Briefcase

FOR SOLE TRADERS & LANDLORDS

MAKING TAX DIGITAL IS COMING

Why should I switch to Briefcase Ledger?

Briefcase Ledger is the simplest, most efficient way to handle MTD — and here's why it's the right move for you and your business.

Making Tax Digital (MTD) is coming — and **it's not optional** (sadly). From 6 April 2026, sole traders and landlords with qualifying income over £50,000 have to keep digital records and send HMRC an update every quarter, not just once a year. The threshold falls to £30,000, then £20,000, in the years after (gov.uk).

Built for Making Tax Digital — not bolted on

The big platforms — Xero, QuickBooks, Sage — were built for large, complex businesses, and have had MTD bolted on afterwards. Briefcase Ledger was built from the ground up for exactly your situation: a sole trader or landlord who needs to file with HMRC, simply and correctly.

One purpose, done properly — register your details, add your income (self-employment, UK or foreign property, or any mix), and you're set up in under a minute.

Easy upload — choose what works for you

We've focussed on making it effortless to get all your documents into Briefcase, in whichever way makes sense for you:

WhatsApp Upload

Snap a photo of a receipt or invoice while out and about, and send it straight in.

See how it works →

Email Upload

Forward supplier invoices to Briefcase as they land, or set up auto-forwarding.

See how it works →

Web Upload

Drag and drop everything at once on the web.

See how it works →

Faster turnarounds with AI

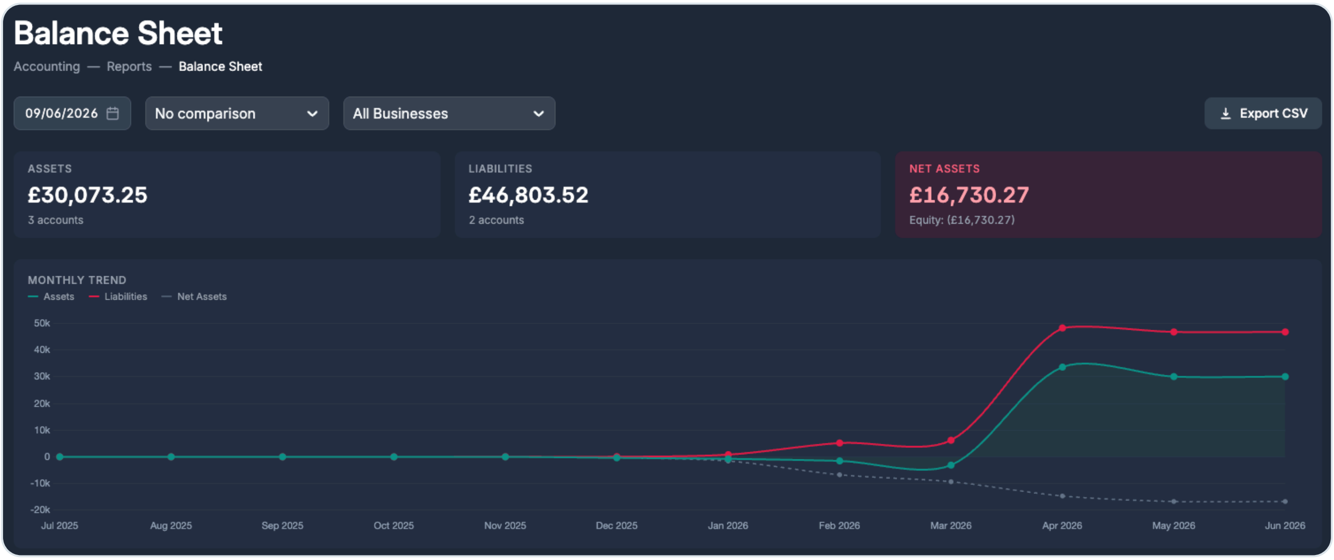
Briefcase uses AI to actually understand the context of your document. It reads each one, pulls out the supplier, amounts, line items and VAT, and files it correctly. **No typing, no data entry, no manual sorting.** You send it; it's handled.

There are no rules to set up and no jargon to learn. The more you use it, the smarter it gets and the quicker it moves — so it increasingly automates your workflows every month. That means you get the information you need faster, and the tasks you need done sooner.

Everything accurate, in one place — from receipt to HMRC

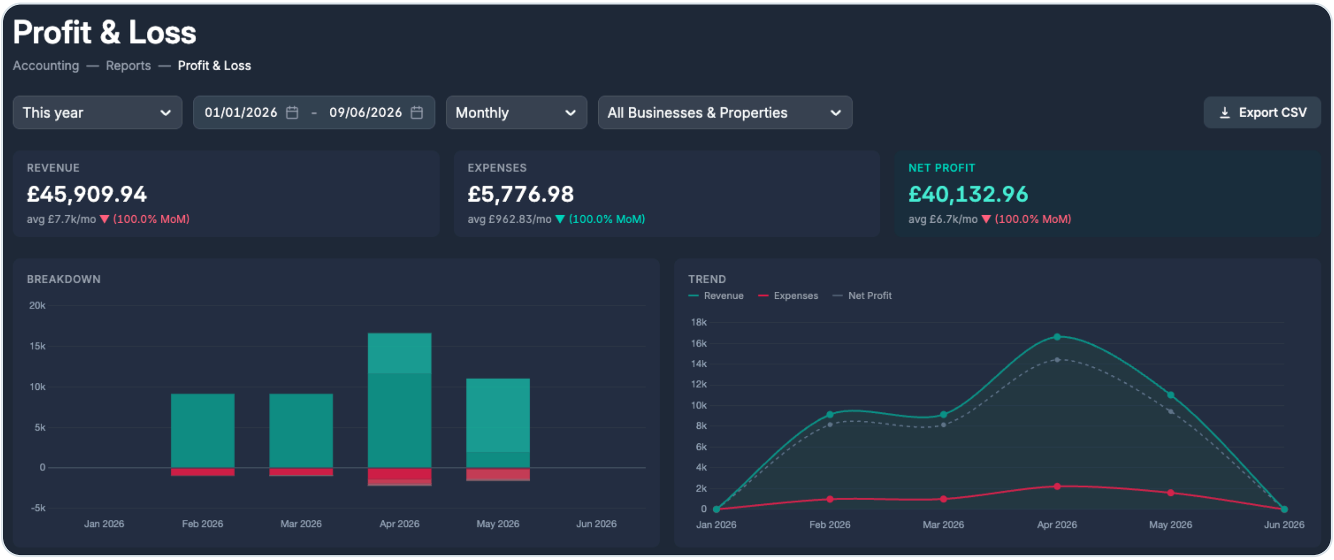
No bridging spreadsheets. No exporting and re-keying. No juggling three tools. Briefcase Ledger takes you the whole way: capture your documents, keep your books, see a live view of how your business is doing, and file your quarterly updates and year-end straight to HMRC — all from one login.

Because your records stay up to date throughout the year, you and your accountant can see clearer reports whenever you need them, including your profit and loss. When the quarter closes, your submission is calculated from the records you've already kept in Briefcase.



You get detailed Balance Sheet reporting in Briefcase Ledger

One platform, from the receipt in your pocket to the return at HMRC.



View your P&L reports in detail within Briefcase Ledger

Your data is safe — and never used to train AI

We know financial information is sensitive. Briefcase is built to keep it protected. Briefcase is independently audited against ISO/IEC 27001 and is GDPR compliant. Your data is hosted on European servers and encrypted both at rest and in transit. Each customer's data is kept separate, and access is protected with mandatory two-factor authentication.

Briefcase uses AI to help process your documents, but **your data is never used to train AI models** and is handled under zero-data-retention agreements with our AI providers. In short: your data stays secure, private, and under your control.

ISO/IEC 27001 audited | GDPR compliant | Encrypted & 2FA

To recap

- **Effortless** — send a photo on WhatsApp; the AI does the bookkeeping.
- **All in one** — capture, books, and HMRC submissions in one place.
- **Backed by experienced accountants** — the platform they already trust.

Getting started takes minutes

Speak to your accountant to get set up on Briefcase Ledger — ready for Making Tax Digital, without the stress.

→ Learn more about MTD with Briefcase