not a stream of emails.

Limits

- The client sees only their own requests and what the firm issues to them; the rest of the workspace is locked.
- The portal collects documents. It does not give the client a computed tax figure or advice.

Related

[AI tax software for accounting firms \(/ai-tax-software-for-accounting-firms\)](/ai-tax-software-for-accounting-firms)

[AI tax document intake \(/ai-tax-document-intake\)](/ai-tax-document-intake)

[Client workspace feature \(/features/client-workspace\)](/features/client-workspace)

Calculators and cross-border

Calculators compute from TaxOrch's certified rules. Where a rule is not certified for a country or year, the calculator says so instead of guessing. The cross-border tools give the domestic withholding rate, the treaty ceiling and the conditions a recipient must meet before the lower rate applies.

5 min read · Anyone checking a rate or a payment abroad, from a freelancer with a foreign client to a finance team paying dividends.

Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

1 Open the calculators

Choose Calculators. Six tabs: Income tax, Payroll, Sales tax / VAT, US federal, Currency and Tax ID check. Income tax takes a country, gross annual income, filing status and tax year; results come from the certified rules for that country and year. Below, More calculations links to cross-border, depreciation, scenarios and the fact interview.

Calculators: six tabs, the income tax form, and links to the cross-border and scenario tools.

What changed

Entering figures and choosing Calculate shows the result or, for an uncertified country and year, the refusal and its reason.

2 Check a cross-border payment

Choose Cross-border. Three tabs: Treaty rate, Withholding and Residency. Treaty rate takes where the income arises, where the recipient is resident, the kind of income (dividends, interest, royalties) and the year. The panel reminds you that treaty relief is not automatic: most countries require a residency certificate or form before a reduced rate applies at source.

TaxOrch

WORKSPACE

- Dashboard
- Tax assistant
- Getting started
- Insights
- History
- Notifications

TAX WORK

- Calculators
- Documents
- Receipts
- Tax returns
- Research
- Planning
- Cross-border**
- Transfer pricing
- Global mobility
- Workflows

CLIENT MATTERS

- Review queue

Search or jump to... Ctrl K

Calculators

Cross-border

Treaty rate caps, withholding on payments abroad and tax residency tests.

Treaty rate Withholding Residency

Paid from (where the income arises) *

Choose

Paid to a resident of *

Choose

Kind of income

Dividends

Tax year

2026

Calculate

4,776 country-to-country treaty rates published for 2026.

Choose the countries to compare

Answers come from the treaty and residence rules TaxOrch holds, and say plainly when a country is not covered.

Treaty relief isn't automatic

Most countries require a residency certificate or form before a reduced rate applies at source.

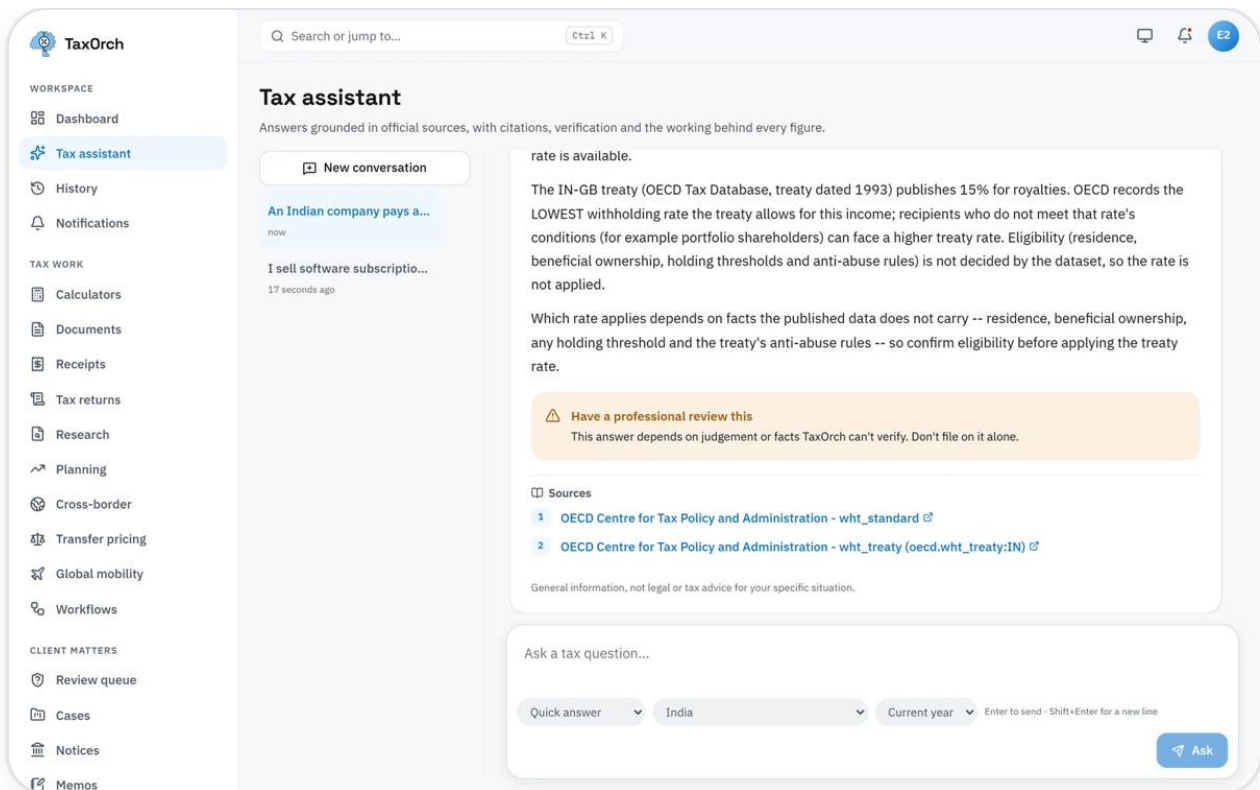
Treaty rate: the two countries, the kind of income, the year, and the reminder that relief is not automatic.

What changed

The result shows the domestic rate, the treaty ceiling and the conditions to check, and says plainly when a country is not covered.

3 Read a treaty answer with its conditions

The assistant gives the same answer in prose. For royalties from India to the UK: India's domestic rate of 20% (2026), the 15% the treaty publishes as the lowest rate it allows, and the facts the dataset does not carry (residence, beneficial ownership, holding thresholds, anti-abuse rules), so the treaty rate is not applied. A professional review notice sits above the two OECD sources.



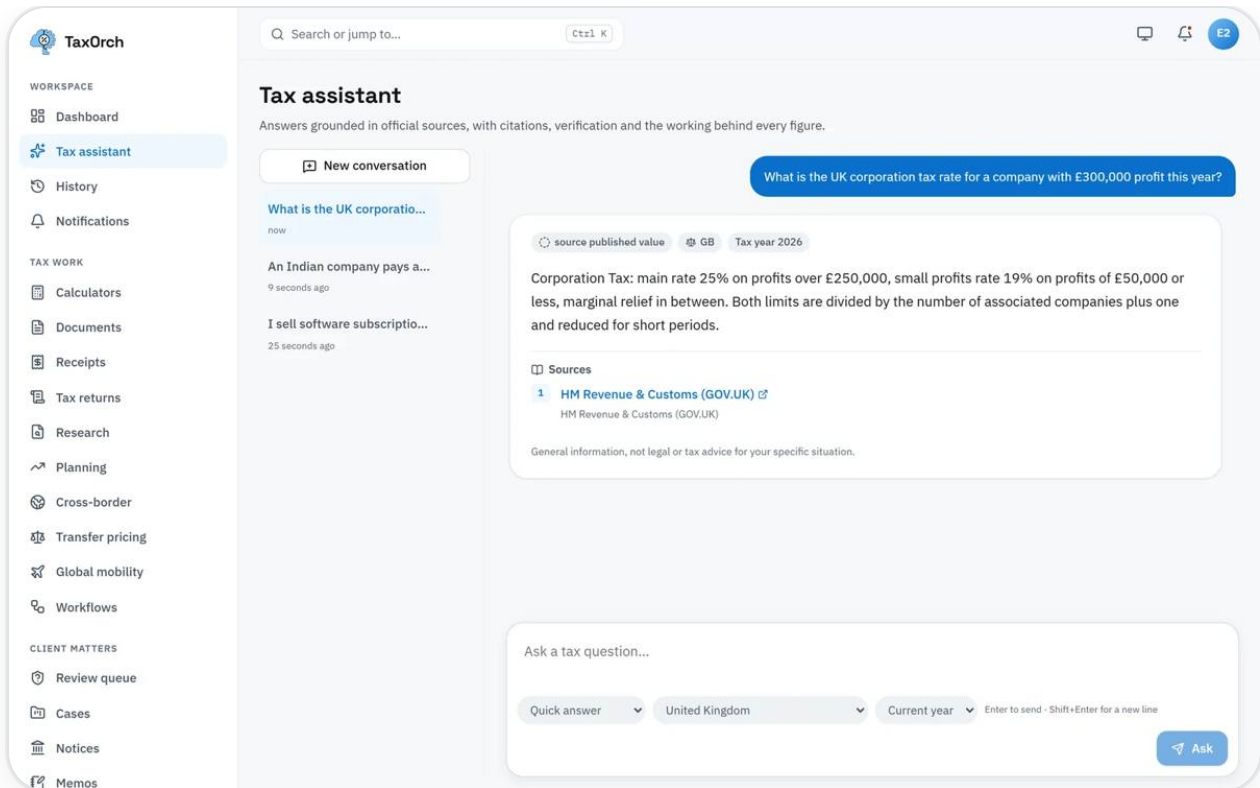
India to UK royalties: domestic rate, treaty ceiling, conditions and sources.

What changed

The answer carries a review notice because eligibility depends on facts TaxOrch cannot verify.

4 Look up a corporate tax rate

Ask the assistant with the country set. For the UK: main rate 25% on profits over £250,000, small profits rate 19% on profits of £50,000 or less, marginal relief in between, both limits divided by the number of associated companies plus one and reduced for short periods. Cited to HM Revenue & Customs, tax year 2026.



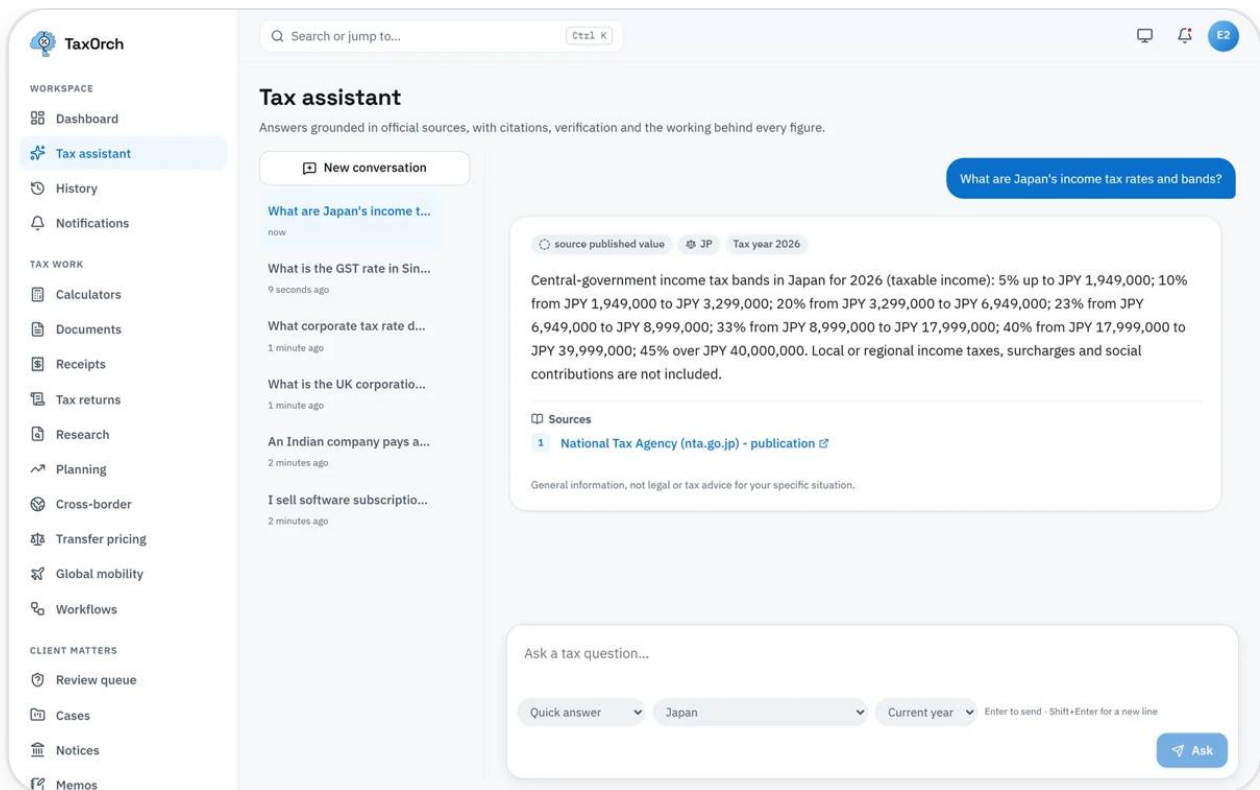
UK corporation tax: main rate, small profits rate and marginal relief, cited to HMRC.

What changed

The badge reads source published value, GB, tax year 2026.

5 Look up income tax bands

For Japan, the assistant lists the central-government income tax bands for 2026 from 5% up to JPY 1,949,000 through 45% over JPY 40,000,000, states that local or regional income taxes, surcharges and social contributions are not included, and cites the National Tax Agency. Bands are given; a liability is not computed.



Japan's income tax bands for 2026, from the National Tax Agency's publication.

What changed

The answer names the tax year and the source; asking for a computed bill in an uncertified year is refused (chapter 2).

6 Convert currency and check a tax ID

The Currency tab converts an amount between currencies with the rate and date shown, so a foreign invoice can be recorded in the books at a stated rate. Tax ID check validates the format of a tax identifier before it goes on an invoice.

What changed

The converted amount and the rate used appear beside the form.

7 Open a global mobility assignment

Global mobility records an employee's assignment: home and host country, kind (short-term assignment and others), start and end dates, and who bears the

cost, which decides whether the host employer is the economic employer and whether a short-stay treaty exemption survives. Travel days and consent counts have their own tabs.

The screenshot shows the TaxOrch interface with a sidebar on the left containing sections: WORKSPACE (Dashboard, Tax assistant, Getting started, Insights, History, Notifications), TAX WORK (Calculators, Documents, Receipts, Tax returns, Research, Planning, Cross-border, Transfer pricing, Global mobility, Workflows), and CLIENT MATTERS (Review queue). The 'Global mobility' option is highlighted. The main content area is titled 'Global mobility' and includes a search bar at the top. Below the title is a description: 'Assignments, travel days and what may be read about an employee's movements – with the basis for reading it on the record.' There are three tabs: 'Assignment' (selected), 'Travel days', and 'Consent & counts'. The 'Open an assignment' section contains a sub-description: 'A business traveller with no paperwork creates the same obligations as an assignee with a great deal of it.' The form fields include: 'Employee (client record id) *' (text input), 'Home country *' and 'Host country *' (text inputs), 'Kind' (dropdown menu with 'Short-term assignment' selected), 'Start date *' and 'End date' (date pickers with 'dd/mm/yyyy' format), and 'Who bears the cost' (text input). A note at the bottom states: 'It decides whether the host employer is the economic employer, which decides whether a treaty exemption for short stays survives at all.' A blue button labeled 'Open assignment' is at the bottom right.

Global mobility: the assignment form, with the cost-bearer field explained.

What changed

The assignment appears with its travel-day count and what may be read about the employee's movements, with the basis recorded.

Tips

- Set the tax year deliberately; a treaty ceiling and a domestic rate can change in different years.
- Keep the residency certificate with the payment record; the calculator tells you it is needed, it cannot obtain it.

Limits

- Calculators compute only where the rules for that country and year are certified. Otherwise they refuse with the reason.
- Treaty answers give the published ceiling and its conditions; eligibility is not decided by TaxOrch.
- Income band answers do not compute a liability.
- Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

Related

[Cross-border withholding tax calculator \(/cross-border-withholding-tax-calculator\)](/cross-border-withholding-tax-calculator)

[Tax treaty withholding rates \(/tax-treaty-withholding-rates\)](/tax-treaty-withholding-rates)

[Corporate tax rates by country \(/corporate-tax-rates-by-country\)](/corporate-tax-rates-by-country)

[Income tax rates by country \(/income-tax-rates-by-country\)](/income-tax-rates-by-country)

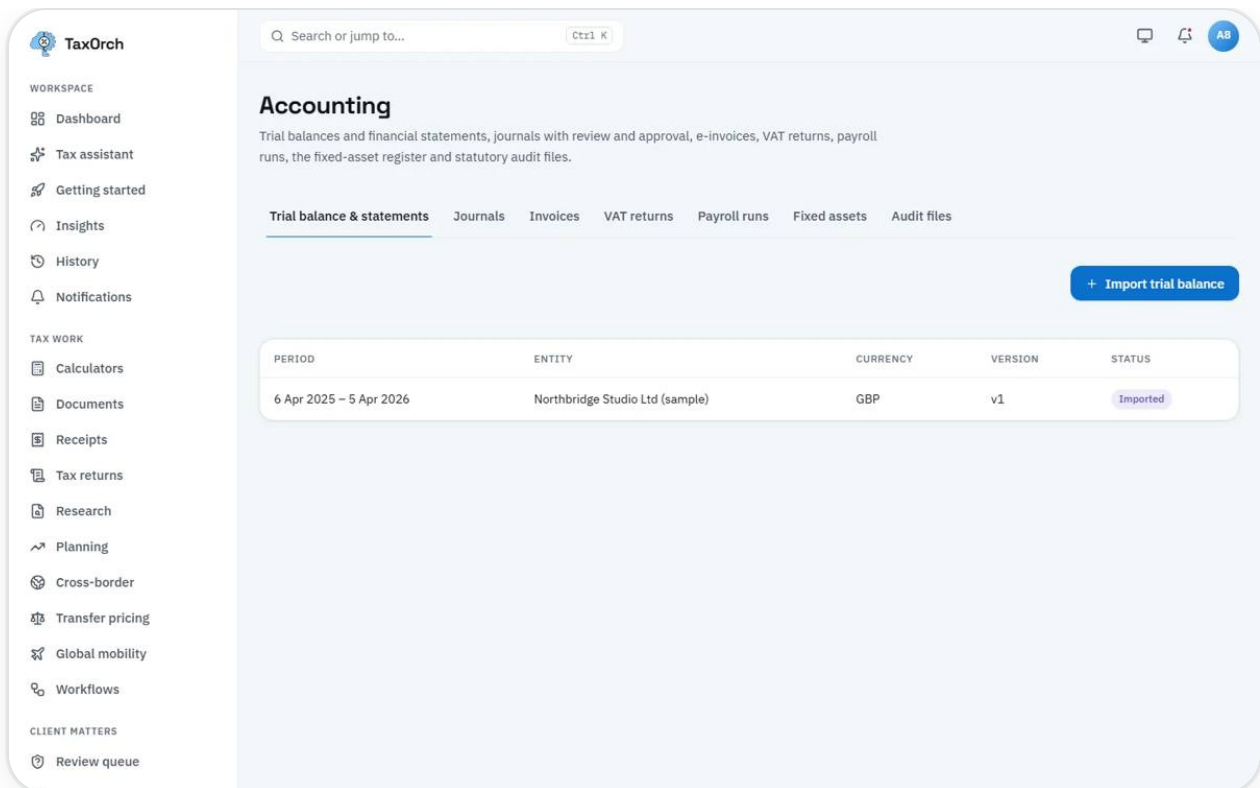
Books and accounting

The Accounting page holds trial balances and statements, journals with review and approval, e-invoices, VAT returns, payroll runs, the fixed-asset register and statutory audit files. Books holds the ledger review: expense classifications, insights, anomalies and the chart of accounts. Imports from accounting systems are read-only.

8 min read · Bookkeepers, finance teams and firms preparing accounts for tax.

1 Import a trial balance

Choose Accounting, then Import trial balance on the Trial balance & statements tab. Each import is listed with its period, entity, currency, version and status. Northbridge Studio Ltd (sample) has a GBP trial balance for 6 April 2025 to 5 April 2026 at version 1, status Imported.



Accounting: the imported trial balance with its period, entity, currency and version.

What changed

A new row appears with status Imported; re-importing the same period creates the next version.

2 Map accounts and accept the mappings

Open the trial balance. The panel shows accounts counted, how many are categorised, how many a reviewer has accepted, and that debits and credits balance. Map accounts assigns each account to a category; Accept mappings records a reviewer's acceptance; Reconcile checks the totals. Sample Holdings Ltd for 2026 has 24 of 24 accounts categorised and accepted, £6,504,900.00 on each side, and an accounting profit of £880,000.00 broken down by category.

The screenshot displays the TaxOrch Accounting module. The left sidebar contains navigation options under 'WORKSPACE' (Dashboard, Tax assistant, Getting started, Insights, History, Notifications) and 'TAX WORK' (Calculators, Documents, Receipts, Tax returns, Research, Planning, Cross-border, Transfer pricing, Tax provision, Pillar Two, Filing readiness, Global mobility). The main area is titled 'Accounting' and includes a description: 'Trial balances and financial statements, journals with review and approval, e-invoices, VAT returns, payroll runs, the fixed-asset register and statutory audit files.' Below this is a tabbed interface with 'Trial balance & statements' selected. A table lists two periods: '1 Jan 2026 – 31 Dec 2026' for 'Sample Holdings Ltd' and '6 Apr 2025 – 5 Apr 2026' for 'Northbridge Studio Ltd (sample)'. On the right, a 'Trial balance' panel shows 'Imported' data for 'Sample Holdings Ltd · 1 Jan 2026 – 31 Dec 2026 · GBP'. It lists 'Accounts' as 24, 'Categorised' as 24 of 24, and 'Accepted by a reviewer' as 24 of 24. The 'Debits and credits' are £6,504,900.00 each side, balanced. Buttons for 'Map accounts', 'Accept mappings', and 'Reconcile' are present. Below this, an 'Accounting profit' section states 'Credits less debits over the profit-and-loss categories' and shows a total of £880,000.00. A table details the effect on profit for various categories.

CATEGORY	EFFECT ON PROFIT
Cost of sales	£2,180,000.00
Depreciation amortisation	£185,000.00
Employment costs	£1,165,000.00
Finance costs	£54,000.00

A mapped and reviewed trial balance: every account categorised and accepted, and the books balanced.

What changed

Accepted by a reviewer reaches 24 of 24 and the accounting profit becomes available to the tax provision (chapter 8).

3 Review expense classifications

Choose Books. Expense review lists each expense with the suggested category, the confidence and the amount; Confirm accepts the suggestion, the cross rejects it. Every entry is held for your approval; nothing is posted on its own. The other tabs are Ledger insights, Anomalies, Categories, Chart of accounts and Commerce ledger.

Books
Keep the ledger accurate: review classifications, act on findings and manage your chart of accounts.

Expense review | Ledger insights | Anomalies | Categories | Chart of accounts | Commerce ledger

EXPENSE	SUGGESTED	CONFIDENCE	AMOUNT	
DE Business Services Ltd	Office	80%	€3,301.66	✓ Confirm ×
GB Business Services Ltd	Office	80%	€2,577.60	✓ Confirm ×
US Business Services Ltd	Office	80%	US\$1,611.00	✓ Confirm ×
DE Business Services Ltd	Office	80%	€3,301.66	✓ Confirm ×
GB Business Services Ltd	Office	80%	€2,577.60	✓ Confirm ×
US Business Services Ltd	Office	80%	US\$1,611.00	✓ Confirm ×
DE Business Services Ltd	Office	80%	€3,301.66	✓ Confirm ×
GB Business Services Ltd	Office	80%	€2,577.60	✓ Confirm ×
US Business Services Ltd	Office	80%	US\$1,611.00	✓ Confirm ×
DE Business Services Ltd	Office	80%	€3,301.66	✓ Confirm ×
GB Business Services Ltd	Office	80%	€2,577.60	✓ Confirm ×

Expense review: suggested category, confidence, amount, and a Confirm button on every row.

What changed

Confirmed rows leave the review list and their category is recorded with who confirmed it.

4 Journals, VAT returns, payroll and fixed assets

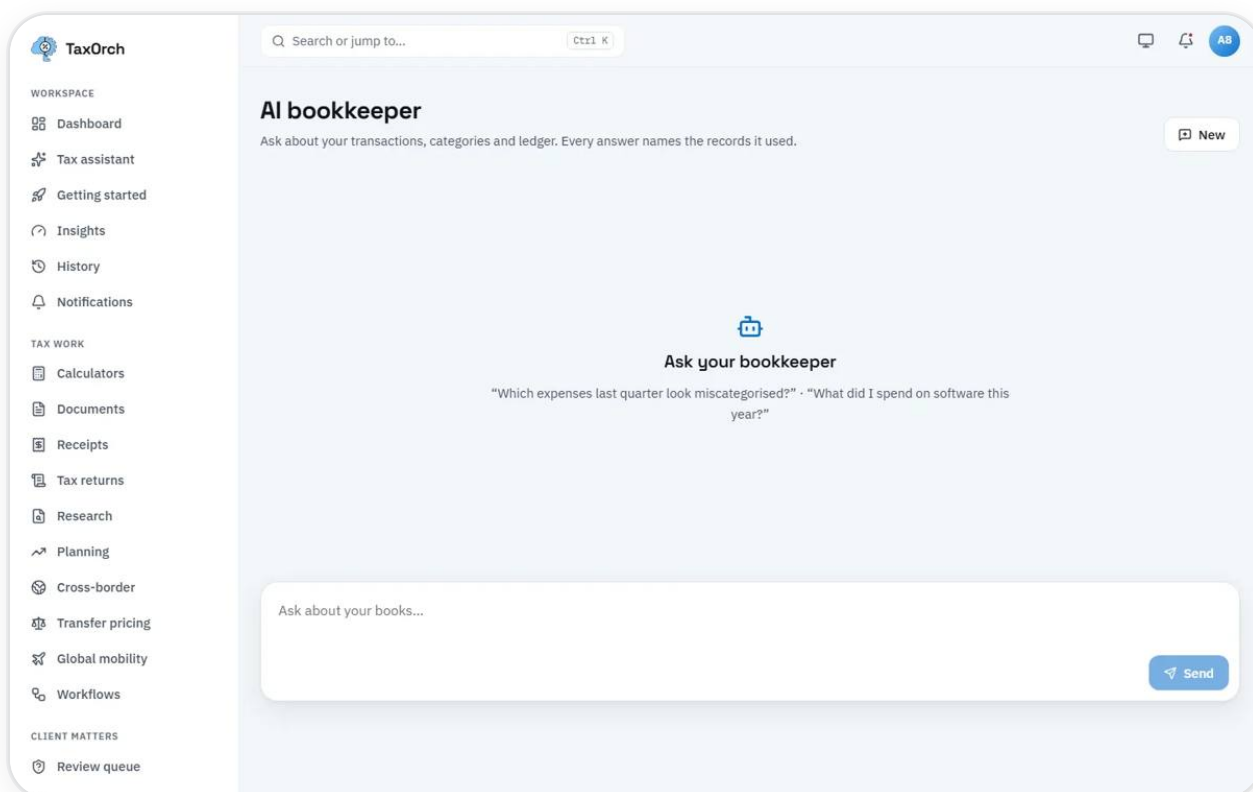
The Journals tab holds proposed entries with review and approval before they post. VAT returns builds the return from the ledger for the period. Payroll runs and Fixed assets keep their registers; Audit files prepares the statutory file. Each tab follows the same rule: a proposal, a reviewer, then a record.

What changed

An approved journal shows its approver and time; a rejected one stays a proposal.

5 Ask the AI bookkeeper

The AI bookkeeper answers questions about your transactions, categories and ledger, and every answer names the records it used. The examples on screen: which expenses last quarter look miscategorised, and what was spent on software this year.



The AI bookkeeper: questions over your own ledger, with the records named in each answer.

What changed

Answers list the transactions they rest on so you can open each one.

6 Invoices and e-invoicing (In development)

The Invoices tab prepares e-invoices in Peppol BIS Billing 3.0 and checks them against the EN 16931 business rules. It carries an In development badge.

Sample invoices to Kanaal Media B.V., Rheinwerk Handels GmbH and Hofmann Logistik GmbH show the number, issue date, customer, place of supply, total and state (Draft or Issued).

Accounting
Trial balances and financial statements, journals with review and approval, e-invoices, VAT returns, payroll runs, the fixed-asset register and statutory audit files.

Trial balance & statements Journals **Invoices** VAT returns Payroll runs Fixed assets Audit files

In development E-invoices in Peppol BIS Billing 3.0, checked against the EN 16931 business rules. [+ New e-invoice](#)

NUMBER	ISSUE DATE	CUSTOMER	PLACE OF SUPPLY	TOTAL	STATE
NS-2026-0143	22 Sept 2026	Kanaal Media B.V. (sample)	NL	€3,740.00	Draft
NS-2026-0142	15 Sept 2026	Rheinwerk Handels GmbH (sample)	DE	€7,190.00	Issued
NS-2026-0141	8 Sept 2026	Kanaal Media B.V. (sample)	NL	€1,700.00	Issued
NS-2026-0140	1 Sept 2026	Hofmann Logistik GmbH (sample)	DE	€2,350.00	Issued

Invoices (In development): Peppol BIS Billing 3.0 drafts and issued invoices with place of supply.

What changed

A new invoice appears as Draft; issuing it changes the state to Issued and generates the file.

7 Create an e-invoice draft

New e-invoice takes the buyer's postcode, VAT number and Peppol address, then one or more lines with description, quantity, unit, unit price and VAT treatment. A line with no VAT needs a reason; the sample line is a reverse-charge motion graphics package for €3,200.00. Totals and the VAT breakdown are computed; the invoice stays a draft until you issue it.

New e-invoice

Enter the sale. Totals and the VAT breakdown are computed for you; the invoice stays a draft until you issue it.

Buyer postcode: 1015 AB

Buyer VAT number: NL123456789B01

Buyer Peppol address: 9944:NL123456789B01

scheme:identifier, e.g. 9930:DE123456789

Lines

Line 1 €3,200.00

Line 1 description *: Motion graphics package

Line 1 quantity: 1 Line 1 unit: C62 Line 1 unit price: 3200.00

C62 = unit, HUR = hour

Line 1 VAT treatment: Reverse charge

Line 1 reason *: Reverse charge: VAT to be accounted for by the customer

Why no VAT is charged, e.g. Reverse charge

Cancel Create draft

TOTAL	STATE
€3,740.00	Draft
€7,190.00	Issued
€1,700.00	Issued
€2,350.00	Issued

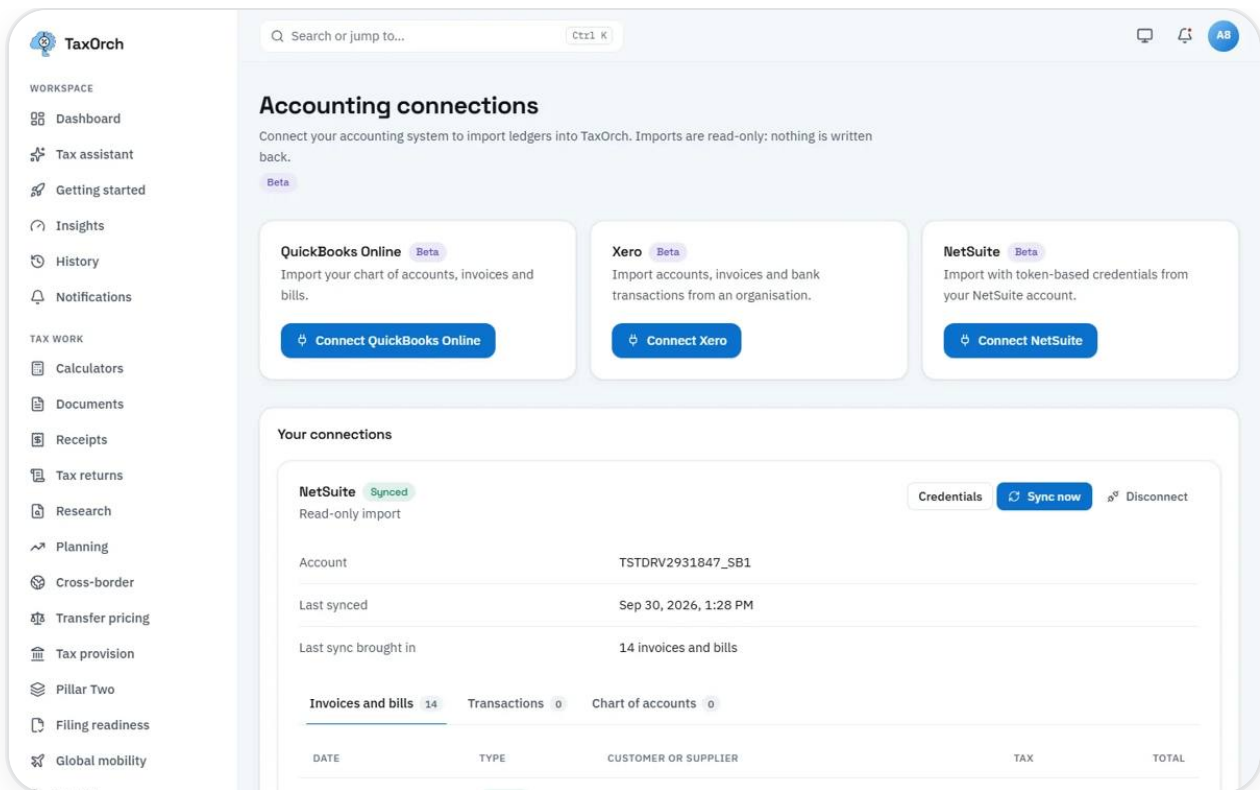
A new e-invoice: buyer identifiers, one reverse-charge line with its reason, and Create draft.

What changed

Create draft adds the invoice to the list in Draft state with its computed total.

8 Connect an accounting system (Beta)

Accounting connections imports ledgers from QuickBooks Online, Xero and NetSuite. All three carry a Beta badge. Imports are read-only: nothing is written back. Each connection shows the company or account, when it last imported, what the last import brought in, and tabs for invoices and bills, transactions and the chart of accounts.



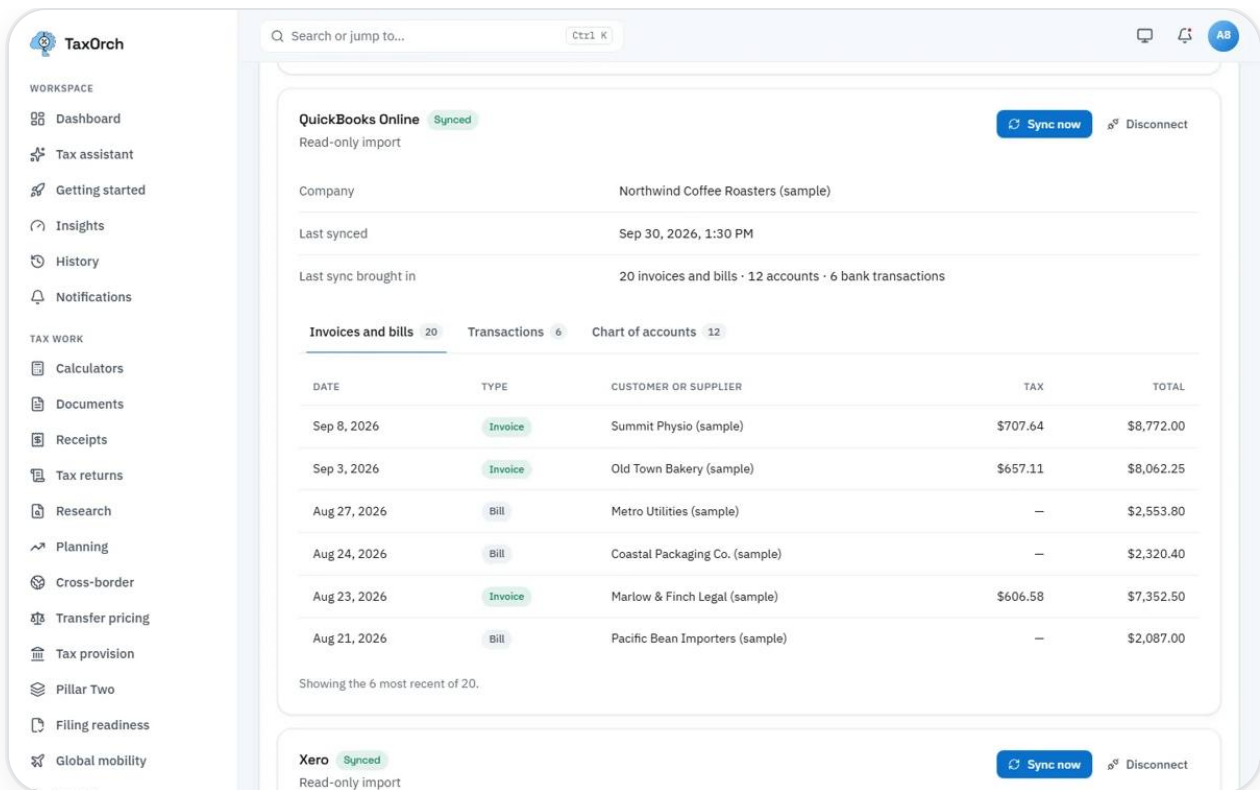
Accounting connections (Beta): three systems, read-only imports, and what the last import brought in.

What changed

A connected system appears under Your connections with its last import time and record counts.

9 Read the imported records

The QuickBooks Online connection for Northwind Coffee Roasters (sample) brought in 20 invoices and bills, 12 accounts and 6 bank transactions; each record shows its date, type, customer or supplier, tax and total. The Xero connection for Kestrel Design Studio Ltd (sample) shows the same for 16 invoices and bills, 8 accounts and 10 bank transactions in pounds.



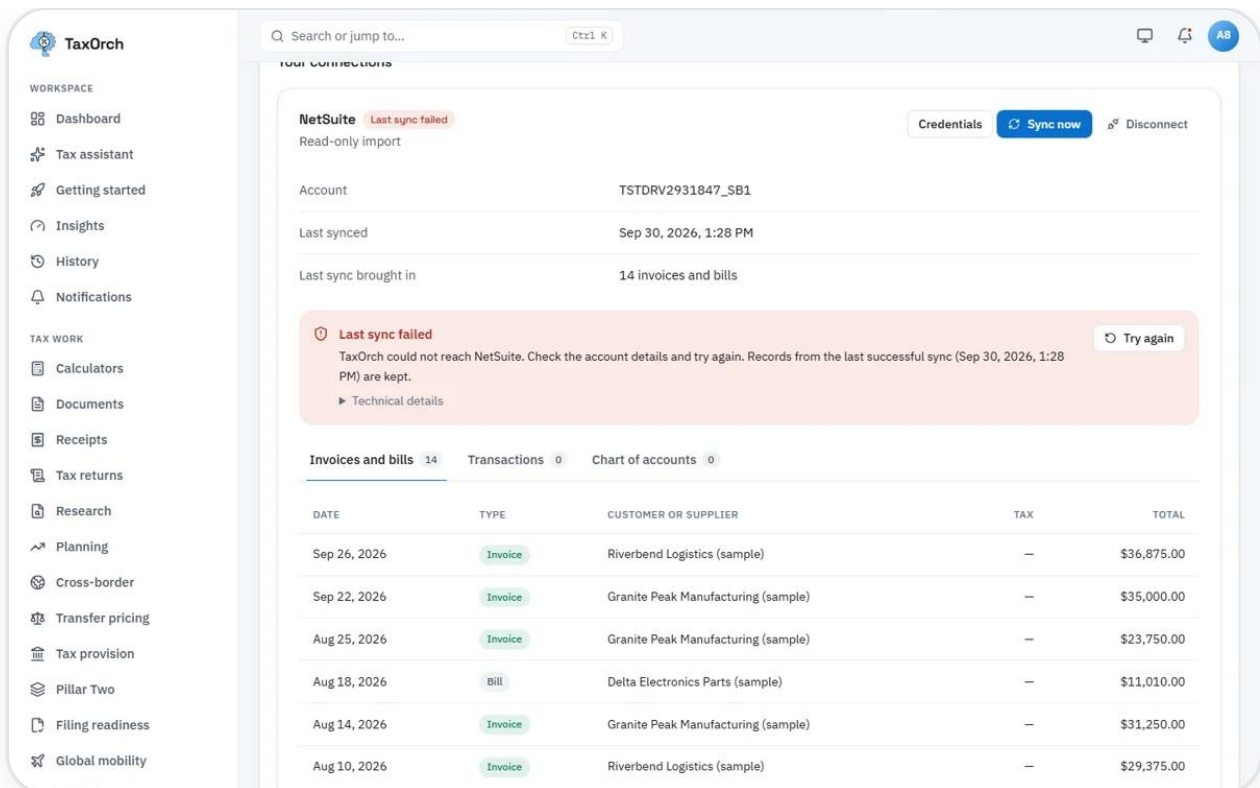
Imported QuickBooks Online records: invoices and bills with their tax and totals.

What changed

Imported records are available to expense review and the anomaly checks, still read-only.

10 When an import fails

A failed import is shown as it is. The NetSuite connection reads Last sync failed: TaxOrch could not reach NetSuite, check the account details and try again, and the records from the last successful import are kept. Technical details expand for support; Try again re-runs it.



An import that failed, said plainly, with the earlier records kept.

What changed

The status badge changes from connected to Last sync failed until a retry succeeds.

11 Bank feeds and anomaly checks

Bank feed transactions land in Books for classification like any other entry. The Anomalies tab lists findings across the ledger (duplicates, unusual amounts, missing tax) for a person to act on. Tax tools also has a Cross-source anomalies view that compares figures across sources for a year and jurisdiction.

What changed

Findings appear on the Anomalies tab with a status until someone resolves or dismisses them.

Tips

- Import the trial balance before opening a provision cycle; the provision binds a reviewed version.
- Confirm categories in batches by vendor; the confidence column shows where to look first.
- Keep connections read-only in your mind as well: TaxOrch never writes to your accounting system.

Limits

- E-invoicing is in development: no transmission to an access point and no digital signing yet.
- Accounting connections are Beta. Imports are read-only.
- Bank feeds on the sample workspace are sample data, not a live bank connection.
- Anomaly checks run on your ledger; production calibration is still pending.

Related

[AI bookkeeping review \(/ai-bookkeeping-review\)](/ai-bookkeeping-review)

[Bookkeeping and accounting \(/product/bookkeeping\)](/product/bookkeeping)

[AI bookkeeper \(/product/bookkeeper\)](/product/bookkeeper)

Tax provision and Pillar Two

A provision cycle computes on two declared bases, an accounting framework and a tax law as at a date, each versioned. It binds a reviewed trial balance, records seven linked schedules, and certifies a close only when five named checks pass. Pillar Two records the group's entities and GloBE inputs and validates them; a pool the engine cannot compute is shown as unsupported with the reason, never as nil.

5 min read · Group tax and finance teams closing a period. Business plan.

This chapter follows Sample Holdings Ltd for FY2026. It is in local review and not yet certified: two approvals are still to sign.

1 Bind the reviewed trial balance

A cycle starts from a trial balance whose accounts are all categorised and accepted by a reviewer. Sample Holdings Ltd 2026 has 24 of 24 accepted, balanced at £6,504,900.00, with an accounting profit of £880,000.00. Binding records the hash of those balances so the workings can later prove which figures they used.

The screenshot displays the TaxOrch Accounting module. The main panel shows the 'Trial balance & statements' section with a table of trial balances. The right-hand panel provides a detailed view of the trial balance and accounting profit.

PERIOD	ENTITY	CURRENCY
1 Jan 2026 – 31 Dec 2026	Sample Holdings Ltd	GBP
6 Apr 2025 – 5 Apr 2026	Northbridge Studio Ltd (sample)	GBP

ACCOUNTS	DEBITS	CREDITS
Accounts	24	
Categorised	24 of 24	
Accepted by a reviewer	24 of 24	
Debits and credits	£6,504,900.00 each side, balanced	

CATEGORY	EFFECT ON PROFIT
Cost of sales	£2,180,000.00
Depreciation amortisation	£185,000.00
Employment costs	£1,165,000.00
Finance costs	£54,000.00

The reviewed trial balance the cycle binds: balanced, fully accepted, £880,000.00 accounting profit.

What changed

The readiness panel shows Sources bound and Sources unchanged.

2 Declare the bases

The basis statement names what the cycle is computed on: the accounting framework (IFRS, IAS 12 with the 2023 amendments) and the tax law (CTA 2009 as at 31 December 2026). Both are versioned so a later change cannot silently alter a computed figure.

What changed

Bases declared turns green in the readiness panel.

3 Record and review the schedules

Seven linked components: credits and losses, currency, current tax, deferred tax, disclosure, rates and uncertain positions. Each shows its state, key figures, who prepared it and who reviewed it. On the sample cycle every schedule is Reviewed: taxable profit £867,400.00 on accounting profit £880,000.00, current tax charge £216,850.00, deferred tax charge £6,250.00, total tax expense £223,100.00 and an effective rate of 25.35%.

Select a schedule to see its workings line by line, recorded against both basis versions and the hash of the bound balances.

Schedules
The seven linked components of this version. Select one to see its workings.

COMPONENT	STATE	KEY FIGURES	PREPARED BY	REVIEWED BY
Credits and losses	Reviewed	Losses used £0.00	Amina Wanjiru	rhea.reviewer
Currency	Reviewed	Translation difference £0.00	Amina Wanjiru	rhea.reviewer
Current tax	Reviewed	Taxable profit £867,400.00 · Accounting profit £880,000.00 · Current tax charge £216,850.00	Amina Wanjiru	rhea.reviewer
Deferred tax	Reviewed	Deferred tax charge £6,250.00 · Presented liability £57,500.00	Amina Wanjiru	rhea.reviewer
Disclosure	Reviewed	Total tax expense £223,100.00 · Effective tax rate 25.35%	Amina Wanjiru	rhea.reviewer
Rates	Reviewed	Main rate 25%	Amina Wanjiru	rhea.reviewer
Uncertain positions	Reviewed	Provision for uncertain positions £0.00	Amina Wanjiru	rhea.reviewer

Current tax: workings Reviewed
Recorded against both basis versions and the hash of the bound balances. Reviewed by rhea.reviewer.

LINE	AMOUNT
Accounting profit before tax (bound trial balance)	£880,000.00
Add back: depreciation	£185,000.00
Add back: client entertaining (disallowable)	£12,400.00

Seven schedules, each prepared and reviewed by different people, with the current tax workings opened.

What changed

Schedules complete turns green once every component is prepared, reviewed and free of blockers.

Check close readiness and sign the stages

Close readiness runs five named checks: schedules complete, balances reconciled, rules supported, critical review notes cleared, approvals signed. On the sample cycle four pass and approvals are outstanding: still to sign, regional review and consolidated review. The close state reads Local review, close version 1, certified Not yet, journals may post Yes.

The Readiness to compute panel is separate: bases declared, perimeter approved and current, sources bound and unchanged. Nothing computes until every check passes.

The screenshot shows the TaxOrch interface with a sidebar on the left containing sections for WORKSPACE (Dashboard, Tax assistant, Getting started, Insights, History, Notifications) and TAX WORK (Calculators, Documents, Receipts, Tax returns, Research, Planning, Cross-border, Transfer pricing, Tax provision, Pillar Two, Filing readiness, Global mobility). The main content area is divided into three panels:

- Close readiness:** Five checks before a close can be certified, each named.
 - ☒ **Schedules complete**
Each component prepared, reviewed and free of blockers.
 - ☒ **Balances reconciled**
Every entity's tax expense reconciles to its statutory expected charge with no residual nobody can name.
 - ☒ **Rules supported**
No component rests on a rule this system could not read or a rate nobody enacted.
 - ☒ **Critical review notes cleared**
No significant or critical review note is still open on the entities in this cycle.
 - ☐ **Approvals signed**
Still to sign: Regional review, Consolidated review
- Close state:** One state, used by dashboards and journal export.

Stage	Local review
Means	Checked where the figures were prepared.
Close version	1
Certified	Not yet
Journals may post	Yes
- Readiness to compute:** Nothing computes until every check passes.
 - ☒ **Ready to compute**
 - ☒ Bases declared
 - ☒ Perimeter approved
 - ☒ Perimeter current
 - ☒ Sources bound
 - ☒ Sources unchanged

Below these panels is a **Basis statement** section:

What this cycle is computed on: two bases, each versioned.

Accounting framework	IFRS (IAS 12 (2023 amendments))
Tax law	CTA 2009 as at 31 Dec 2026

Close readiness: four of five checks passed, two approvals still to sign, and the declared bases.

What changed

Each signed approval moves the stage on; Certified changes to Yes only when all five checks pass.

Record Pillar Two entities and inputs

Pillar Two lists every entity in the group, its jurisdiction, kind and ownership, and the GloBE inputs recorded for it: net income (FANIL), covered taxes, payroll and tangible assets, in GBP under IFRS. The sample group has four constituent entities in NL, DE and GB.

Computations run one per jurisdictional pool. On the sample dataset all three pools are Unsupported: no verified rule pack covers the jurisdiction for the period, and computing on the nearest year's numbers would produce a rate somebody could act on. The reason is shown; nothing is shown as nil.

The screenshot shows the TaxOrch interface with a sidebar on the left containing navigation links: WORKSPACE (Dashboard, Tax assistant, Getting started, Insights, History, Notifications) and TAX WORK (Calculators, Documents, Receipts, Tax returns, Research, Planning, Cross-border, Transfer pricing, Tax provision, Pillar Two, Filing readiness, Global mobility). The main content area is titled 'Entities and inputs' and contains a table of four entities. Below this is a 'Computations' section showing three unsupported pools (DE, GB, NL) with reasons. At the bottom, there are 'Validation' and 'Jurisdictional pools' sections.

ENTITY	JURISDICTION	KIND	NET INCOME (FANIL)	COVERED TAXES	PAYROLL	TANGIBLE ASSETS
Sample Holdings B.V.	NL	Constituent - 100%	£22,750,000.00	£2,730,000.00	£6,100,000.00	£4,450,000.00
Sample Holdings GmbH	DE	Constituent - 100%	£31,400,000.00	£9,420,000.00	£27,900,000.00	£18,300,000.00
Sample Holdings Ltd	GB	Constituent - 100%	£880,000.00	£223,100.00	£1,165,000.00	£1,240,000.00
Sample Trading UK Ltd	GB	Constituent - 100%	£46,200,000.00	£11,320,000.00	£38,400,000.00	£21,700,000.00

POOL	RESULT	EFFECTIVE RATE	TOP-UP TAX	WHY
DE Main group	Unsupported	—	—	No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.
GB Main group	Unsupported	—	—	No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.
NL Main group	Unsupported	—	—	No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.

Validation
Complete against the perimeter, aligned on definitions and reconciled.
Each check named.

Jurisdictional pools
Which entities blend together for the effective rate.
DE Main group

Pillar Two entities and inputs, and three pools recorded as unsupported with the reason.

What changed

Each entity's inputs appear in the table; a pool's result stays Unsupported until a verified rule pack covers it.

6 Validate the dataset

Validation checks the dataset against the perimeter, aligned on definitions and reconciled, with each check named: every entity placed in a pool, no entity in two pools, every exclusion cites its rule, joint ventures and minority-owned subgroups blend separately, permanent establishments placed where they are, required inputs present and usable, every figure on the group's standard. The sample dataset passes all sixteen. Jurisdictional pools show which entities blend together.

The screenshot shows the TaxOrch interface. On the left is a sidebar with a 'WORKSPACE' section containing 'Dashboard', 'Tax assistant', 'Getting started', 'Insights', 'History', and 'Notifications'. Below this is a 'TAX WORK' section with 'Calculators', 'Documents', 'Receipts', 'Tax returns', 'Research', 'Planning', 'Cross-border', 'Transfer pricing', 'Tax provision', 'Pillar Two' (highlighted), 'Filing readiness', and 'Global mobility'. The main area has a search bar at the top. Below it, a table shows validation results for three jurisdictions: DE, GB, and NL. Each row shows 'Main group' as 'Unsupported' with a reason: 'No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.' Below the table are two panels: 'Validation' and 'Jurisdictional pools'. The 'Validation' panel lists 16 checks, all marked as 'Complete'. The 'Jurisdictional pools' panel shows entities for DE (Sample Holdings GmbH), GB (Sample Holdings Ltd, Sample Trading UK Ltd), and NL (Sample Holdings B.V.).

POOL	RESULT	EFFECTIVE RATE	TOP-UP TAX	WHY
DE Main group	Unsupported	—	—	No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.
GB Main group	Unsupported	—	—	No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.
NL Main group	Unsupported	—	—	No verified rule pack covers this jurisdiction for this period, so the computation is unsupported. Computing on the nearest year's numbers would produce a rate somebody could act on.

Validation
Complete against the perimeter, aligned on definitions and reconciled. Each check named.

- Complete 16 verified
- Every entity placed in a pool
- No entity in two pools
- Every exclusion cites its rule
- Joint ventures blend separately
- Minority-owned subgroups blend separately
- Permanent establishments placed where they are
- Required inputs present
- Every input usable
- Every figure on the group's standard

Jurisdictional pools
Which entities blend together for the effective rate.

DE Main group
Sample Holdings GmbH

GB Main group
Sample Holdings Ltd, Sample Trading UK Ltd

NL Main group
Sample Holdings B.V.

Validation complete: sixteen named checks, and the pools each entity blends into.

What changed

Validation reads Complete with the number of checks verified; a failing check is named with the entity it concerns.

Tips

- Have a second person review each schedule; the table shows prepared by and reviewed by side by side.

- Re-check readiness after any trial balance re-import: Sources unchanged will tell you if the bound balances moved.

Limits

- The sample close is not certified: approvals are outstanding, and the screen says so.
- Pillar Two pools without a verified rule pack are recorded as unsupported. No effective rate or top-up tax is shown for them.
- Reference cases per jurisdiction are not yet included.
- Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

Related

[Bookkeeping and accounting \(/product/bookkeeping\)](/product/bookkeeping)

[Audit proofs and ledger integrity \(/product/audit\)](/product/audit)

[Enterprises \(/for/enterprises\)](/for/enterprises)

Transfer pricing

Transfer pricing in TaxOrch is the controlled transaction inventory, its functional analysis, the method chosen and why, and what documentation may rest on. Documentation may rest on an approved transaction and on nothing else. The sample group is Sample Holdings Ltd with Sample Distribution GmbH (sample) and Sample Services BV (sample).

4 min read · Group tax teams and advisers preparing transfer pricing documentation. Business plan.

1 Record group entities and agreements

The Group entities tab lists each entity with its jurisdiction; Agreements holds the signed intra-group agreements a transaction can cite (a distribution agreement for Germany, an intra-group services agreement). A transaction without an agreement is recorded as such.

What changed

Entities become selectable as tested party and counterparty; agreements become selectable on a transaction.

2 Build the transaction inventory

The Transactions tab counts controlled transactions, how many are approved for documentation and how many are still being analysed. Record a transaction adds one with the tested party, counterparty, amount and method. The sample inventory holds three: a sale or purchase of goods at €4,200,000.00 (TNMM,

approved), a licence of intangibles at €126,000.00 (method not chosen, recorded) and a provision of services at €860,000.00 (cost plus, recorded).

Transfer pricing
The controlled transaction inventory, its functional analysis, the method chosen and why, and what documentation may rest on.

Transactions Group entities Agreements

Controlled transactions
3
Between 3 group entities

Approved for documentation
1
Documentation may rest on these

Still being analysed
2
Open one to see what is missing

Controlled transactions
Every transaction between group entities that documentation may have to rest on. Open one to record its functional analysis and method.

[+ Record a transaction](#)

TRANSACTION	TESTED PARTY – COUNTERPARTY	AMOUNT	METHOD	STATE
Sale or purchase of goods	Sample Distribution GmbH (sample) → Sample Holdings Ltd	€4,200,000.00	Transactional net margin method (TNMM)	Approved for documentation
Licence of intangibles	Sample Distribution GmbH (sample) → Sample Holdings Ltd	€126,000.00	Not chosen	Recorded
Provision of services	Sample Services BV (sample) → Sample Holdings Ltd	€860,000.00	Cost plus method	Recorded

The controlled transaction inventory: three transactions, one approved for documentation.

What changed

The new transaction appears as Recorded; the counters update.

3 Open a transaction and check completeness

Each transaction shows its tested party and counterparty with jurisdictions, period, amount, ledger account and agreement. The panel is the analysis complete? counts functions, assets and risks, whether a benchmarking study is linked, and what is outstanding. The goods transaction is Complete: two functions, two assets, two risks, study linked, nothing outstanding.

Transfer pricing

The controlled transaction inventory, its functional analysis, the method chosen and why, and what documentation may rest on.

Transactions | Group entities | Agreements

← All transactions Approved for documentation

Sale or purchase of goods
Purchase of finished goods from the parent for resale in Germany

Tested party	Sample Distribution GmbH (sample) · DE
Counterparty	Sample Holdings Ltd · GB
Period	1 Jan 2025 – 31 Dec 2025
Amount	€4,200,000.00
Ledger account	5000 Intercompany purchases - finished goods
Agreement	Distribution agreement - Germany (signed)

Is the analysis complete?
Documentation may rest on an approved transaction, and on nothing else.

Complete

Functions	2
Assets	2
Risks	2
Benchmarking	Study linked

Nothing outstanding.

Pricing method
The method and the reason for it. Which method suits a transaction is the analysis; naming one is the conclusion.

Transactional net margin method (TNMM) Benchmark: Pan-European distributors, FY2023-2025 (sample) Change method

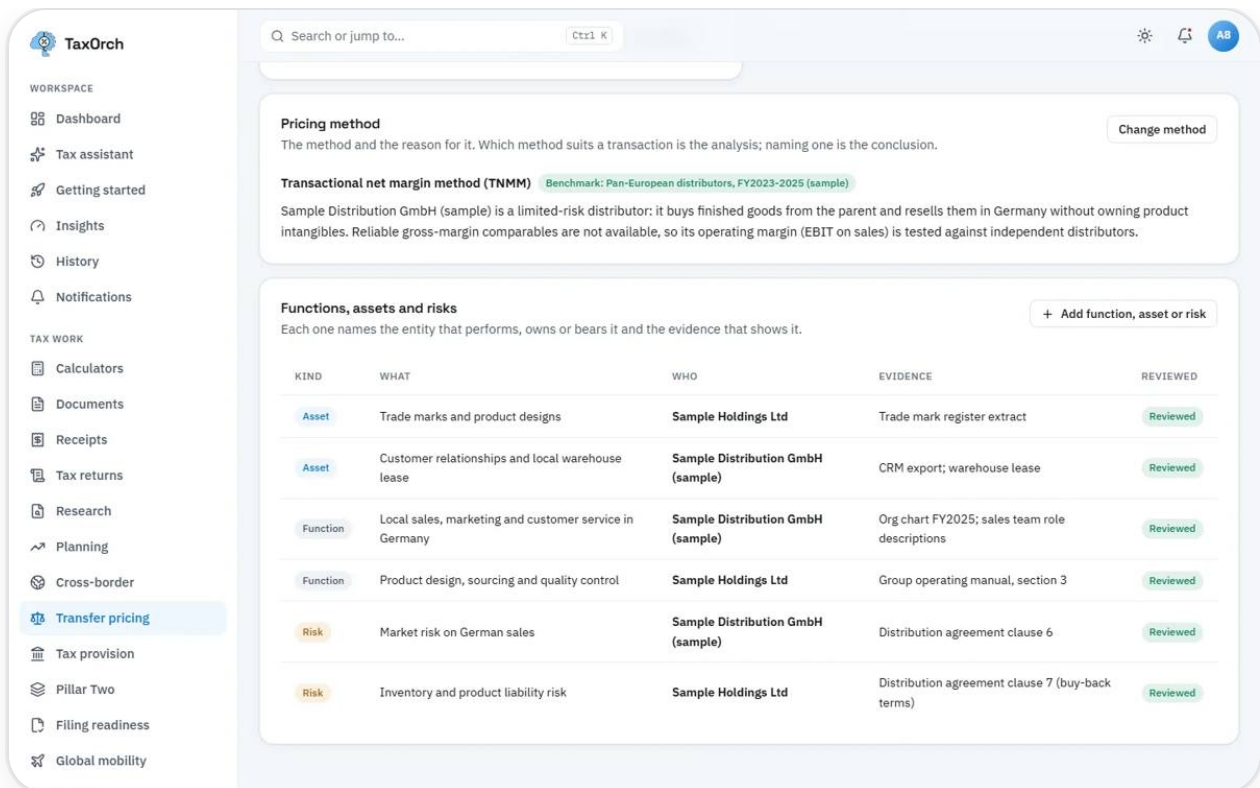
One transaction: parties, period, amount, agreement, and the completeness panel.

What changed

The state badge reads **Approved for documentation** once the analysis is complete and approved.

4 Complete the functions, assets and risks analysis

Add function, asset or risk records each item, the entity that performs, owns or bears it, and the evidence that shows it (a trade mark register extract, a CRM export, an org chart, a distribution agreement clause). Each row carries a Reviewed badge once checked. The pricing method sits above: TNMM, with the reason (a limited-risk distributor with no product intangibles, so operating margin is tested against independent distributors) and the linked benchmark.



FAR analysis: each function, asset and risk with who holds it and the evidence, all reviewed.

What changed

The completeness panel counts each reviewed row; a row without evidence is left outstanding.

5 Choose the method with its rationale and benchmark

Which method suits a transaction is the analysis; naming one is the conclusion. Change method records the choice and its reason. The services transaction uses cost plus (routine support services, limited risk, no unique intangibles, costs fully recorded) and carries a No benchmarking study linked badge, so it stays Recorded rather than approved. TaxOrch does not include a benchmarking database; you link your own licensed study.

TaxOrch

Search or jump to... Ctrl K

WORKSPACE

- Dashboard
- Tax assistant
- Getting started
- Insights
- History
- Notifications

TAX WORK

- Calculators
- Documents
- Receipts
- Tax returns
- Research
- Planning
- Cross-border
- Transfer pricing**
- Tax provision
- Pillar Two
- Filing readiness
- Global mobility

Period 1 Jan 2025 – 31 Dec 2025

Amount €860,000.00

Ledger account 4100 Intercompany service income

Agreement Intra-group services agreement (signed)

ASSETS 1

Risks 1

Benchmarking No study linked

Nothing outstanding.

Pricing method Change method

The method and the reason for it. Which method suits a transaction is the analysis; naming one is the conclusion.

Cost plus method No benchmarking study linked

Sample Services BV (sample) provides routine support services to the group, bears limited risk and uses no unique intangibles. Its costs are fully recorded, so a mark-up on total costs is the most reliable measure.

Functions, assets and risks + Add function, asset or risk

Each one names the entity that performs, owns or bears it and the evidence that shows it.

KIND	WHAT	WHO	EVIDENCE	REVIEWED
Asset	Group ERP licences	Sample Holdings Ltd	Software licence register	Reviewed
Function	IT helpdesk, payroll processing and group accounting	Sample Services BV (sample)	Service catalogue FY2025	Reviewed
Risk	Service quality risk	Sample Services BV (sample)	Services agreement clause 4 (service levels)	Reviewed

Cost plus with its rationale, and the honest badge: no benchmarking study linked yet.

What changed

Linking a study clears the badge and the transaction can be approved for documentation.

Tips

- Attach the evidence to each FAR row as you record it; a row without evidence blocks approval.
- Record the reason for the method in a sentence a tax authority could read.

Limits

- No benchmarking database is included. Comparables come from a study you license and link.
- TaxOrch records and structures the analysis; the arm's-length conclusion is yours.

Related

[Enterprises \(/for/enterprises\)](/for/enterprises)

[Multi-country tax \(/features/multi-country-tax\)](/features/multi-country-tax)

Planning, deadlines and filing readiness

Three tools for looking ahead. Scenario comparison measures every option from the same baseline and states plainly when a figure cannot be computed. The Deadlines calendar computes each client's filing and payment dates from the jurisdiction's statutory rules and names the rule. Filing readiness shows what is ready and what is missing before a return could be filed electronically; it is a preview and nothing is transmitted.

7 min read · Freelancers weighing a structure, and firms watching every client's dates.

Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

1 Set up a scenario comparison

Choose Planning, then Scenario comparison. Give it a title, jurisdiction, tax type and year, then a baseline (the facts as they are, one per line) and alternatives that state only what changes. Priya Nair (sample), UK 2025: baseline sole trader with self-employment income 68,000 and turnover 82,000; alternative 1 a limited company with salary 12,570 and dividends 40,000; alternative 2 the sole trader VAT registered.

TaxOrch

WORKSPACE

- Dashboard
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TAX WORK

- Calculators
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- Global mobility

Search or jump to... Ctrl K

Calculators

Scenario comparison

Compare the tax outcome of different choices, or let the engine rank the lawful positions for you.

Compare choices Maximize deductions

Title: Priya Nair (sample): sole trader or l
Jurisdiction: United Kingdom
Tax type: Income tax
Tax year: 2025

Baseline

Sole trader

self_employment_income: 68000
turnover: 82000

The facts as they are. One per line, e.g.
self_employment_income: 68000

Alternative 1

Limited company

self_employment_income: 0
company_profit: 68000
salary: 12570
dividends: 40000

Only what this alternative changes about the baseline.

Salary up to the personal allowance, the rest

Alternative 2

Sole trader, VAT registered

vat_registered: true

Only what this alternative changes about the baseline.

Reclaim VAT on new equipment

+ Add alternative Compare

Scenario inputs: a baseline and two alternatives, each stating only what it changes.

What changed

Compare produces one column per option under the same baseline.

2 Read the comparison, including what is not computed

The result compares facts, new obligations, when tax is paid and why each option was considered. Because the GB 2025 figures have not yet been verified for calculation, the card reads No tax figure and no recommendation yet, the tax liability row says Not computed for every option, and the saving row explains it is shown only when both sides are computed. The footer reminds you that lowest tax is not the same as best.

WORKSPACE

- Dashboard
- Tax assistant
- Getting started
- Insights
- History
- Notifications

TAX WORK

- Calculators
- Documents
- Receipts
- Tax returns
- Research
- Planning
- Cross-border
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- Tax provision
- Pillar Two
- Filing readiness
- Global mobility

Search or jump to... Ctrl K

Priya Nair (sample): sole trader or limited company

GB · tax year 2025 · every option measured from the same baseline

Figures not yet verified

No tax figure and no recommendation yet

The GB 2025 tax figures have not yet been reviewed and verified for calculation. The law for that year exists; until its figures are verified, no tax is computed and no recommendation is made from a figure nobody produced. The changes and the obligations each option brings are compared below; the liability row fills in once the figures are verified.

	Sole trader	Limited company	Sole trader, VAT registered
Tax liability	Not computed	Not computed	Not computed
Saving against the baseline	—	Shown only when both sides are computed	Shown only when both sides are computed
Facts	- Self-employment income: 68,000 - Turnover: 82,000	- Company profit: 68,000 - Dividends: 40,000 - Salary: 12,570 - Self-employment income: 68,000 — 0	VAT registered: Yes
New obligations	As today	Company tax return — A company files its own return, separately from the individual's.	VAT registration — VAT returns become due on their own cycle, and the registration has to be maintained.
When tax is paid	No published payment dates	No published payment dates	No published payment dates
Why considered	—	Salary up to the personal allowance, the rest as dividends	Reclaim VAT on new equipment

Lowest tax is not the same as best: check when tax is paid and the obligations each option brings. Decision support, not tax advice; a professional reviews before anything is filed.

The comparison: obligations and facts per option, and Not computed where the figures are not verified.

What changed

Once the year's figures are verified, the liability row fills in; until then no figure and no recommendation is shown.

3 Open the deadlines calendar

Choose Deadlines. Four tiles: due in the next 30 days, in the next 90 days, upcoming obligations (28, computed on 30 September 2026) and clients on the calendar (11, across Canada, the United Kingdom, Kenya and the United States). Below, upcoming deadlines soonest first, each naming the rule that produced it and adjusting for weekends: Oliver Grant (sample)'s VAT return is due 6 November 2026 because the 7th is a Saturday, under VAT Regulations 1995 reg. 25(1).

The badge under the title reads Decision support, confirm before relying on a date.

TaxOrch product manual · Chapter 10: Planning, deadlines and filing readiness

Decision support, not tax advice. Sample data throughout. 80

Deadlines

Filing and payment dates for every client, computed from each jurisdiction's statutory rules and the tax period on the case.

Decision support - confirm before relying on a date

Due in the next 30 days
0
Nothing due this month

Due in the next 90 days
2

Upcoming obligations
28
Computed on 30 Sept 2026

Clients
11
Canada, United Kingdom, Kenya, United States

Upcoming deadlines
Soonest first. Each date names the rule that produced it.

DUE	CLIENT	OBLIGATION	TYPE	RULE
6 Nov 2026 Fri · In 37 days	Oliver Grant (sample) United Kingdom · 2026-27	VAT return and payment 7 Nov 2026 is a Saturday, so it is due the working day before	Filing	VAT Regulations 1995 reg. 25(1)
7 Nov 2026 Sat · In 38 days	Oliver Grant (sample) United Kingdom · 2026-27	Making Tax Digital quarterly update For the quarter ending 5 Oct 2026	Update	HMRC, Use Making Tax Digital for Income Tax
29 Jan 2027 Fri · In 121 days	Oliver Grant (sample) United Kingdom · 2026-27	First payment on account 31 Jan 2027 is a Sunday, so it is due the working day before	Payment	Taxes Management Act 1970 s. 59A(2)(a)
29 Jan 2027 Fri · In 121 days	Priya Nair (sample) United Kingdom · 2026-27	First payment on account 31 Jan 2027 is a Sunday, so it is due the working day before	Payment	Taxes Management Act 1970 s. 59A(2)(a)

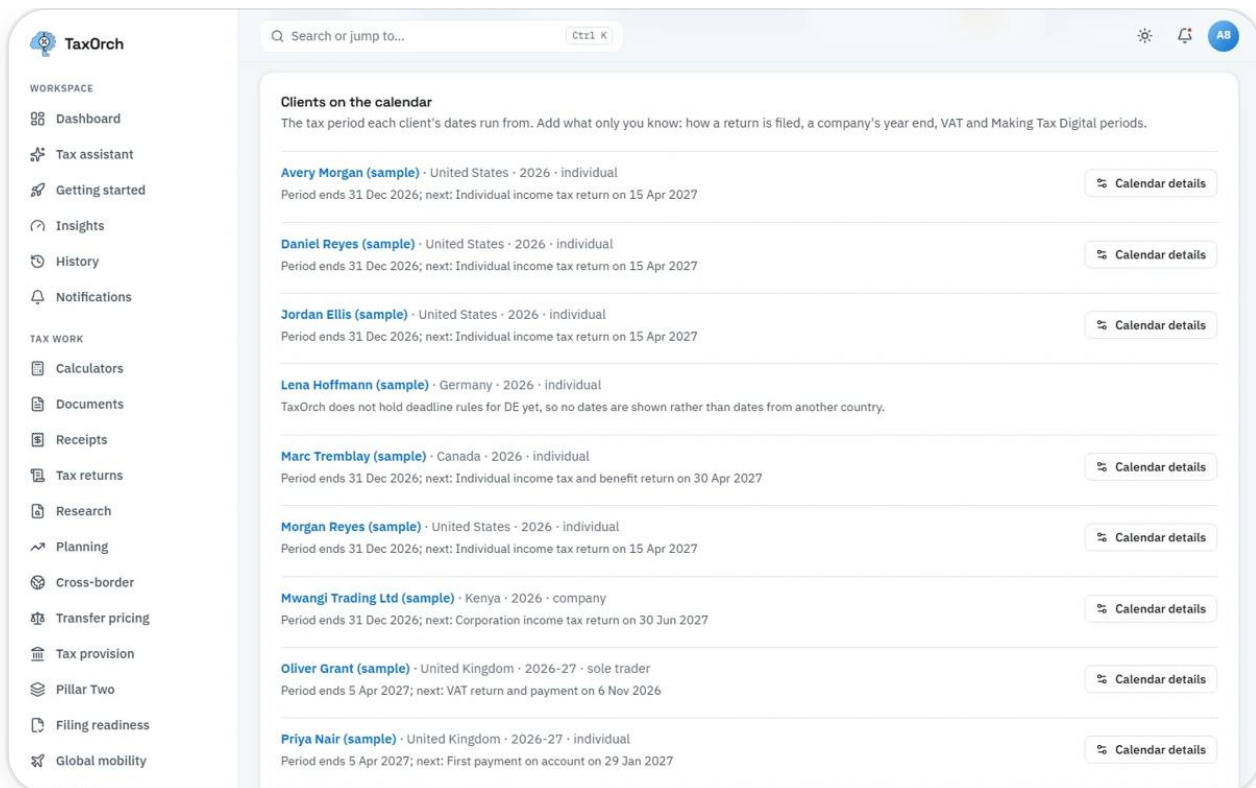
Deadlines: each date computed from the statutory rule, named in the last column.

What changed

Adding a client's tax period to the calendar adds their obligations to the list and the tiles.

4 Read the list by date and by client

The by-date list continues through first payments on account (29 January 2027, Taxes Management Act 1970 s. 59A(2)(a)), a Self Assessment balancing payment (s. 59B(4)) and US Form 1040 filings and payments on 15 April 2027 (IRC sec. 6072(a) and 6151(a)). The Clients view shows each client's period and next obligation, and says when TaxOrch does not hold deadline rules for a country: for Lena Hoffmann (sample) in Germany no dates are shown rather than dates from another country.



Clients on the calendar: period end and next obligation, and an honest gap for Germany.

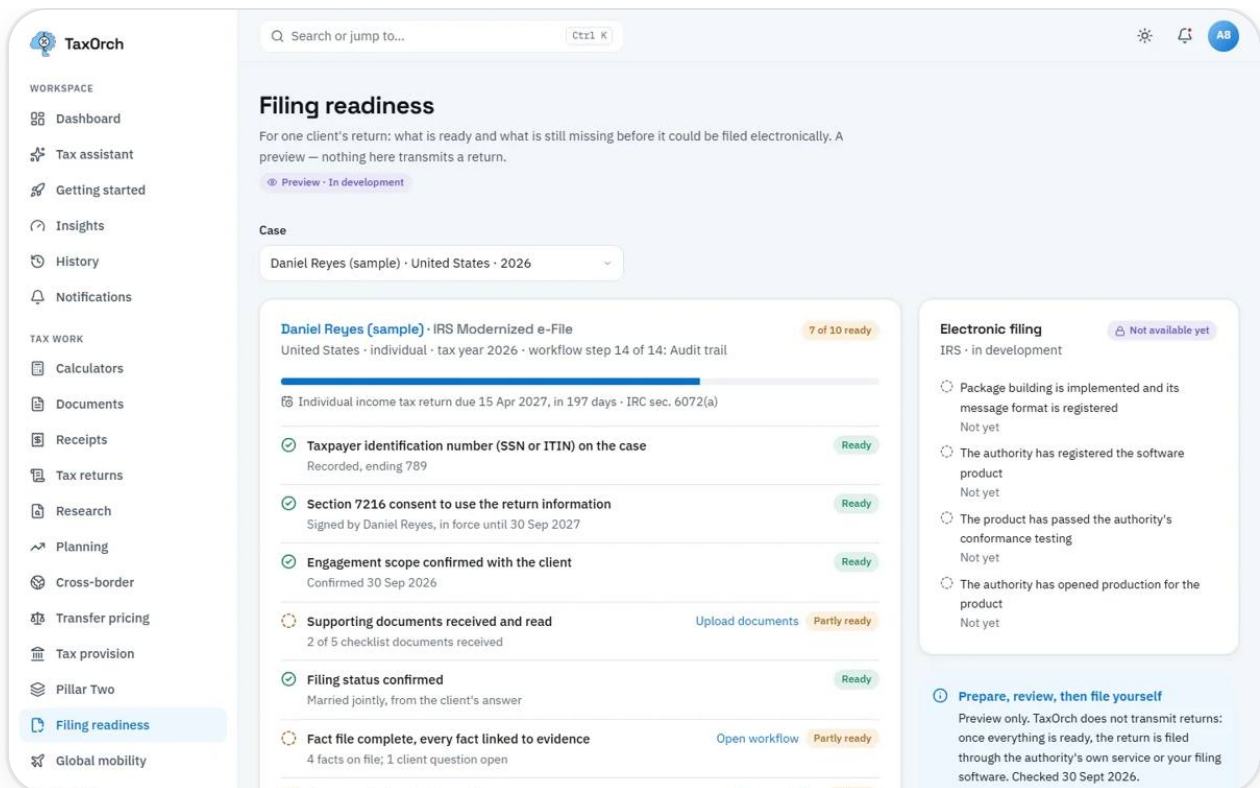
What changed

Calendar details lets you add what only you know: how a return is filed, a company's year end, VAT and MTD periods.

5 IRS filing readiness (Preview, In development)

Choose Filing readiness and a case. For Daniel Reyes (sample), IRS Modernized e-File, the checklist shows 7 of 10 ready: taxpayer identification number, 7216 consent, engagement scope, filing status, maker-checker review, separate-reviewer sign-off and no open issues are Ready; documents and the fact file are Partly ready; calculated figures are Missing because the rules engine declined. The panel Electronic filing reads Not available yet and lists the four authority steps not yet done.

The note at the bottom is the rule: prepare, review, then file yourself through the authority's own service or your filing software. TaxOrch does not transmit returns.



IRS readiness preview: what is ready and what is missing, and electronic filing marked Not available yet.

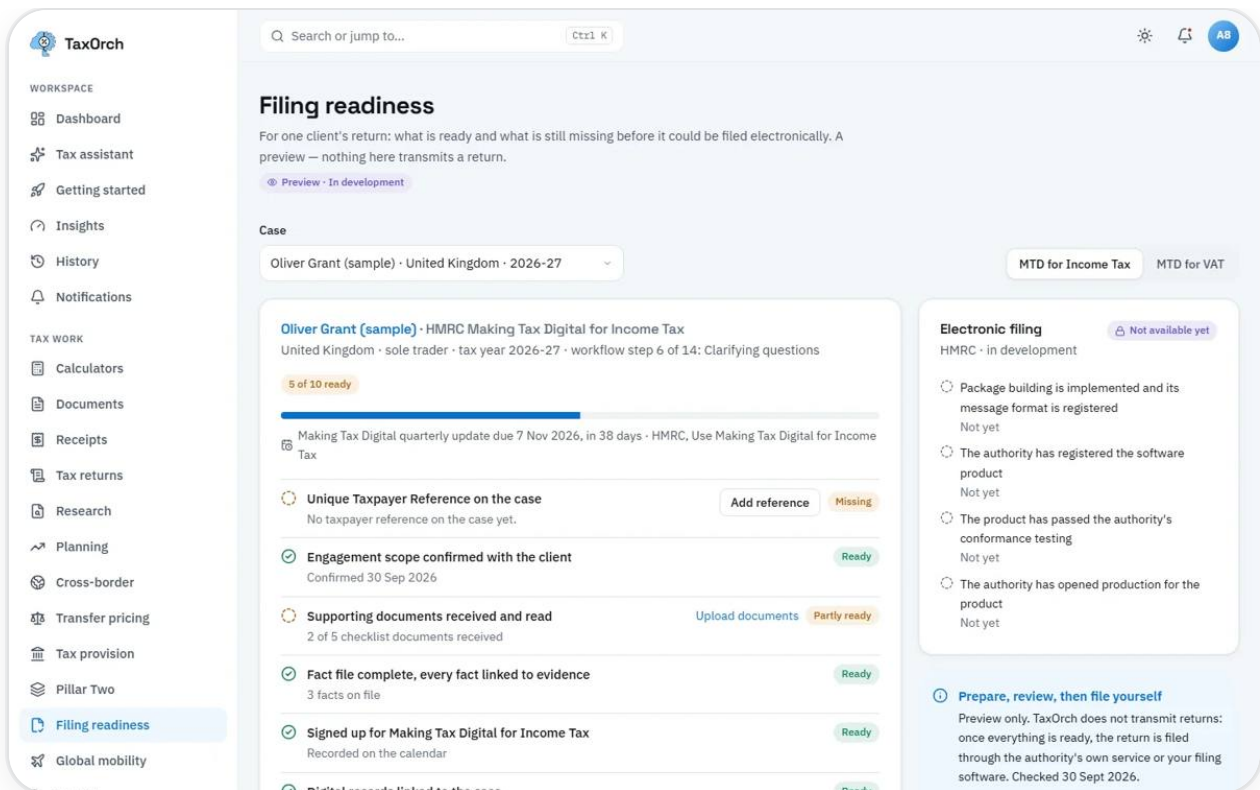
What changed

Each requirement links to the step that clears it (Upload documents, Open workflow).

6

HMRC Making Tax Digital readiness (Preview, In development)

For Oliver Grant (sample), a UK sole trader for 2026-27, the checklist can be viewed for MTD for Income Tax or MTD for VAT. It shows 5 of 10 ready, the quarterly update due 7 November 2026, and a Missing unique taxpayer reference with an Add reference button. Electronic filing is again Not available yet.



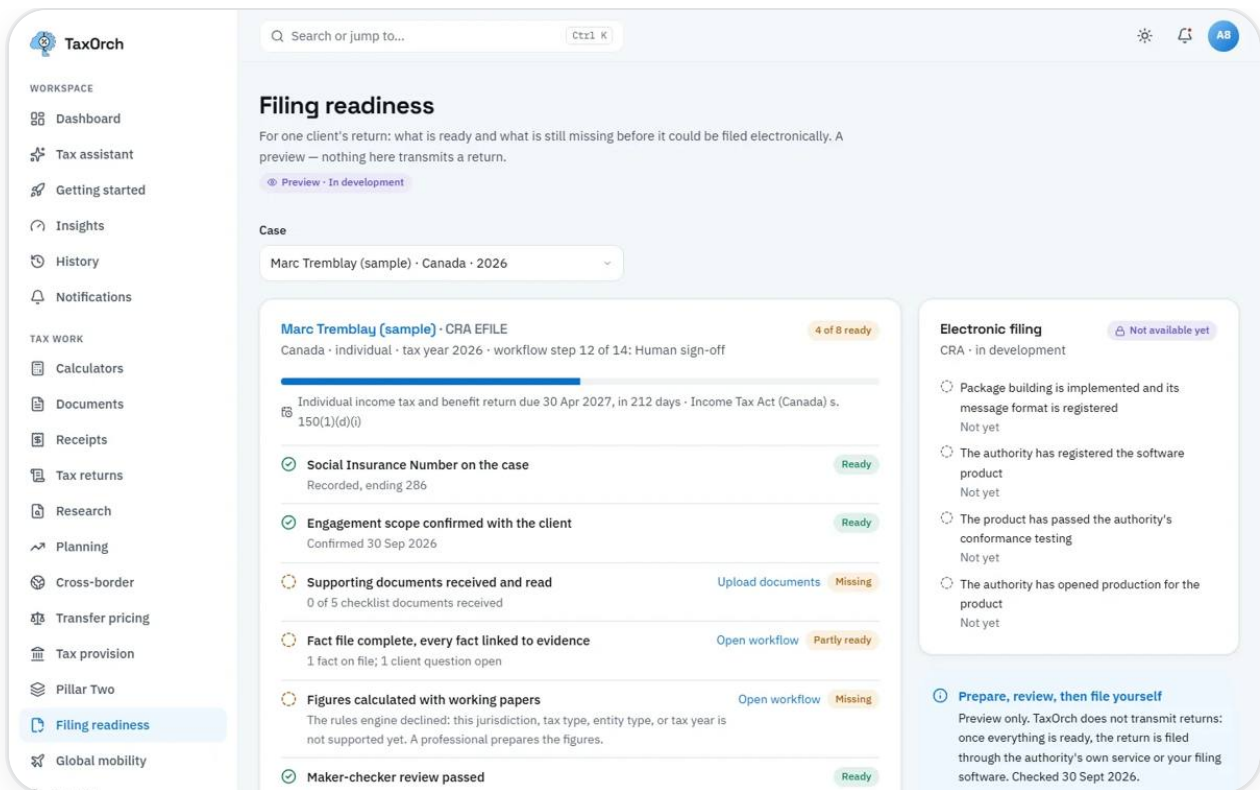
HMRC MTD readiness preview: the quarterly update date, and the taxpayer reference still to add.

What changed

Adding the reference and the missing documents raises the ready count; nothing is submitted.

7 CRA readiness (Preview, In development)

For Marc Tremblay (sample), Canada 2026, CRA EFILE readiness shows 4 of 8 ready: the Social Insurance Number and engagement scope recorded, documents Missing (0 of 5 received), the fact file Partly ready, calculated figures Missing because the rules engine declined, the return due 30 April 2027 under the Income Tax Act s. 150(1)(d)(i).



CRA readiness preview: four of eight ready, with the statutory due date named.

What changed

Each Missing item names the screen that clears it.

Tips

- Enter alternatives as differences from the baseline, not full fact sets; it keeps the comparison readable.
- Add a client's filing method and year end in Calendar details; the calendar only computes what it has been told.
- Use readiness as a checklist for the file, not as a filing step: the filing happens in the authority's service.

Limits

- Scenario comparison shows no tax figure and no recommendation where the year's figures are not verified.
- Deadline rules are held for some countries only; where they are not, no dates are shown.
- Filing readiness is a preview and in development. TaxOrch is not registered with the IRS, HMRC or CRA to transmit returns and never transmits one.
- Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

Related

[Tax planning and scenarios \(/product/planning\)](/product/planning)

[Tax deadlines feature \(/features/tax-deadlines\)](/features/tax-deadlines)

[Tax calendar \(/resources/tax-calendar\)](/resources/tax-calendar)

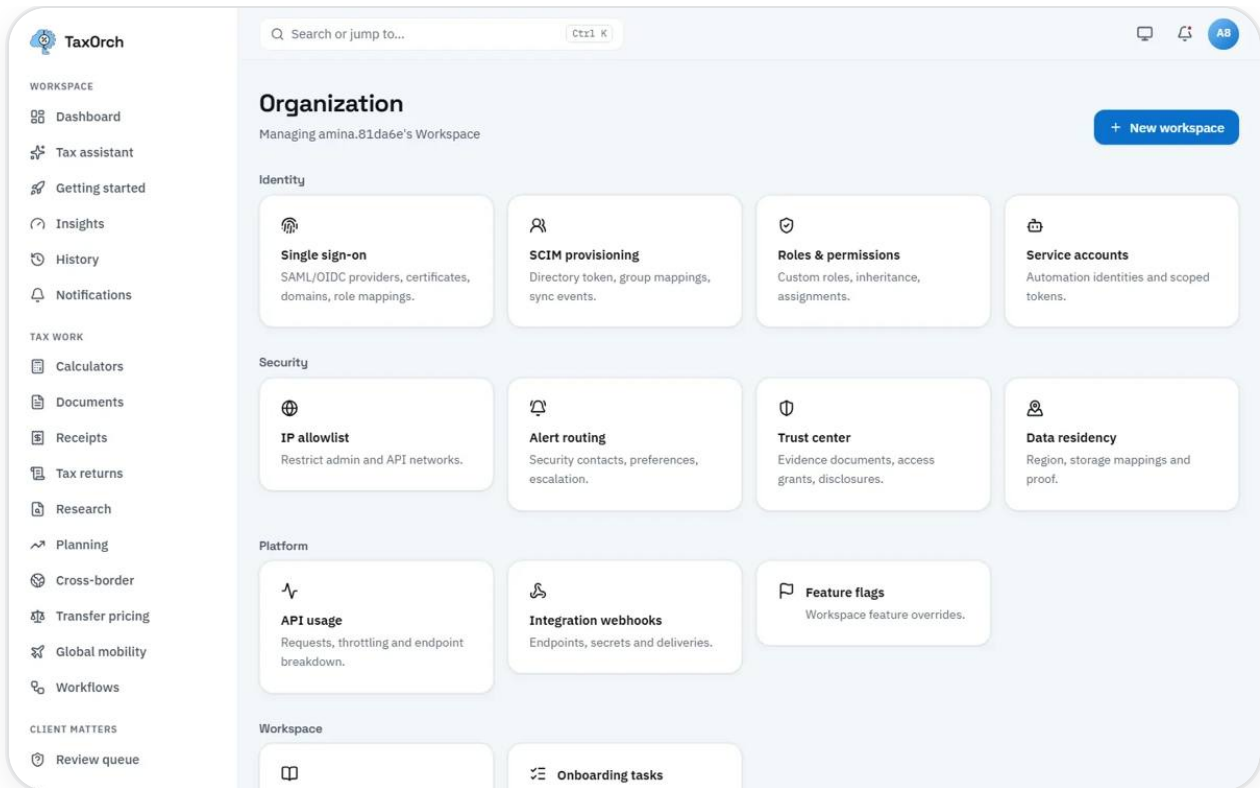
Team, roles and security

Everything an administrator or a security reviewer needs lives on the Organisation page. This chapter goes through it in the order a new firm sets it up: people and roles, sign-in, provisioning, periodic review, support access, the audit log and its delivery, encryption keys, data residency, retention and legal hold, export, and the trust centre.

14 min read · Workspace owners and administrators on the Business plan, and the security reviewer evaluating TaxOrch.

1 Open the organisation page

Choose Organisation. Identity: single sign-on, SCIM provisioning, roles and permissions, service accounts. Security: IP allowlist, alert routing, trust centre, data residency. Platform: API usage, integration webhooks, feature flags. Each card is one setting page.



The organisation page: every administrator setting, grouped.

What changed

Each card opens its page; the workspace cards at the bottom cover onboarding tasks and members.

2 Invite members and set roles

Members are invited by email and given a role: Owner, Admin, Reviewer, Preparer or Viewer. Roles decide who can prepare, who can review, and who can sign off; the engagement workflow enforces that the preparer and the reviewer are different people (chapter 4). Roles can also be set from a directory group (next step).

What changed

The member appears in the list with their role; an access review will later ask you to keep or revoke it.

3 Turn on single sign-on

Single sign-on lets the team sign in with the firm's identity provider over SAML 2.0 or OpenID Connect. Add provider takes the metadata; Test connection checks it. The sample workspace has two providers: Northbridge staff directory (sample), SAML 2.0, active since 30 September 2026, and Microsoft Entra ID (sample tenant), OpenID Connect, configured but not active. Sign-in with a provider is optional, so password sign-in still works, and TaxOrch starts every sign-in.

Single sign-on

Let your team sign in with your firm's identity provider over SAML or OpenID Connect, with groups mapped to TaxOrch roles.

[+ Add provider](#)

PROVIDER	PROTOCOL	STATUS	SIGN-IN	ACTIVE SINCE
Microsoft Entra ID (sample tenant)	OpenID Connect · Microsoft Entra ID	Configured, not active	Optional	—
Northbridge staff directory (sample)	SAML 2.0	Active	Optional	30 Sept 2026, 13:07

Northbridge staff directory (sample) SAML 2.0 · active [Close](#)

[Test connection](#) [Disable](#) [Edit](#) [Mapping preview](#) [Upload SAML metadata](#) [Rotate certificate](#) [Rotation status](#) [Delete](#)

Identity provider entity ID	https://sso.northbridge.example/saml/idp
Sign-in URL	https://sso.northbridge.example/saml/sso
Metadata	Uploaded
Name ID format	Email address
Email from	email claim

Single sign-on: a SAML provider active, a Microsoft Entra ID provider configured and waiting.

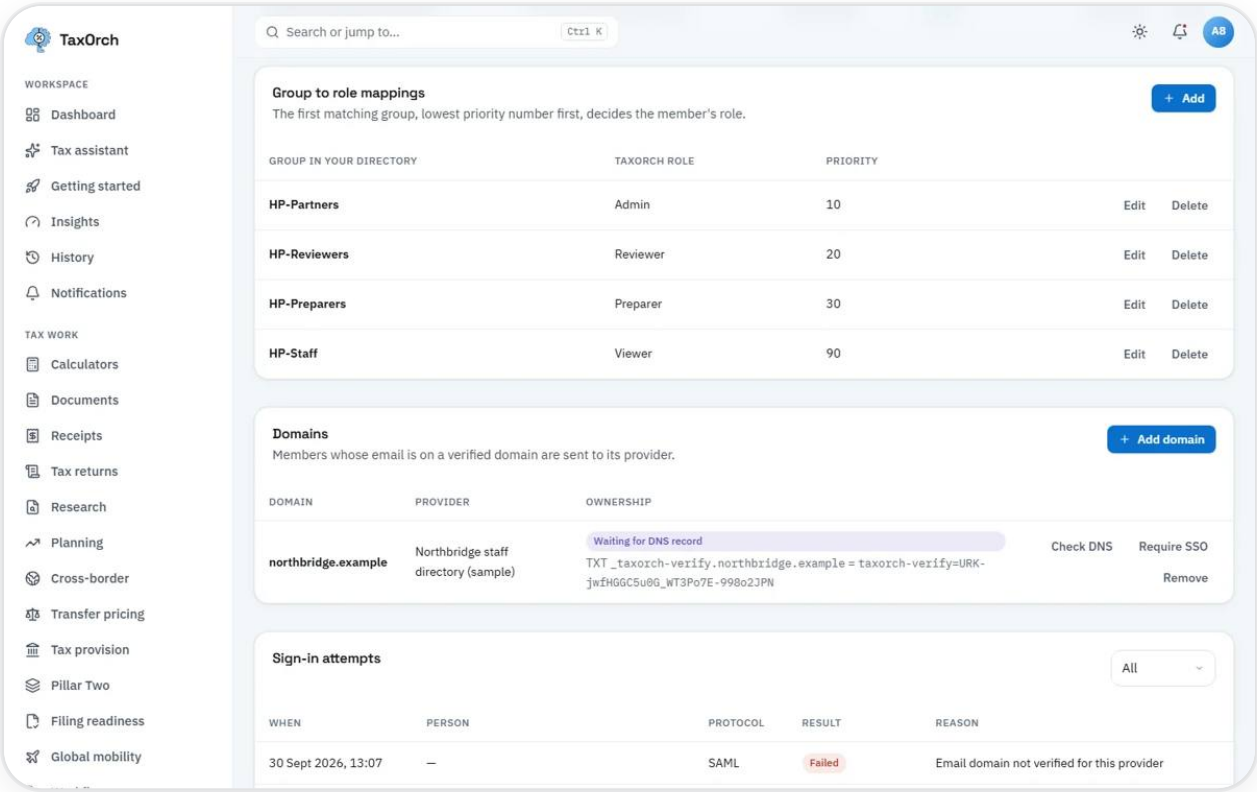
What changed

An activated provider shows Active with the time; the certificate can be rotated from the same row.

4 Map directory groups to roles and verify your domain

Group to role mappings assign a TaxOrch role from the first matching directory group, lowest priority number first: partners to Admin, reviewers to Reviewer,

preparers to Preparer, staff to Viewer. Domains sends members whose email is on a verified domain to their provider; ownership is proven with a DNS TXT record and the screen shows Waiting for DNS record until it is found. Sign-in attempts lists every attempt with the result and reason.

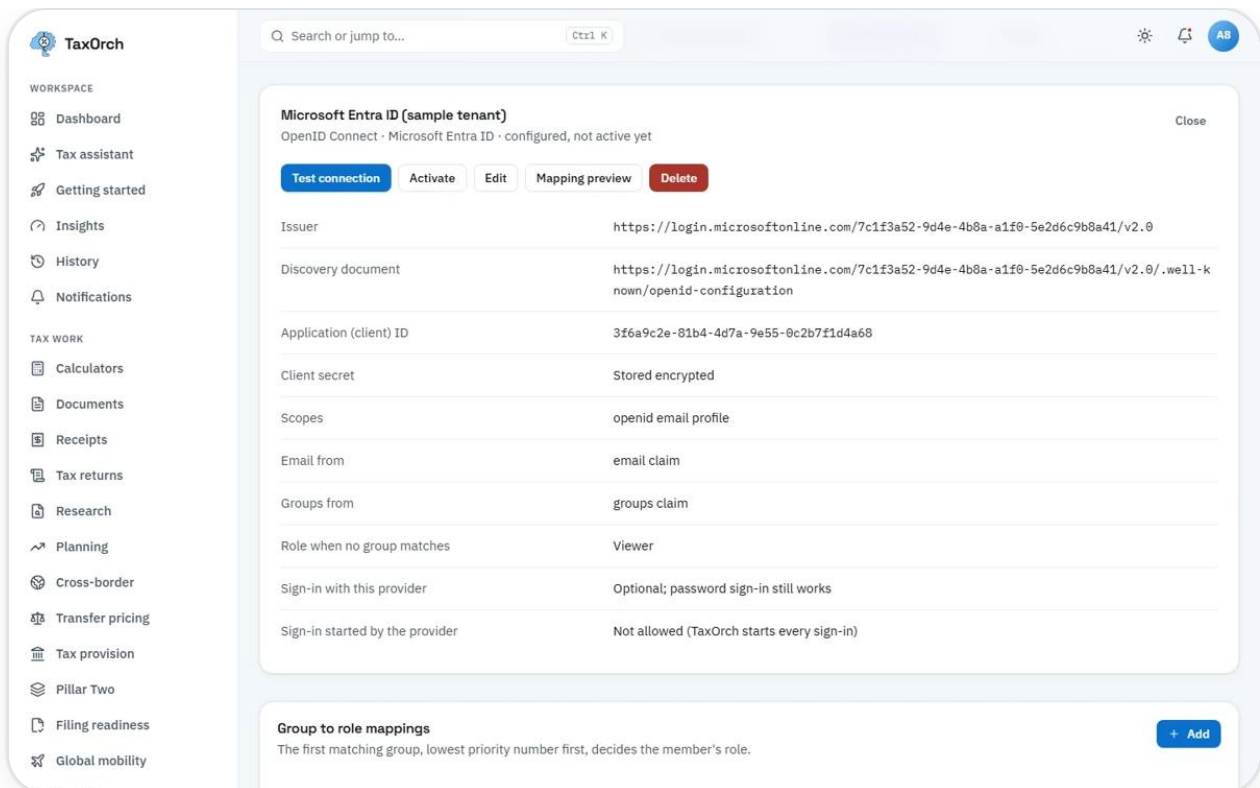


Group mappings, the domain waiting for its DNS record, and a failed sign-in with its reason.

What changed
A verified domain lets you Require SSO for it; a failed attempt appears in the log with its reason.

5 Microsoft sign-in

The Microsoft Entra ID provider uses OpenID Connect with the tenant's issuer and discovery document, the application (client) ID, a client secret stored encrypted, and the openid, email and profile scopes. Email and groups come from claims; the role when no group matches is Viewer. Activate turns it on once Test connection passes.



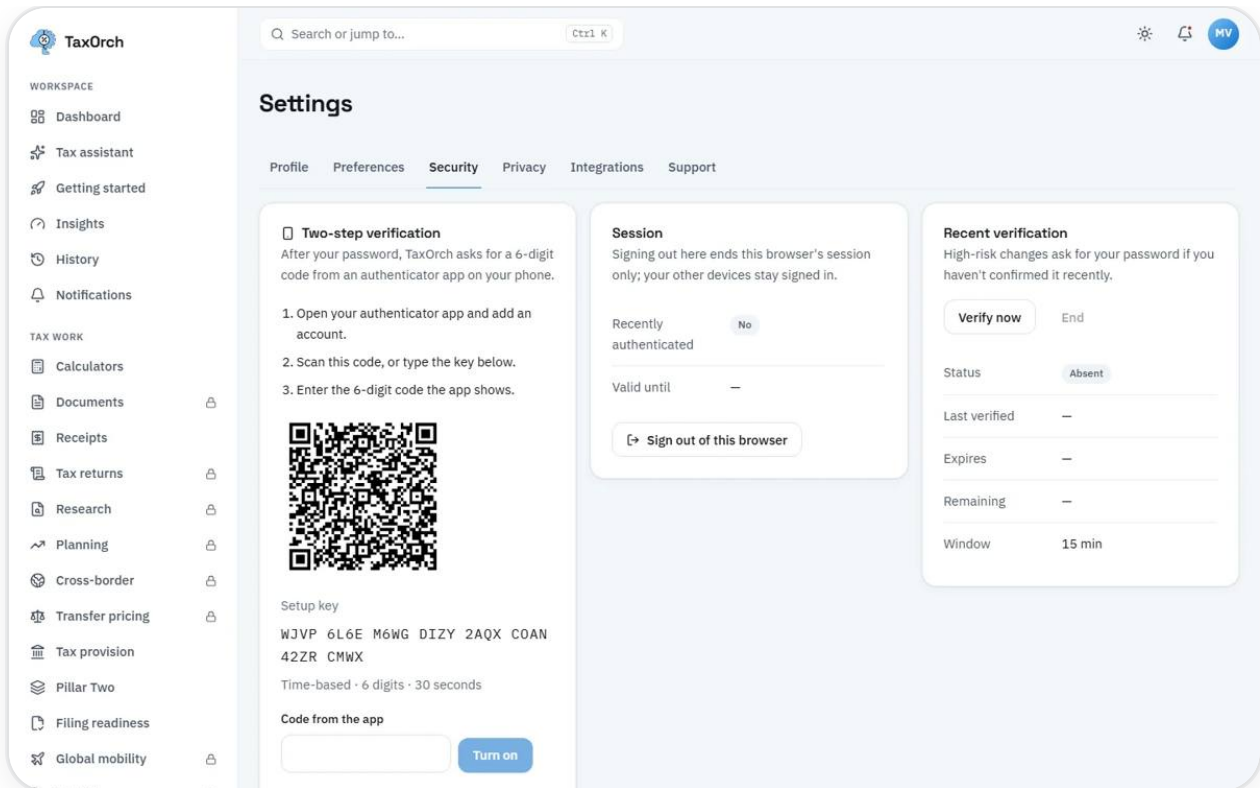
Microsoft sign-in: the OpenID Connect settings, configured and ready to activate.

What changed

After Activate the provider's status changes from Configured, not active to Active.

6 Turn on two-step verification

In Settings, Security, each person can turn on two-step verification: add an account in an authenticator app, scan the code or type the setup key (time-based, 6 digits, 30 seconds), enter the code and choose Turn on. Once on, every password sign-in also asks for a code, and recovery codes work if the phone is lost. The same tab shows the session and recent verification: high-risk changes ask for the password again within a 15-minute window.



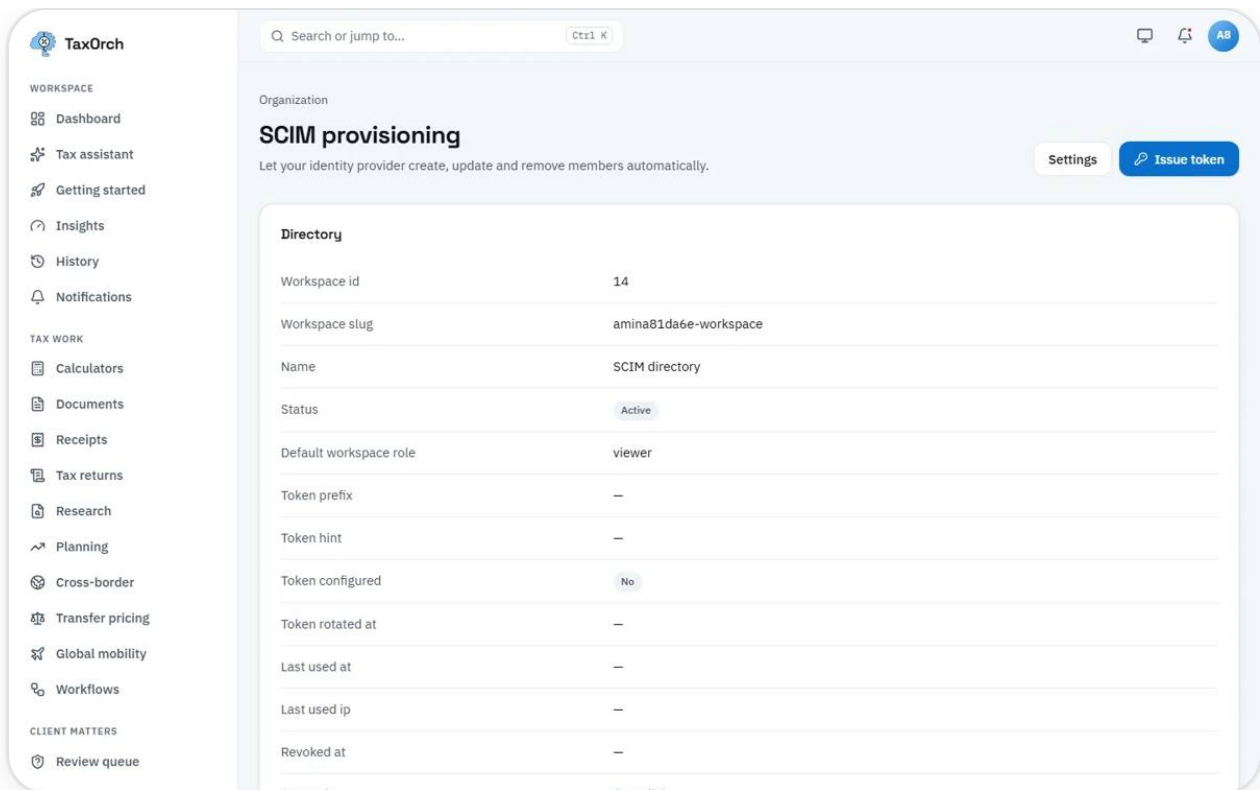
Two-step verification setup: scan the code, enter the six digits, turn it on.

What changed

The panel shows On with a Turn off button, and Recent verification shows Valid with its expiry.

7 Provision users automatically with SCIM

SCIM provisioning lets the identity provider create, update and remove members. The Directory panel shows the workspace id and slug, the directory name and status, the default workspace role (viewer), and the token state: prefix, hint, whether configured, when rotated, last used and from where. Issue token creates the token to paste into the provider.



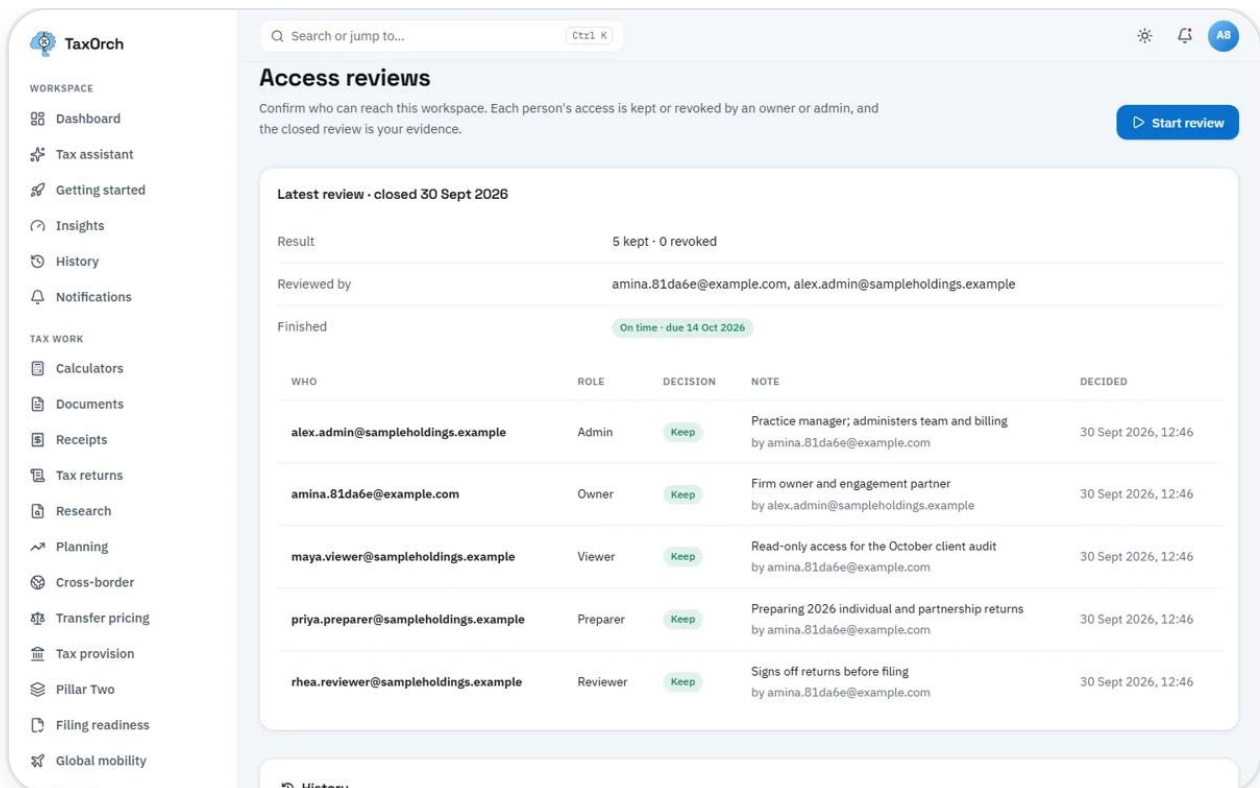
SCIM provisioning: the directory active, the token not yet issued.

What changed

After Issue token the panel shows the token prefix, when it was rotated and when it was last used.

8 Run a periodic access review

Access reviews confirm who can reach the workspace. Start review lists every member; an owner or admin keeps or revokes each one with a note, and the closed review is the evidence. The latest sample review closed on 30 September 2026: five kept, none revoked, reviewed by two people, finished on time against a 14 October due date. A person cannot decide their own row: the owner's access was kept by the admin.



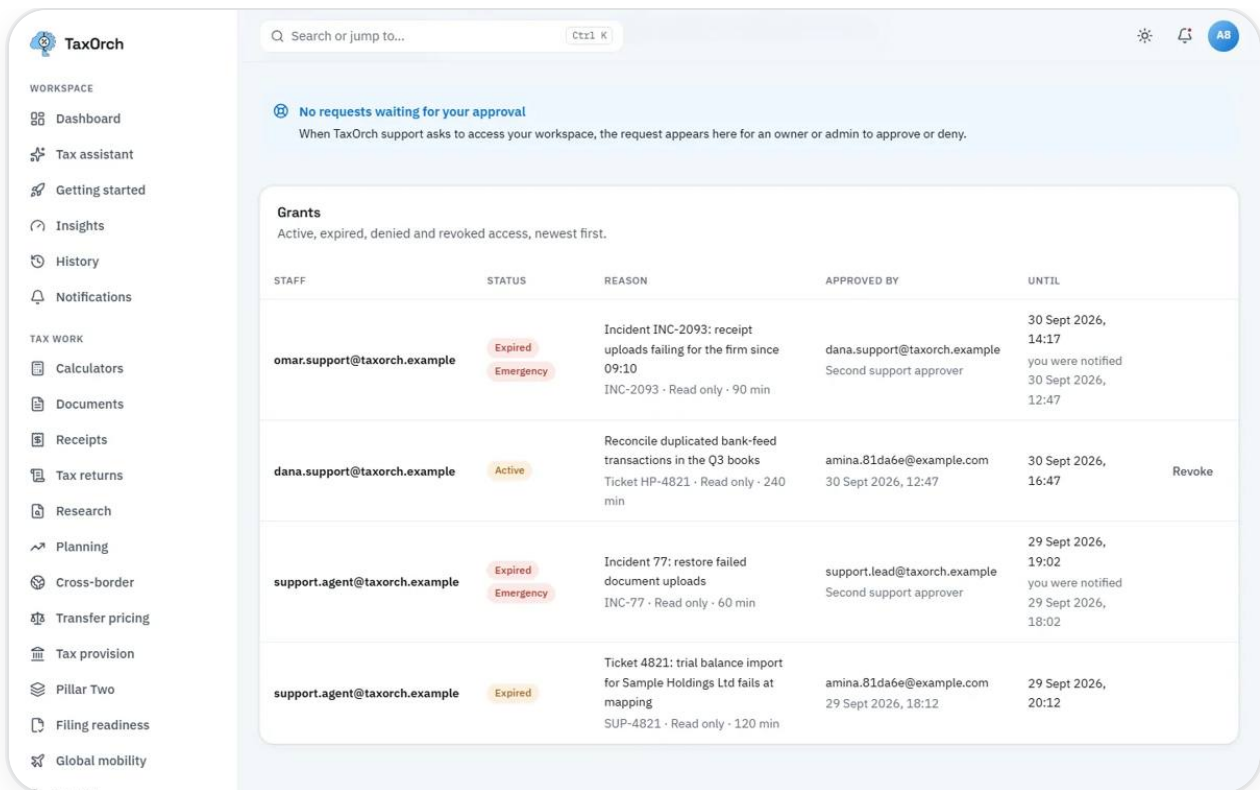
A closed access review: every member kept or revoked, with the note and the decider.

What changed

The closed review moves to History; a review past its due date is marked late.

9 Approve or deny support access

TaxOrch support cannot open your workspace on its own. A request appears on the Support access page for an owner or admin to approve or deny, with the reason, the ticket, the scope (read only) and a time limit. Grants lists active, expired, denied and revoked access, newest first: for example, a 240-minute read-only grant to reconcile duplicated bank-feed transactions, approved by the firm owner, with a Revoke link. Emergency grants approved by a second support approver are shown and the workspace is notified.



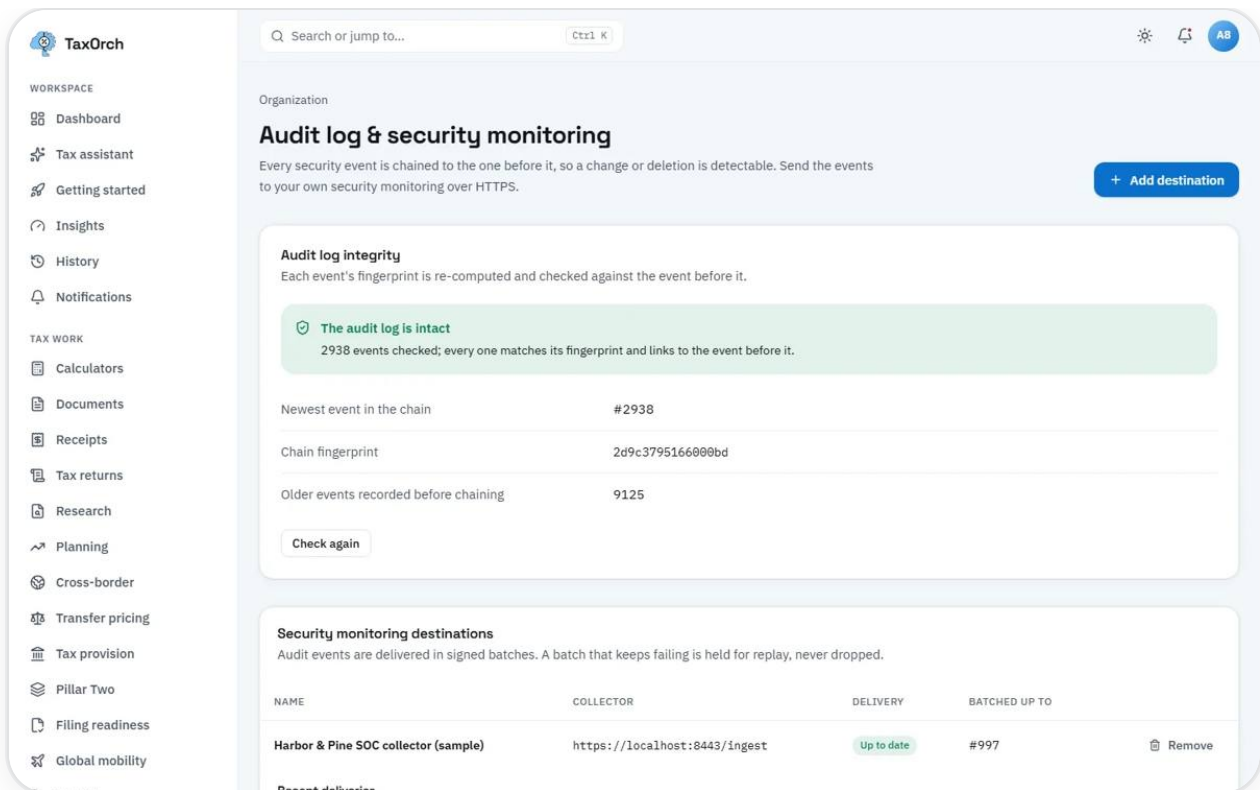
Support access grants: reason, scope, time limit, approver, and Revoke on the active one.

What changed

A pending request appears in the banner at the top with Approve and Deny; an approved grant expires on its own at the time limit.

10 Check the audit log is intact

Every security event is chained to the one before it, so a change or deletion is detectable. Audit log integrity re-computes each event's fingerprint and checks it against the previous event. On the sample workspace the log is intact: 2,938 events checked, every one matching its fingerprint and linking to the event before it, with the newest event number, the chain fingerprint and the count of older events recorded before chaining began. Check again re-runs it.



Audit log integrity: every event checked against its fingerprint and the one before it.

What changed

A broken chain would be reported with the first event that fails; Check again shows the time of the last check.

11 Deliver audit events to your security monitoring

Add destination sends audit events to your own collector over HTTPS in signed batches; a batch that keeps failing is held for replay, never dropped. The sample destination, Northbridge SOC collector (sample), is up to date and batched up to event 3,042. Recent deliveries list each batch's event range, count, status, the collector's response, chain fingerprint and time. Recent audit events shows the action, category and severity of each event.

Security monitoring destinations
Audit events are delivered in signed batches. A batch that keeps failing is held for replay, never dropped.

NAME	COLLECTOR	DELIVERY	BATCHED UP TO	
Northbridge SOC collector (sample)	https://localhost:8443/ingest	Up to date	#3042	Remove

Recent deliveries

EVENTS	COUNT	STATUS	COLLECTOR ANSWERED	CHAIN FINGERPRINT	DELIVERED
#2811-#3042	24	Delivered	HTTP 202	e49b4fd72d9	30 Sept 2026, 14:33
#1448-#2769	200	Delivered	HTTP 202	89b3c7ec1059	30 Sept 2026, 14:33
#1010-#1447	200	Delivered	HTTP 202	5085e8385ca8	30 Sept 2026, 14:33
#885-#997	15	Delivered	HTTP 202	4efe94926788	30 Sept 2026, 12:48
#864-#864	1	Delivered	HTTP 202	7772861447e1	30 Sept 2026, 12:37
#5-#856	179	Delivered	HTTP 202	fc9c94e49424	30 Sept 2026, 12:37

Recent audit events

ACTION	CATEGORY	SEVERITY	CREATED AT
audit_event.query.workspace	system	Info	30 Sept 2026, 17:24
identity_provider.saml.service_provider	identity	Info	30 Sept 2026, 17:23

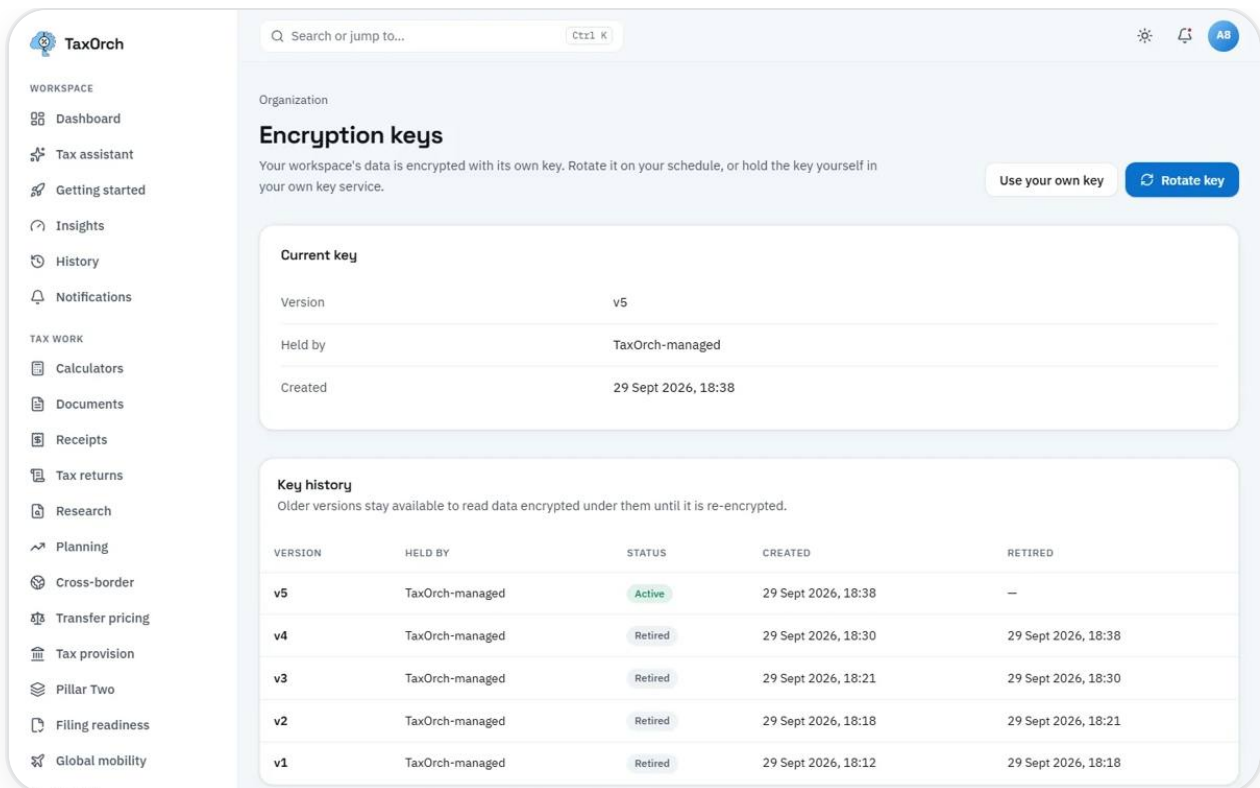
Signed batches delivered to the firm's own collector, each with its response and chain fingerprint.

What changed

A destination's delivery status reads Up to date, Behind or Held for replay; each batch is listed as it is delivered.

12 Rotate the encryption key or use your own

The workspace's data is encrypted with its own key. Rotate key creates a new version on your schedule; older versions stay available to read data encrypted under them until it is re-encrypted. Use your own key holds the key in your own key service. The sample workspace is on version 5, TaxOrch-managed, with four retired versions in the history.



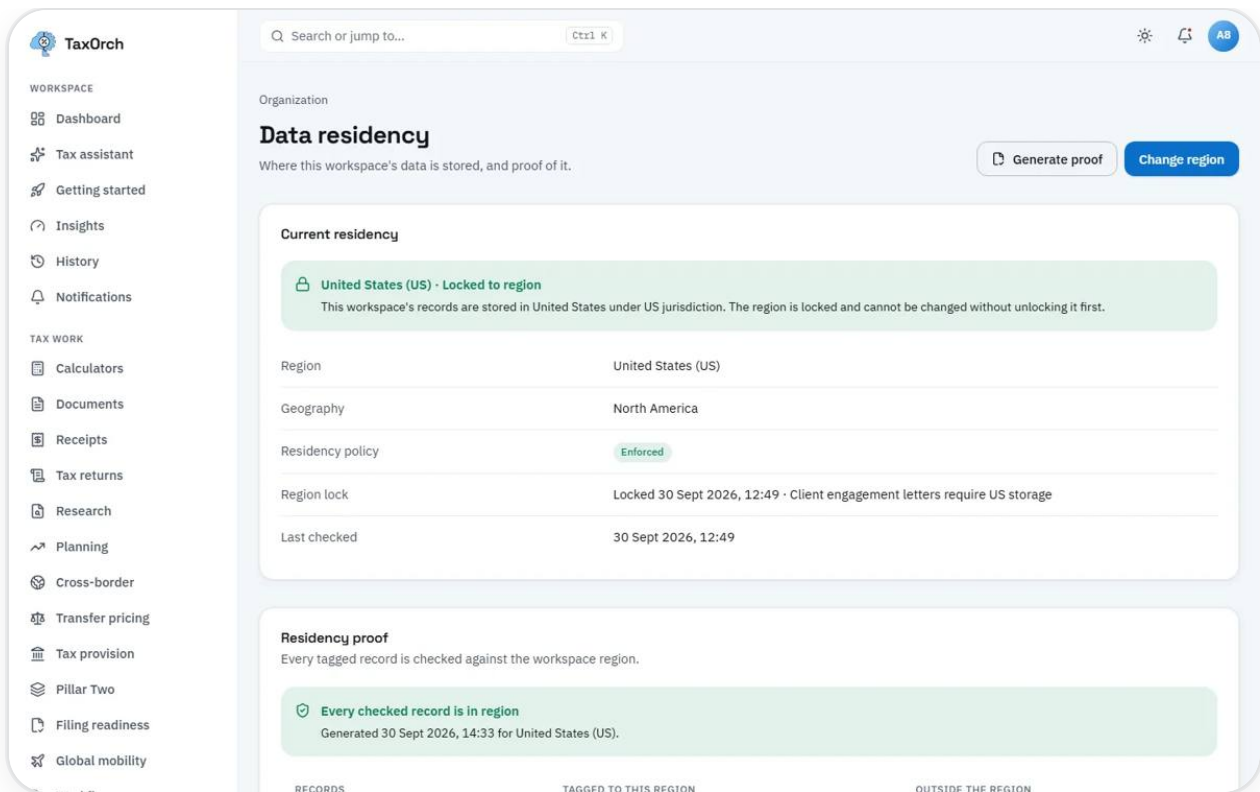
Encryption keys: the active version, the retired history, and the option to hold the key yourself.

What changed

Rotation adds a new Active row and retires the previous one with the time.

13 Set and prove data residency

Data residency shows where the workspace's records are stored. The sample workspace is locked to the United States under US jurisdiction, policy Enforced, with the reason for the lock recorded (client engagement letters require US storage) and who locked it when. Generate proof checks every tagged record against the region: every checked record is in region, generated on 30 September 2026.



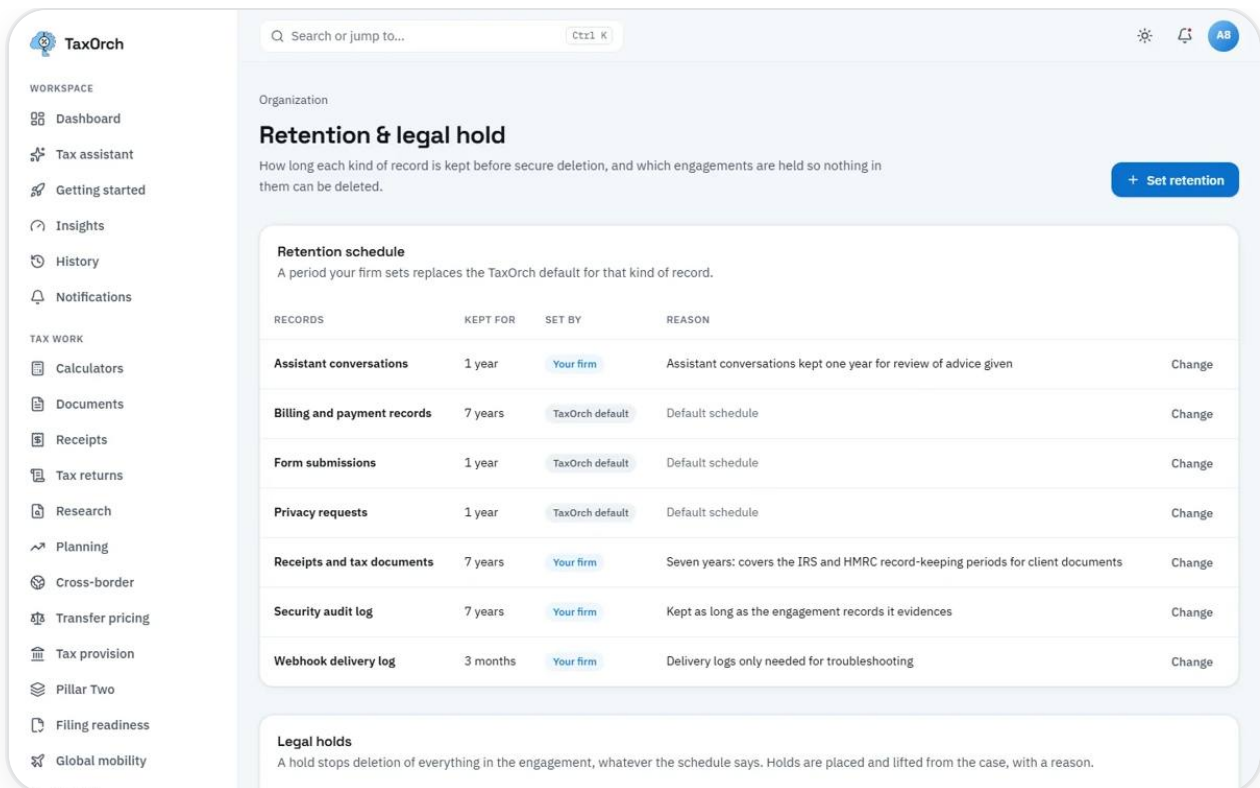
Data residency: the region, the lock and its reason, and a generated proof that every checked record is in region.

What changed

A new proof is dated and lists records tagged to the region and any outside it.

14 Set retention periods and legal holds

Retention & legal hold sets how long each kind of record is kept before secure deletion; a period the firm sets replaces the TaxOrch default and records the reason. The sample firm keeps receipts and tax documents and the security audit log for seven years, assistant conversations for one year and webhook delivery logs for three months. Legal holds stop deletion of everything in an engagement, whatever the schedule says.



The retention schedule: each record kind, its period, who set it and why.

What changed

A changed period shows Your firm with the reason; the next deletion run preview updates.

15 See holds and preview the next deletion run

Legal holds lists each held engagement, year, reason and who placed it: Daniel Reyes (sample), US 2026, held because an IRS examination notice was received. Next deletion run is a preview only: nothing is deleted from the screen, and records under a legal hold are never included whatever their age. On the sample workspace nothing is past its retention period.

The screenshot shows the TaxOrch workspace interface. On the left is a sidebar with navigation links: Workspace (Dashboard, Tax assistant, Getting started, Insights, History, Notifications) and Tax Work (Calculators, Documents, Receipts, Tax returns, Research, Planning, Cross-border, Transfer pricing, Tax provision, Pillar Two, Filing readiness, Global mobility). The main area has a search bar at the top. Below it, the 'Legal holds' section shows a table with one row for 'Daniel Reyes (sample)' under 'US - 2026', with a reason 'IRS examination notice received for tax year 2026; preserve all workpapers and correspondence' and a 'PLACED' date of '30 Sept 2026'. Below this is the 'Next deletion run' section, which includes a green banner stating 'Nothing is past its retention period' and a table of records.

RECORDS	OLDER THAN	WOULD BE DELETED
Assistant conversations	30 Sept 2025, 14:32	0
Security audit log	2 Oct 2019, 14:32	0
Receipts and tax documents	2 Oct 2019, 14:32	0
Webhook delivery log	2 Jul 2026, 14:32	0
Billing and payment records	2 Oct 2019, 14:32	0
Form submissions	30 Sept 2025, 14:32	0
Privacy requests	30 Sept 2025, 14:32	0

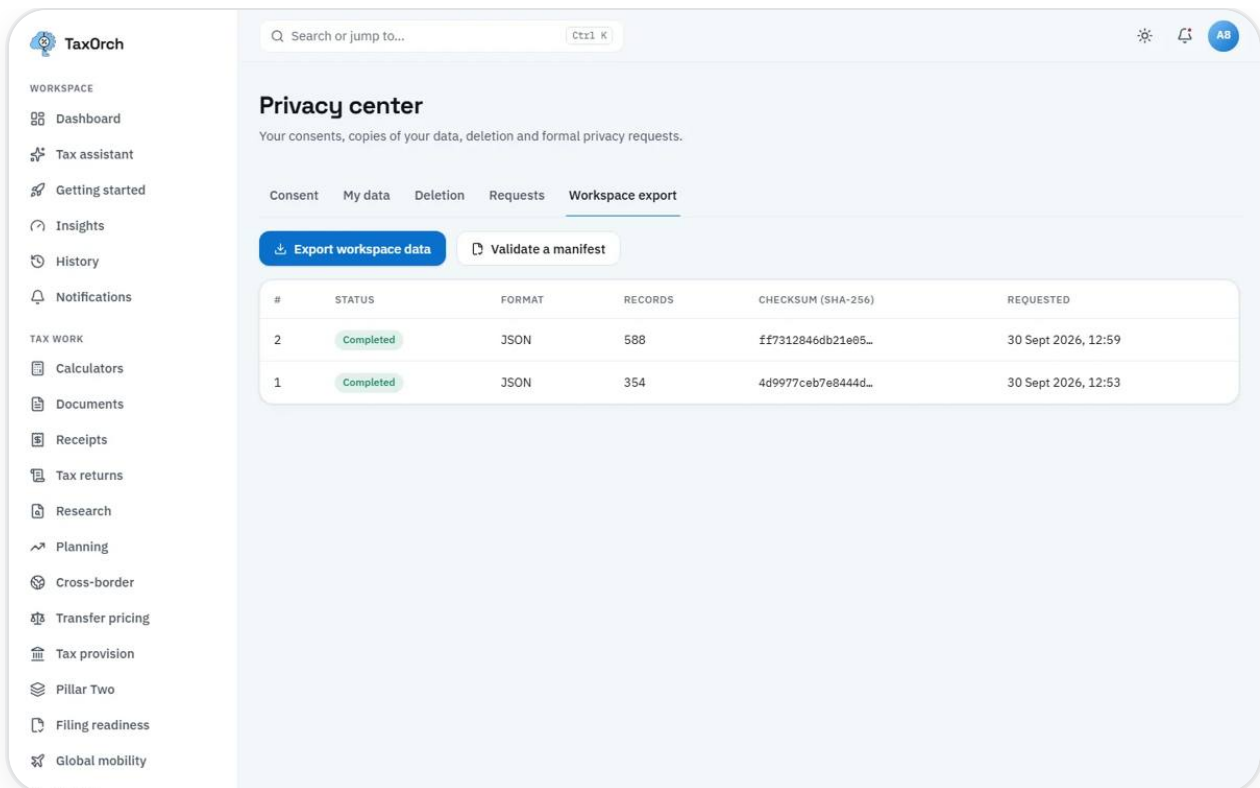
One engagement on legal hold, and the deletion run preview with nothing due.

What changed

Placing a hold from the case adds a row here and a banner on the case; lifting it records who did so.

16 Export the workspace

Privacy centre, Workspace export produces a full copy of the workspace's data as JSON, with the record count and a SHA-256 checksum for each export. Validate a manifest checks a downloaded export against its checksum. Two completed exports are shown on the sample workspace, 354 and 588 records.



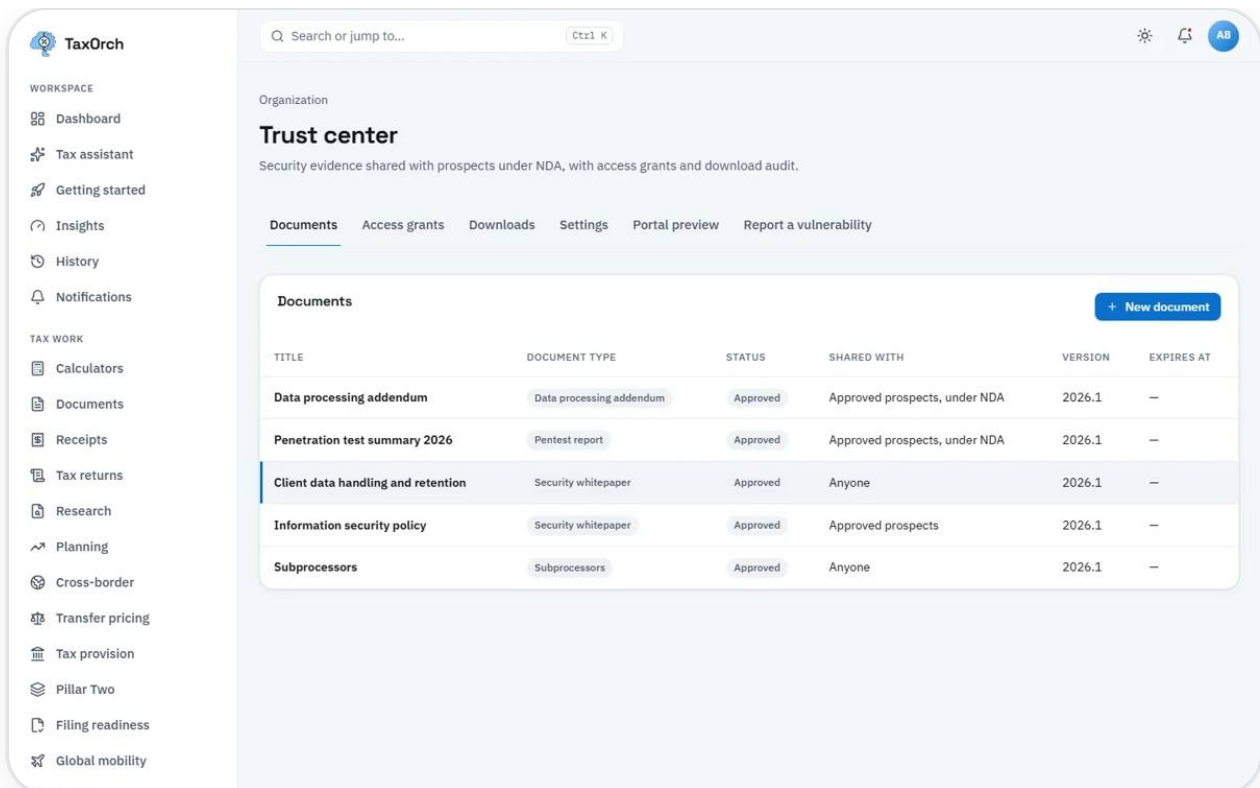
Workspace export: completed exports with record counts and checksums.

What changed

A new export appears as Requested, then Completed with its checksum.

17 Share security evidence from the trust centre

The trust centre holds the documents a prospect's security review asks for, with access grants under NDA and a download audit. The sample documents are a data processing addendum, a 2026 penetration test summary, two security whitepapers and a subprocessors list, each approved, versioned and marked who it is shared with. Other tabs: Access grants, Downloads, Settings, Portal preview and Report a vulnerability.



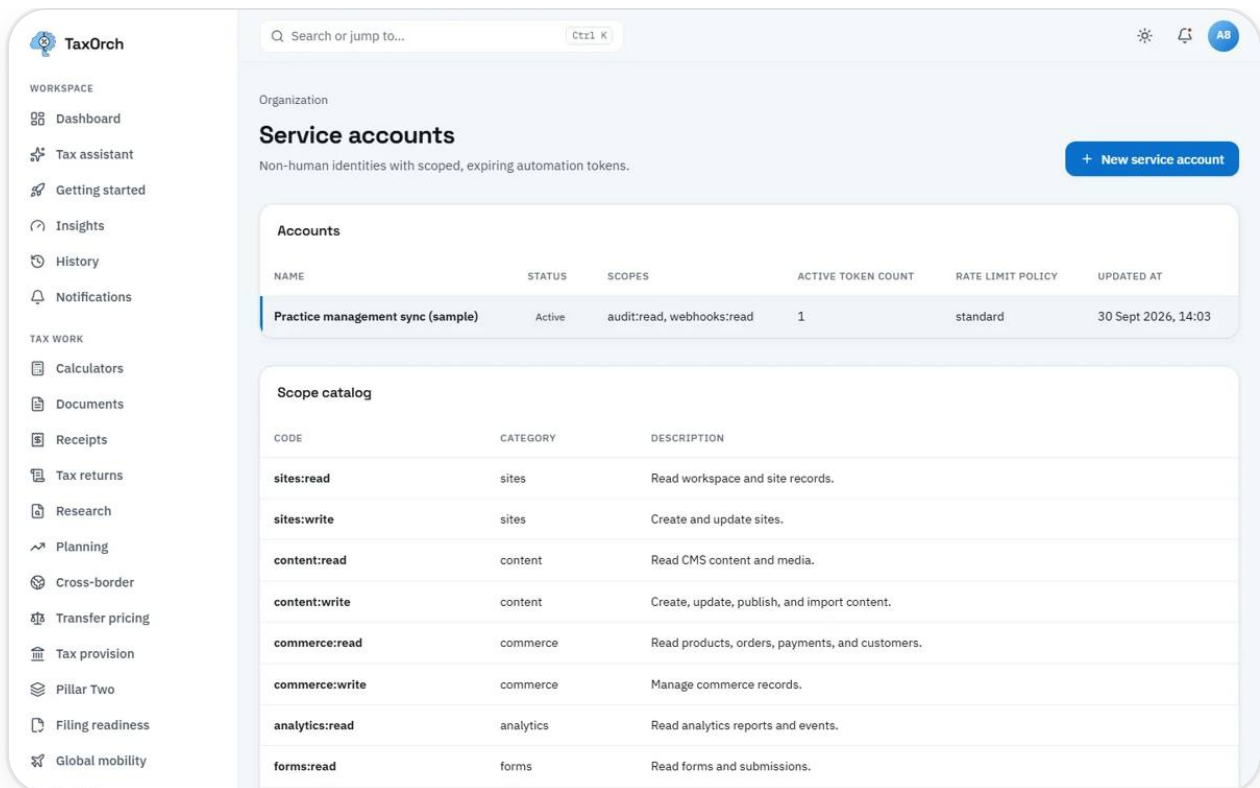
Trust centre documents: what is shared, with whom, and at which version.

What changed

A granted prospect can download the documents they were granted; each download is logged.

18 Service accounts, API and webhooks

Service accounts are non-human identities with scoped, expiring tokens. The sample account, Practice management sync (sample), has the audit:read and webhooks:read scopes, one active token and the standard rate limit; the scope catalogue lists every scope with its category. Integration webhooks deliver events to your endpoints with secrets and a delivery log.



Service accounts: scoped tokens, and the catalogue of scopes they can be given.

What changed

A new account appears with its scopes; a token is shown once, at issue.

Tips

- Turn on two-step verification for owners and admins first, then require SSO on the verified domain.
- Schedule access reviews quarterly; the closed review is what an auditor asks for.
- Set retention by record kind with a reason; the reason is what a reviewer will ask about later.

Limits

- Single sign-on on a real identity provider needs your DNS and tenant; the sample providers are local fixtures.
- Data residency proof covers tagged records in the workspace database.
- Support staff location is taken from the connection, not from device attestation.
- No certification is claimed. Audits are planned; the trust centre holds the evidence that exists.

Related

[Secure AI tax software \(/secure-ai-tax-software\)](/secure-ai-tax-software)

[Trust and security \(/trust\)](/trust)

[Security \(/trust/security\)](/trust/security)

[Enterprises \(/for/enterprises\)](/for/enterprises)

Branding and white-label

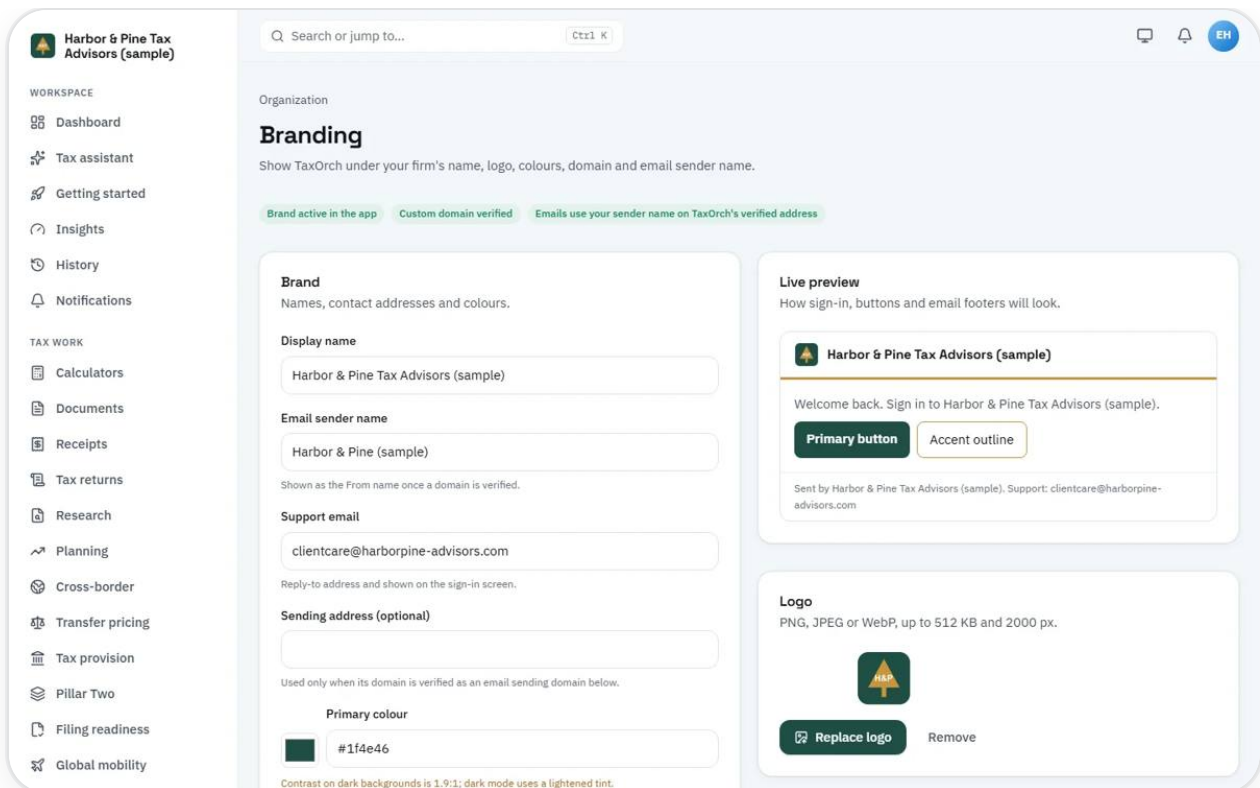
The White-label licence runs TaxOrch under your brand: your name, logo, colours, web address and email sender name, for your clients and staff. TaxOrch hosts and runs it. This chapter shows the sample brand Harbor & Pine Tax Advisors (sample), which is not a real firm.

4 min read · Firms, advisers and fintechs on the White-label licence, and Business customers checking what it adds.

1

Set the brand

Organisation, Branding. Enter the display name, the email sender name (shown as the From name once a domain is verified), the support email (the reply-to, shown on the sign-in screen), an optional sending address, and the primary and accent colours. The live preview shows how sign-in, buttons and email footers will look. Contrast is checked as you type: the sample accent colour is flagged at 2.66:1 on white, below 4.5:1.



Branding: names, addresses and colours, with the live preview and the uploaded logo.

What changed

Three badges at the top read Brand active in the app, Custom domain verified and Emails use your sender name.

2 Upload the logo and check the colours

Logo accepts PNG, JPEG or WebP up to 512 KB and 2,000 pixels. Colour fields warn when contrast is low: dark mode uses a lightened tint of a dark primary, and white button text on a low-contrast accent is flagged as hard to read. Save branding applies it.

What changed

The sidebar, buttons and sign-in screen take the new colours after saving.

3 Verify your own web address

Custom domain serves the app on your domain. Add the domain, choose its use (app domain), and prove ownership with a DNS TXT record; only verified domains show your brand. The sample domain portal.harborpine-advisors.com is Verified as the app domain, with Re-check and Remove beside it.

Harbor & Pine Tax Advisors (sample)

WORKSPACE

- Dashboard
- Tax assistant
- Getting started
- Insights
- History
- Notifications

TAX WORK

- Calculators
- Documents
- Receipts
- Tax returns
- Research
- Planning
- Cross-border
- Transfer pricing
- Tax provision
- Pillar Two
- Filing readiness
- Global mobility

Search or jump to... Ctrl K

clientcare@harborpine-advisors.com

Reply-to address and shown on the sign-in screen.

Sending address (optional)

Used only when its domain is verified as an email sending domain below.

Primary colour

#1f4e46

Contrast on dark backgrounds is 1.9:1; dark mode uses a lightened tint.

Accent colour

#c8963e

Contrast on white is 2.66:1 (below 4.5:1). White button text may be hard to read.

Save branding

Logo

PNG, JPEG or WebP, up to 512 KB and 2000 px.

Replace logo Remove

Custom domain

Serve the app on your own domain. Prove you own it with a DNS TXT record; only verified domains show your brand.

Domain Use

tax.yourfirm.com App domain Add domain

portal.harborpine-advisors.com Verified App domain Re-check Remove

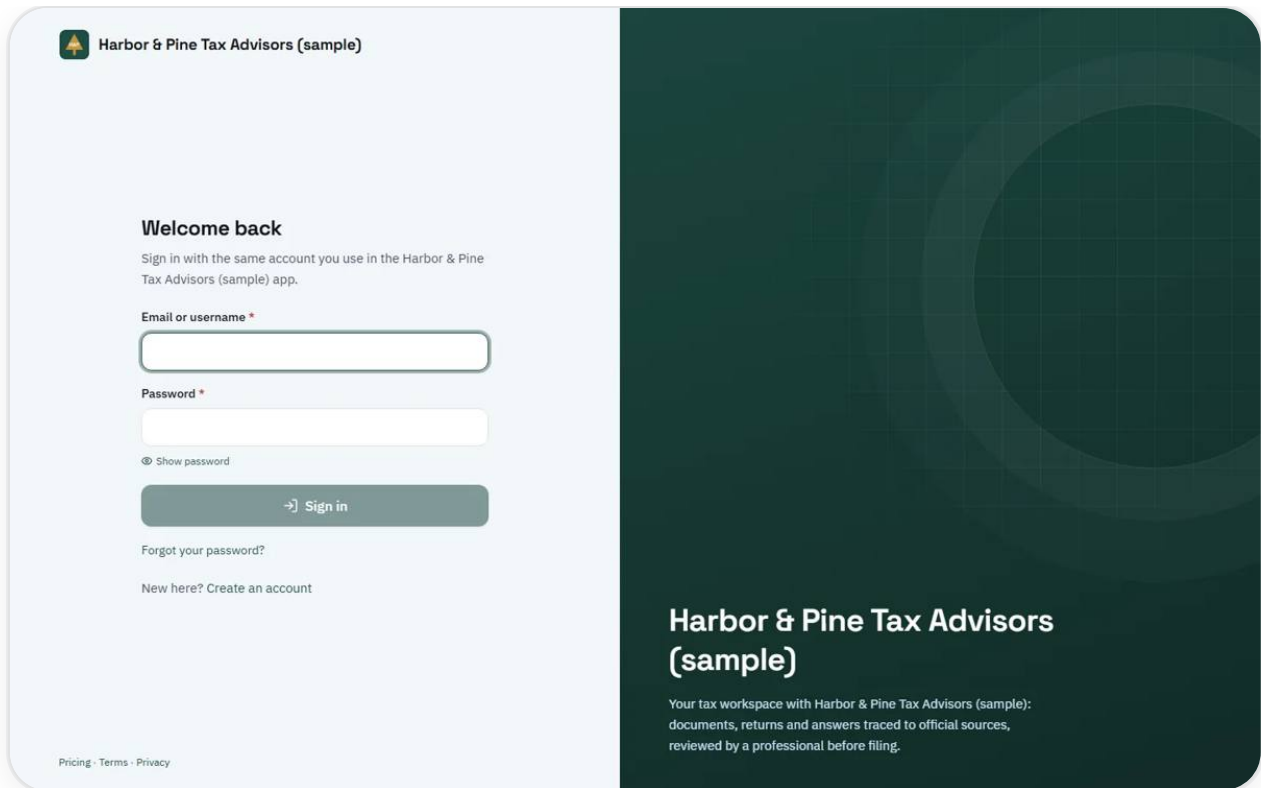
The custom domain verified by DNS record, and the contrast warnings on the colour fields.

What changed

A newly added domain shows the TXT record to publish and a pending status until Re-check finds it.

4 What your clients see: the sign-in screen

On the verified domain, the sign-in screen carries your logo and name, your primary colour, and a welcome that names your firm. The copy on the right describes the workspace: documents, returns and answers traced to official sources, reviewed by a professional before filing. Pricing, Terms and Privacy links stay in the footer.



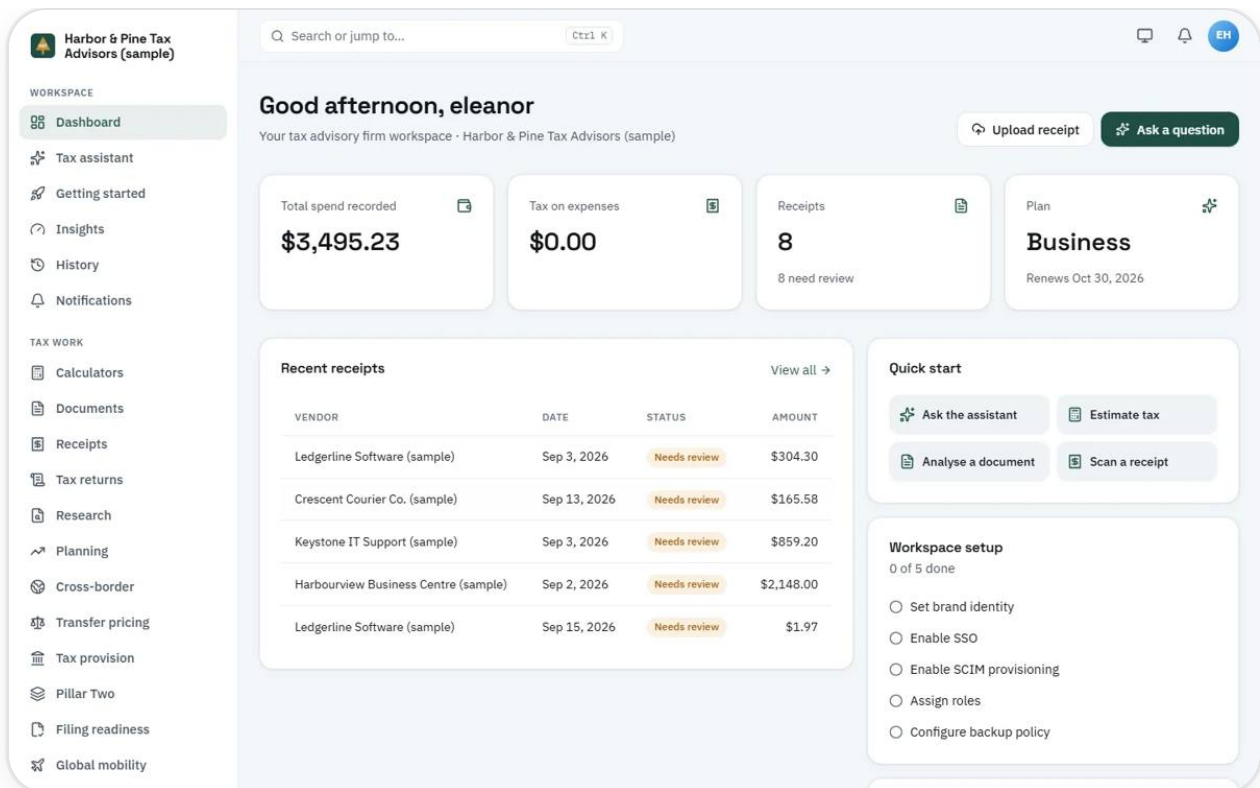
The branded sign-in screen on the firm's own domain.

What changed

The TaxOrch logo is replaced by yours everywhere a signed-out visitor looks.

5 What your clients see: the dashboard

Signed in, the dashboard greets the person by name under your firm's name, with Upload receipt and Ask a question in your colours. Tiles show total spend recorded, tax on expenses, receipts needing review and the plan. A Workspace setup list for the firm covers brand identity, SSO, SCIM provisioning, roles and backup policy.



The branded dashboard: the firm's name and colours on every element.

What changed

Emails and exports also carry the firm's name once the sender domain is verified.

Tips

- Pick an accent colour that passes the contrast check; the warning tells you the ratio.
- Verify the email sending domain as well as the app domain, so emails go out under your name.

Limits

- TaxOrch hosts and runs the app; the licence changes what your clients see, not where it runs.
- Domain verification and SSO on a branded domain need real DNS records you control.
- The White-label licence has no published price; talk to us.

Related

[White-label licence \(/white-label\)](/white-label)

[White-label tax software \(/white-label-tax-software\)](/white-label-tax-software)

[Partners \(/partners\)](/partners)

The mobile app

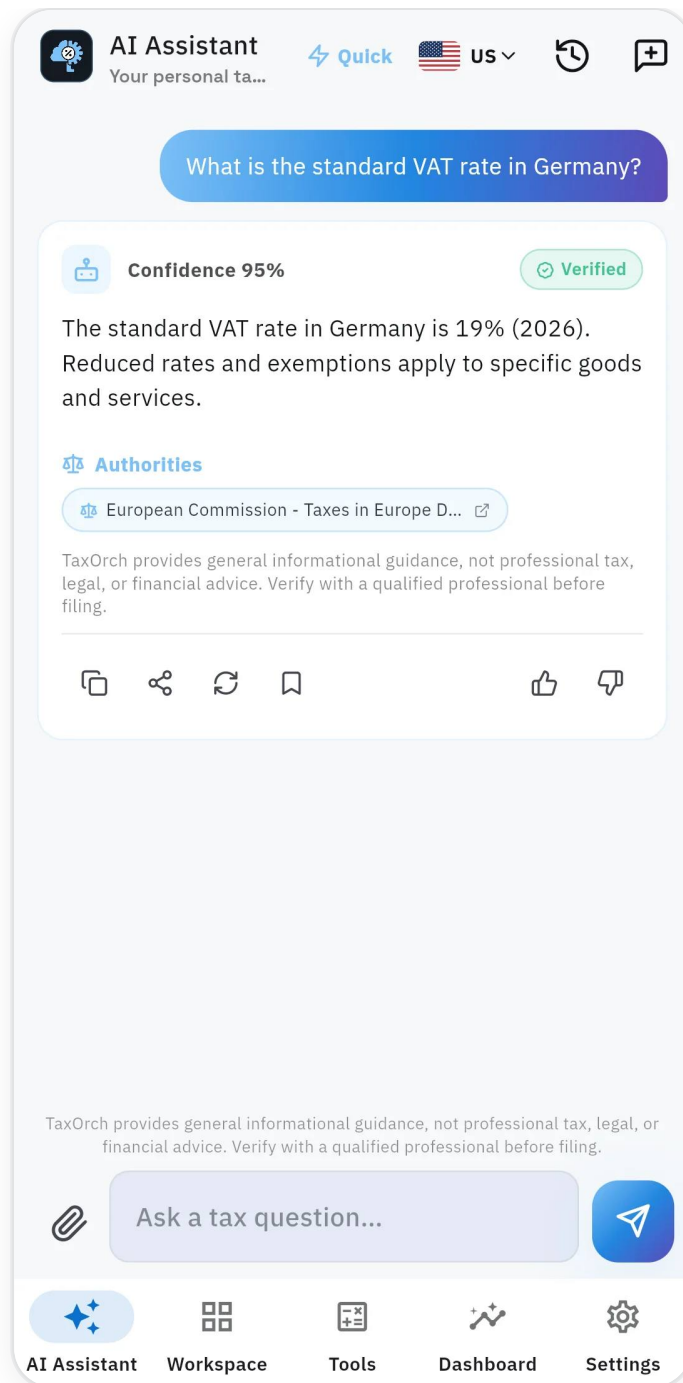
The mobile app gives the same cited answers as the browser. Five tabs: AI Assistant, Workspace, Tools, Dashboard and Settings. Every answer shows a confidence figure, a Verified badge where the value was checked, the authority it comes from, and the general-guidance line. The captures here are from the mobile layout at phone width.

3 min read · Anyone who wants an answer with its source while away from a desk.

Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

1 Ask a question

On the AI Assistant tab, pick the mode (Quick) and country from the top bar, type the question and send. For the standard VAT rate in Germany the answer is 19% (2026), with Confidence 95%, a Verified badge and the European Commission's Taxes in Europe Database under Authorities. Copy, share, re-run, save and thumbs up or down sit under the answer.



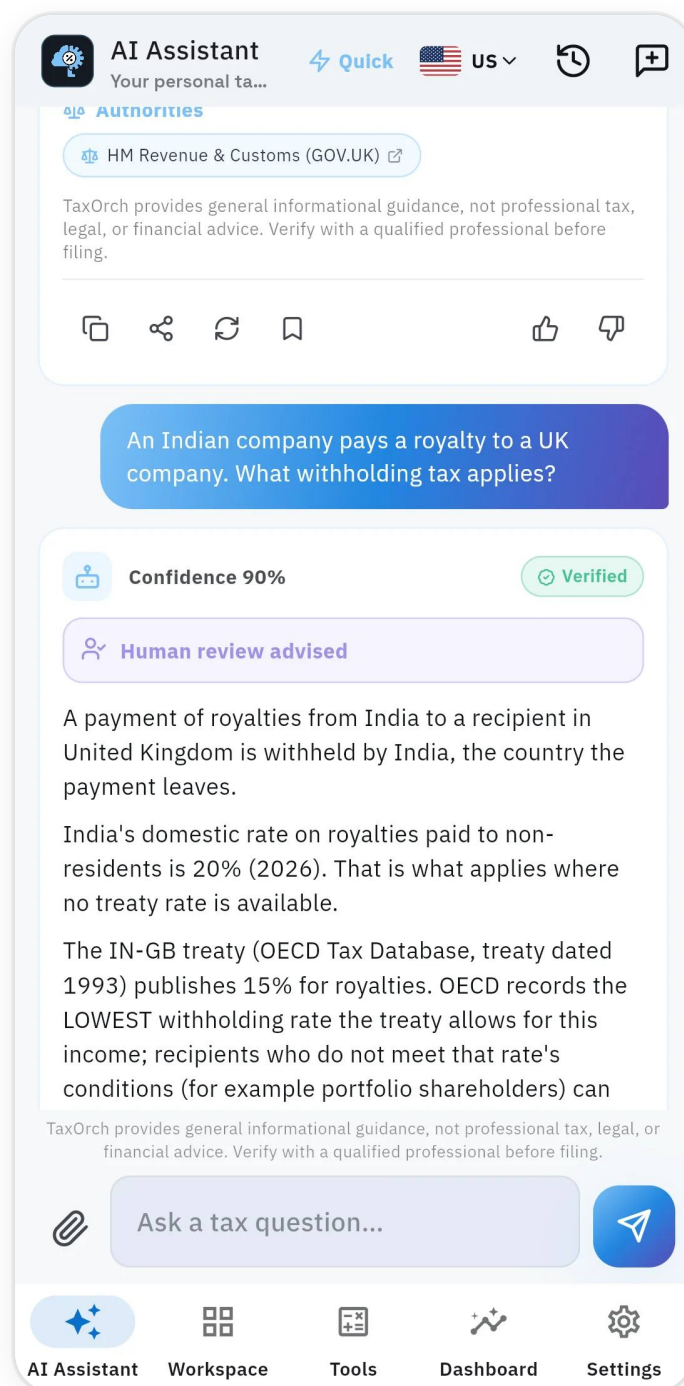
Germany VAT on the phone: verified, cited, with feedback controls.

What changed

The conversation is kept under the history icon in the top bar.

2 Read a review notice

A follow-up on royalties from India to a UK company gives the domestic 20% rate and the 15% treaty rate with its conditions. Because it depends on facts the app cannot verify, a Human review advised banner sits above the answer next to Confidence 90% and Verified.



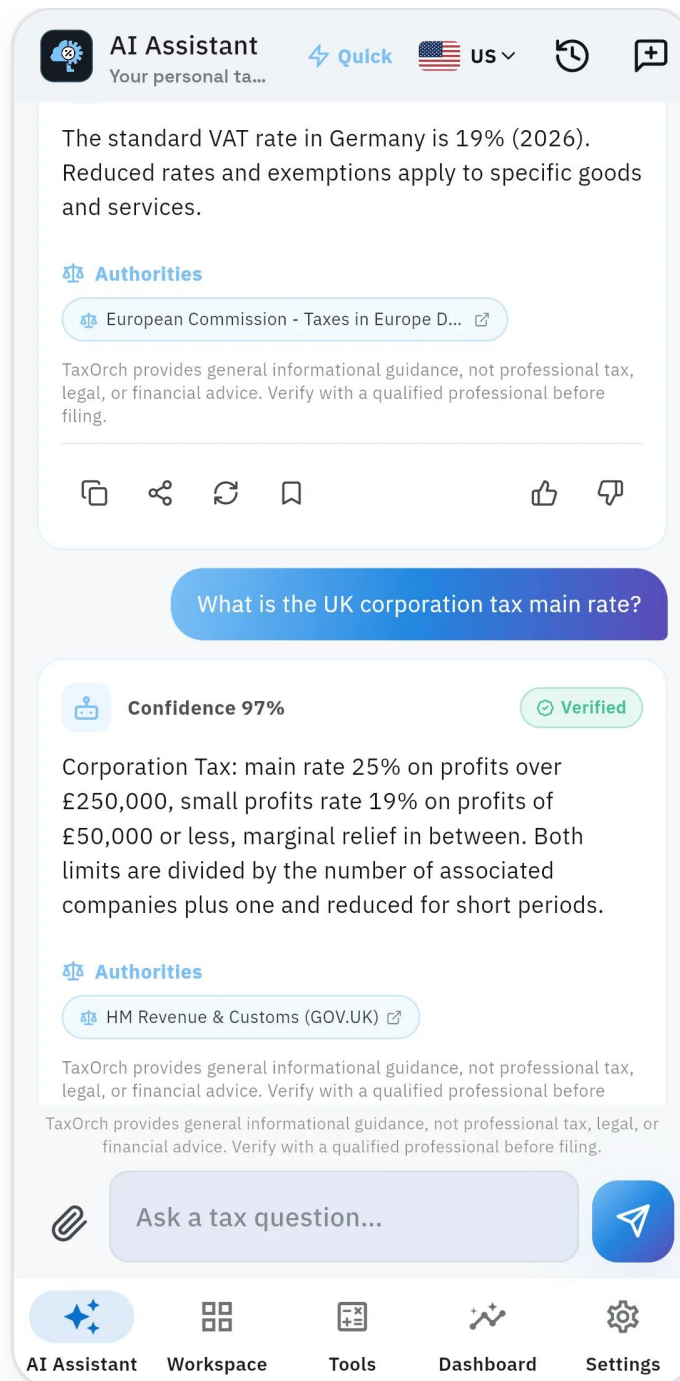
A review notice on the phone: the answer is verified, and a professional should still look.

What changed

The banner appears inside the answer card, above the text.

3 Look up a rate

Asked for the UK corporation tax main rate, the app gives the 25% main rate over £250,000, the 19% small profits rate at £50,000 or less and marginal relief between, with Confidence 97%, Verified, and HM Revenue & Customs under Authorities. Earlier answers stay in the same conversation above.



UK corporation tax on the phone, cited to HMRC, in the same conversation.

What changed

Each answer's authority chip opens the official page in the browser.

Workspace opens your documents, receipts and cases; Tools holds the calculators; Dashboard shows your recent activity; Settings holds your profile, language and security. The paperclip beside the question box attaches a photo of a receipt.

What changed

A receipt photographed from the paperclip appears on the Receipts page with status Needs review.

Tips

- Set the country in the top bar before asking; it changes which sources are used.
- Use the bookmark icon to keep an answer you will need again.

Limits

- The mobile app answers questions and takes photos; engagements, provision and administration are desktop work.
- A Human review advised banner means what it says: do not file on that answer alone.
- Tax figures on these screens are decision support, not tax advice; a professional reviews before anything is filed.

Related

[Tax assistant mobile app \(/tax-assistant-mobile-app\)](/tax-assistant-mobile-app)

[Ask the tax assistant \(/manual/tax-assistant\)](/manual/tax-assistant)

Reference: statuses, badges and limits

Every badge in this manual is listed here with its meaning. The last section is the one to read before you buy: what TaxOrch never does.

4 min read · Anyone who has seen a badge on a screen and wants to know exactly what it means.

Answer badges

Badge	Meaning
Official figure	The value was checked against the cited official publication for that tax year.
source published value	The figure is taken from a published official table; the source is cited.
Verified (mobile)	The same check as Official figure, shown on the phone with a confidence figure.
Not verified for this year	The rules for that year have not been verified; no figure is given.
No verified source yet	TaxOrch holds no verified official guidance for the question; no figure is given and the gap is logged.
Have a professional review this / Human review advised	The outcome depends on judgement or facts TaxOrch cannot verify. Do not file on it alone.
Machine translation by TaxOrch	The answer is translated; figures were checked against the English original, which is one

Document and ledger statuses

Status	Meaning
Needs review	Read, but a person has not yet confirmed the flagged fields.
Please confirm	A field TaxOrch could not decide, such as business use.
Imported	A trial balance or record brought in and not yet mapped or reviewed.
Reviewed	A schedule, mapping or FAR row checked by a second person.
Draft / Issued	An e-invoice before and after issue.
Last sync failed	An accounting import could not reach the system; earlier records are kept.

Engagement and workflow statuses

Status	Meaning
Open / In review / Finalised	A case's overall state.
Done	A workflow step completed and recorded.
Blocked	A step that cannot run, with the reason (for example, no signed 7216 consent).
Waiting	Sign-off waiting for a qualified, different reviewer.
Needs a different reviewer	The preparer tried to sign off their own work.
Sign-off cancelled	A step was re-run after sign-off; the reviewer must look again.

Status	Meaning
Legal hold	Nothing in the engagement can be deleted while the hold stands.
Requested / Received, being checked	A client portal document request before and after the client sends it.
Ready / Partly ready / Missing	Filing readiness items, in a preview that transmits nothing.
Not computed	A scenario liability that cannot be computed until the year's figures are verified.
Unsupported	A Pillar Two pool with no verified rule pack for the period; never shown as nil.

Feature status labels

Label	Meaning
In development	Being built. Shown on screen, but not to be relied on. E-invoicing, filing readiness, translated answers.
Preview	Visible for review only; nothing is transmitted or filed.
Beta	Working with sample or early connections: QuickBooks Online, Xero and NetSuite imports.
On our roadmap	Planned, not built.

Keyboard shortcut and limits

Item	Value
Ctrl K	Search or jump to any page.

Item	Value
Enter / Shift+Enter	Send a question / new line in the question box.
Upload size	20 MB per file; PDF, images, CSV and XLSX on Documents; photos or PDFs on Receipts.
Logo	PNG, JPEG or WebP up to 512 KB and 2,000 pixels.
Recent verification window	15 minutes before a high - risk change asks for the password again.

Questions

Does TaxOrch file returns?

No. TaxOrch does not file returns or execute payments. It produces draft packages, explicitly marked as not filed, and a filing readiness preview. Filing happens through the authority's own service or your filing software.

Is an answer tax advice?

No. TaxOrch provides decision support, not professional tax advice. Exact results apply only within declared coverage, and a professional reviews outputs before anything is filed.

What happens when TaxOrch does not know?

It refuses. A refusal names the reason, what is missing and what to do next, and the gap is logged so the source can be added. No figure is shown rather than a guess.

Can TaxOrch support staff open my workspace?

Only with an owner's or admin's approval, for a stated reason, read only, and for a time limit. Every grant is listed and can be revoked.

Can I take my data out?

Yes. Workspace export produces a full JSON copy with a record count and a SHA-256 checksum, and a manifest can be validated against it.

Tips

- When a badge is amber or a step is blocked, read the reason on screen first; it names the next action.

Limits

- TaxOrch never files a return, never moves money and never gives professional tax advice.
- Computed figures exist only where the rules for a country, tax type, entity type and year are certified.
- No certification (SOC 2, ISO) is claimed. Audits are planned.

Related

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