

Ref	Requirement		
	HEADER		
	ICAEW Technical Accreditation Scheme Business Management Software Evaluation		
	Remindoo.co		
			
	Oct-26		
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	CONTENTS		
1	Introduction and Prologue		
2	Issues identified and evaluation conclusion		
	-- GLOBAL REQUIREMENTS:		
3	Access and security		
4	Data processing and reporting		
5	Usability		
6	SaaS hosting		
	-- SPECIFIC REQUIREMENTS: (to follow deep dive demonstration if deemed appropriate)		
7	Practice Management Solution		

Ref	Requirement	Response	Reviewer Comments
1.	INTRODUCTION AND PROLOGUE		
Introduction			
1.01	The suitability of software for each particular user will always be dependent upon that user's individual requirements. These requirements should therefore always be fully considered before software is acquired. The quality of the software developers or suppliers should also be considered at the onset.		
1.02	Fundamentally, good software should: 1. Be capable of supporting the functions for which it was designed. 2. Provide facilities to ensure the completeness, accuracy, confidentiality and continued integrity of these functions. 3. Be effectively supported and maintained. It is also desirable that good software should: 4. Be easy to learn, understand and operate. 5. Make best practical use of available resources. 6. Accommodate limited changes to reflect specific user requirements. It is essential, when software is implemented, for appropriate support and training to be available.		
Approach to evaluation			
1.03	The objective is to evaluate a product against a set of criteria developed by the ICAEW to ensure that the software meets the requirements of Good Accounting Software, as laid down in the summary.		
1.04	In order to effectively evaluate the software, a product specialist from the vendor completed the detailed questionnaire and provided it to the ICAEW to examine. The ICAEW's Scheme Technical Manager then reviewed the operation of the various aspects of the software assisted by a member of the vendor's technical staff and checked the answers to confirm their validity. The questions were individually reviewed and commented on and the majority of assessments were confirmed.		
1.05	The Technical Manager discussed the assessment with a member of the vendor's staff in order to clarify any points requiring further information. In the event of disagreement between the supplier and the Technical Manager, the Technical Manager's decision was taken as final and the response was changed accordingly.		
1.06	The latest version of the software was used throughout the evaluation.		
1.07	When the evaluation had been completed, a draft copy was sent to the ICAEW Scheme Manager for review before completion of the final report.		
Prologue: Matters to consider before purchase		NB: This text has been provided directly by the software vendor and does	
1.08	General Overview:	Remindoo is a UK-built practice management platform for accountants, bookkeepers and tax advisers, covering the full firm workflow in one system — from lead capture, proposals and e-signed engagement letters through client onboarding, task and deadline management, workflow automation, AML risk assessment and client communication. It includes Companies House sync, a secure client portal with document sharing, email triage, HMRC agent authorisation, and practice dashboards covering deadlines, capacity and team workload. Unlimited users are included on every plan, with pricing based on the number of clients rather than staff, across core & growth packages.	

1.09	Supplier background:	Remindoo was founded by Waqas Sagar, a qualified accountant and member of the Institute of Chartered Accountants in England and Wales (ICAEW), the Association of Chartered Certified Accountants (ACCA) and the Association of Accounting Technicians (AAT). Alongside Remindoo, he runs an established, growing UK accountancy practice serving over 1,200 clients across accounts, tax and compliance services. Remindoo was born directly out of that practice: the platform was designed, tested and refined in a live multi-staff firm environment to manage recurring compliance work, statutory deadlines, client onboarding and communication at scale before being made available to the wider profession. The product therefore reflects first-hand knowledge of how UK accountancy firms actually operate, rather than a generic workflow tool adapted to the sector. Besides that he is also founder of UK's only Accountancy & Taxation fee comparison website and largest UK directory of Accountants www.accountingfirms.co.uk	
1.10	Product background and suitability for the user:	Remindoo was built by accountants, for accountants. The product originated inside a busy, multi-staff UK accountancy practice, where the founding team encountered the day-to-day operational problems firms face first-hand: missed or manually tracked statutory deadlines, client information scattered across spreadsheets and inboxes, slow onboarding, AML record-keeping, chasing clients for documents, and recurring compliance work managed through disconnected tools. Rather than adapting a generic workflow product to the profession, Remindoo was designed around these real problems as they occurred each module (deadline and task automation, client onboarding, Companies House sync, AML risk assessment, proposals and engagement letters with e-signatures, client portal, email triage) exists because the team needed it in practice before it was ever offered to other firms. As practising accountants, we understand the problem from the inside and have built the solution around it. Remindoo is therefore suitable for UK accountancy, bookkeeping and tax practices of all sizes from sole	
1.10 (Cont.)		practitioners to multi-staff firms and particularly those managing high volumes of recurring compliance work (year-end accounts, VAT, payroll, confirmation statements, self assessment) who want to centralise deadlines, client records, communication and workflow in a single system designed specifically for how a UK practice operates.	
1.11	Add-on modules:	Remindoo does not sell separate add-on modules. All functionality is delivered through two packages Core and Growth both covering the full platform (task management, client management, workflow automation, leads, proposals and e-signatures, client portal, dashboards), with no hidden fees.	

1.12	Typical implementation (size):	There is no fixed implementation size. Remindoo is designed to scale from a sole practitioner with a handful of clients up to multi-office firms with 5,000+ clients. Unlimited users are included at no extra per-user cost, so implementation size is driven by the number of active clients rather than staff numbers. Typical customers are UK accounting and bookkeeping practices of all sizes.	
1.13	Vertical applications:	Remindoo is itself a vertical application: it is designed exclusively for the UK accountancy sector accountancy practices, bookkeepers and tax advisers rather than being a horizontal workflow product with industry editions. All functionality is built around UK practice operations, including Companies House integration, statutory deadline management (accounts, confirmation statements, VAT, payroll, self assessment), AML risk assessment, engagement letters and HMRC agent authorisation. No separate vertical or industry-specific versions are offered or required; the single product serves firms of all sizes within this sector.	
1.14	Server platform and database:	The application is deployed on AWS cloud infrastructure, with a PostgreSQL database managed via Supabase in the AWS London (eu-west-2) region and the front end delivered via Vercel, leveraging the security and networking capabilities of these platforms.	
1.15	Client specification required:	As a fully cloud-based platform, Remindoo requires only a client device with a modern, supported web browser and an internet connection. No local server or client software installation is required. The interface is designed and optimised for desktop/laptop use rather than mobile phone usage.	
1.16	Partner network:	Remindoo is sold, implemented and supported directly by Remindoo Limited; there is no third-party reseller, distributor or implementation partner network. Onboarding, training and ongoing support are provided in-house by the Remindoo team, which keeps implementation consistent and gives users a single point of contact. Data migration from other practice management systems is likewise handled directly.	

Ref	Requirement		
2.	ISSUES AND CONCLUSION		
Highlighted issues			
2.01	There are a number of limitations in the product, which while not adversely impacting upon this evaluation may be of importance to some organisations. It is important that any business contemplating the purchase of software reviews the functionality described and limitations therein against its detailed requirements. Attention is drawn in particular to the following areas where the product, on its own, may not be suitable for businesses with certain requirements:		
2.02	Findings for considerations by potential customers: (See vendor comments against the various questions)	Question reference	
	* Single sign-on is not currently supported, including integration with Microsoft Entra ID / Active Directory, Google Workspace or other identity providers. MFA is available on a per-user basis within the Growth package, but it cannot currently be enforced centrally for all users. This may require firms to apply additional controls where centralised identity management and mandatory MFA form part of their security policy. SSO and central MFA enforcement are included on the product roadmap, with a stated target of August 2027.	3.08, 7.09	
	* The system provides record-level activity timelines, but it does not currently maintain a comprehensive, system-wide audit trail recording all changes, users, timestamps and deletions. This may limit the evidence available for internal review, investigation or regulatory audit. A more comprehensive audit trail is a committed roadmap item, targeted for completion by September 2027.	3.21	
	* Users cannot currently create their own reports, and a general reporting facility producing separate outputs in formats such as PDF, XML, XLS or text is not available across all areas of the system. This may limit management reporting, independent analysis and the ability to meet specific evidence or data-extraction requirements. Customers should assess whether the available dashboards, exports and supplier-provided data copies are sufficient for their needs.	4.37	
	* The in-application interface cannot currently be customised with a firm's logo, colour palette or other corporate branding. Client-facing emails and templates can reflect the firm's style, but the application interface remains standard. This may be relevant where internal branding, white-labelling or a consistent corporate user experience is required.	5.02	
	* Record locking is not currently applied while a record is being updated. This means that other users are not prevented from accessing the record while an update is in progress. While users cannot amend the record concurrently, this creates a potential risk that another user may access or rely on information while an update is being made, or that conflicting changes may arise depending on how the system handles subsequent updates. Firms should therefore consider appropriate working procedures to manage concurrent access and confirm how the system handles conflicting or subsequent updates in practice.	5.05	
	* The software does not currently provide general links to external word-processing, graphics or financial-modelling packages for alternative display or reporting. This may restrict automated document production, specialist analysis or presentation outside the application and may require manual export or re-entry of information.	5.44	

	* There is currently no general-purpose customer API or web-services interface. As a result, customers may have limited ability to automate data exchange, develop bespoke integrations or connect the system to other business applications. A public API is on the product roadmap; customers with integration requirements should confirm its intended scope, controls and delivery timing.	5.49	
	* The browser-based application can be opened on different devices, but the interface is designed primarily for desktop and laptop use and is not currently mobile-responsive. There is no native mobile or tablet application, and dashboards, lists and data-entry screens may be impractical on smaller displays. Responsive design and a mobile application are planned, with a stated target of July 2027.	5.5, 7.06	
	* Remindoo does not currently hold security certifications in its own name, although its AWS hosting provider maintains a range of infrastructure certifications. However, Cyber Essentials certification is planned, and customers should confirm completion and scope with the supplier.	6.03, 6.50	
	* No independent penetration-test report is currently available for the application. This limits external assurance over the identification and remediation of technical vulnerabilities. Customers with defined security or supplier-assurance requirements should consider whether additional evidence or testing is needed and confirm any planned testing arrangements with the supplier.	6.46, 6.48	
	* Backups are not currently encrypted, and there is no formally documented disaster-recovery plan. These gaps may increase confidentiality and service-recovery risks if backup media are compromised or a significant disruption occurs. Customers should review backup protection, recovery responsibilities, recovery objectives and evidence of testing before determining whether the arrangements meet their continuity requirements.	6.52, 6.57	
	* The application interface uses fixed branding and system terminology, although firms can configure templates, fields, statuses and other operational elements. The inability to rebrand the interface or rename system terms may affect user adoption or suitability where firm-specific language, presentation or white-labelling is required. Prospective customers should assess this during implementation planning.	7.03	

Evaluation conclusion			
2.03	For the specific use-cases in support of assisting accountancy firms to make effective use of Business Management software, for which the product is designed, the solution appears to meet this criteria. It continues to be actively developed and enhanced. The product provides a broad range of integrated practice-management features, including configurable workflows and templates, role-based permissions, recurring task automation, client communication tools and operational dashboards. Planned enhancements including universal search, expanded audit logging, single sign-on, central MFA enforcement, a public API and improved mobile access have the potential to broaden its capabilities further, subject to successful delivery and validation. Members should be aware of the limitations of the solution as above, and fully understand the role that it can play in helping manage their compliance needs. * NOTE THAT THE QUESTIONNAIRE RELATES TO THE SOFTWARE PRODUCT AND NOT ANY SUPPLEMENTARY SERVICES PROVIDED BY THE SUPPLIER TO THE ACCOUNTANCY FIRM USING THAT PRODUCT *		
Disclaimers			
2.04	Any organisation considering the purchase of this software should consider their requirements in the light of proposals from the software supplier or its dealers and potential suppliers of other similarly specified products. Whilst the contents of this document are presented in good faith, neither ICAEW, nor the ICAEW's Technical Manager (RSM UK Consulting LLP or any party nominated by the ICAEW to perform this role on the ICAEW's behalf) will accept liability for actions taken as a result of comments made herein. The decision to purchase software resides entirely with the organisation.		

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3.	ACCESS AND SECURITY		
Access control			
3.01	What security features are included to control access to the application?	Access is controlled via role-based permissions and standard username/password authentication, with optional multi-factor authentication (MFA). Data in transit is protected with SSL/TLS encryption; the platform runs on secure cloud infrastructure with system monitoring and audit logging.	Noted.
3.02	Can access to functions be managed via a permissions matrix so users can only see (in menus and other links) and access those areas they are authorised to access?	Yes — Remindoo provides role-based permissions and visibility controls, allowing firms to restrict what each user can see and access (e.g. by clients, tasks, dashboard, user roles), so users should only see areas they are authorised for.	Confirmed.
3.03	Is this access to the application managed by:- - Individual user profiles? - User groups or job roles?	Access is managed via role-based permissions (i.e. by user group/job role) rather than solely individual profile settings.	Confirmed.
3.04	Can a report be produced detailing all current users, their user groups if relevant, and their authority levels and/or access rights?	The application does not currently provide a self-service export of this report. However, all user access information is fully visible on screen: administrators can view every current user, their team membership, assigned role, and the detailed permissions granted to them directly from the user management dashboard, so a firm can review who has access to what at any time. Where a formal report is required (for example, for an internal review or audit), it can be requested from Remindoo and our development team will provide a report detailing all current users, their user groups, and their authority levels and access rights.	Noted.
3.05	If menus can be tailored does the system limit the display of menu options to those for which permission has been granted for each user?	Yes. Menu options are permission-driven: each user's navigation displays only the modules and functions for which they have been granted permission under their assigned role. Options for which a user has no permission are not presented in their menus, rather than being shown and blocked on selection.	Confirmed.
3.06	Does security allow for access to be limited to: - Read only? - Read/write? - Read/amend/delete?	Yes. Permissions are granular and set per module, allowing access to be restricted to view-only, view/edit, or full view/amend/delete levels. For example, a user without delete permission cannot delete tasks, clients, leads or proposals — the delete function is withheld for that user while view and edit rights (where granted) remain available. These levels are configured through roles and permissions by the firm's administrator, so each staff member's rights can be matched to their responsibilities.	Confirmed.
3.07	If data can be accessed by separate reporting facilities, such as ODBC or an external report writer, is the user access security control applied?	Not applicable. Remindoo does not expose data through ODBC connections, external report writers or any direct database access; there is currently no public API. All data access takes place through the application itself, where role-based permissions and access controls are always enforced. Any reporting or exports available within the application are governed by the same user permission model.	N/A.

3.08	Does the system security integrate with Microsoft's Active Directory or other tools that provide a single sign-on?	No, not currently. User authentication is handled natively by the application using individual credentials (email address and password), with multi-factor authentication available on the Growth package. The system does not currently integrate with Microsoft Active Directory / Entra ID or other single sign-on providers.	Noted.
3.09	Does the system provide multi-factor authentication (MFA)?	Yes, multi-factor authentication (MFA) is supported and can be enabled per account.	Confirmed.
Passwords and access logs			
3.10	Is access to the software controlled by password?	Yes. Access requires authentication and password protection, with optional multi-factor authentication (MFA) if turned on.	Confirmed.
3.11	Does each user have a separate log on (user ID)?	Yes — each user has their own separate log-on (user ID). Remindoo provides unlimited named users per firm, each with individual credentials and role-based permissions, so all activity is attributable to a specific user.	Confirmed.
3.12	If there is no password facility please state how confidentiality and accessibility control is maintained within the software?	Not applicable — Remindoo provides a password-based login facility (with optional multi-factor authentication), so this question does not apply.	N/A.
3.13	Are passwords masked for any user logging in?	Yes. Passwords are masked when entered on the login screen and are stored securely in the database using encryption, rather than being stored or displayed in plain text.	Confirmed.
3.14	Is password complexity available and enforced?	Yes. Password complexity requirements are enforced when a user creates or resets a password. Users must create a strong password containing a combination of uppercase and lowercase letters, numbers and special characters.	Noted.
3.15	How many previous passwords are retained / the password history?	No previous-password history is currently retained by the system.	Noted.
3.16	Are passwords encrypted?	Yes — passwords are stored encrypted (hashed); they are never stored or transmitted in plain text.	Confirmed.
3.17	Are users automatically logged off after a pre-set idle time? - Can the time period be changed? - Can any information be viewed without being logged in, including after logging off, if so what information?	Yes — users are automatically logged off after a pre-set idle time. The time period can be adjusted by Remindoo, although it is not user-configurable. No information can be viewed without being logged in, including after logging off.	Noted.
Deletion of transactions			
3.18	Is it possible to delete a transaction?	Yes.	Noted.
3.19	If so, then how are deletions controlled by the system?	Deletions are controlled through role-based permissions set by the firm's administrator. Delete rights are granted per module (tasks, clients, leads, proposals), and a user without delete permission for a module has no delete function available in that module. Bulk delete actions are governed by the same permissions. Where retention rather than removal is appropriate, records can be archived instead of deleted, keeping them accessible for reference. Actions on records are reflected in the front-end timeline, so a record's chronological history remains visible to users, providing transparency over changes made.	Noted.

3.20	Are deleted transactions retained in the audit trail (see below) and denoted as such?	Deleted records are not currently retained in a system-wide audit trail; deletions of associated items are visible in the front-end timelines of related records. Retention and denotation of deleted records will form part of the comprehensive audit trail on the development roadmap. It will be done by end of March 2027.	Noted.
Audit trails			
3.21	Does the system have an audit trail (log) which records all changes to transactions in the system?	The system does not currently provide a full system-wide audit trail recording every change made to every record. Activity logging is provided at the record level through front-end timelines: client and task timelines record actions chronologically (creation, status changes, comments and related activity), so users can see the history of a record within the application. A comprehensive system-wide audit trail — logging all changes with the user, date/time stamp and details of the change, including deletions — is a committed item on the development roadmap.	Noted - see 3.20.
3.22	Does this log also record any system error messages and/or any security violations?	System error messages and security events are captured in Remindoo's server-side system monitoring and audit logging (see 6.43); these logs are maintained internally by Remindoo rather than being visible within the application.	Noted.
3.23	Is it possible to turn off or delete the audit trail?	No — users cannot turn off or delete the record timelines or the underlying system logs.	Noted.
3.24	Does the software allocate a system generated sequential unique reference number to each transaction in the audit log, date and time stamp it and record the user ID?	No — timeline entries are date and time stamped and attributable to the user, but a system-generated sequential unique reference number is not currently allocated to each entry.	Noted.
3.25	Are all master file changes recorded in the audit trail?	Changes to client (master file) records are reflected in the client's front-end timeline. A complete audit trail of all master file changes will form part of the planned comprehensive audit trail.	Noted.
Compliance			
3.26	Does the system operate in a way that is compliant with data protection legislation including GDPR? How does the system facilitate this?	Remindoo Limited is ICO-registered (ICO no. ZC099417) and complies with UK GDPR, and the system facilitates our customers' own compliance in several ways. Access to personal data is restricted through role-based permissions, so client information is visible only to staff members who have been granted access, with multi-factor authentication available for added account security. Data is transmitted over encrypted connections (TLS/HTTPS) and hosted in the United Kingdom (AWS London region). Client records are held centrally rather than scattered across spreadsheets and inboxes, which supports accuracy, security and subject access requests — a client's data can be located, reviewed and exported from one place. Records can be deleted or archived in line with a firm's retention policy, and deletion rights are permission-controlled to prevent unauthorised removal. Remindoo acts as data processor in respect of customer data, with a data processing agreement available; firms remain data controllers of their client information.	Noted.

3.27	Describe your use of sub-processors if any?	Remindoo uses a small number of established sub-processors to deliver the service, each engaged under contractual terms consistent with UK GDPR. These comprise: Supabase, which provides the managed PostgreSQL database hosted in the AWS London (eu-west-2) region; Amazon Web Services (AWS), which hosts the application backend; Vercel, which delivers the front end; Stripe, for subscription billing and payment processing (card data is handled entirely by Stripe and is never stored by Remindoo); and our transactional email provider for system notifications. Sub-processors are used only where necessary for service delivery, have access limited to the data required for their function, and are reviewed for their security and data protection practices. A current list of sub-processors is available to customers on request, and customers are notified of changes.	Noted.
Backup and recovery			
3.28	Is there a clear indication in the software or manuals as to how the data is backed-up and recovered?	Backup and recovery are managed centrally by Remindoo as part of the cloud service, so customers do not need to run their own backups. Backup procedures are referenced in Remindoo's service terms rather than detailed in the software or a manual; details of the backup and recovery arrangements can be obtained from support at any time.	Noted.
3.29	How often are backups taken and to what point can restores be done?	Backups are taken daily and retained for seven days. Restores can be made to any daily backup point within that seven-day retention window.	Noted.
3.30	How does the software facilitate recovery procedures in the event of software failure? (E.g. roll back to the last completed transaction).	In the event of software failure, Remindoo restores data from the most recent daily backup on request (within the seven-day retention window). In addition, all database writes are atomic transactions, so an incomplete transaction is rolled back automatically rather than leaving partial data (see 6.17).	Noted.
3.31	If software failure occurs part way through a batch or transaction, will the operator have to re-input the batch or only the transaction being input at the time of the failure?	The operator would re-input the entries being made at the time of the failure. Entries already committed are unaffected, as database writes are atomic — incomplete transactions are rolled back rather than partially saved.	Noted.
3.32	What features are available within the software to help track down processing problems?	Server-side error logging and system monitoring are maintained and reviewed by the development team to diagnose processing problems. Users report any issue to support, and the team can trace the related activity in the system logs to identify and resolve the cause.	Noted.

Ref	Requirement	Response	Reviewer Comments
4.	DATA PROCESSING AND REPORTING		
Input and validation of transactions			
4.01	Is data input controlled by self-explanatory menu options?	Yes — data entry in Remindoo is performed through structured on-screen forms and menu-driven options (e.g. Quick Task Creation, Detailed Task Creation, client records) rather than command-line or code-based entry.	Confirmed.
4.02	Are these menus user/role-specific?	Yes — the menus and options visible to each user are governed by the same role-based permissions described under Access & Security (see 3.05).	Confirmed.
4.03	Can the creation or amendment of standing data (e.g. customer account details) be undertaken using menu options or dialogue boxes as opposed to requiring system configuration?	Yes - standing data such as client and customer account details can be created and amended through standard menu options and on-screen dialogue boxes, and this can be done in all modules. No system configuration or developer involvement is required.	Confirmed.
4.04	Does the software provide input validation checks such as: - (account) code validation? - reasonableness limits? - validity checks?	Ledger-style account code validation does not apply, as Remindoo is a practice/workflow management and CRM platform rather than a double-entry accounting package. Basic input validation is present on data entry forms, covering required fields, field formats and permitted values.	Confirmed.
4.05	What control features are within the software to ensure completeness and accuracy of data input?	Completeness and accuracy are controlled through validation on inputs - required fields, format checks and permitted-value checks applied at the point of entry, with errors highlighted on screen for correction (see 4.10 and 4.11).	Confirmed.
4.06	How does the software ensure uniqueness of the input transactions? (i.e. to avoid duplicate transactions)	Entries are compared against existing records at the point of input and duplicates are prevented.	Noted.
4.07	Is data input by users validated by scripts or routines in the browser, or other client software, before transmission to the server?	Yes - data entered by users is validated by routines running in the browser before it is transmitted to the server.	Noted.
4.08	Is data input by users validated by routines running on the server before data files are updated?	No - validation is carried out in the browser before submission (see 4.07) rather than by separate server-side validation routines before the data files are updated.	Noted.
4.09	Does the above validation ensure that data entered in all input boxes: - Cannot be longer than a maximum length? - Cannot contain unaccepted characters such as semi-colons etc?	Yes. Field-specific validation is in place for structured fields such as email addresses, UTRs, National Insurance numbers, mobile numbers and other reference fields. These controls restrict entries based on the required format, maximum length and permitted characters. Free-text fields allow appropriate standard characters and punctuation.	Noted.
4.10	Are input errors highlighted?	Yes - input errors are highlighted on screen, with help text and visual cues to guide users to correct the entry.	Confirmed.
4.11	If Yes are they: - Rejected and error report generated on-screen? - Rejected and error reports generated? - Accepted and posted to a temporary account/area?	Erroneous entries are rejected and the errors are shown on screen at the point of entry, where applicable. Data is not accepted and posted to a temporary or suspense area.	Confirmed.
4.12	Are responses to erroneous data input clear so that they do not lead to inappropriate actions?	Yes - error messages identify the field and the correction required in plain language, so users are not led into inappropriate actions.	Confirmed.

4.13	Does the software have an automatic facility to correct/reverse/delete transactions?	Not applicable — Remindoo manages tasks, clients and workflows rather than financial ledger transactions, so automatic transaction correction/reversal in the accounting sense does not apply; standard task edit/delete functionality exists (Features: Edit/Delete Task) but is not described as an automatic correct/reverse facility.	N/A.
4.14	If yes, are these logged in the audit trail?	Not applicable in the ledger-transaction sense (see 4.13). Changes made by users are captured in the system's audit logging of user activity (see 6.43).	N/A.
4.15	Are all data entries or file insertions and updates controlled to ensure that should part of a data entry fail the whole transaction fails?	Yes - data entries and file updates are handled so that if part of an entry fails, the entry is not committed in part.	Noted.
4.16	Are messages provided to users clearly explaining whether the data entry or file upload has been processed successfully or not?	Yes - users are shown clear on-screen messages confirming whether a data entry or file upload has been processed successfully or has failed.	Confirmed.
Import and export of data			
4.17	Can files/attachments be uploaded and stored against any transaction?	Yes. Multiple files, including PDFs, images, CSV, XLS/XLSX and ZIP files, can be uploaded and stored across different modules, including client records, Client Portals, proposals and signed engagement letters, with module-specific permissions.	Noted.
4.18	Is there an additional charge made for storage of uploaded files? - If yes, please indicate the cost.	No — there is no separate charge for storage of uploaded files; storage is included within the standard per-client subscription.	Noted.
4.19	Can data be imported into the system from multiple types of files, e.g. XLS, text, CSV?	Yes — client data can be imported using CSV and XLS files, and assisted migration from another system is offered (a per-client migration fee may apply).	Noted.
4.20	Explain how the system validates imports into the system and what happens to any import which fails?	Imports are validated by checking that the file type is supported, and an import template is provided to guide users to enter the information correctly. Where entries fail, the number of failed entries is reported back to the user so they can be corrected and re-imported.	Noted.
4.21	Are imported /interfaced transactions detailed in the audit trail? (See also 3.27)	No - imported or interfaced records are not currently detailed separately in the audit trail (see also 3.27).	Noted.
4.22	Can data be exported from all areas of the system to multiple formats e.g. XLS, CSV, PDF, text; if so specify which formats are supported?	CSV and XLS formats are supported for client data import. A general export facility from all areas of the system into multiple formats (XLS, CSV, PDF, text) is not currently provided; a copy of customer data can be requested from Remindoo (see 6.83).	Noted.
Data processing			
4.23	Does the software ensure that menu options or programs are executed in the correct sequence (e.g. outstanding transactions are processed before month end is run)?	Not applicable — Remindoo does not perform ledger posting sequences, month-end runs or similar accounting-cycle processing; it manages tasks, deadlines and workflow rather than the underlying accounting records.	N/A.
4.24	Does the software provide automatic recalculation, where appropriate, of data input? (e.g. VAT)	Not applicable — Remindoo does not perform financial calculations such as VAT within client transaction processing; it offers a separate public VAT calculator tool on its website, which is not part of the core practice-management data platform.	N/A.
4.25	Is a month/period-end routine required to be undertaken?	Not applicable — as a practice/workflow management and CRM platform rather than a ledger/accounting system, Remindoo does not require a month or period-end routine.	N/A.

4.26	Is it possible to delete accounts if the balance is Nil but transactions have been recorded against the code?	Not applicable — Remindoo does not maintain financial accounts/ledger balances, so this does not apply to a practice management/CRM platform.	N/A.
4.27	What is the size and format of reference numbers and descriptions within: - Ledgers? - Stock? - Currencies?	Not applicable — Remindoo is a practice/workflow management and CRM platform, not a ledger/stock/currency accounting system, so this does not apply.	N/A.
4.28	How does the software guard against/warn about duplicate account numbers on set up?	Not applicable in the ledger 'account number' sense (see 4.26). Duplicate client and record creation is prevented by comparison checks applied at the point of entry (see 4.06).	N/A.
4.29	How does the software enable the traceability (from, to and through the accounting records) of any source document or interfaced transaction?	Remindoo does not hold the underlying accounting records, so traceability through to ledger postings does not apply. Source documents are stored against the relevant client and task records, and user activity is captured in the system audit log (see 6.43).	Confirmed.
4.30	What drill down/around functionality is available within the software?	Drill-in is available from list and dashboard views into task and sub-task detail (View Sub Tasks, Task Details View). There is no drill-down across financial data, as the platform does not hold ledger information.	Confirmed.
4.31	If the software uses a lot of standing information which changes frequently or regularly, does the software allow for such changes to be effected through the use of parameters or tables?	Yes - frequently changing standing information is maintained through configurable settings and templates (service, task, reminder, email, checklist, subtask, document and proposal settings templates), which authorised users can amend directly without code changes (see 4.36 and 6.16).	Confirmed.
Report writer			
4.32	Does the system have an in-built report generator or is a third-party solution used (if so please specify)?	Reporting is provided by Remindoo's built-in Analytics and Dashboards views and Employee Reporting; no third-party report-writer is used and no separate report-generation module is provided (see also 6.89).	Confirmed.
4.33	Is the report writer based on a standard SQL-type approach and is it flexible and easy to use?	No - there is no SQL-based or user-configurable report writer. Reporting is limited to the built-in dashboard and analytics views.	Confirmed.
4.34	Can the report generator operate over the financial and operational aspects of the system, e.g. combining service metrics with financial information?	The built-in dashboards cover operational practice data such as tasks, deadlines, workloads and staff performance. Remindoo does not hold ledger or financial data, so combined financial and operational reporting does not apply.	Confirmed.
4.35	Is a comprehensive data dictionary provided to aid field selection?	No - a data dictionary is not provided, as there is no user-facing report writer requiring field selection (see 4.33).	Confirmed.
4.36	Does the system provide a library of reports and templates which can be amended, saved and re-run?	A library of reusable templates is provided throughout the application - Service, Task, Reminder, Email, Checklist, Subtask, Document and Proposal Settings templates - which can be amended, saved and re-used. This is a template library rather than a library of saved, re-runnable reports.	Confirmed.
4.37	Can users create their own reports? If so, what are the controls on users doing this?	No - users cannot create their own reports. Reporting is limited to the standard dashboard and analytics views, which are governed by the same role-based permissions as the rest of the system (see 4.33).	Noted.
4.38	Can users create saved searches/filters/queries?	Yes - filters can be applied across tasks and clients and saved filter sets are available for re-use.	Confirmed.

4.39	Can regular reports be added to user menus in the appropriate area of the system?	Not applicable - there is no user-defined report facility, so reports cannot be added to user menus. Dashboard and analytics views are reached from the standard navigation.	Confirmed.
4.40	Does the system support the production of on demand (interactive) and scheduled batch reports?	On-demand, interactive dashboard and analytics views are available. Scheduled batch report production is not currently supported (see 4.33).	Noted.

Ref	Requirement	Response	Reviewer Comments
5.	USABILITY		
Ease of use			
5.01	Does the solution provide a multi-language user interface?	No. The user interface is currently provided in English only, which reflects the product's focus on the UK market.	Confirmed.
5.02	Does the system allow for customisable branding and UI (e.g. corporate colour palate, upload company logo, etc)?	No. The application's interface itself is not customisable with a firm's branding corporate colour palettes and logo upload within the UI are not currently supported. Firms can, however, connect their own email domain so that all client-facing emails sent from the system come from the firm's own address, and email templates can be written in the firm's own style and tone.	Confirmed.
5.03	Does the system have a similar look and feel and overall consistency between screens and modules?	Yes — the platform is a single unified system (tasks, clients, dashboards, workflow, leads, proposals and communication) with a consistent look and feel across all screens and modules.	Confirmed.
5.04	Is data entry easily repeated if similar to previous entry?	Yes — repetitive data entry is minimised throughout: records and tasks similar to a previous entry can be duplicated, service and task templates generate standardised work automatically, recurring tasks repeat on schedule without re-entry, and bulk actions apply the same change across multiple records at once.	Confirmed.
5.05	Does the software prevent access to a record while it is being updated?	No. The system does not currently apply record locking a record is not blocked from access while another user is updating it.	Noted.
5.06	Is there locking at file or record level?	No, the system does not currently apply locking at file or record level.	Noted.
5.07	Does the software allow for the running of reports whilst records are being updated?	Yes — reporting operates independently of live record updates: dashboard and analytics views are generated from data refreshed overnight, so reports can be run while records are being updated without conflict.	Noted.
5.08	Can timestamps or user comments be added to transactions?	Yes — comments and colleague tagging can be added to tasks and records, time can be recorded against tasks, and timeline entries are date and time stamped.	Confirmed.
5.09	Is there the ability to store preferences and default values on a per-user basis e.g. department/team/user?	Yes — each user can customise and retain their own page views and filters, and firms can create custom fields to capture the data points they need.	Noted.
5.10	Does the system have the ability to provide user-defined fields with associated validation of data input?	Yes, users can create custom fields (e.g. Year End Date, VAT Quarter End) with input validated by field type, and these can also drive automated scheduling and reminders via trigger dates.	Confirmed.
5.11	Can the system provide users with reminders and notifications e.g. workflows?	Yes — automated task reminders, deadline notifications and workflow-driven alerts are core features (recurring services automatically generate tasks/reminders).	Confirmed.
5.12	If the system provides workflows, does it have functionality to substitute/delegate authorisations?	Yes — tasks and workflow responsibilities can be reassigned or delegated instantly to another user (individually or in bulk, e.g. to cover absence), although the system does not operate a formal authorisation-matrix with automatic substitution rules.	Noted.

5.13	Describe the tools and features available for a power user to make configuration changes such as amending a workflow.	All configuration is performed in-application by an administrator or authorised power user, with no coding required. Workflows are amended by editing service templates the tasks, subtasks and checklists they generate, their recurrence frequency, estimated time allocations and automated reminders with changes applying to work generated thereafter. Power users can also create and amend custom fields with validation and trigger dates for automated scheduling, build and edit email templates with dynamic tokens, configure roles and permissions, define lead statuses and pipeline stages, create teams, and tailor page views and filters. Access to these configuration functions is itself controlled by permissions.	Confirmed.
5.14	Is there the ability for users to define and configure layouts of letters and forms?	Yes, within the product's scope: Letters of Engagement and proposals can be designed and configured using templates, lead-capture forms can be built with custom fields and embedded on the firm's website, and email templates with dynamic tokens can be fully user-defined. A general-purpose letter/document designer is not provided, as client correspondence is handled through the templated engagement letter, proposal and email functions.	Confirmed.
5.15	Can users save the parameters of searches?	Yes, in part: applied filters are retained per user, so when a user returns to a screen the same filters are still applied and the same filtered data is displayed. Saving search parameters as named, reusable templates is not currently supported.	Noted.
5.16	Does the system have a "universal search" option, allowing a search to be undertaken over all modules of the system?	Not currently as a single search — search is provided within each module (clients, tasks, leads, proposals). A universal search across all modules of the system is in active development and is scheduled for release within the next 14–18 weeks.	Noted.
5.17	Can the system store menu option 'favourites' on a per user basis?	No — per-user menu favourites are not currently supported, although each user can customise their page views and filters, which are retained per user.	Noted.
5.18	Can a user open multiple windows accessing the same or different modules of the system?	Yes — as a browser-based application, users can open multiple windows or tabs simultaneously, accessing the same or different modules of the system at the same time.	Confirmed.
5.19	Can more than one software function be performed concurrently?	Yes — multiple functions can be performed concurrently; for example, a user can work on tasks in one window while viewing client records, reports or leads in another, and processes such as bulk actions run without preventing continued use of the system.	Confirmed.
User documentation and training			
5.20	Confirm whether a user manual / instructions is provided and how this is distributed?	Yes — a user manual is provided in the form of an online knowledge base (getting started guides, how-to guides and troubleshooting content), accessible to all users online. No separate distribution is required and the content always reflects the current release.	Confirmed.

5.21	Does the user manual include: - An index or search facility? - A guide to basic functions of the software? - Pictures of screens and layouts? - Examples? - A tutorial section? - Details of any error messages and their meanings?	User documentation is provided through the online knowledge base, which includes: a search facility and organised categories (in place of a traditional index); a Getting Started guide covering the basic functions of the software; how-to guides illustrated with screenshots of screens and layouts; worked examples within the guides; a tutorial-style Getting Started section for new users; and a dedicated Troubleshooting & Errors section explaining common error messages and their resolution.	Confirmed.
5.22	Is context-sensitive help available within the system?	No traditional screen-by-screen context-sensitive help is provided; instead, help is available at any point via the searchable online knowledge base and the in-product assistant/support chat, which answers questions as they arise.	Confirmed.
5.23	Is the manual and/or help editable by the user (subject to the permissions matrix)?	No — the knowledge base and help content are maintained centrally by Remindoo and are not editable by users; this ensures documentation always reflects the current release.	Noted.
5.24	Will the Software House make the detailed program documentation (e.g. file definitions for third party links) available to the user, either directly or by deposit with a third party (ESCROW)?	Detailed program documentation is not published as standard, and no ESCROW deposit arrangement is currently in place. Users retain the ability to export their data from the system, and requests for technical documentation (for example, to support data migration) are considered on a case-by-case basis.	Noted.
5.25	Please detail the training options available?	New customers receive three hours of training together with full onboarding support, covering system setup, data migration and getting the team working in the platform. Thereafter, ongoing support is available via email, supplemented by the online knowledge base with getting-started guides, how-to articles and troubleshooting content.	Noted.
5.26	Who provides training: - Software House? - VAR?	Training is provided directly by the Remindoo team. No third-party resellers or VARs are involved in training delivery.	Noted.
Support and maintenance			
5.27	How is the software sold: - Direct from the software house? - Via a Value Added Reseller (VAR) or Integrator?	The software is sold direct by Remindoo via remindoo.co; no Value Added Resellers or integrators are involved in the sales channel.	Noted.
5.28	How is the product supported: - Direct from the software house? - Via a Value Added Reseller (VAR) or Integrator?	Support is provided direct by Remindoo via email, with no VARs or integrators involved — sales, onboarding, training and ongoing support are all delivered by the same in-house team.	Noted.
5.29	Do VARs have to go through an accreditation process?	Not applicable	N/A.
5.30	Is the software sold based upon number of named users or a number of concurrent users?	Neither — Remindoo includes unlimited users per firm at no per-user cost. Pricing is based on the number of active clients rather than on named or concurrent users.	
5.31	The supplier should detail the support cover options available, covering: - The hours provided? - Associated costs? - The global regions covered?	Support is included in the subscription at no additional cost — there are no tiered support packages or extra charges. Cover is provided via email during UK business hours (Monday to Friday, 9.00am–5.30pm), with onboarding support and three hours of training included for new customers. Support is delivered from the UK, reflecting the product's current UK market focus.	Noted.

5.32	Detail the process by which customers raise support requests and how these can be viewed/managed?	Support requests are raised by email to the Remindoo support team. Each request is acknowledged and managed through to resolution, with progress and outcomes communicated to the customer by email. Requests are logged and tracked internally so response standards are maintained and nothing is missed. A self-service ticket portal is not currently provided; customers can obtain an update on any open item at any time by replying to the email thread.	Noted.
5.33	Please note the methods of support available: - Telephone? - Internet chat? - Remote access to customer workstation? - Other, please specify?	Support is provided primarily by email, supplemented by screen-sharing sessions where an issue is best resolved visually, and telephone calls to the client where genuinely needed. Internet chat and remote access to customer workstations are not offered; screen-sharing is conducted with the customer present and in control.	Noted.
5.34	Do you offer service credits for failure to meet performance around SLA and uptime (if applicable)	No — service credits are not currently offered. The service has not experienced material downtime to date, and availability has remained consistently high since launch.	Noted.
5.35	What is your escalation path for tickets which have not been resolved within a reasonable time?	We operate a zero-inbox support policy: every email received by 4.00pm is dealt with the same working day, and anything received after that is dealt with the next working day. Support is managed entirely through email under this discipline, ensuring every request is actioned on time, every time. Any item requiring deeper technical work is escalated to the development team, with senior management having direct oversight of anything outstanding until resolution.	Noted.
5.36	How often are general software enhancements provided?	Enhancements are released regularly and frequently. We operate a continuous development cycle driven by customer feedback — via our public feature request portal and direct engagement with firms with improvements and new features shipped on an ongoing basis and documented in our public roadmap and changelog.	Noted.
5.37	Will they be given free of charge?	Yes — all enhancements to features within a customer's package are provided free of charge. Updates to Core functionality are included for all customers, and Growth customers additionally receive enhancements to Growth-tier features at no extra cost. There are no upgrade fees; new functionality is simply released within the relevant package.	Noted.
5.38	How are enhancements and bug fixes provided to customers?	As a cloud-hosted service, enhancements and bug fixes are deployed centrally by Remindoo, so all customers are automatically on the latest version with no installation or action required. Changes are communicated to customers through our newsletter and notifications within the application, with details also published in the public changelog.	Noted.
5.39	Is “hot line” support to assist with immediate problem solving available?	Yes — where a customer has an immediate problem, our team will telephone them directly and work through the issue in real time, supported by screen-sharing where helpful, in addition to our same-day email support policy.	Noted.

5.40	If so, is there an additional cost involved?	No — this support is provided free of charge; there is no additional cost.	Noted.
5.41	At what times will this support be available?	Support is available during UK office hours (Monday to Friday), and in practice our team frequently assists outside these hours where a customer needs help — while out-of-hours cover is not contractually guaranteed, we pride ourselves on being available when it matters.	Noted.
Integration and www facilities			
5.42	Are the different modules of the system fully integrated (i.e. no set-up effort required in order to use the various modules together)?	Yes — all modules (tasks, clients, workflows, leads, proposals, communication and dashboards) are part of a single fully integrated platform sharing one database, and work together out of the box with no set-up or integration effort required; for example, a lead converts to a client, a proposal generates the engagement, and services automatically create the associated tasks and deadlines.	Confirmed.
5.43	Are they integrated on real time basis or batch basis?	Modules are integrated on a real-time basis — actions in one module (e.g. converting a lead, onboarding a client, completing a task) are reflected immediately across the system. The exception is the reporting layer, where dashboard and analytics views are generated from data refreshed overnight.	Confirmed.
5.44	Can the software be linked to other packages e.g. word processing, graphics, financial modelling, to provide alternative display and reporting facilities?	N/A, this has not been requested so nothing in plan at this stage	Noted.
5.45	Can definable links to spreadsheets be created?	No — definable links to spreadsheets cannot be created. Data can be exported in CSV/XLS format for use in spreadsheets.	Noted.
5.46	Does the system provide a secure document storage capability: If so, please give examples of the document types saved and what transactions these might relate to.	Yes — secure document storage is provided on AWS infrastructure. Examples include client documents uploaded and shared through the client portal, proposals, and signed Letters of Engagement stored against the client record — typically relating to onboarding, engagement and ongoing compliance work.	Confirmed.
5.47	Can documents be scanned into a secure repository?	Documents scanned by the user can be uploaded and stored securely against client records, including via the client portal; the system does not provide a built-in scanning capture facility.	Noted.
5.48	Does the system provide data migration tools for transactional and master data sets (e.g. employees customers, suppliers, journals, invoices).	Assisted migration of client and contact data from other systems is provided by the Remindoo team using CSV/XLS import templates (a per-client migration fee may apply). There are no self-service migration tools for other data sets, and Remindoo does not hold ledger data such as journals or invoices.	Noted.
5.49	What connection mechanisms does the software have and what breadth of functionality in terms of: - operations (add, update, delete)? and - what transactions/data it can access? E.g. if webservices APIs available, then can customers connect to whatever software they wish?	Remindoo integrates directly with Companies House (company details and filing deadlines) and HMRC services to retrieve data used by the platform. A general-purpose public API or webservices interface for customers to build their own connections (add/update/delete operations) is not currently offered; a public API is on the product roadmap.	Noted.
5.50	Does the system support mobile working?	Remindoo is browser-based and can be opened on any device; however, the interface is designed and optimised for desktop/laptop use — it is not currently mobile-responsive and there is no native mobile app.	Noted.

Ref	Requirement	Response	Reviewer Comments
6.	SaaS HOSTING		
	This evaluation covers the system but not the method by which it is delivered and/or contracted for. Potential users need to satisfy themselves on the security and disaster recovery aspects and licensing of the online system and any data protection issues of their own and customer/supplier information, contained therein, being held on the system, as well as the return of the data when the contract expires or is terminated.		
Data centres and customer data			
6.01	Whose data centres are used and where are these located: - If hosted -- where data centre controlled by a third-party? - If SaaS -- where the software vendor will be in control?	Remindoo is provided on a SaaS basis: the software and its environment are controlled by Remindoo, with hosting on Amazon Web Services (AWS) data centres. The database is managed via Supabase and hosted in the AWS London (eu-west-2) region, the application backend runs on AWS, and the front end is delivered via Vercel. AWS provides the physical infrastructure and holds extensive certifications (including ISO 27001 and SOC 2); Remindoo controls the application, database and all customer data within that environment. Customer data resides in the United Kingdom.	Noted.
6.02	Does the customer get a choice of the jurisdiction in which their data resides?	No — customers do not choose the hosting jurisdiction; all customers are hosted in Remindoo's standard environment, with customer data resident in the United Kingdom (AWS London region). This provides a consistent, uniformly secured platform for every firm rather than fragmented per-customer arrangements.	Noted.
6.03	What certification(s) do you or your platform operators hold relating to your data centres and your business operations?	Our platform operator, AWS, holds an extensive set of certifications covering the data centres on which Remindoo runs, including ISO 27001, ISO 27017, ISO 27018, SOC 1, SOC 2 and SOC 3, and Cyber Essentials Plus. Remindoo Limited does not itself currently hold certifications; Cyber Essentials certification is planned It will be done by end of december, already in talks with vendor.	Noted.
6.04	Do you or your platform operator have an SSAE16 (System and Organisation Controls) report available?	Remindoo Limited does not itself hold an SSAE/SOC report. Our platform operator, AWS, publishes SOC 1, SOC 2 and SOC 3 reports (under SSAE 18) covering the infrastructure on which the service runs; these are available through AWS Artifact, and the SOC 3 report is publicly available.	Noted.
6.05	What are the physical controls over the:- - Premises? - Fileservers? - Communications equipment?	All production infrastructure servers and communications equipment resides in AWS data centres, which apply industry-leading physical controls: perimeter security, 24/7 security staff, CCTV, multi-factor and biometric access controls, strictly limited and logged access to server halls, and redundant power and connectivity, all independently audited under AWS's ISO 27001 and SOC certifications. No customer data is stored on physical equipment at Remindoo's premises; staff access the environment remotely through secured, authenticated administrative access.	Noted.
6.06	Is the space in this/these data centre(s) shared with any other companies?	Yes — AWS data centres are multi-tenant facilities shared by many organisations, as is standard for public cloud. Customer environments are logically separated by AWS's virtualisation and security controls, which are independently audited under its ISO 27001 and SOC certifications; no other company has access to Remindoo's environment or data.	Noted.

6.07	Is data for different customers/companies kept:- - On separate servers? - In different databases? - In separate database tables? - In a database with data for other customers and companies using logical security to partition customers' data?	Customer data is held in a managed PostgreSQL database provided by Supabase, hosted in the AWS London (eu-west-2) region, in a shared database with logical security partitioning: every record carries the customer's unique identifier, and application-level tenant separation ensures each firm can only ever access its own data. This separation is enforced consistently across every module and query; no customer can access another customer's data.	Noted.
6.08	How is it ensured that data for different customers and companies is reliably identifiable and only accessed by authorised users for each customer/company?	Every record in the database is tagged with the customer firm's unique identifier, and all data access passes through the application layer, where each query is automatically scoped to the authenticated user's firm — data belonging to another customer is never returned. Within each firm, role-based permissions then control which authorised users can access which modules and records. Users authenticate with individual credentials (with MFA available), so all access is attributable to a specific authorised individual within a specific customer firm.	Noted.
6.09	What controls are in place to prevent users from one customer/company accessing data from another customer/company by accident or by design?	Access is bound to the authenticated session: on login, a user's session is tied to their firm's unique identifier, and every request is scoped server-side to that firm before any data is returned — there is no mechanism in the application through which a query can reach another customer's data, whether by accident or by deliberate manipulation. Requests for records outside the user's firm are rejected regardless of how they are constructed. Within the firm, role-based permissions further restrict access, and individual credentials with MFA available reduce the risk of unauthorised use of an account.	Noted.
6.10	How is (Internet) communication traffic monitored to identify potential problems before they happen: - From a performance perspective? - From a security standpoint?	From a performance perspective, the application and infrastructure are monitored using AWS and Supabase platform monitoring, which track server load, database performance, response times and resource utilisation, allowing capacity issues to be identified and addressed before they affect users. From a security standpoint, all traffic is encrypted over HTTPS/TLS, and platform-level protections from AWS and Supabase (including network firewalling and DDoS mitigation) apply to all inbound traffic; access and error logs are reviewed by the development team.	Noted.
6.11	What procedures are in place to prevent a break in Internet Connection (at the server, client or in between) from causing data corruption?	All writes to the database are performed as atomic transactions in PostgreSQL: a save either completes in full or is rolled back entirely, so a connection failure at the client, server or anywhere in between cannot leave a record partially written or corrupted. If a user's connection drops before a request completes, the change is simply not committed and the user re-submits it on reconnection. Server-side data is further protected by the managed database platform's integrity controls and daily backups.	Noted.
6.12	Are communications between the user's computer and the software service encrypted: - User log in data only? - All data exchanged between user client and software service?	All data exchanged between the user's browser and the service is encrypted not just login credentials. The entire session is conducted over HTTPS/TLS, covering authentication, all application data, uploads and downloads.	Noted.

6.13	Is data on your servers encrypted at rest?	Yes — data is encrypted at rest. The database is hosted on Supabase's managed PostgreSQL platform, which encrypts stored data at rest (AES-256) as standard across its infrastructure, in addition to encryption in transit for all communications.	Noted.
6.14	What level of encryption is used?	Data at rest is encrypted using AES-256; data in transit is encrypted using TLS 1.2 or higher.	Noted.
6.15	Is a staging environment provided that is an exact replica of production; which can be used for testing purposes?	Remindoo maintains its own staging environment, mirroring production, in which all enhancements and fixes are tested before release. A separate customer-facing staging replica is not provided; instead, every customer receives a free 60-day trial of the full product, allowing them to create an account, test their processes and evaluate the system thoroughly with their own data before committing and simply continue on the same account at the end of the trial, with nothing to re-enter.	Noted.
6.16	Is a test environment provided to test configuration changes? If so, is there an additional charge for this?	A separate test environment is not provided; configuration changes (such as amendments to service templates, custom fields or permissions) are made in the live system by authorised users, and the free 60-day trial account can be used to test set-up and configuration before go-live. There is accordingly no charge, as no separate environment is required.	Noted.
Access to customer data			
6.17	What are the implications of the Data Protection Act over information held by the hosting service provider, and how does the vendor mitigate these?	Customer personal data resides on infrastructure operated by third-party providers (Supabase/AWS and Vercel), who act as sub-processors under UK GDPR and the Data Protection Act 2018. Remindoo mitigates the implications of this as follows: customer data is hosted in the United Kingdom (AWS London region via Supabase); the providers are engaged under data processing terms incorporating the required Article 28 processor obligations; data is encrypted in transit (TLS) and at rest (AES-256); and the providers operate independently audited environments (ISO 27001, SOC 2). Where a customer firm uploads client data, the customer remains the Data Controller and Remindoo acts solely as Data Processor, processing data only on documented customer instructions and never for its own marketing or commercial purposes; any ancillary international transfers by sub-processors are covered by adequacy decisions or Standard Contractual Clauses.	Noted.
6.18	Are you subject to any legal or regulatory requirements obliging you to retain a copy of customer data?	No - Remindoo is not subject to any specific legal or regulatory requirement obliging it to retain a copy of customer data. Personal data is retained only for as long as necessary to meet legal, accounting or regulatory requirements, after which it is deleted or anonymised.	Noted.
6.19	Who will be able to access or see customer data?	Only users and employees authorised by the customer can access that customer's data, controlled through role-based permissions within the customer's own account. A limited number of Remindoo staff (bound by confidentiality obligations) and contracted sub-processors (cloud hosting/infrastructure, payment processing, email delivery, analytics and support tools, all contractually bound to UK GDPR) may process data strictly to deliver the service. Data is not sold or shared for marketing.	Noted.

6.20	Explain the procedures to prevent unauthorised access from staff, or contractors, working for the service provider or any other people with access to the service provider's internal systems.	Internal access is controlled by role-based access permissions, so staff and contractors can only reach the systems and data required for their role. Access is granted on that basis and revoked when a role changes or the individual leaves (see 6.25).	Noted.
6.21	Explain the release management procedures in place and the associated segregation of duties ?	Releases follow a weekly scheduled sprint release, deployed by the DevOps team only after approval by the QA team and the Product Owner, providing segregation of duties between development, testing/approval and deployment.	Noted.
6.22	Is there sufficient segregation of duties preventing system developers from accessing and changing live applications and data files?	Yes - duties are segregated so that system developers do not have unrestricted access to change live applications or data files; deployment to the live environment is carried out by the DevOps team following QA and Product Owner approval.	Noted.
6.23	Explain the review and approval procedures covering system operations staff when emergency changes need to be made to live applications and data?	Yes - a documented urgent release SOP (standard operating procedure) sets out the review and approval steps required before emergency changes are made to live applications and data.	Noted.
6.24	Is an audit trail always maintained of these emergency changes?	Yes - an audit trail is maintained for all releases, including emergency changes.	Noted.
6.25	What procedures are in place when members of staff leave to ensure that their system access is stopped?	Systems are maintained in-house and the IT team revokes all system access for a member of staff upon their exit.	Noted.
Platform and service levels			
6.26	Which databases and servers are used to host the software?	The application uses a PostgreSQL database, managed via Supabase and hosted in the AWS London (eu-west-2) region. The application backend is hosted on AWS and the front end is deployed on Vercel.	Noted.
6.27	What forms of user authentication are supported e.g. user names, passwords certificates, tokens etc.?	Username and password authentication is used, with encrypted password storage and JWT access and refresh tokens for session/API authentication. Multi-factor authentication (MFA) is also supported.	Noted.
6.28	What is the proposed product/service availability percentage?	No fixed uptime percentage is contractually committed — the Platform is provided on an 'as available' basis (Terms and Conditions, section 10) but in practice the service is available almost all of the time, dependent on the underlying hosting/server providers.	Noted.
6.29	What percentage availability has been achieved over the past 12 months?	Availability has been effectively continuous over the past 12 months, with no material outages. A formally measured uptime percentage is not yet published; independent uptime monitoring is being introduced so that availability can be reported against recorded data.	Noted.
6.30	Is a service level agreement ("SLA") offered regarding: - Service availability? - Data recovery?	No formal SLA is currently offered in respect of service availability or data recovery; the Platform is provided on an 'as available' basis.	Noted.
6.31	Is the service available 24x7 or are there downtime periods for maintenance?	The service is available 24x7 and there are no scheduled recurring downtime periods for maintenance, although uninterrupted service is not guaranteed and short interruptions can arise from infrastructure or third-party provider issues.	Noted.
6.32	Is the customer made aware of maintenance periods in advance?	Yes — customers are notified in advance of maintenance periods where reasonably practicable.	Noted.

6.33	Does the application software:- - Require any client software to be installed on the user's computer? - Work entirely within Internet Browser software on the user's computer?	No client software installation is required — Remindoo works entirely within the user's internet browser.	Confirmed.
6.34	Where the product/service relies upon downloading and running an executable program, has that program been secured with a digital certificate to verify the source and integrity of the program?	Not applicable — Remindoo is a browser-based SaaS application and does not require customers to download or run an executable program.	N/A.
6.35	Does the product/service currently use any technologies which are obsolescent / out of support / soon to be end of life? If so, describe how the user can mitigate this risk.	None — no obsolescent, out-of-support or soon-to-be end-of-life technologies are currently used by the product/service.	Noted.
Platform security			
6.36	What security steps are taken to prevent and detect intrusion attempts?	Access controls, monitoring and logging and secure hosting environments are in place, and multi-factor authentication (MFA) is used to prevent unauthorised access.	Noted.
6.37	Is firewall hardware and software used to protect the live systems from unauthorised access?	Yes — firewall protection is in place to protect the live systems from unauthorised access.	Noted.
6.38	Which monitoring software is used to create alerts when intrusion attempts are suspected?	None — no dedicated intrusion-detection or alerting software is currently in use.	Noted.
6.39	Are designated staff responsible for receiving and urgently responding to these alerts?	No — there are no staff formally designated to receive and respond to intrusion alerts, as no intrusion alerting software is currently in place.	Noted.
6.40	Have clear procedures been established for identifying and responding to security incidents?	Yes. Documented procedures are in place to identify, assess, escalate and respond to security incidents. System monitoring and audit logs support incident detection and investigation. Incidents are assessed based on severity, appropriate containment and remediation actions are taken, and relevant parties are notified where required, including in accordance with UK GDPR requirements.	Noted.
6.41	Is all security sensitive software, such as operating systems and databases, kept up to date with the latest software patches? Please indicate how regularly updates are applied.	Yes — security-sensitive software, including operating systems and databases, is patched and updated on a monthly basis.	Noted.
6.42	List the procedures and software tools in place to prevent or detect and eliminate interference from malicious code, such as viruses?	Not applicable — no separate anti-virus/anti-malware tooling is operated by Remindoo; the product is browser-based and runs on managed cloud infrastructure (AWS/Vercel), relying on the security controls of those providers.	Noted.
6.43	Is a system log maintained by the service provider that details - User access? - User activity? - Error messages? - Security violations?	Yes — system monitoring and audit logging is maintained covering user access, user activity, error messages and security violations.	Confirmed.
6.44	Is this log available to the customer?	No — the system log is not currently made available to customers.	Noted.
6.45	Have there been any successful unauthorised access attempts been made during the last year? If Yes:- - What was the effect on the business and users? - What steps are in place to prevent this happening again?	No, there have been no successful unauthorised access attempts during the last year. We dont create log at this stage.	Noted.
6.46	Is penetration testing regularly carried out by (please indicate frequency of tests): - Staff specialising in this field? - External specialists?	No — regular penetration testing is not currently carried out by internal or external specialists. See 6.48 for the testing that is undertaken.	Noted.
6.47	Are procedures in place to ensure that any weaknesses found by penetration testing are addressed quickly?	Not applicable — no formal penetration testing programme is currently in place.	N/A - see 6.46.
6.48	If penetration testing by a specialist is not performed regularly, please indicate the main procedures in place to identify weaknesses?	Stress testing and general authentication testing are carried out to identify weaknesses.	Noted.

6.49	Are security procedures regularly reviewed? Please indicate frequency of reviews.	Yes — security procedures are reviewed weekly. Our lead developer is responsible for this and i review them where required.	Noted.
6.50	What security reporting is provided demonstrating compliance against certification(s) and policy(ies)?	None — no formal security or certification compliance reporting is currently provided to customers.	Noted.
6.51	How are security breaches communicated to customers?	Remindoo's Customer Care representatives contact any affected client immediately in the event of a security breach. Customers may also raise concerns with the ICO as set out in the Privacy Notice.	Noted.
Backups by the service provider			
6.52	In relation to backups undertaken by the system provider please explain: - How is a customer's data backed up? - How often is this undertaken? - What is backed up? - What's the media used? - Where are backups stored? - How many copies are there? - How long are they retained for? - Who has access to them? - Is the data encrypted?	Customer data is backed up daily, with the daily backups retained for each week. Access to backups is restricted to the DevOps team. Backups are not currently encrypted. Backup procedures form part of Remindoo's general security measures.	Noted.
6.53	How frequently is a test-restore of backups undertaken?	A test-restore of backups is undertaken daily.	Noted.
6.54	Can the provider restore from a backups that it has taken at a customer request?	Yes — Remindoo can restore data from a backup it has taken at a customer's request.	Noted.
6.55	Does a customer have the ability to undertake their own backups?	No — customers cannot currently take their own backups; customers may request a copy of their data (see 6.83).	Noted.
6.56	If so, can a customer restore data a backup that they have taken?	Not applicable — customers cannot take their own backups, so customer-led restores do not apply.	N/A.
Platform recovery			
6.57	What contingency plans are in place to enable a quick recovery from: - Database or application software corruption? - Hardware failure or theft? - Fire, flood and other disasters? - Communication failures?	No formal documented contingency/disaster recovery plan is currently in place for these scenarios. Recovery relies on the daily backups described at 6.52 and the resilience of the managed cloud hosting providers (AWS/Vercel).	Noted - see 6.61 for RTO and RPO targets.
6.58	How often are these plans tested?	Not applicable — no formal contingency plans are currently in place to be tested.	Noted - see 6.57.
6.59	How often are these plans reviewed and updated?	Not applicable — no formal contingency plans are currently in place to be reviewed or updated.	Noted - see 6.57.
6.60	What is the longest period of time envisaged that service may not be available?	A few hours at most, dependent on the availability of the underlying hosting/service providers.	Noted.
6.61	What are your: - Recovery Point Object (RPO) standards? - Recovery Time Objective (RTO) minimum standards?	The Recovery Time Objective (RTO) is targeted at within 1 hour. As backups are taken daily, the Recovery Point Objective (RPO) is up to 24 hours — recovery is to the most recent daily backup.	Noted.
6.62	If transaction records are dated and time stamped are the times used local to the user or based on where the server is located?	Times are stored in UTC in the database and displayed in the user's local time in the user interface.	Confirmed.
6.63	What protection is in place to enable users to able to access their accounting and other data if the service provider should experience serious difficulties, cease trading or decide to stop providing the service?	No specific arrangements are currently in place to guarantee continued access to data if Remindoo experienced serious difficulties, ceased trading or stopped providing the service. Customers own their data and can request a copy of it.	Noted.

6.64	Do these arrangements include: - Standby arrangements for another organisation to continue providing the full service? - Minimal arrangements to at least enable customers to access their data for a sufficient period of time to extract data copies, produce reports and make alternative arrangements?	Not applicable — no standby or wind-down arrangements of this type are currently in place.	N/A - see 6.63.
6.65	If the system is hosted are there arrangements in place for this third party to continue providing a hosting service in the short term to allow time for customers to negotiate their own arrangements? If so, how long does the arrangement allow?	No — there are no arrangements with the hosting provider for it to continue providing a hosting service in the short term.	Noted - see 6.63.
6.66	Are there any individual members of the vendor's staff whose leaving or illness would significantly reduce, or even stop, the service provider's ability to provide a full and reliable service to customers?	Not applicable — no individual member of staff represents a single point of failure whose absence or departure would significantly impact or stop the service. We have established systems, procedures and internal protocols to ensure responsibilities are covered by other team members and services continue in line with our internal guidance.	Noted.
Platform change management			
6.67	Describe your approach to upgrades including what option customers have not to take upgrades (if any)?	Not applicable — as a multi-tenant SaaS platform, upgrades are applied centrally for all customers and there is no option for a customer to decline an upgrade. Pricing and feature changes may be revised on renewal with reasonable notice.	N/A.
6.68	Are users able to test the application before new versions go into live use?	No — customers are not provided with a separate test/UAT environment to trial new versions before they go live.	Noted.
6.69	Are users given notice before application changes are applied to the live system?	Yes — users are given notice before application changes are applied to the live system, and release notes are published in the Changelog on remindoo.co.	Noted.
6.70	Are changes delivered into the live environment "switched off" to enable users to test them before enabling them for their environment?	No — changes released into the live environment are not delivered switched off for customers to enable and test individually.	Noted.
6.71	Describe what testing and QA processes are undertaken before upgrades and other changes are made live/available to customers?	Testing is carried out by the QA team and includes unit, integration and system testing, with final approval given by the Product Owner before release.	Noted.
6.72	Explain the release management procedures in place and the associated segregation of duties?	Releases are made as a weekly scheduled sprint release by the DevOps team, after approval by the QA team and the Product Owner, providing segregation of duties between development, testing/approval and deployment.	Noted.
6.73	Are users informed when they next login of the application changes that have gone into live use?	Yes — users are informed of application changes that have gone live when they next log in.	Noted.
6.74	Do customer staff have to take any action (e.g. regression testing) when new editions, patches or upgrades are released? If so, please describe what they should ordinarily do.	No action is required from customer staff — updates are applied centrally by Remindoo to the browser-based service.	Noted.
Subscription options			
6.75	What is the minimum level of commitment must the customer sign up to, e.g. 36 months?	None — there is no minimum commitment period; a 60-day free trial is offered and the subscription can be cancelled at any time.	Noted.
6.76	Where online payment is used, what type of security is used to protect sensitive information?	Online payments are processed through Stripe's built-in payment workflow, so card data is handled by Stripe rather than being stored by Remindoo.	Confirmed.
6.77	Where online subscription / payment is used, is an invoice provided to the customer and, if so, in what format?	No — an invoice is not currently issued for online subscription payments; a confirmation email is sent instead (see 6.81). instead customers can login to stripe portal and see there invoices from there.	Noted.

6.78	When subscriptions need to be renewed, what advance notice is provided and what is the time limit for renewal?	Subscriptions renew automatically on a monthly basis unless cancelled before renewal.	Noted.
6.79	Is there a procedure for late renewal and is there a time limit after which subscriptions cannot be renewed?	Where a subscription is not renewed or payment is not received, access to the application is revoked after a set period. No separate late-renewal window is published. Access is revoked after 30 days.	Noted.
6.80	How soon after creating or renewing a subscription (if applicable) can the system / service be used?	Immediately — the system can be used as soon as the subscription is created or renewed.	Noted.
6.81	What notifications / confirmations are provided to the customer regarding subscriptions and payments?	A confirmation email is sent to the customer confirming the subscription and payment.	Noted.
6.82	To what extent are users able to access their accounting and other data if: - They miss one or two payments? - They cease being customers?	No information is accessible — access to the application and the data held within it is withdrawn where payments are missed or the customer ceases to be a customer.	Noted.
6.83	At the end of the contract term, how long does a customer have to obtain a copy of their data from you?	Customer data is retained for 28 days after the end of the contract term so that a copy can be obtained, unless the customer instructs Remindoo to delete their information immediately. Customers own their data.	Confirmed.
6.84	At the end of the contract term, how is a customer's data destroyed (if appropriate) and will that destruction be certified?	Customer data is deleted at the end of the contract term in line with the retention policy; the destruction is not certified.	Noted.
6.85	What is your processes regarding disposal of end-of-life and failed hardware devices that were used to operate your service?	Remindoo does not operate its own hardware — the service runs on managed cloud infrastructure (AWS/Vercel), so disposal of end-of-life and failed hardware devices is handled by those hosting providers under their own processes.	Noted.
SaaS/Hosted reporting			
6.86	Are reports produced from the same software as the financial applications or is separate reporting software used?	Not applicable — Remindoo does not run separate financial applications; it is a single practice/workflow management and CRM platform, and any reporting/analytics (Analytics & Dashboards) is part of the same system.	N/A.
6.87	Does any application software (i.e. other than a web browser or PDF reader) need to be installed on the user's computer in order to prepare or view the reports?	No — Remindoo is accessed entirely through a web browser and no additional application software needs to be installed to prepare or view output.	Confirmed.
6.88	What browser versions are support: - On desktop/laptop (PC, Mac, Linux)? - On Tablets? - On mobiles?	Any current, actively supported browser can be used, on desktop/laptop (PC, Mac, Linux), tablets and mobiles.	Noted.
6.89	Is access to the reporting facilities and data controlled by the same procedures as access to the main application?	Not applicable — no separate reports are created within the system; analytics and dashboard views form part of the main application and are governed by the same role-based access controls.	N/A.
6.90	If it's different, explain the user access control facilities available to ensure information is only viewed by users with appropriate authority?	Not applicable — access to analytics/dashboard views is controlled by the same role-based permissions as the main application.	Noted.
6.91	In what electronic formats are reports produced:- - PDF? - XML? - MS Excel spreadsheet? - CSV file? - As html for viewing in a web browser? - Other, please specify?	Not applicable — no separate report outputs are produced by the system (see also 4.22).	Noted.
6.92	Are report documents stored on the web server or on the user's computer? If stored on the web server, are they secure to ensure only users with appropriate authority can get access?	Not applicable — no report documents are produced or stored by the system.	Noted.

6.93	For documents viewable in a browser is any data stored on the user's computer in a web browser cache or temporary file? If Yes: - Is there any protection against other users viewing the report or data on which it is based? - Is it clear on the reports when they were produced and the date of the data on which they are based, so the user can tell whether they are viewing out of date information?	No — report data is not stored on the user's computer in a web browser cache or temporary file.	Noted.
6.94	Are communications between the browser and the server encrypted for any report related communications?	Yes — communications between the browser and the server are encrypted using SSL/TLS.	Noted.
6.95	If reports are produced dynamically each time the user views them can historical reports be reproduced at any time?	Not applicable — the system does not produce separate reports, so reproduction of historical reports does not apply.	N/A
6.96	Can reports viewable in a browser be navigated dynamically by users? For example: - Enabling drill down to more detailed information? - Altering which columns and rows of data are displayed. - Choosing time periods? - Specifying selection criteria?	Not applicable — no separate browser-viewable reports are produced; Analytics & Dashboards views form part of the main application.	N/A.
6.97	Can report data be reliably copied and pasted direct from browser viewable reports to an MS Excel spreadsheet retaining any table layout?	Not applicable — no separate browser-viewable reports are produced from which data would be copied into Excel.	N/A.
6.98	If reports are incomplete, for instance due to a poor Internet connection, is sufficient information provided to enable the user to notice that some of the report is missing?	Not applicable no separate reports are produced by the system.	N/A.

Ref	Requirement	Response	Reviewer Comments
7.	<u>PRACTISE MANAGEMENT SOLUTION</u>		
	Platform setup and administration		
7.01	Does the system support multiple practices, legal entities or brands within one account? If so, can a user switch between them using one login, and can each entity retain separate data and configuration while selected settings and reporting are administered centrally?	Not currently. Remindoo is provisioned as one account per practice, and each practice, legal entity or brand requires its own separate account and login; there is no entity switcher within a single login and no central administration or consolidated reporting across multiple entities. Firms operating more than one entity typically run them as separate Remindoo accounts, each with its own data, configuration and subscription.	Noted.
7.02	Can a practice model its internal organisational hierarchy within an entity, including offices, departments, service lines, teams, partners and managers? Can an employee belong to multiple teams or service lines?	In part. Within an entity, a practice can create teams and assign a team lead, allocate partners, managers and other employees to clients and to individual tasks, and define roles that reflect job function (for example partner, manager, senior, administrator). Employees can't be a member of more than one team at this stage. Offices, departments and service lines are not modelled as separate structural levels of a formal organisational hierarchy; firms generally reflect these using teams, roles and custom fields.	Noted.
7.03	Can practices configure the system to reflect their operating model? If so, which branding, terminology, statuses, categories, templates, fields and validation requirements can be customised?	Yes, within the following scope. Practices can configure: service, task, subtask, checklist, reminder, email, document and proposal templates; recurrence frequencies and estimated time allocations; custom fields (with validation applied by field type) and trigger dates that drive automated scheduling; client types and service categories; lead statuses and pipeline stages; roles and permissions; teams; and per-user page views and filters. Client-facing output can carry the firm's own branding - proposals and Letters of Engagement are built from the firm's own templates, and emails are sent from the firm's own domain using its own templates and tone. The application interface itself is not re-brandable (no logo upload or colour palette), and system terminology cannot be renamed (see 5.02).	Confirmed.
7.04	Does the system provide a universal search function? If so, can users search across all system functions using a single search?	Not currently as a single search. Search and filtering are provided within each module (clients, tasks, leads, proposals). A universal search across all modules is in active development and is scheduled for release within the next 14-18 weeks (see 5.16).	Noted.
7.05	Does the system support data migration, import, export and extraction? What principal data, formats, limitations and API capabilities are supported?	Yes, in part. Client and contact data can be imported using CSV and XLS files against a supplied import template, with failed rows reported back for correction and re-import; assisted migration from another system is offered by the Remindoo team (a per-client migration fee may apply). Lead and proposal history can also be imported. Data can be exported in CSV/XLS from the client area; a general export facility covering every area of the system in multiple formats (XLS, CSV, PDF) is not yet provided, and a full copy of a firm's data can be requested from Remindoo at any time (see 4.19-4.22 and 6.83). There is currently no public API or webservice interface; the system's own integrations to Companies House and HMRC are not exposed to customers. A public API is on the product roadmap.	Noted.

7.06	Does the system support access from desktop, tablet and mobile devices? If so, is the interface responsive across each device type, is a native mobile application available, and which functions are unavailable or restricted when using a tablet or mobile device?	Remindoo is browser-based and can be opened on any device with a current browser, but the interface is designed and optimised for desktop and laptop use. It is not currently mobile-responsive and there is no native mobile or tablet application, so on smaller screens the layout does not adapt and data-entry screens, dashboards and list views are impractical to use rather than functionally restricted. Responsive design and a mobile application are on the product roadmap (see 5.50). The target date is July 2027.	Confirmed.
Security, users and access control			
7.07	Does the system provide configurable role-based access control? Can roles be assigned by organisational scope, such as allocated clients, office, team, department or service line?	Yes. Access is controlled by configurable role-based permissions defined by the firm's administrator, applied per module and reflected in each user's menus, so users see only the areas they are authorised to access. Visibility can be scoped to allocated clients, and users can be grouped into teams. Because offices, departments and service lines are not modelled as separate organisational levels (see 7.02), roles cannot currently be scoped by those dimensions.	Noted.
7.08	For each record or module type, can administrators define the actions a role may perform, such as view, create, edit, approve, archive or delete?	Yes, for the core actions. For each module (clients, tasks, leads, proposals, settings and so on) an administrator can define whether a role may view, create, edit or delete, and delete rights are withheld entirely - a user without delete permission has no delete function in that module, including in bulk actions. Records can be archived as an alternative to deletion, and archive rights follow the same permission model. A distinct 'approve' permission is not currently configurable as a separate action type; review and approval are handled operationally through task stages, subtasks and checklists (see 3.06 and 3.19).	Confirmed.
7.09	Does the system support single sign-on and multi-factor authentication? If so, which identity providers are supported and can authentication requirements be enforced for all users?	Multi-factor authentication is supported and is included in the Growth package; it is enabled per user account. Single sign-on is not currently supported - there is no integration with Microsoft Entra ID / Active Directory, Google Workspace or other identity providers, and authentication is handled natively using individual credentials with JWT session tokens. MFA cannot currently be enforced firm-wide as a mandatory policy for all users; central enforcement and SSO are on the product roadmap (see 3.08-3.09). Target date is August 2027.	Confirmed.
7.10	Does the system maintain an audit trail of user and administrative activity? If so, which record changes and actions are captured, and can authorised users search, filter and export the audit trail?	In part. Activity is recorded at record level through front-end timelines: client, task, lead and proposal timelines capture actions chronologically (creation, status changes, assignments, comments and related activity), date and time stamped and attributable to the user. These are all visible to users. Remindoo additionally maintains server-side system monitoring (not visible to users) and audit logging covering user access, user activity, errors and security events, but those logs are not exposed to customers.(kept for three months only) A comprehensive system-wide audit trail - recording all changes and deletions with user, timestamp and before/after detail, and searchable, filterable and exportable by authorised users - is a committed item on the development roadmap (see 3.20-3.25 and 6.43-6.44).	Noted.

7.11	Does the system support user lifecycle administration for joiners, movers and leavers? Can accounts be activated, suspended or closed promptly, and can administrators report on active and inactive users, roles, team memberships and access rights?	Yes, in part. Administrators can invite new users, assign and change roles and team membership, and deactivate or remove accounts immediately, with unlimited users included at no per-user cost. Where a user leaves or changes role, their clients, services and tasks can be reassigned individually or in bulk. All current users, their team membership, role and detailed permissions are visible on screen in the user management area; a self-service export of a user access report is not yet available, and such a report can be requested from Remindoo where required for an internal review or audit (see 3.04). We aim to provide reports within 14 days.	Noted.
Client and contact management			
7.12	Does the system provide a central client and contact database? If so, which corporate, personal, partnership, trust, charity, landlord and other client types can be maintained?	Yes. Remindoo provides a single central client and contact database holding all client information, services, documents, notes and communication history in one place. Clients are recorded by type - including limited companies, sole traders / self-employed individuals, partnerships and LLPs, personal tax clients, trusts, charities and landlords - and firms can extend this with their own client types and custom fields to suit their client base. Dashboards analyse the client base by type, and clients can be archived rather than deleted where a relationship ends.	Confirmed.
7.13	Can client records be created or updated using Companies House data? What information and update parameters are supported, and are there any limitations?	Yes. Remindoo integrates directly with Companies House: entering or searching a company number retrieves and populates the statutory record - company name, number, registered office address, incorporation date, company status and type, SIC codes, officer information and the accounts and confirmation statement filing deadlines - which then drive automated task creation and reminders. Data can be refreshed from Companies House to keep the record and deadlines current. Limitations: the integration is read-only (no filing to Companies House from Remindoo), it covers registered entities only (unincorporated clients are maintained manually), and it is subject to the accuracy and availability of the Companies House public data service.	Confirmed.
7.14	Can multiple contacts, related entities and relationships be linked to a client? If so, can the system show contact roles, service responsibilities, company groups, ownership structures, directors, shareholders and associated personal tax clients?	In part. Multiple contacts can be held against a client with their own details and notes, directors, shareholders/PSCs and officer information are retrieved from Companies House, and each client record carries the service responsibilities and allocated team. Formal modelling of company groups, ownership structures and cross-linked related entities - for example linking a company to its directors' personal tax records as navigable relationships with defined contact roles - is not yet supported; firms currently record these associations using contacts, custom fields and notes.	Noted.
7.15	Can partners, managers, service owners and other employees be allocated to each client? If so, can responsibility differ by service and be updated for individual clients or in bulk?	Yes. Each client can have a partner, manager and other allocated employees, and work can be assigned at service, task and subtask level, so responsibility can differ by service rather than being a single client-wide owner. Allocations can be changed on an individual client or applied in bulk across multiple clients, services or tasks - for example to cover absence, a leaver or a portfolio reallocation (see 7.34).	Confirmed.

7.16	Does the system detect possible duplicate clients, contacts and leads across records created through any channel? Which matching rules are used, and can authorised users review and merge duplicates while preserving record history?	Duplicate creation is prevented rather than detected after the event: entries are compared against existing records at the point of input and duplicates are blocked (see 4.06), and client records created from Companies House are keyed on the company number, which prevents duplicate corporate records. There is currently no cross-channel duplicate-matching engine with configurable fuzzy matching rules, and no merge tool that consolidates duplicate clients, contacts or leads while preserving the history of both records. For Example, if a company exists within the system, remindoo will not allow user to add the same company, it will say already added.	Confirmed.
7.17	Can practices maintain a central register of statutory and client-specific dates on each client record, including accounting reference dates, confirmation statements, tax returns, VAT periods and payroll dates? Can source, status and amendment history be retained for each date?	Yes. Each client record holds a central register of key dates. Statutory dates - accounting reference date, accounts and confirmation statement due dates - are retrieved and refreshed from Companies House, and firms record further dates such as VAT quarter ends, tax return, payroll and CIS dates using custom fields. Any date field can be set as a trigger date, so the associated service automatically generates the relevant tasks, deadlines and reminders. Amendments are visible chronologically in the client timeline.	Confirmed.
Client onboarding, AML and compliance			
7.18	Does the system provide configurable client onboarding and acceptance workflows? If so, can requirements vary by client type, legal form, service, risk rating or other practice-defined criteria?	Yes, in part. Client onboarding is delivered through the Client Onboarding Automation and Client Journey Tracking functions, driven by service and task templates and checklists, so a practice defines the onboarding steps once and they are generated automatically. Requirements can be varied by the services selected and by client type (different templates and checklists can be applied), and lead-to-client conversion carries the agreed services into the onboarding workflow. Automatic branching of onboarding requirements by legal form, risk rating or other practice-defined criteria is not yet rule-driven - firms achieve this by selecting the appropriate template - and conditional onboarding rules are on the roadmap.	Confirmed.
7.19	Can practices configure onboarding checklists and the information, evidence, reviews and approvals required?	Yes. Onboarding checklists are fully configurable: practices build their own task, subtask, checklist and document templates specifying the information and evidence to be obtained at each stage, who is responsible, the estimated time and the reminders to be issued. Review steps are represented as checklist items and subtasks assigned to the reviewing partner or manager, with completion recorded and visible in the client timeline. A separate structured approval object with formal sign-off status is not currently provided (see 7.08).	Confirmed.
7.20	Can specified onboarding evidence and approvals be configured as activation gates, so that a client or service cannot become active until those requirements are completed or an authorised exception is approved?	Not currently. Onboarding requirements are tracked and enforced procedurally - work cannot progress in practice while onboarding tasks and checklist items remain open, and outstanding items are visible on dashboards and drive reminders - but the system does not apply a hard activation gate that blocks a client or service from becoming active until specified evidence and approvals are recorded, nor a formal authorised exception override.	Confirmed.

7.21	Does the system provide a configurable methodology for AML customer due diligence and risk assessment, including questions, risk factors, weightings, classifications, review frequency and approval thresholds?	In part. Remindoo provides AML customer due diligence and risk assessment recording, allowing the firm to complete and store its AML checks, supporting evidence and a risk classification against each client, with the assessment forming part of the onboarding workflow and periodic review generated as a recurring task. The methodology itself is not yet fully configurable - practices cannot currently define their own weighted question sets, scoring, automatic classification or approval thresholds within the system, and firms typically mirror their AML policy using custom fields, checklists and templates.	Confirmed.
7.22	Does the system provide a dedicated conflict-of-interest and independence assessment before accepting a prospective client? Can it search connected parties and retain evidence of the search, assessment, decision and approval?	Not as a dedicated module. Conflict of interest and independence considerations are handled as configurable checklist items and review steps within the client acceptance workflow, with the outcome and any supporting notes or documents retained against the client or lead record and visible in its timeline. The system does not currently perform an automated search of connected parties across the client base, nor produce a structured conflict/independence assessment with its own decision and approval record.	Confirmed.
7.23	Does the system support the ongoing monitoring of client acceptance conditions and other compliance obligations after onboarding? If so, can practices record conditions, actions and expiry dates, assign responsibility and prevent or escalate work where required compliance activity remains unresolved?	In part. After onboarding, ongoing compliance obligations are managed as recurring services and tasks with owners, due dates and automated reminders - for example periodic AML reviews, identity re-verification and annual acceptance reviews - and outstanding items are visible on dashboards and in client timelines, with escalation achieved through reminders and reassignment. The system does not currently maintain a formal register of acceptance conditions with expiry dates, nor does it block or automatically escalate chargeable work where a required compliance activity remains unresolved. In settings, we are adding an option, if there is any sanction reported, it will generate an email and send to admin and they can take necessary actions	Confirmed.
7.24	Can the system integrate with external identity-verification, AML-screening, sanctions and Companies House identity-verification providers? Which providers are supported, what evidence is returned, and how are screening results and refresh events recorded?	Yes. Remindoo integrates with external providers for identity verification, KYC, AML, PEP and sanctions screening, including Companies House-related identity verification. We use didit mainly for AML verification and ongoing monitoring. Results and supporting evidence are returned and recorded against the relevant client, including verification status, screening results and checks performed. Ongoing monitoring and refresh events are also recorded, providing an audit trail of compliance activity.	Confirmed.

	Service templates, workflows and automation		
7.25	Does the system provide configurable templates for recurring and one-off accountancy practice services? If so, which standard templates are supplied and can practices create, copy, import and amend their own?	Yes. Service templates are a core part of the platform: a practice defines each recurring or one-off service once - the tasks, subtasks, checklists, documents, responsibilities, estimated time and reminders it requires - and applies it to any client. Templates covering the standard UK compliance services are supplied and can be used as delivered or adapted, including year-end accounts, bookkeeping, VAT, payroll, CIS, management accounts, confirmation statements and personal tax. Practices can create their own templates from scratch, copy and amend an existing template, and maintain a catalogue of services and categories; template histories and proposal/service catalogues can also be imported during migration.	Confirmed.
7.26	When a service template is applied, what work items and supporting information can it create automatically (such as tasks, checklists, responsibilities, documents and deadlines)?	Applying a service template automatically creates the full work package for that client: the parent task and its subtasks, the checklists to be completed at each stage, the assigned owner(s) and reviewer(s), the estimated time allocation for each element, the required documents, and the due dates - calculated from the client's own trigger dates (for example year end, VAT quarter end or a Companies House deadline). It also creates the associated automated reminders and internal notifications, and the recurring schedule so that the next period's work is generated without re-entry.	Confirmed.
7.27	Can recurring workflows be scheduled daily, weekly, monthly, quarterly or annually, with due dates calculated from client attributes, statutory filing dates or practice-defined anchor dates?	Yes. Services and tasks can be scheduled to recur daily, weekly, monthly, quarterly or annually, and on practice-defined custom frequencies. Due dates are calculated from the client's own attributes rather than a fixed calendar - statutory filing dates synchronised from Companies House, or trigger dates held in custom fields such as year end, VAT quarter end or payroll date - with offsets applied so internal target dates fall ahead of the statutory deadline.	Confirmed.
7.28	Can dependencies and event rules control when the next task or action opens, becomes due or completes in response to a preceding task, client response, approval, payment or status change?	In part. Work is sequenced through parent tasks, ordered subtasks and checklists, with status changes, assignment and completion driving notifications, reminders and the visibility of the next stage, and the next occurrence of a recurring service generated automatically on completion of the cycle. Dependencies can be set up based on the task status. For example, we can define automated actions such as: when a task is marked as completed, automatically send an email, create a new task, or trigger another predefined action.	Confirmed.
7.29	Can practices configure outbound reminders, internal notifications and escalations for defined events? Can recipients, message content, timing, frequency and stopping conditions be set independently?	Yes, in large part. Automated reminders and internal notifications are configured within service and task templates and by reminder templates, with the recipients (client contact, assigned employee, manager or team), the message content (built from email templates using dynamic tokens), the timing relative to the due date and the repeat frequency all set independently for each reminder. Reminders are dependant on task progress statuses and stop automatically when the taskprogress status is changed.	Confirmed.

	Tasks and work management		
7.30	Does the system provide central task and work management for client and internal activities?	Yes. Central task and work management is the core of the platform. All client work generated from services, together with one-off client tasks and internal, non-client activities, is held in a single task register with owner, team, priority, status, due date, estimated time, subtasks, checklists, documents and comments, and is visible through dashboards at practice, team, employee and client level.	Confirmed.
7.31	Can operational tasks be displayed in list, calendar, Kanban or other work-management views? Can users tailor the layout and perform bulk actions on the tasks shown?	Tasks are presented in configurable list and card views, with a customisable task page layout retained per user, strong filters (by client, assignee, team, service, status, priority, tag and deadline), saved filter states and a deadline-focused view of upcoming and overdue work. Bulk actions can be performed on the tasks displayed - for example bulk reassignment, status change, rescheduling or archiving. A drag-and-drop Kanban board and a full calendar view of tasks are on the product roadmap; deadline calendars are currently presented through the dashboard and deadline views. Kanban view is live now, Calendar integration will be done by 31st Dec 2026	Noted.
7.32	Can an individual task contain assigned subtasks, checklists, documents, comments, mentions, preparer stages, reviews and approvals? Can selected components be required before that task is completed?	Yes. A task can contain assigned subtasks (each with its own owner and due date), checklists, attached documents, comments with colleague mentions and notifications, recorded time, and preparer and reviewer stages represented as sequenced subtasks. Completion of a task can be made dependent on its subtasks and checklist items, so the work cannot be closed until the required components are complete. A formally configurable approval object with an independent sign-off status and approver permission is not yet provided (see 7.08).	Noted.
7.33	Does the system distinguish between statutory, client-agreed and internal deadlines? If so, how are approaching, missed and overdue deadlines presented to users and managers?	In part. Statutory deadlines are distinguished by source - they are synchronised from Companies House or derived from HMRC filing dates and cannot be edited freely - while internal target dates are set by the practice, typically as an offset ahead of the statutory date, and client-agreed dates such as record-receipt dates are held as custom or task dates. Approaching, due, missed and overdue items are colour-coded and prioritised in task lists, the deadline view and dashboards, are surfaced to the assigned employee and to their manager through team and employee dashboards, and drive automated reminders.	Noted.
7.34	Can managers rebalance live workloads when an employee is absent, overloaded or changes role? Can affected clients, services and tasks be identified and reassigned in bulk with an audit history of each transfer?	Yes. Where an employee is absent, overloaded or changes role, managers can identify the affected work through the employee and workload dashboards and filters - showing tasks, clients, services and hours by employee and team - and reassign it individually or in bulk to another user or team. Reassignments are reflected chronologically in each task and client timeline, so the change of ownership is visible on the record; a consolidated, exportable transfer history report will form part of the planned comprehensive audit trail (see 7.10).	Noted.

7.35	Does the system provide a practice-wide calendar of client and internal deadlines? What views, filters and external calendar integrations are available?	In part. A practice-wide view of client and internal deadlines is provided through the deadline and task views and dashboards, filterable by client, service, employee, team, status and date range, and by statutory deadline type. A dedicated month/week calendar interface and two-way integration with external calendars such as Microsoft Outlook or Google Calendar are not currently available.	Confirmed.
Time recording and resource management			
7.36	Does the system provide time recording against clients, services, tasks and internal activities? If so, can users record time through a timer and manual timesheet entry?	Yes, in part. Time can be recorded against clients, services and tasks - including internal and non-client tasks - using available timer against the task, and each service and task carries an estimated time allocation against which recorded time is measured. Recorded time feeds the Service Time Analysis by Employee and Work and Utilisation dashboards. time is currently entered against the task record and manual entry is not currently allowed. This is planned and will be done by 15th Dec 2026.	Noted.
7.37	Can time entries be added, amended, transferred or corrected after initial recording? If so, can amendment rights be restricted and is a history retained of the original and revised entries?	No. At present, once a time entry has been recorded, it cannot be amended, transferred or corrected.	Noted.
7.38	Can expected or budgeted hours be set for a client, service, task and employee, and can budget consumption be compared with allocated, billable, non-billable and actual hours?	In part. Estimated (budgeted) time is set on each service and task through the Estimated Time Allocation function and can be varied per client, and dashboards compare estimated against actual recorded time by service, employee, team and period, highlighting overruns and capacity impact. Because Remindoo does not currently hold fees, charge-out rates or billing data (see 7.58), analysis of billable against non-billable hours and of budget consumption in value terms is not available; comparison is on a time basis. This will be added by 31st March 2027	Noted.
7.39	Does the system provide forward-looking resource and capacity planning? Can managers view available capacity, committed allocation, utilisation, idle capacity and missing hours by employee, team, office and period?	In part. The Employee Reporting, Work and Utilisation and Employee Task Breakdown dashboards provide a real-time and forward view of committed workload - the tasks and estimated hours scheduled to each employee and team by period - together with utilisation, deadline performance and productivity, allowing managers to identify overload and spare capacity and to rebalance work. Because recurring services generate work in advance, committed allocation can be seen for future periods.	Confirmed.
7.40	Can the availability calendar used for capacity planning reflect contractual working patterns and temporary exceptions such as part-time hours, annual leave, sickness, parental leave, secondments and bank holidays?	Not currently.	Noted.
7.41	Does the system support operational control of work in progress? Can authorised users select unbilled time and expenses for billing, transfer, hold over, write-down or write-off, with approval and adjustment history retained?	Not applicable at present.	Noted.

	Lead, proposal and client acquisition management		
7.42	Does the system provide lead and pipeline management? If so, can users record lead source, estimated value, owner, stage, probability, activities, notes, attachments and expected conversion date?	Yes. Lead and pipeline management is a core module. Each lead records the source, owner, custom status reflecting the firm's own sales stages, notes of conversations and requirements, attachments, follow-up activities and the services being discussed, with custom lead fields available for any further data the firm wishes to capture (such as estimated value and expected conversion date). Leads can be assigned automatically on a round-robin basis across a team, and the Leads Overview provides a real-time, filterable view of the whole pipeline.	Confirmed.
7.43	Can a new lead be captured directly from an incoming email or Companies House search? Which source fields and attachments are mapped into the lead record at creation?	In part. Leads are captured automatically from customisable lead capture forms embedded on the firm's website, which map the form's fields - including custom fields - directly into the lead record and assign an owner, and can be created manually or imported. Leads can also be created from the emails, but user will have to do that.	Confirmed.
7.44	From a lead record, can users manage follow-up activities and proposals, and can a successful lead be converted to a client without rekeying data? Which lead details, relationships and activity history transfer during conversion?	Yes. Follow-up activities, notes, attachments and proposals are managed directly from the lead record, and a successful lead is converted into a client without rekeying: the contact and company details, custom field values, assigned owner, notes, attachments, proposal and the agreed services carry across into the new client record, which then drives onboarding, service set-up and the associated tasks and deadlines. Lead and proposal history is retained and can also be imported from a previous system, so the firm keeps full visibility of the relationship from first enquiry onwards.	Confirmed.
7.45	Does the system support configurable proposal and letter of engagement templates? If so, can templates include branding, reusable clauses, variables, service descriptions, team details, checkboxes, pricing and signature fields?	Yes. Proposal and Letter of Engagement templates are fully configurable by the practice. Templates carry the firm's own branding and standard wording, reusable clauses and service descriptions drawn from the firm's products and services catalogue (organised into categories), dynamic variables and tokens that populate client, service, team and pricing detail, fee and pricing sections, and electronic signature fields. Templates are reusable and can be amended and versioned by authorised users, and firms can maintain different templates for different service lines or client types.	Confirmed.
7.46	Can users create, issue and manage proposals for individual services or service packages? What pricing options, acceptance processes and handover into client and service setup are supported?	Yes. Users create a proposal from a template for an individual service or for a package of services selected from the catalogue, priced per service with recurring or one-off fees and totals, issue it to the client for review, and track its status through the proposal register with filters. The client accepts by signing electronically (see 7.57), and the signed proposal and Letter of Engagement are retained against the client record. On acceptance the lead is converted to a client and the agreed services are set up, generating the associated onboarding workflow, tasks and deadlines. Automated collection of fees on acceptance is not currently supported (see 7.58).	Confirmed.

	Email and communication management		
7.47	Does the system integrate with Microsoft Outlook, Gmail or other email services? If so, which services are supported and does the integration operate in one or both directions?	Yes, on the Growth package. Email inbox integration allows a user's own mailbox to be connected to Remindoo so that client correspondence is worked on within the platform, and the firm connects its own sending domain so that all outbound email is sent from the firm's own address. Sending from within the system and visibility of correspondence against the record therefore operate in both directions for connected mailboxes. Firms should confirm the current list of supported providers with Remindoo, as coverage is being extended as part of the ongoing email integration programme.	Confirmed.
7.48	Can personal and shared mailboxes be connected to the system? If so, how many mailboxes can be connected and can access to mailbox content be restricted by user, team, role, client allocation or sensitivity?	Personal mailboxes are connected by the individual user under the Growth package, Each user can connect their own email and a firm can connect one centralised email address on top if required. Access to a connected mailbox's content follows the user and the firm's role-based permissions, so correspondence is visible to that user and to those authorised to view the related client record. Shared or functional mailboxes (for example info@ or payroll@) as a jointly monitored resource with team-level or sensitivity-based access restrictions are not yet supported and are on the product roadmap.	Noted.
7.49	Can incoming and outgoing emails be filed automatically or manually against the correct client, contact, lead, proposal, service or task? Can a user create a linked follow-up task directly from a filed email?	In part. Correspondence sent from within Remindoo from a client, lead, task or proposal record is filed against that record automatically and appears in its timeline, and a follow-up task can be created directly from the record. For inbound mail, correspondence in a connected mailbox is worked on in the platform and can be linked to the relevant record; fully automatic matching and filing of incoming email against the correct client, contact, lead, proposal or task - including attachments.	Confirmed.
7.50	Can users compose and send individual emails from client, lead and task records using approved templates, variables, attachments, scheduled sending and practice signatures?	Yes. Users compose and send emails directly from client, lead, task and proposal records using the firm's own reusable email templates with dynamic tokens that populate client, service, deadline and user details, with attachments, and sent from the firm's own domain so the message carries the firm's address and signature. Automated and reminder emails are scheduled by the workflow (see 7.29); scheduled sending of an individual, user-composed email at a chosen future date and time is on the roadmap and should be live by mid October.	Confirmed.
7.51	Does each client and lead have a chronological, searchable communication timeline that combines emails, reminders, portal messages, proposals, notes and calls? Can the timeline be filtered and exported?	Yes. Each client and lead has a chronological communication history, including emails, reminders, proposals, notes and other recorded activities. The timeline is searchable and filterable. Export functionality is not there.	Confirmed.

7.52	Does the system support bulk or targeted client communications? What audience-selection, consent-management, scheduling and delivery-reporting capabilities are available?	Yes, on the Growth package. Bulk client communication allows a targeted group of clients or contacts to be selected using the system's filters - for example by client type, service, deadline, status or custom field - and sent a templated email from the firm's own domain, which is recorded against each client record. Formal marketing consent management (opt-in/opt-out status, preference centre and suppression lists) and detailed delivery reporting such as open, click and bounce analytics are not currently provided; firms managing marketing campaigns typically continue to use a dedicated marketing platform for that purpose.	Confirmed.
	Document management, client portal & e-signatures		
7.53	Does the system provide a document repository for client and practice records? Can documents be classified and retrieved using client, service, task, period, document type, status, tag and other metadata?	Yes, in part. Documents are stored securely on AWS infrastructure against the relevant client, service, task and proposal record - for example onboarding and AML evidence, client-supplied records, proposals and signed Letters of Engagement - and are retrieved through the client record and the module filters, so they are effectively classified by client, service, task and record type. A dedicated document management layer with configurable document types, periods, statuses, tags and metadata-based search across the whole repository is not yet provided and is on the product roadmap; document storage of 5GB is included in the growth subscription (see 4.17-4.18 and 5.46).	Noted.
7.54	Can a standard folder structure be created automatically when a client, service, task or accounting period is opened? Can practices maintain folder templates and apply access restrictions to folders?	Yes. Standard folders are automatically created within the relevant areas of the system. Practices can manage folder structures, and access restrictions can be applied to control which folders/documents are visible to clients through the Client Portal.	Confirmed.
7.55	Does the system provide document version control, check-in, check-out or locking? If so, can users identify the current version, view earlier versions and see who uploaded, amended, reviewed or approved each version?	Not currently.	Noted.
7.56	Does the system provide a client portal? If so, can clients view associated entities, services, tasks, deadlines and documents, respond to information requests, complete forms, upload evidence, approve work and communicate with the practice?	Yes, in part. A client portal is provided, through which clients securely view and download documents shared by the practice, upload their own records and evidence, and receive and respond to requests for information, with activity recorded against the client record. Approval of work is obtained through the proposal and engagement e-signature process (see 7.57). Client visibility of their own services, task progress and deadline calendar, structured online forms and portal-based messaging are on the product roadmap; client communication is currently by email from the system.	Confirmed.
7.57	Does the system provide or integrate electronic-signature functionality? Does it support multiple documents and signatories, signing order, reminders and expiry, and retain an auditable completion certificate and signed version?	Yes - electronic signature is built into the platform for proposals and Letters of Engagement, allowing the client to review and sign online, with automated reminders while a document remains unsigned, status tracking through the proposal register, and the signed document retained against the client record as evidence of engagement. Multiple signatories on a single document, a defined signing order, per-document expiry dates and a separate signature completion certificate are not currently supported.	Confirmed.

	Billing, invoicing and financial management		
7.58	Does the system support the creation and management of client fees? If so, can fees be configured by client, service, proposal, billing frequency and accounting period?	Yes, a service catalogue can be created for all services offered by the firm. When sending a Letter of Engagement, the relevant services can simply be selected and priced accordingly. The firm can then raise invoices directly from Remindoo and collect payment for the services provided.	Confirmed.
7.59	Can the fee model for an active client service be configured as fixed, recurring, hourly, time-and-materials, capped, percentage-based or usage-based? Can retainers and pre-purchased blocks of hours be tracked against consumption?	Yes, this can be done. Remindoo can support different fee models, including fixed, recurring, hourly, time-and-materials, capped, percentage-based and usage-based fees. Retainers and pre-purchased blocks of hours can also be tracked against actual time/usage, so firms can monitor the remaining balance.	Noted.
7.60	Can users create and manage invoices, credit notes and recurring billing? What charging, tax, approval and issuing options are supported?	Yes, this can be done. Users can create and manage invoices, credit notes and recurring billing within Remindoo, with flexible charging, VAT/tax treatment, and invoice issuing options. Approval workflow is not there yet.	Noted.
7.61	Does the system integrate with accounting and payment platforms? Which platforms and records are supported, in which direction, and how are synchronisation exceptions managed?	Yes, user can connect with Xero & quickbooks and can collect payment via stripe by connecting their account.	Confirmed.
7.62	Can a client record display the current invoice, payment, credit-note and overdue-balance position received from the billing process or accounting integration? Can credit-control restrictions or approval rules be applied based on that position?	Partially. The client record can display the current invoice, payment, credit note and overdue balance position through the billing/accounting integration. Credit-control restrictions or approval rules based on the client's financial position are not currently available. They will be done by September 2027	Noted.
7.63	Does the system calculate client, service and engagement profitability by combining fees, budgets, recorded time, charge-out value, write-offs, WIP and recoveries? Can results be analysed by responsible partner, manager, employee and period?	Not currently.	Noted.

	Reporting, dashboards, knowledge management and AI		
7.64	Which standard operational, compliance, resource, client, sales and financial dashboards and reports are supplied? Which are intended to support practice-management decisions?	The supplied dashboards and analytics cover operational, resource, client and sales information. Operational and compliance: task and deadline dashboards showing upcoming, due, missed and overdue work by client, service, employee and team, and client deadline views driven by statutory dates. Resource: Employee Reporting (capacity, productivity and deadline performance), Employee Task Breakdown, Service Time Analysis by Employee, and Work and Utilisation. Client: Client Summary, Client Growth Trend (acquisition and retention) and Clients by Type. Sales: Leads Overview and proposal pipeline status. Financial dashboards are not provided, as fee and ledger data is not held (see 7.58). All of these are intended to support practice-management decisions - workload allocation, deadline risk, staff utilisation, client mix and pipeline. Advanced analytics are included in the Growth package, and dashboard data is refreshed overnight (see 5.43).	Noted.
7.65	Can authorised users adapt a report or dashboard by selecting fields, calculations, filters and presentation, then save, schedule and distribute that customised output with recipient-level access controls?	Not exactly. However, reports can be downloaded in CSV format, allowing users to customise and analyse the data according to their specific requirements. Reporting is not planned as we give multiple other options such as MCP , claude integration to export data. That will be live by March 2027.	Noted.
7.66	Does the system provide knowledge-management functionality for employees or clients? What content-management, search, access, approval and review controls are available?	Yes. Remindoo includes a built-in Knowledge Base where firms can create, manage, organise and search internal or client-facing content, with appropriate access controls for users and teams. Approval and review workflows are not currently available.	Confirmed.
7.67	Does the system provide artificial-intelligence (AI) functionality? If so, which capabilities and AI providers are available, where can AI be used, and can its use be enabled, restricted or configured by the practice?	Yes. Remindoo currently provides AI functionality for Task AI Summaries and Client AI Summaries, with the ability to connect ChatGPT. Further AI capabilities, including MCP integrations, are currently under development and are expected to be available by the end of December 2026.	Noted.
7.68	Where AI is used, how are data privacy, retention, external model training, user review, approval and auditability controlled?	Remindoo uses AI solely to process and present relevant data already held within its database. The AI does not act as the system of record or independently modify client data. Remindoo does not host or provide the AI model; each customer connects a chosen third-party AI provider through a secure connector or their own encrypted, tenant-specific API key. Access is user-authorised, revocable, read-only and limited by the user's existing permissions. AI activity is logged, and data is encrypted in transit and at rest. Data retention and use for model training are governed by the customer's agreement with its chosen AI provider.	Noted.

7.69	Does the system provide exception-based or risk-based management reporting that prioritises items requiring intervention? Can thresholds identify overdue information, deadline risk, stalled work, budget overruns, low recoverability, unbilled WIP, unpaid invoices and incomplete compliance activity?	In part. The dashboards are exception-oriented for operational risk: overdue and approaching deadlines, missed deadlines, stalled or unstarted work, workload concentration and employee overload, estimated against actual time overruns, and open onboarding, AML and compliance tasks are highlighted and prioritised for intervention, with automated reminders and notifications driving follow-up, and outstanding client information tracked through tasks and reminders.	Confirmed.
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