

O L U T O

# Built for the People Who Keep the Books

How Oluto gives accountants and bookkeepers superpowers —  
multi-client management, trust-first AI, and CRA-ready exports.



Multi-Client Console



Trust-First AI



CRA-Ready Exports

## THE PROBLEM

# Managing 10-30 Clients Shouldn't Feel Like This



## Tab-Switching Chaos

Log into each client separately. No cross-client view. Context-switching kills your day.



## Tax Time Scramble

Exporting transactions, gathering receipts, matching source docs — all manual, every period, for every client.



## No Audit Trail You'd Trust

When CRA asks who changed what and when, most tools can't answer clearly.



## AI You Can't Verify

QuickBooks Intuit Assist and Digits auto-categorize, but you can't see confidence levels or audit the reasoning.



## Canadian Tax as Afterthought

Global tools bolt on GST/HST. None understand provincial nuance — QST vs PST vs HST by province.



## Clients Don't Do Their Part

Receipts pile up. Bank statements arrive late. No automated nudges to keep clients on track.

*Current tools were built for business owners. Bookkeepers managing multiple clients are an afterthought.*

MULTI-CLIENT CONSOLE

# One Dashboard. All Your Clients.

A purpose-built workspace for bookkeepers managing multiple small businesses — not a bolted-on feature.



## Cross-Client Review Queue

AI-flagged exceptions from all your clients in one prioritized feed. Review, approve, or reclassify without switching accounts.



## Close Checklists

Per-client month-end checklists with progress tracking. See which clients are done, which are blocked, and what needs your attention.



## Client Health Dashboards

At-a-glance view of every client's financial health — cash position, pending exceptions, days since last import, close status.

**Think:** Xero HQ + Practice Manager — but designed for Canadian bookkeepers from day one.

# AI That Shows Its Work

Every AI decision comes with a confidence score. You review only what needs human judgment.



## WITHOUT OLUTO

You review every transaction. 200-500 per client per month. No prioritization. No confidence indicator. Same effort whether the AI was 99% sure or 50% sure.

## WITH OLUTO

High-confidence transactions are auto-approved. You only see the 10-20% that need human judgment. Each item shows why the AI flagged it. Across all clients, in one queue.

**Result: 80-90% reduction in review time. You focus on judgment calls, not rubber-stamping.**

## TAX WORKPAPER EXPORTS

# One Click from Close to CRA-Ready Package

### EXPORT PACKAGE CONTENTS



#### Period Transaction CSV

Every transaction for the period, with CRA T2125 categories, tax breakdowns by province, and original source references.



#### Supporting Attachments

Receipts, bank statements, and imported PDFs matched to their transactions. No more chasing clients for documents.



#### Immutable Audit Log

Who did what, when, and why — every edit, approval, categorization change, and AI decision traced with actor and timestamp.



#### Tax Summary by Province

GST/HST/PST/QST calculated and broken out by province. Pre-formatted for Canadian tax workpaper standards.



#### Close Verification

Confirmation that all exceptions were reviewed, all reconciliations completed, and the period is locked for integrity.

### HOW IT WORKS

1

Complete the close checklist for a client's period

2

Click "Export Tax Workpaper" from the client dashboard

3

Oluto compiles all transactions, attachments, audit log, and tax calculations

4

Download a structured ZIP ready to hand to your accountant

Hours → Minutes

per client, per period

CANADIAN-NATIVE TAX

# Not a Bolt-On. Built for Canada.

## OLUTO — BUILT IN

- Province-aware GST/HST/PST/QST engine
- CRA T2125 expense category mapping
- Tax reserves auto-calculated and set aside
- Safe-to-Spend net of tax obligations
- AI trained on Canadian expense patterns
- 3 provinces live (BC, ON, AB) — expanding to all 13

## COMPETITORS — BOLTED ON

### QuickBooks

Canadian tax as config option on a US platform

### Xero

Global-first, Canada accommodated — not native

### Wave

Basic GST/HST only, innovation stalled since H&R Block

### Digits / Kick / Puzzle

Zero Canadian support — US/UK only

### Kashoo

Manual-first, no AI, limited province support

When CRA compliance is your responsibility, the difference between native and bolted-on is the difference between confidence and anxiety.

# What Oluto Means for Your Practice

 **80-90%**

Less Review Time

Exceptions-only workflow means you're not rubber-stamping what the AI already got right.

 **2-3x**

More Clients

Time saved on transaction review and export prep lets you take on more clients without hiring.

 **Zero**

CRA Surprises

Immutable audit log + province-aware tax engine means every number traces back to its source.

 **Stronger**

Client Relationships

Safe-to-Spend gives clients daily clarity. They ask you less, trust you more.

**Pricing:** Pro plan CAD \$45-65/mo per client. No per-user fees. Your whole team, unlimited.

OLUTO

# Partner With Us

*We're not building another accounting tool that treats bookkeepers as an afterthought. We're building the platform you'd design if you were starting from your workflow.*

## Early Access

Be among the first bookkeepers to use the multi-client console. Shape the product with direct feedback.

## Partner Program

Preferred pricing for your clients. Priority support. Your practice listed in our bookkeeper directory.

## Co-Build

Tell us what your ideal workflow looks like. We'll build the close checklists and export formats you actually need.

Your clients deserve cashflow clarity. You deserve tools built for how you actually work.