Rukn

THE No. 1 ERP FOR UAE PRO & BUSINESS SETUP FIRMS

Platform Overview

Rukn — The Complete ERP for UAE Business Setup & PRO Firms

Built specifically for PRO services and business setup companies in the UAE.

A complete operating platform for UAE business-setup, PRO, and visa services firms — from the first client inquiry through UAE compliance, payroll, billing, and renewal, in one system.

Try it free. Pay nothing until you decide to purchase.

Run your own business on it during the trial. If it's not the right fit, walk away at no cost.

30+	3	1
Connected Modules	Portals	System of Record

Why This ERP

Why UAE PRO firms choose this platform over anything else

Generic ERPs are built for warehouses and manufacturers, then bent to fit a PRO firm's workflow afterward. Spreadsheets and WhatsApp are free, but they don't scale past a handful of clients without something breaking. This platform starts from a different place entirely: it was designed from day one around exactly how a UAE business-setup and visa services firm actually works.

One

It speaks UAE compliance natively, not as an add-on

VAT, Corporate Tax, E-Invoicing, Emiratisation, UBO/ESR — these aren't custom fields bolted onto a generic "compliance module." Every one of these is a first-class part of the platform, because for a UAE PRO firm, they are the business, not a side feature.

Two

One record, from lead to renewed license, forever

Most firms juggle a CRM for leads, a separate accounting tool for invoices, a shared drive for documents, and WhatsApp for client updates — four systems that don't talk to each other. Here, a single client record carries every application, every invoice, every document, and every compliance deadline for the life of that relationship.

Three

Clients see their own status — your phone stops ringing for it

A real, working customer portal — not a token afterthought — means a client can check their own application progress, download their own invoice, or pay online, without a phone call to your office. For a busy PRO team, this alone recovers hours every week.

Four

Built to scale from two people to two hundred

Every list, every search, and every report was checked against real data volume and indexed accordingly — not just tested on a handful of demo records. The platform performs the same way on day one as it does once a firm is managing thousands of active files.

Five

You own it — your data never leaves your control

This isn't a shared multi-tenant SaaS where your client data sits alongside a competitor's. Each firm gets its own licensed, domain-locked installation — your data belongs to you, on infrastructure you control.

The honest comparison. A generic ERP costs less to license but far more in the customization needed to make UAE compliance work at all. A spreadsheet costs nothing but breaks down the moment a firm needs two people working from the same client list. This platform is the only option built specifically, and only, for this exact business.

Introduction

Built around how a PRO firm actually works

Most firms run their business across a spreadsheet, a WhatsApp thread, a shared drive of scanned passports, and whatever their accountant uses for invoices. This platform replaces all of it with one connected system.

30+	3	1
Connected Modules	Portals — Staff, Client, Partner	System of Record

Who this is built for

Business setup consultancies, PRO service providers, and visa/immigration agencies operating in the UAE — free zone and mainland — who handle the full client journey from lead to license to ongoing compliance.

What makes it different

- Every module is connected — an invoice, an application, a compliance deadline, and a WhatsApp reminder all reference the same client record
- Built specifically around UAE requirements — VAT, Corporate Tax, E-Invoicing, Emiratisation, UBO/ESR — not adapted from a generic template
- A genuine client-facing portal, not just an internal tool
- Built to scale from a two-person office to a firm handling thousands of active files, without changing how the team works
- A dedicated Referral Partner portal — agents track their own commission without calling your office
- Try it free before paying anything — see the section on the free trial later in this document

Why this matters: Every extra system a firm runs — a separate CRM, a separate accounting tool, a separate document store — is another place data can go out of sync, another login to manage, and another monthly bill. Consolidating onto one platform removes all three costs at once.

How to read this document. Each section that follows covers one area of the platform in real detail: what it does, the specific capabilities inside it, and why that capability matters to a firm running this business day to day. Together they form one continuous system — a client entered as a Lead can be tracked all the way through to a renewed license and a settled invoice without ever leaving the platform.

Section One

Client Lifecycle — Leads & Clients

From the first inquiry to a fully profiled client record — nothing here is a generic "contact" entry.

Leads

Every inquiry captured in one place, before it becomes a client.

- Source tracking — referral, website, walk-in, and more
- Stage pipeline from first contact through quotation sent
- Staff assignment and reassignment
- One-click conversion into a full client record, carrying source and notes across

Why this matters: A lead that isn't tracked is a lead that gets forgotten. Firms routinely lose business simply because a WhatsApp inquiry from three weeks ago never got followed up.

Individuals

A complete profile per person — not a name and a phone number.

- Full activity timeline: every application, invoice, payment, and note in one place
- Applications, Quotations, Invoices, Payments, and Expenses, all inside one profile
- Profit & Loss per client, and per individual service within that client
- Document storage, encrypted, tied directly to the client record
- Manual or automatic notification preference, chosen per client
- Safe deletion rules — a client with any history on file cannot be accidentally removed

Companies

A distinct client type from individuals, matching how a company actually operates.

- Employees, portal access, and named contacts tracked separately from the company's own billing details
- Bank account records and Legal Documents Tracker per company
- Named-person billing — bill the company as a whole, or tag a specific invoice line to one named employee
- The same Profit & Loss, Activity, and Attestation visibility Individuals get

Why this matters: A trade license renewal and a specific employee's visa are both billed to the same company, but they're not the same conversation. Being able to tell them apart on the invoice itself avoids disputes later about what was actually charged for whom.

Section One, continued

Client Lifecycle — Applications & Billing

The actual service work, and getting paid for it — tracked step by step, not as a single static status.

Applications

A trade license renewal, a visa, an attestation — tracked against a configurable workflow built for that exact service.

- Custom workflow per service, with as many steps as that service genuinely needs
- Real per-step completion percentage — calculated from actual step status, never a guess
- Document requests and rejections tracked per step, with the reason on file
- Multi-service application groups — one client, one invoice, several linked services
- Staff assignment and task ownership per application
- Automatically created from an invoice's catalog-linked services — no separate manual step

> **Why this matters:** "In progress" tells a client nothing. A real percentage, tied to a real step, is the difference between a client trusting your process and a client calling to ask what's actually happening.

Quotations, Invoices & Payments

A quotation converts to an invoice with one click, carrying every line item across exactly as quoted.

- Service catalog with pre-set pricing and included-items detail shown on the document itself
- Government Fee Schedule reference shown alongside quoted prices, so a quote reflects real authority costs
- Partial payments, multiple payment methods, and bank/cash account tracking
- Add a payment directly from a client's own profile, against any open invoice, without opening the invoice itself
- Live summary cards — total invoiced, collected, outstanding, and overdue, always current

Referral Partners

Agents and introducers who bring in business, paid automatically and correctly.

- Percentage or flat-fee commission, calculated automatically per invoice or payment
- Full commission ledger — pending and paid, per partner, always reconcilable
- A self-service portal for partners to see their own referred clients only
- Referral source tracked independently for individuals and companies

> **Why this matters:** Commission disputes with referral partners cost real relationships. An automatic, transparent ledger both sides can trust removes the argument entirely.

Section Two

UAE Compliance — Tax & E-Invoicing

Purpose-built for UAE regulatory requirements — not a generic compliance module with UAE terms added on top.

Tax Compliance — VAT & Corporate Tax

- Registration status and filing deadlines tracked per client
- Return due-date reminders, sent automatically before the deadline arrives
- Client-facing compliance health dashboard on the customer portal
- CSV exports for external accounting handoff, ready for a firm's own accountant
- One place to see every client's registration status across the whole book of business

Why this matters: A missed VAT or Corporate Tax deadline is a real financial penalty for the client, and a real reputational cost for the firm that was supposed to be tracking it.

E-Invoicing (FTA)

- UAE PINT-AE compliant e-invoice generation, built to the actual FTA format
- Provider-agnostic Accredited Service Provider integration
- Built and fully tested against a mock ASP — ready to connect a live provider the moment your firm is
- No separate e-invoicing tool needed alongside the platform

Why this matters: UAE e-invoicing requirements are tightening. Being ready before it becomes mandatory for your client base is a genuine competitive advantage, not just a compliance checkbox.

Compliance isn't a side feature here. For a UAE PRO firm, tax and e-invoicing status aren't optional extras bolted onto an invoicing tool — they're as central to daily operations as the invoice itself, and the platform treats them that way.

Section Two, continued

UAE Compliance — Emiratisation, UBO/ESR & Calendar

The regulatory areas most generic software simply doesn't understand.

Emiratisation (MOHRE) & UBO / ESR

- MOHRE quota status and Emirati employee count tracked per company
- UBO Register status tracked per company, with supporting document reference
- Economic Substance Regulations — notification and report deadlines, tracked separately since they carry different penalties
- Dashboard alerts for anything approaching non-compliance, before it becomes urgent

Why this matters: Emiratisation quotas and ESR reporting carry real financial penalties for non-compliance, and both are easy to lose track of across a large book of company clients without a dedicated system watching them.

Legal Documents Tracker

- Trade license, establishment card, and other document expiries in one list
- UAE public holiday calendar, maintained by your own team as authorities update it

Compliance Calendar

- One unified calendar combining every compliance deadline across every module — tax, Emiratisation, UBO/ESR, and document expiries together
- Color-coded by module, filterable, and exportable for a team meeting or a client update

Why this matters: A deadline tracked in five different places is a deadline that eventually gets missed in at least one of them. One calendar means one place to check, every morning.

Why this matters most. Missed UAE compliance deadlines carry real financial penalties for a client, not just inconvenience. Centralizing every regulatory date in one calendar, with automated reminders, is often the single most valuable reason a firm adopts this platform in the first place.

Section Three

Payroll & WPS

For firms that also manage their own staff payroll — an area most PRO-specific software leaves out entirely, forcing a second system just for this.

Employee Records & WPS

- Employee salary records held per staff member
- WPS payroll cycles, with full cycle history ready for reporting
- Salary structure tracked in line with UAE WPS requirements
- End of service (gratuity) calculated automatically from UAE labour law rules — no manual spreadsheet formula to maintain
- A dedicated view of every active payroll cycle, past and current

Why this matters: Gratuity miscalculation is one of the most common — and most expensive — payroll mistakes a firm can make. Automating it from the actual labour law rules removes that risk entirely.

Leave Management

- Leave balances tracked per employee — entitlement and used days, always current
- Leave request and approval workflow, submitted and approved inside the same system
- Automatic staff notification the moment a request needs approval — nothing waiting in an inbox unseen
- A complete leave history per employee, visible whenever it's needed

Government Fee Schedule

A reference table used across the whole platform, not just for payroll.

- Reference table of official authority fees — DED, MOHRE, ICP, notarization, and more
- Admin-manageable categories — add, rename, or retire freely, not a fixed list
- Last-verified date tracked, since authorities revise fees without notice
- Referenced directly inside quotations and invoices while pricing a service

Why this matters: Quoting a client an outdated government fee is an awkward conversation and a lost margin. A single, maintained fee list prevents both.

Section Three, continued

Corporate & Government Services

The document and process tracking that fills up a filing cabinet at most firms — centralized here instead.

Corporate Secretarial

- Board resolutions on file per company, searchable by date or subject
- Company meeting minutes, searchable per company
- Share certificate register — active and historical, per-shareholder
- A complete corporate history available the moment a client or auditor asks for it

Why this matters: When a bank or auditor asks for a company's shareholding history or its last board resolution, having it on file in seconds — instead of searching through years of paper — is the difference between looking professional and looking disorganized.

Document Courier & Attestation Tracking

- Physical document movement — who currently has it, and its expected return date
- Overdue-return alerts, sent automatically to the assigned staff member
- Attestation stage tracking — home country attestation through embassy and MOFA, stage by stage
- A running record of every document movement, not just its current location

Why this matters: An original passport or trade license physically lost between two offices is a genuine crisis. Knowing exactly who has it, and when it's due back, prevents that crisis before it starts.

Bank Account Opening

A dedicated tracker for the bank account opening process itself — a service many PRO firms offer clients directly, and one that involves its own multi-step process worth tracking properly rather than in a side note.

One record, every service. A company's board resolution, its WPS cycle, and the courier currently holding its trade license are all visible from the same company profile — nothing here lives in a separate spreadsheet or a separate filing cabinet.

Section Four

Finance & Reporting

The full financial picture of the business, not just client-facing invoicing — the numbers a firm's own management and accountant actually need.

Expenses, Vendors & Banking

- Expense tracking with admin-manageable categories
- Vendor and supplier records, tied to the expenses they generate
- Bank statement reconciliation — CSV import, line-by-line matching against recorded transactions
- Payment Gateway integration for client-paid invoices online

Retainer & Subscription Billing

- Recurring client billing on a defined schedule — monthly, quarterly, or annual retainers
- Automatic invoice generation on each billing date, with no manual step required
- Handles month-end date overflow correctly — a retainer billed on the 31st never skips or doubles a cycle in a shorter month

Why this matters: Retainer clients are often a firm's most stable revenue. Automating the billing removes the single most common way that stable revenue quietly leaks through a missed invoice.

Reports

- Profit & Loss, by client and by individual service within that client
- Outstanding payments, transactions, sales, and expense reports
- SLA / turnaround time — actual versus target, per workflow step
- Every export is safe against spreadsheet formula injection by design

Know your margin, not just your revenue. Profit & Loss is calculated per service, factoring in the real cost tagged against it — so a firm can see which services are actually profitable, not just which ones bring in the most invoices.

Section Five

Client Communication & Portals

Clients are kept informed automatically, and can check their own status without calling the office — reducing the single biggest daily interruption for most PRO teams.

Email & WhatsApp

- Branded HTML email templates — welcome, quotation, invoice, payment received, application status — each editable with a live preview
- WhatsApp Business integration, provider-configurable to the gateway a firm already uses
- Nine ready-drafted WhatsApp message templates, staged for provider approval, covering every customer-facing event out of the box
- Manual or fully automatic notification delivery, chosen per client

Why this matters: WhatsApp approval processes can take weeks to sort out from scratch. Nine templates already drafted and ready to submit means a firm can go live on WhatsApp notifications almost immediately, not months later.

Customer Portal

A genuine self-service experience, not a read-only client list.

- Applications, documents, quotations, and invoices — all visible to the client at any hour
- Pay an invoice online directly from the portal
- Compliance health dashboard specific to that client
- Renewal reminders and support requests, without a phone call

Referral Partner Portal & Notification Templates

- A dedicated, separate login for referral partners to track their own referred business and commission history
- Every automated message is editable from one place, with the exact variables for each event inserted by clicking

One client record, every channel. A message sent by email, by WhatsApp, or shown in the portal all draw from the same underlying event — a payment received, a status change — so a client never receives conflicting information across channels.

Section Six

Operations, Security & Reliability

The infrastructure underneath every module above — built to be trusted with client documents and financial records.

Dashboard & Oversight

- 31 configurable KPI widgets across every area of the business
- Live compliance alerts across every UAE regulatory module
- Role-based permissions per staff member
- Full audit log of every meaningful action taken
- Automated daily backups

Data Safety

- Recycle Bin recovery across every module
- Documents stored encrypted
- Sensitive credentials encrypted at rest

Application Security

- Session, CSRF, and CSV-export protections throughout
- Never indexed by search engines
- Indexed and optimized for real business volume

Why this matters: This platform handles passport copies, Emirates ID data, and financial records. A single security oversight isn't a minor bug here — it's client trust, and it's treated with that level of seriousness throughout.

Licensing & Deployment

Every installation is domain-locked at setup and verified continuously — a licensed installation cannot be copied to a second, unlicensed server. Your business stays yours; the software stays where you put it.

Built to grow with the firm, not just for the demo. Every list page, every search, and every report in this platform was checked against real query patterns and indexed accordingly — the same experience on day one and on the day a firm is handling thousands of active files.

Getting Started

Try it free. Decide when you've seen it work.

No payment is required to start. Run the platform on your own business first — purchase only if it's genuinely the right fit.

Free trial, no cost to start

Bring your own leads, clients, and services into the platform during the trial period and use it exactly as your team would day to day. **There is nothing to pay until you decide to purchase** — if it isn't the right fit for your firm, you simply walk away, at no cost.

One

Start the trial

Tell us about your firm and we set up a trial instance — no card details, no upfront commitment.

Two

Run your real work

Add real clients, applications, and invoices. See how it fits how your team already works.

Three

Decide, then purchase

If it's the right fit, move to a paid license and keep everything you've entered — nothing to redo.

What's included in the trial

- Full access to every module described in this document
- Your own staff logins, with the same role-based permissions a paid account has
- A real client portal your own clients can use during the trial
- Direct support from our team while you evaluate it

If you don't continue: nothing is charged, and nothing is shared. Your trial data stays yours, and can be exported or removed on request.

Why we offer this. We'd rather a firm see exactly how this fits their own daily work before paying anything, than take a decision on a demo alone. Most firms know within the first week whether it's the right fit.

Closing

One system, from first inquiry to renewed license.

Every module in this document works from the same client record, the same calendar, and the same financial ledger — nothing here is a bolt-on. A firm can start with the modules it needs today and grow into the rest without ever migrating data or changing systems.

Ready to see it on your own business? Start free — pay nothing until you decide to purchase.

No card details, no upfront commitment. Bring your own clients and services into a trial instance, and only move to a paid license once you've seen it work for your team.

WHAT YOU'VE JUST READ

Client Lifecycle, UAE Compliance, and Payroll & Corporate Services — the full day-to-day operating core.

Finance, Reporting, Client Communication, and Portals — how the numbers and the client relationship stay connected.

Why this platform, Operations & Security, and a free trial with nothing to pay until you decide to purchase.

Product	Rukn — The Complete ERP for UAE Business Setup & PRO Firms
Built by	Crafts Software
Web	craftssoftware.com