



Close faster and chase less, across every client

NeodyAI for Accounting & bookkeeping firms · Firms doing the books, close and tax for clients

Where the time goes in accounting firms



Chasing clients for documents

Statements, receipts and tax forms requested again and again.



Every client's books differ

Reconciliation exceptions and AP handled differently for each client.



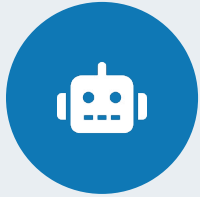
Tax season doubles the load

The same team handles close, tax prep and client questions at once.

NeodyAI takes on this work with AI that prepares, checks and chases, while your people decide.



AI does the work. Your team stays in control.



AI does the work

Reads documents, checks them against your rules, drafts and follows up across the systems you already use.



Your people decide

It runs beside your team first. Autonomy is earned on measured agreement, and taken back automatically when quality drops.



Your data stays protected

Sensitive fields are protected before any model sees them, and every action is on the record.



8 use cases for accounting firms

Use cases by department

■ Made for accounting firms ■ Also applies



7

made for accounting firms

4

high value at low or medium effort

6

ready to run or start from a template

Every use case is on a card in the appendix.

Where we'd start

1

CLIENT SERVICES

Month-end close pack

Each client's close: reconciliations done, exceptions listed, the pack drafted for review.

Consolidate → Validate → Draft

Value high · effort medium · Template ready

2

CLIENT SERVICES

Tax-season document chase

Every client's tax documents requested, tracked and chased before the deadline.

Follow up → Intake & extract

Value high · effort medium · Template ready

3

CLIENT SERVICES

Client document collection

Statements, receipts and forms requested from clients, checked when they arrive, chased when they don't.

Follow up → Intake & extract → Validate

Value high · effort medium · Template ready



The work AI takes on



6

Validate

Checks documents and data against your rules



4

Draft

Writes the first version for a person to edit



4

Follow up

Chases people until the gap is closed



4

Intake & extract

Reads emails, PDFs and forms



3

Consolidate

Pulls sources together and matches them



1

Answer

Answers questions from your own material



Your sensitive data stays protected

Sensitive data these use cases touch



Personal information

4



Bank details

2

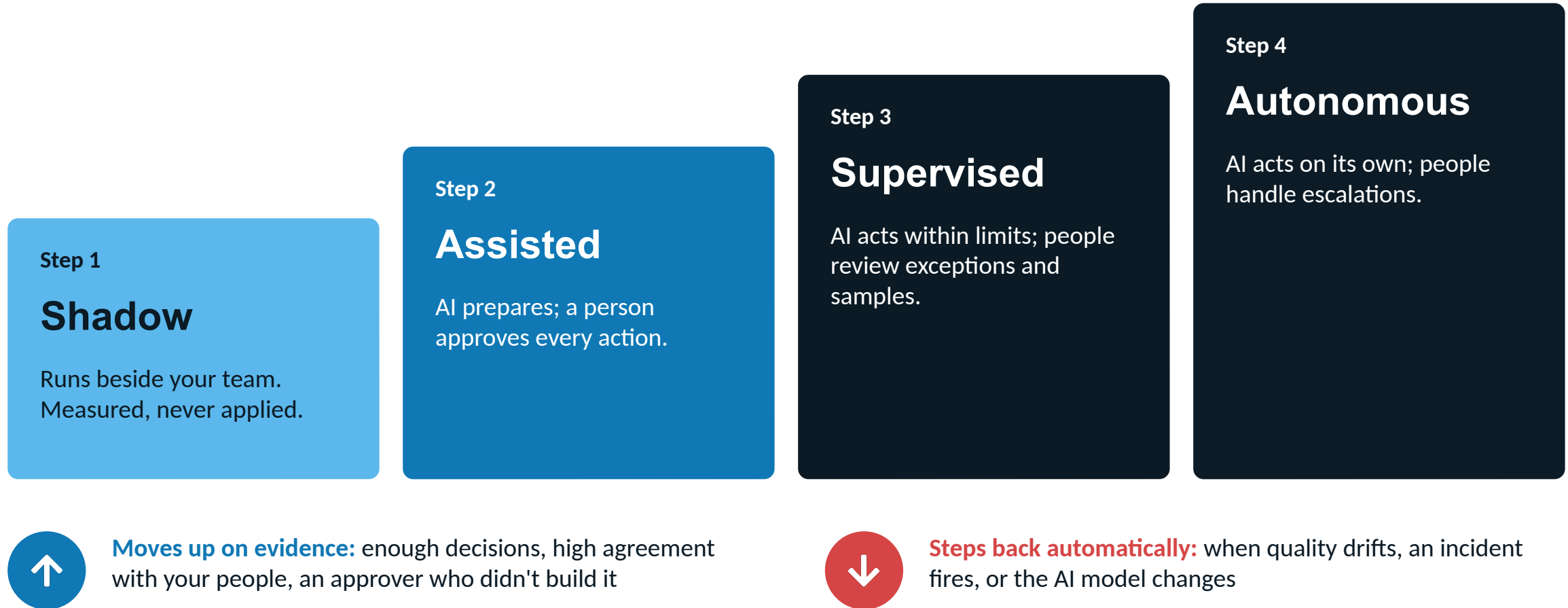


Business confidential

2



Your team approves until the AI has earned more



Works with the systems you already use



Email

5 use cases



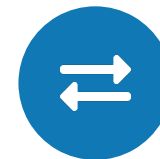
Accounting system

4 use cases



Shared files

4 use cases



Bank feeds

2 use cases



How to get started



01

Try the free workflows

Run sample processes free, including one on protected sample data



02

Pick your first use case

We'd suggest Month-end close pack, or the pain that costs you most



03

Run it beside your team

Nothing is applied until your people agree with its work



04

Add the next one

The second use case is faster: connections and approvals already exist

Use cases made for accounting firms (1 of 2)

CLIENT SERVICES

High risk

Client document collection

Statements, receipts and forms requested from clients, checked when they arrive, chased when they don't.

Follow up → Intake & extract → Validate

Value high · effort medium · Template ready

CLIENT SERVICES

Medium risk

Month-end close pack

Each client's close: reconciliations done, exceptions listed, the pack drafted for review.

Consolidate → Validate → Draft

Value high · effort medium · Template ready

CLIENT SERVICES

Medium risk

Tax-season document chase

Every client's tax documents requested, tracked and chased before the deadline.

Follow up → Intake & extract

Value high · effort medium · Template ready

CLIENT SERVICES

Medium risk

Bank reconciliation exceptions

Unmatched bank lines explained or queried with the client.

Consolidate → Validate → Follow up

Value medium · effort medium · Template ready

CLIENT SERVICES

High risk

Client AP processing

Clients' bills captured, coded and checked, ready for approval and payment.

Intake & extract → Validate → Execute

Value medium · effort medium · Template ready

CLIENT SERVICES

Medium risk

Client onboarding & engagement

New clients onboarded: engagement letter, ID and documents collected and checked.

Intake & extract → Validate → Draft → Follow up

Value medium · effort medium · Template ready



Use cases made for accounting firms (2 of 2)

CLIENT SERVICES

Medium risk

Client question answers

Clients' routine questions answered from their file and your guidance, for a quick review.

[Answer → Draft](#)

Value medium · effort medium · Guide



Also applies, from other industries

CLIENT SERVICES

Low risk

Unbilled time & billing review

Time entries checked against the engagement, unbilled work found, invoices drafted.

[Consolidate](#) → [Validate](#) → [Draft](#)

Value high · effort medium · Guide

