



Using Capisso - WhatsApp Smart Upload

Instead of asking you to provide us with a spreadsheet listing your income and expenses (which we appreciate can take time to prepare), we have partnered with Capisso, an accounting software company based in Cork, to provide you with the ability to record and upload all of your income statements, invoices, receipts and expenses via WhatsApp.

Your images/documents will be securely stored in the cloud, and we will use these documents to prepare your Income and Expenditure account, and then prepare your Form11 income tax return.

We hope this makes your tax returns as straightforward as possible for you.

To get started, simply provide us with your WhatsApp number, and we'll take it from there.

Please note only JPEG and PDF files are accepted by the system.

FAQs

How does it work?

We will provide you with a dedicated phone number to save in your phone, and you will then simply take pictures of your paper invoices/expenses/receipts, or attach your PDF documents, and send them to us via WhatsApp. We will take care of the rest.

A [video demo](#) is available for you to see it in action.

Please note only JPEG and PDF files are accepted by the system.

What will this cost me?

There is no additional fee for this service.

Why do I need to use this software?

Several reasons.

Firstly, we find that it is the quickest and easiest way to transfer information (having been doing this for several years). You won't need to sit down and trawl through paperwork, bank statements and documents to provide CloudAccounts with your records of income and expenses.

Secondly, your documents will be securely stored in the cloud (hosted by Amazon Web Services in Ireland), which means that you will never lose a receipt, or if Revenue ever requests copies of receipts/invoices they will all be readily available.

And finally, you will now have the ability to capture your receipts and expenses on the go from the palm of your hand, which means you can stay up to date at all times (yes you can use this immediately to record your 2025 expenses, as well as sending all of your 2024 information).

Are there other companies that provide this software?

There are indeed. [Dext](#) is the market leader, but we find that it is expensive. And any others that we have investigated all require a separate app. Capisso is the only service we know of that utilises WhatsApp, to make it even more convenient for you.

What happens if Revenue carries out an audit/risk review on my tax return?

Your accounts and tax return will be based on the documents/images submitted to CloudAccounts via WhatsApp. We will be reviewing your expenses, same as before, to ensure that only allowable business expenses are included as tax deductions. Each invoice/receipt/expense that you submit will be securely stored in the cloud and have its own hyperlink, where a digital copy can be retrieved. So if Revenue asks to see receipts, you won't have to dig through your files and emails, everything will be neatly stored in an expense report, which we can make available to you.

What are the allowable expenses that I can upload?

If you run a business, you must keep certain records for tax purposes, which can be used to confirm information contained in your tax returns. Revenue provides more details [here](#) and [here](#).

If you are in doubt about what are allowable expenses, please ask us, or view our handy guide [here](#).

What if I don't want to use this service?

There is no obligation to use Capisso, and we will work with you in whatever format you wish to digitally submit your data to us.

Sounds great - what do I need to do next?

To get started, we need to add you to the Capisso platform. Simply provide us with your mobile number (which you use for WhatsApp) and we will take it from there. Once you are onboarded we will let you know, and you can start snapping pictures of those receipts, uploading PDF documents for your invoices/expenses and manage your business finances from the palm of your hand.

[Capisso demo - Watch Video](#)

CloudAccounts proudly partners with Capisso. If you have any questions or concerns, contact us at info@cloudaccounts.ie