ICB

The Institute of Certified Bookkeepers

Practice management software review

SENTA®

By IRIS

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Scope of the review

Senta is always making improvements to the software. New features are rolled out on a monthly basis free of charge to all Senta clients. The new feature roadmap is set to accelerate with added IRIS investment. This review is limited to the features and their capabilities as of May 2021.

In this review, I have tried to include all the features that I think are invaluable to bookkeeping and accountancy practices when choosing a practice management software. However, this list is by no means exhaustive.

I believe Senta's edge over other practice management software comes from their '**customer-first'** approach. If you need additional help, you can call and speak to an actual human if urgent - or send a ticket and they will respond promptly. Senta has the facility to remotely access your platform and you can book a session where they will go through any problems you may have. They'll also help you to implement a new process or make changes to an existing one.

I wanted quite a few items added to my platform and although they must have been pulling their hair out at my never-ending requests, this was never portrayed and all my requests were implemented.

I had difficulty setting up the email integration so these guys actually called my email provider and fixed it without me even being involved!

I wanted pensions and a pre-filled email for PAYE liabilities adding to my payroll process – done!

I wanted the ability to change incoming emails into tasks – done!

I have asked for features that no one else has asked for before, nothing is too much trouble. They are flexible and will find a way to make the software work for you.

They provide support sessions to enable you to create and edit workflows for clients according to their needs.

Before I get on to the more mundane part of the review, take a moment to imagine if you could call other software providers and get them to evolve a process or implement a new feature just for you!

About the company

Senta is a cloud-based, dynamic practice management platform that was founded to make accountancy practices more profitable, more scalable and to help them deliver great customer service.

Senta was founded in 2014 by two friends – Phil Murphy and James Kilford – who were brought together by a knack for problem-solving, and an enthusiastic approach to software development. Two separate crowdfunding rounds resulted in 350 individual investors and allowed Senta to expand and develop as the volume of clients grew.

In 2020, the number of practices using Senta doubled. When Senta was approached by IRIS Software, they realised this would be a huge opportunity to roll out new features that had been planned for some time, for example, email triage and linking Senta with Office 365.

In January 2021, Senta was acquired by IRIS Software as part of their strategic plan to move to cloud-based services and became 'Senta by IRIS' in April 2021. For Senta clients, there is no change in terms of price, service delivery and support. IRIS respects the Senta culture and personality. Senta retains its client-first approach, with client input still vital to developing the software, in addition to regular client user groups, webinars and yearly client conference 'Senta Discovery'.

Transparency is key to the relationship between Senta and their clients, and this was apparent when the announcement was made about IRIS acquiring Senta. I liked that Senta organised a webinar with Phil Murphy and James Kilford as well as the IRIS leads to discuss the motivation behind the acquisition. It was a very frank and open discussion that addressed a lot of concerns.

Meet the team

Based in Bristol, the Senta family grew to 19 people in 2020, all of whom were recruited for technical aptitude, positivity, problem-solving skills and their friendly, client focused attitude.

You do get to know the team, they appear in the support videos available, reply to your help tickets and answer the phone when you call. And even more so on a one-to-one support session, but more importantly they get to know you and start to understand your business needs.

Louise - Customer Operations Manager: *I'm Louise (she/her) and I manage client services at Senta. I have experience working with customers across a range of industries, and have been working with accountants for 3 years. I love helping practices make the most of our product, making their lives easier in the long run.*

Laurence - Training & Implementation Specialist: *I'm Laurence (he/him), I take care of our training offerings and work with our clients to create their perfect configuration of Senta.*

I really love supporting clients as they begin their journey into using Senta; Whether it's during "day one" training, where they start to understand all the ways that Senta can power up their business, or helping them roll out a completely custom configuration to their team - It's really satisfying seeing our clients get Senta to work for them.

Loma - Client Support Specialist: *"I'm Loma from the support team, and I've been fiddling with computers since I was a toddler (cheers, Dad). I love helping clients figure out their path and use case for a piece of software, then empowering them to be able to build, tweak and maintain their setup. Senta has so much room for customisation, it really allows you to flex your imagination when it comes to building processes that work for you."*

Leigh - Client Support Specialist: *I'm Leigh (they/them) and I work on the support team. I love the problem-solving nature of software support, paving your own way to out-of-the-box solutions is very gratifying. On top of that our customers tend to be thoroughly engaged with software so it's great to feel like you're helping people who love the product as much as you do!*

"Leigh was the wonderful person who sorted out the email integration."

"I have attended training with both Laurence and Loma leading the sessions. I also had one-to-one support sessions with Loma and her statement above really does reflect her attitude. She was friendly and supportive; I knew what I wanted to do, but I didn't know how to do it! Loma did and after listening to my needs, helped create it in the right way to make the process flow work for my clients."

The product

Intuitive CRM
Senta gives you the ability to seamlessly look after clients. From prospect, through onboarding, all the way to valued client.

You enter a contact as a prospect and one click converts them to client, Senta then kicks off a workflow for client take on which includes:

- Services & registrations required
- Obtain clearance from the previous accountant
- Notify the client about AML
- Client ID upload
- Obtain authorisations
- Set up invoicing

Senta makes sure that the process is streamlined throughout your practice and nothing is forgotten. If the client is slow to upload their ID to the secure portal, you can create an 'auto-chase' which means Senta takes on the job of nagging via email for you, saving so much precious time.

When the client has uploaded their AML documentation and you have checked it, you can create a task to remind you that their passport runs out in 2023 and Senta will prompt you when you need a new photo ID.

You also have all your client data in one place, instead of that spreadsheet you made that now stretches over three screens!

If you're sick of searching through your emails looking for the last email communication between yourself and a client? Senta integrates with your email so you have a complete history of communications all stored within the relevant client record.

You can automate emails to chase for information, approval or that elusive signature. If your client is slow to answer emails, you can send a text instead. These are fully customisable so your clients know that it is still very much you.

The bulk email function is an absolute game-changer, making it so easy to send out a newsletter, HMRC updates, or a ‘happy holidays’ message to all clients. You can also create custom client groups and send dedicated updates - for example, an update just for sole trader clients.

Once a client is set up and you have selected the services that you will be taking on for them, Senta creates new jobs according to their deadlines. It’s payroll day – you can just search ‘payroll clients’ and a full list of all the clients you need is in front of you.

And of course, there’s the ability to turn incoming emails into tasks and delegate to your staff (if you are lucky enough to have a team to delegate to!).

Integrations

Senta offers effortless integration with your favourite apps.

The **Companies House** integration is automatically enabled. Company information such as the registered address, SIC codes and Director information can be synced to a prospect or client. In addition, filing dates can be added for jobs such as accounts production or confirmation statements, meaning you never miss a crucial deadline again.

To save time and create a seamless onboarding process, Senta integrates with **GoProposal** and **Practice Ignition**. Meaning you only have to enter client data once, and Senta will pick up the list of selected services from the proposal and kick off the relevant tasks.

Senta integrates with **FreeAgent**, **Quickbooks** and **Xero** to pull through the P&L, Balance Sheet, accounting ratios, bank accounts and timeline information to the client record - meaning that you can do a quick health check without needing to open another browser page. **Top tip: To enable FreeAgent and Dext, go to general settings and find them under extras.**

Senta integrates with **The Pensions Regulator** ensuring you keep up to date with duties for scheme members. It uses the PAYE reference code to look up the ‘staging date’ which can be used to trigger jobs where you are responsible for the client’s compliance.

Senta even integrates with **Dext Precision** to provide a snapshot view of the client’s health score, notifying you if all transactions have been suitably categorised and classified without the need to open Dext.

Melu is a managed live chat service that provides human-operated chat software for your website. If prospect details are captured during one of the live chats, the details are synced to your Senta site. The integration raises the client query as a lead, which is emailed to you as well as added to Senta. It's an easy, cost effective way to manage and automate your customer service and new business development.

Senta integrates with many more such as **TransUnion**, **Zapier** and **PracticeWeb**, although I didn't use these integrations myself.

A full list of all the current integrations is available here: All integrations

If there is another app that you simply can't live without then let Senta know and they will see what they can do to set one up.

Electronic Document Signing

Senta document signing has unlimited storage and unlimited signatures. It's so easy; upload the document, press save and click request signature. The pandemic has changed the way that the world works. So many more clients are open to having a bookkeeper that doesn't live close to them - electronic signing is imperative in this new world.

AML (anti-money laundering) Check Feature

Enabling the AML check feature will allow you run AML checks on your clients directly from the contacts tab on any client record. The integration with TransUnion checks the client's ID validity, address, electoral roll, PEPs and sanctions and provides an overall risk rating.

Please note that each time you run a check on the contact, you will be charged £2.80 per check. AML checks are only available for UK addresses.

This feature can be enabled by practices by going to Settings > General Settings > Extras and toggling the switch to On (remember to press Save to ensure the feature switches on).

Insights

Senta has a fully customisable dashboard allowing you to choose the information you see on your homepage via widgets (for those wondering what a widget is, it's "an element of GUI - Graphical User Interface" and these show you your practice data). Your dashboard clearly shows when tasks are overdue, your work schedule and how your team is managing their workload.

You can also view the latest tasks allocated to you, emails received and emails pending to be sent using the notification

globe on the navigation bar. When something happens that needs your attention, the globe lights up ensuring you never miss a thing.

Senta's production board gives you a Trello-style view of your workload which is particularly useful for helping plan for workload peaks (a task to buy more cake would be useful). You can view your team's workload, reallocate tasks to different dates or people using an easy drag and drop function.

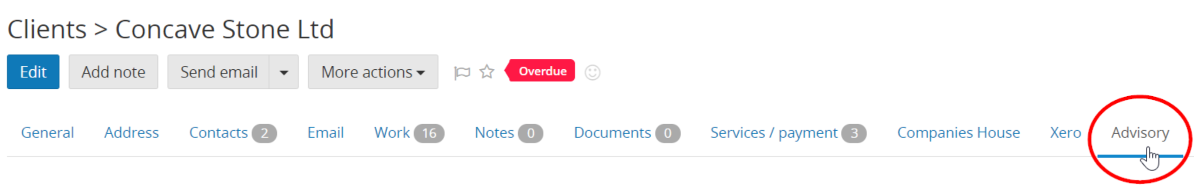
Senta advisory

Senta's advisory feature integrates with bookkeeping software such as Xero and Quickbooks, providing an instant overview of your clients' financial data to support your advisory offering. Information is clearly displayed under each client record, saving you from having to log in to multiple systems.

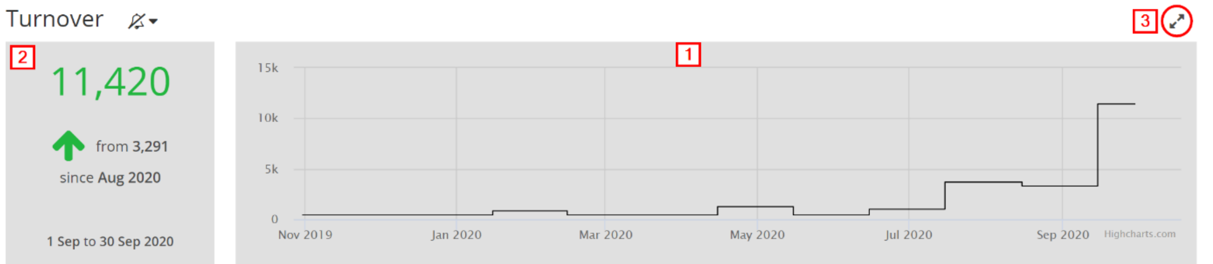
It displays gross profit, net profit, quick and current ratios, debtor days with comparatives, creditor days and the live bank balance. You can set up notifications to alert you when changes happen to these ratios to help you proactively monitor and provide guidance.

Once you have integrated the client's bookkeeping software and switched on the Advisory feature, Senta will interrogate the client's bookkeeping software on a daily basis and analyse the last year's worth of data to generate the topics mentioned above.

Help with switching on the Senta Advisory feature and integrating it with QBO and Xero can be found here: Senta Advisory



Each topic is shown with an interactive chart (1) and a metric (2) comparing the current and previous period. Each chart can also be expanded to a larger view (3):



This is a great tool to help you be proactive about identifying and solving a problem. For example, you know payroll is due to be processed in a week, you can email or text the client to say funds are going to be tight so they need to chase outstanding debtors.

It will highlight any trends - positive or negative - and enables you to provide advice to clients without having to be asked for it. It strengthens your position as a trusted advisor and lets the client know that you are an integral part of their team.

Senta can trigger notifications when ‘topics’ reach certain thresholds, or rise and fall for a certain period of time. These are evaluated every night and you will receive a notification if the criteria are met.

More information on how to set up Advisory notifications can be found here: Senta Advisory

Client portal

Senta’s easy-to-use Client Portal includes in-built secure document storage and unlimited eSigning, making it easy for you to communicate with your end clients, assign them tasks and flag key deadlines. Senta will also advise you when a document has been signed.

There is a 150mb limit for any single file uploaded to Senta, but you have unlimited storage space for each client.

I love the fact that a client’s documents are all stored in one secure portal that both myself, the team and the client have access to. Gone are the days of the client texting, emailing and calling to ask for a document to be resent, as everything you have shared is at their fingertips wherever they are.

Clients can also upload documents for your attention. Don’t worry! Senta will let you know via the notification globe.

When your client logs in, key tiles are visible within their dashboard. These include: Things you must do, Your items, Deadlines, About us and Upload a document.

I also have clients with more than one company and they are able to easily tog between each one.

More information is available for clients or you to familiarise yourself with what they can see in this support guide.

Getting started

When you first log in to Senta, it may look a little daunting at first, but there is a walkthrough guide that takes you through the navigation bar of the home page. The 'Help and Support' page is invaluable - the simple fact it opens as a new tab means you can jump between the software and support articles for the area you need help with.

There is a whole support section on "Getting Started with Senta". Going through this and watching the videos before you begin is the best way to get started. There are so many great tips for setting up Senta your way, to suit your practice from the get go.

Adding your Clients into Senta

When you start onboarding your existing clients to Senta, there are two options available depending on the way you stored your client data beforehand. You can run a bulk import using a CSV file or you can add each client individually.

Remember the spreadsheet you were using to keep track of clients and all their data that was getting ridiculously large? This can now be used to upload your clients to Senta. Senta have created an excel template for you to download which includes example data, so you know what to add and where this data will appear within Senta.

Senta's Support site provides videos to show you clearly and simply how to do both. These are done in a beginner friendly, step by step way. In addition to the videos there is a text version with screenshots for each tutorial which really helps once you have watched the video.

Please see the Senta Support guide for importing clients here.

Practice workflows and processes

Having entered the services you are responsible for, for each client, Senta will now create recurring jobs for you such as payroll or VAT returns.

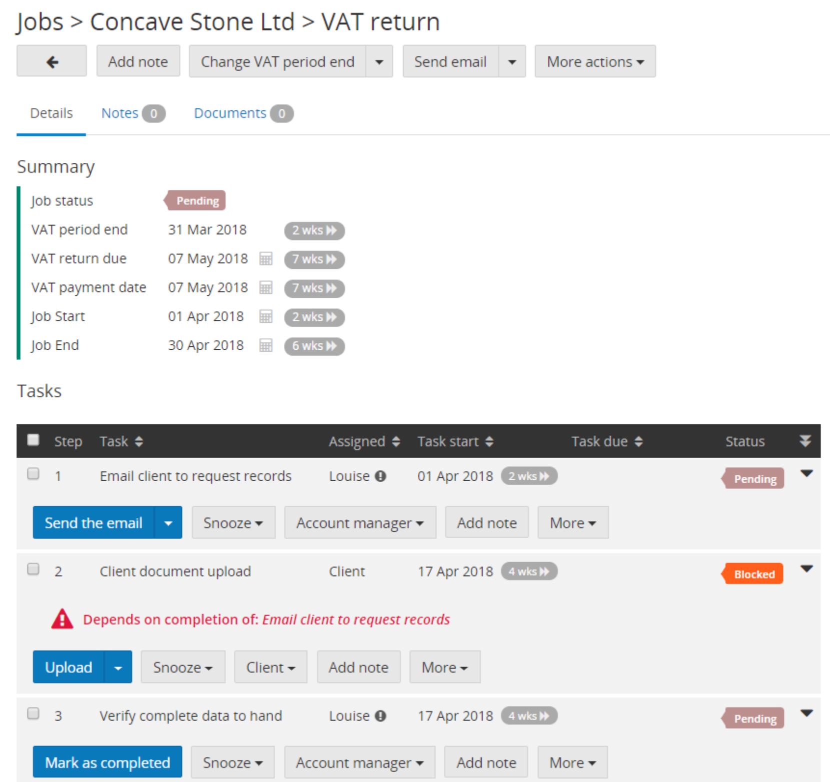
Each job is made up of a workflow, which is a series of granular tasks needed to complete that job. Senta comes preloaded with services and jobs that cover most of the compliance work that we offer.

These jobs can easily be customised to suit your client or your practice's way of working.

When you click on the job, it will open a list of tasks within that job.

Gone are the days of having coloured dot stickers on calendars to mark off the days for VAT returns, payroll, confirmation statements and accounts production.

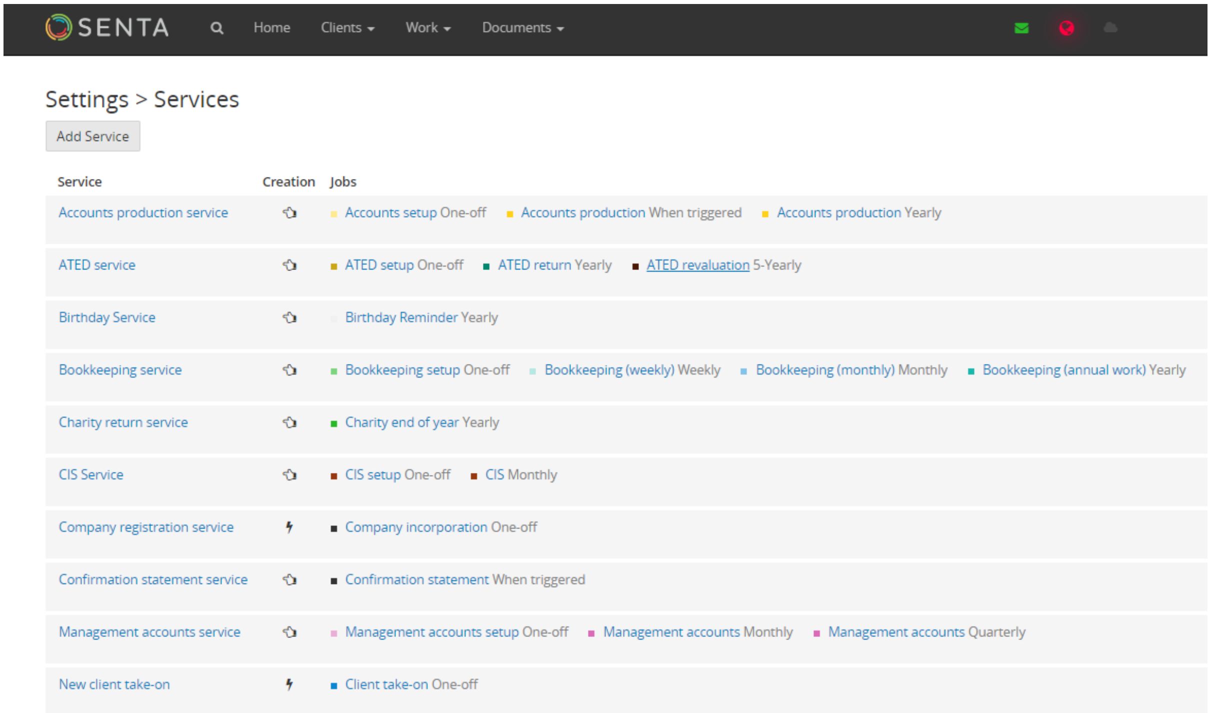
I can trust Senta to keep me on top of what needs to be done.



Configuration

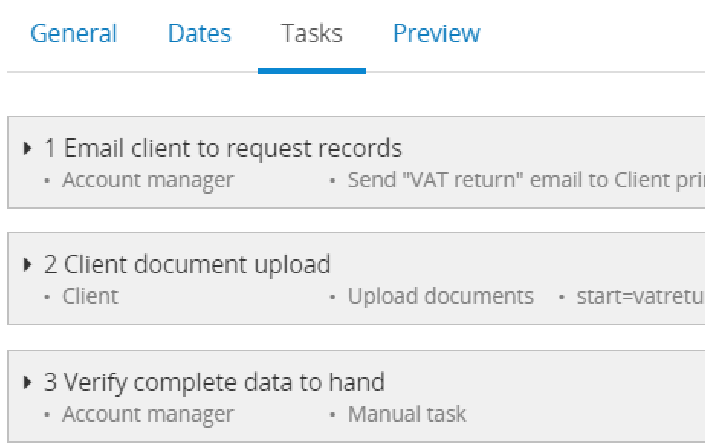
This is where Senta really comes into its own…the software is so innovative and customisable. The beauty of Senta is that it becomes tailored and unique to your practice and your client's needs, and you are in total control of how it works.

To view Senta's pre-built service templates, go to **Settings > Services**



Services create jobs, which are made up of tasks. For instance, the service would be VAT Returns, the job is the completion of the actual return, and this job is made up of several smaller tasks such as preparing the return and checking calculations.

It is worth noting that by determining a frequency at the service level you can set jobs to repeat at different cadences. This enables you to create one service that repeats at different frequencies per client, for example yearly, monthly or weekly payroll.



If there is a service that you offer that isn't available, you can add or edit existing services.

If you want more or fewer tasks within the job, it is totally up to you and what works best for your practice. Please see the following link for guidance: [Changing or adding to jobs]

Any fields within Senta can be used as a placeholder, which allows you to automatically add details regarding the client or their services within emails or letters generated from Senta.

For those of us that are not that technically minded, this just means if you give the field a name, you can refer to that field in any email, letter or text placeholders.

For instance:

```
Dear {to.name},
Your year end is coming up on {client.yearend}, so please start collating your
documents and upload your documents as soon as possible after that.
```

I have added personalised emails to tasks such as payroll, VAT and self-assessment which are configured to pick up these references, reminding the client that they need to make payments, along with detailed instructions on how to carry this out. This saves a huge amount of time, giving me more opportunity to add value. Don't forget to 'create chase' if you think the client may need another automatic reminder, or you can add a task for Senta to text the client.

You can populate Letters of Engagement with service descriptions and fees using these same placeholders.

Advisory topics, the metrics and the underlying data can also be accessed as placeholders and filters. This means jobs and tasks can run off the back of this data, and emails & texts can use the figures automatically to create highly individualised messaging. For example, Senta can text your client when their bank balance falls below a certain threshold.

How do I enable service fields and where can I use them?

Placeholders/field references in-depth guide

Don't forget: if you are having problems, you can book some time with one of the Support team who will remotely access your platform and guide you through the setup.

You can completely configure the ‘jobs’ that live under each service to mirror your practice’s processes, making it so much easier for new team members as everything they need is documented and explained.

You can create all sorts of tasks as part of a job, such as:

Task type	**Description**
Manual task	A simple reminder task
Send email	Send an email to a client or practice user
Send text message	Send an SMS message to a client
Send notification	Notify a user
Checklist	A to-do list of items to be completed
Fill in a form	Presents a form for a user or client to fill in
Yes/no	A yes/no radio
Upload documents	Securely upload a document
Approval	Sign off tasks
Kick off another job	Once completed, this will start another job
Generate a Word document	Create a Word document
Set a field value	Set the value of a field
Call a web url	Send or receive data from an external site using an API
Electronic signing	Electronic document signing assigned to clients
Cancel jobs	Cancel one or more active Jobs for a client
Add note	Add a pre-written note to a client's record

These tasks can be assigned to a practice user or the client.

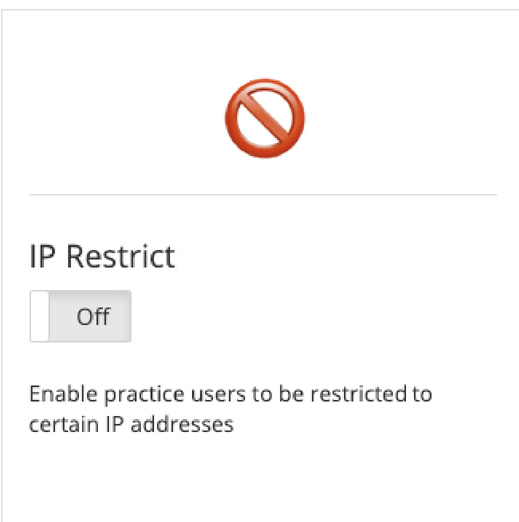
The 30-day free trial is a great time to have a play with the customisation. If you like what you have done you can keep it, if you don't Senta can revert it for you. If you have any ideas for specific jobs that you would like to create, contact Senta and they are more than happy to help you set them up.

Security and GDPR

Senta takes data security as paramount. SSL certificates, with the latest cipher configurations, ensure that your data and your clients' data, is protected in transit.

To add another layer of security, lower the risk of attack and prevent unauthorised access, you can turn on the IP restrict option.

You can turn this feature on by going to **Settings > General settings > Extras**.



Restricting the IP address will prevent any unknown devices from signing in to your Senta workspace. Each device has its own unique IP address that can be obtained from the device settings.

Once the IP restrict option has been applied by the support team, the Practice Manager will be able to select to allow sign-in from any IP address or to restrict sign-in to certain IP addresses.

The allowed IP addresses list can be edited by going to ***Settings > General settings > Security > Access restrictions***

Value for money

Senta costs £29 per month for the first user (a discount of 20% is added if you pay annually - £278.40), less for additional users. And all of your clients use it for free.

What's included in this price? Everything. Senta has committed that you will get every new feature added free of charge, and you always will.

With Senta, there's:

- No long contracts
- No record limits
- No per-module charges
- Discounts for multiple users
- Free upgrades for life
- Free access for your clients

Support is included free of charge, so they will always be there for you if you need help with anything.

AML checks cost £2.50 + VAT each. The total from all of your AML checks will be tallied each month and added to your direct debit payment.

So for £23.20 a month (if you pay annually) you get all this.

Strengths

I am extremely impressed with the software.

Senta's greatest strengths are:

- Free tutorials and one-to-one sessions with Senta's fantastic Support team
- The ability to customise it to your practice's needs
- Senta is always evolving and improving; adding new features that are rolled out free to everyone
- It saves a huge amount of time
- It does a lot of the leg work for you behind the scenes
- It comes with a huge range of features

Weaknesses

Currently, you can only email one client and 'cc' another, which I always worry would seem a little discourteous to the 'cc'd member.

The customisation requires an investment of time to tailor the software to your needs, but once this is done, it pays back this time tenfold.

Sole practitioners or smaller practices may find it a little expensive.

Conclusions

To recap, Senta provides CRM, marketing, workflow, email automation, e-signing, AML checks, a secure document portal for both your clients and your practice, integrations with integral apps and insights for clients that will add extra value to your practice and allow you to deliver amazing customer service.

There is so much that Senta can do, I have only touched the tip of the iceberg. Writing this review has made me realise how much more Senta could do for my practice.

If you zoned out because I wrote so much, please take one thing away, Senta's customer service is second to none!

Testimonials

A full catalogue of testimonials can be found on the Senta website here.

These are specifically from their bookkeeping clients:

AGI Bookkeeping

Adder Bookkeeping

Appendix

Features overview

Disclaimer

The Institute of Certified Bookkeepers having reviewed Senta SaaS Limited software package cannot be held responsible in any way for the actions of the company Senta SaaS Limited or their software. This review is merely an unbiased overview of the software package. Any enquiries should be directed to support@senta.co