Practice Manager

User Guide

Practice management software for solo and small accountants — built by an accountant

Contents

1. Welcome to Siensi Practice Manager

Siensi Practice Manager is a cloud-based practice management tool designed for solo and small accountancy practices. It keeps your clients, deadlines, workflows, AML records and client communications in one place — without the complexity or cost of enterprise software.

With Siensi you can:

- Manage clients and contacts, with documents stored against each record
- Pull company details straight from Companies House with one click
- Run standard workflows for Annual Accounts, VAT, Payroll, Self Assessment, Confirmation Statements, CIS, Pensions, Bookkeeping and Management Accounts
- Track every statutory deadline automatically — each job stage creates the right deadline for you
- Have client reminder emails drafted automatically each morning, sent from your own email address
- Keep audit-ready AML records for every client and beneficial owner
- Access everything from your phone with the companion mobile app

All you need is a web browser. There is nothing to install, and your data is securely isolated to your practice, encrypted, and backed up.

2. Getting started — your account and trial

Creating your account

1. Go to **app.siensi.co.uk** in your browser.
2. Click **Sign up**, enter your email address, choose a password, and give your practice a name (you can change it later).
3. Confirm your email if prompted — the confirmation message comes from Siensi Software.
4. Log in. You'll land on your practice dashboard.

Your free trial

Every new practice starts with a **30-day free trial** with all features included and no card required. A banner inside the app shows how many days remain. To continue after the trial, contact **support@siensi.co.uk** and we'll set up your subscription.

Forgotten your password?

Click **Forgot password?** on the login screen and follow the link emailed to you. The email arrives from Siensi Software — check spam folders if it doesn't appear within a few minutes.

3. Setting up your practice

Open **Settings** from the sidebar. Three things are worth doing on day one:

Practice details

Check your practice name (it appears in the top banner of the app) and your login email. You can also change your password here.

Your logo

Upload your practice logo under **Practice Branding**. It will appear in the top banner. For the sharpest result upload a reasonably large image — at least 300 pixels tall.

Email (SMTP) settings — important

Siensi drafts reminder emails to your clients and sends them **from your own email address**, so they look like they come from you, not from us. To enable this you need to enter your email provider's SMTP details under **SMTP Configuration**:

- **Host and port** — from your email provider (e.g. smtp.office365.com port 587, or your hosting provider's mail server)
- **Username and password** — usually your full email address and its password (some providers require an "app password" instead)
- **From address** — the address your clients will see

> **TIP** If you're not sure of your SMTP details, search your email provider's help pages for "SMTP settings", or email support@siensi.co.uk and we'll help you find them. Until SMTP is configured, email drafts are still created — they just can't be sent.

4. Clients and Companies House

Adding a client

1. Go to **Clients** in the sidebar and click **+ Add**.
2. For limited companies, type the company name or number and use the **Companies House lookup** — Siensi pulls in the registered details, year end, and confirmation statement date automatically.
3. For sole traders and individuals, enter their details manually and set the client type.

Keeping Companies House data fresh

On the Clients page, **Refresh all CH** re-checks every company against the Companies House register and highlights anything that has changed — new year ends, filing dates, or company status. Run it whenever you want reassurance everything is current.

Documents and status at a glance

Each client record can hold a signed letter of engagement and other key documents, so everything for that client lives in one place. The client summary shows **AML and letter of engagement status** indicators, so you can see instantly whether compliance paperwork is in place, and any **alerts** for the client are highlighted on the page.

Contacting your client

From the client page you can **email or WhatsApp the primary contact** with one click — no copying addresses or numbers between apps.

5. Contacts and AML records

Contacts are the people behind your clients — directors, shareholders and beneficial owners. A contact can be linked to one or more clients.

AML documents (passports, driving licences, proof of address) are stored against the **contact**, not the company — because identity checks belong to people. Upload the documents on the contact's record and they're kept as your audit-ready AML file.

> **TIP** One person who directs three of your client companies needs only one set of AML documents, stored once on their contact record.

6. Services, jobs and workflows

Services

A service is something you do for a client on a recurring basis — Annual Accounts, VAT Returns, Payroll, Self Assessment, and so on. Add services to a client from their record, and Siensi creates the first job with the correct workflow attached.

Jobs and stages

A job is one cycle of a service — for example "Payroll, June 2026" or "Annual Accounts, year ended 31 March 2026". Each job moves through a series of stages (records requested, work done, filed, and so on). Tick stages off as you complete them.

Automatic rollover

When you complete a job, Siensi automatically creates the next cycle with the right period and deadlines — the next VAT quarter, the next payroll month, next year's accounts. You never need to remember to set up the next one.

The Overview tab — your safety net

The **Overview** tab shows every client against every service in one grid, and flags anything missing — a client with no active job, or a job with a stage that hasn't progressed. A quick scan once a week catches anything that's slipped through before it becomes a problem.

7. Deadlines

Every stage of every job that has a statutory or practical deadline creates an entry in the **Deadlines** view, calculated from the correct rules — VAT one month and seven days after the quarter end, accounts nine months after year end, PAYE by the 22nd of the following month, and so on.

The deadlines list is your daily safety net: open it each morning and you'll see everything due, ordered by date and colour-coded by urgency — red for overdue, amber for due soon, green when there's breathing room. Completing a deadline ticks off the matching job stage and vice versa — they stay in sync.

8. Your dashboard and day-to-day tools

The dashboard is your morning view: stats across the top, panels for what's due and what's in progress, and a **Quick access** column of one-click links to the sites you use all day — HMRC, Companies House, your bookkeeping software and more.

To Do list

For everything that isn't a statutory deadline — "call Mrs Smith back", "chase the missing bank statements" — use the built-in **To Do** list. Quick to add, satisfying to tick off, and kept right alongside your real deadlines so nothing lives on a sticky note.

Search

The search box in the top bar finds clients and contacts instantly — usually the fastest way to get anywhere in the app.

9. Automated client emails

Each morning at 7am, Siensi reviews your clients and drafts the reminder emails that are due — year-end records requests, VAT return reminders, and payment deadlines approaching.

It also drafts **birthday messages**: if a contact's date of birth is on their record (you'll usually have it from AML), a ready-to-send happy-birthday email appears on the day. A ten-second personal touch that clients genuinely remember.

Drafts wait for your review in the **Email Reminders** view. Nothing is sent without you — open a draft, adjust the wording if you like, and send. You can send **directly through Siensi** (via your SMTP settings, so clients see your address) or click **Open in Outlook** to finish the email in your own mail program instead — whichever suits how you work.

> **TIP** No drafts appearing? Check that the relevant service is added to the client, and that SMTP is configured in Settings if sends are failing.

10. The mobile app

Visit **mobileapp.siensi.co.uk** on your phone and log in with the same email and password. You'll see your dashboard, clients, contacts and deadlines in a mobile-friendly layout.

To install it like an app: open the page in your phone's browser, then choose **Add to Home Screen** (Safari share menu on iPhone; browser menu on Android). It will appear with its own icon and open full-screen.

11. Backing up your data

Your data is stored securely in the cloud with automatic backups on our side. You can also download your own complete backup at any time from **Settings** — a single file containing all your clients, contacts, jobs, deadlines and uploaded documents.

We recommend downloading a backup monthly and keeping it somewhere safe (for example a folder synced to Google Drive or OneDrive). Your data always belongs to you.

12. Your subscription

After the 30-day trial, plans are priced by the number of clients in your practice:

Plan	Clients	Price
Basic	Up to 50	£25 / month
Standard	50–100	£40 / month
Advanced	100–200	£60 / month
Enterprise	200+	Contact us

Prices exclude VAT. Monthly billing, no contract — cancel any time. After cancellation your data is kept for 90 days (so you can download a backup or reactivate) and then permanently deleted.

13. Support and common questions

Email **support@siensi.co.uk** — you'll be talking to the accountant who built the software, not a call centre.

My reminder emails aren't sending

Almost always SMTP: check the host, port, username and password in Settings, and confirm your email provider allows SMTP access (some require an "app password").

A company lookup isn't finding my client

Try the company number rather than the name — numbers are unambiguous. Dissolved companies may not appear.

I've added a service but no job appeared

Check the service has the details it needs (for example a year end for Annual Accounts or a VAT quarter for VAT Returns). The job and deadlines are created from those dates.

Is my data safe?

Yes — your practice's data is isolated from every other practice at the database level, encrypted, and backed up. Full details are in our Privacy Policy and Data Processing Agreement at siensi.co.uk/software.

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