

OUTSOURCING & YOU

(A NEWSLETTER FOR ACCOUNTING PROFESSIONALS)

● PRACTICEGRID

● PRACTICEGRID , SERVICES

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ONE PLATFORM. FASTER WORKFLOWS. SMARTER COMMUNICATION. MEET PRACTICEGRID — BUILT FROM THE GROUND UP FOR UK ACCOUNTING FIRMS.

UK accounting firms are under more pressure than ever — growing client bases, rising compliance demands, and teams stretched thin by manual processes and inbox overload. PracticeGrid is the answer: a single automation and AI platform that brings structured workflows, intelligent email drafting, and HMRC compliance tools together in one place, designed specifically for the way British practices work.



THE MODERN ACCOUNTING FIRM HAS A NEW OPERATING STANDARD

Running a UK accounting firm in 2026 means managing more recurring work, more compliance obligations, and more client communication than any previous generation of practitioners has faced — often with the same headcount and the same hours in the day. The firms growing fastest are not the ones working harder. They are the ones that have replaced manual, fragmented processes with structured, automated, intelligent systems.

PracticeGrid was built to be that system. Not a generic project management tool adapted for accountants. Not a US product retrofitted for the UK market. A purpose-built automation and AI platform, registered in the UK, designed around the specific workflows, deadlines, compliance requirements, and team structures of British accounting and bookkeeping practices.

"PracticeGrid is not one tool doing one thing. It is one platform solving the three biggest operational challenges every UK accounting firm faces every single day."

<p>50,000+ UK Accounting Firms <i>The total addressable market PracticeGrid is built to serve</i></p>	<p>3-in-1 Products, One Platform <i>CinchFlow · DraftBox · MTD for ITSA under one umbrella</i></p>	<p>£29/mo Starting Price <i>CinchFlow Essential — no enterprise procurement required</i></p>
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THREE PRODUCTS. THREE PROBLEMS SOLVED.

PracticeGrid brings three purpose-built products under one umbrella. Each one targets a distinct, chronic pain point in the day-to-day operation of a UK accounting firm. Together, they transform how the whole practice works.

<p>CinchFlow <i>Workflow & Practice Management</i></p> <ul style="list-style-type: none"> ✓ Recurring job schedules for VAT, accounts, payroll ✓ Practice-wide deadline & risk dashboard ✓ Clear job ownership — who owns what, when ✓ Workload views by team member ✓ Linked documents via OneDrive / Google Drive 	<p>DraftBox <i>AI Email Reply Drafts</i></p> <ul style="list-style-type: none"> ✓ AI drafts placed into your Outlook or Gmail ✓ Secure OAuth — no passwords stored ✓ Human approval always — nothing auto-sent ✓ Consistent tone and branding across the team ✓ Organisation-wide admin panel and controls 	<p>MTD for ITSA <i>Quarterly Compliance Module</i></p> <ul style="list-style-type: none"> ✓ Quarterly submissions built to HMRC spec ✓ Agent Services Account (ASA) integration ✓ Obligation tracking dashboard per client ✓ Internal review & sign-off before filing ✓ Xero, QuickBooks and Excel import supported
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SAPPHIRE INFO SOLUTIONS (P) LTD.

Call @ 020 3002 6314

✉ info@sapphireinfo.net
 🌐 www.sapphireinfo.co.uk
 📍 4 Whiteleys Parade, Uxbridge Road, Hillingdon, Uxbridge UB10 0PD

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WHY FIRMS CHOOSE PRACTICEGRID

The practice management software market has no shortage of options. But no single competitor combines workflow management, AI email drafting, and built-in MTD ITSA compliance in one accessible, UK-specific platform. PracticeGrid is the only product that does all three — at pricing that works for firms of two people or twenty.

What PracticeGrid Gives Your Firm

- ✓ Structured recurring workflows — CinchFlow
- ✓ AI email drafts in Outlook or Gmail — DraftBox
- ✓ MTD ITSA quarterly submissions — built to HMRC spec
- ✓ Practice-wide deadline and risk visibility
- ✓ Full audit trail on every action and sign-off
- ✓ UK GDPR & Data Protection Act aligned security
- ✓ Role-based access — preparer to partner
- ✓ Transparent pricing from £29 / user / month

What Makes PracticeGrid Different

- Only platform covering all 3 pillars in one
- UK-built — not a US tool adapted for HMRC
- Purpose-built for 2–20 person accounting firms
- No complex onboarding or lengthy procurement
- Registered UK trade mark — long-term commitment
- Encryption in transit and at rest — bank-grade
- Connects to your existing tools — no rip and replace
- Accessible from day one — early access available now

SECURITY AND COMPLIANCE AT EVERY LEVEL

Accounting firms hold some of the most sensitive financial data in existence. PracticeGrid treats security as a first-class feature — not an afterthought. Encryption in transit and at rest. Role-based access control aligned with preparer, reviewer, manager, and partner responsibilities. Every action automatically logged. UK GDPR and Data Protection Act aligned throughout. The audit trail your regulators and professional body expect is built in from day one.

"Security in PracticeGrid is not just about infrastructure — it's about how your team signs in, shares work, and signs off client files every single day."

THE TIME TO MODERNISE IS NOW

The firms winning in the current market are the ones that have moved beyond spreadsheets, fragmented tools, and manual processes — replacing them with structured, automated, intelligent systems that give every team member clarity and every partner confidence. PracticeGrid is that system, available now, at a price point that makes sense from day one.

See PracticeGrid in Action

CinchFlow · DraftBox · MTD for ITSA — from £29/user/month
practicegrid.co.uk | support@practicegrid.co.uk



SAPPHIRE SERVICES SPOTLIGHT



ANNUAL ACCOUNTS

We specialise in annual accounts production for a wide variety of clients such as sole traders, professionals & ltd companies.



TAX PREPARATION

Expertise in Personal & Corporate Tax Returns using TaxCalc, CCH & other softwares



BOOKKEEPING

Verification of bookkeeping data & preparation of VAT Returns ensuring clarity & compliance with UK accounting standards.



MANAGEMENT ACCOUNTS

We produce monthly, quarterly, semi-annually or according to your clients' specific needs.



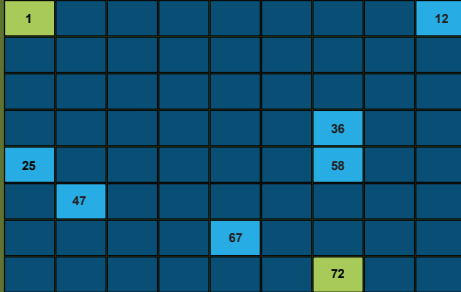
PAYROLL

Preparation of weekly, fortnightly or monthly payslips & CIS Services compliant with UK laws.



HIDATO

Complete the grid so that number 1-72 connect horizontally, vertically or diagonally.



Submit your completed Hidato & 7 Little Words to bdm.k@sapphireinfo.net for a chance to win a **£100** M&S e-gift card. Winners will be chosen through a random drawing from all correct entries and announced in our upcoming newsletter.

7 LITTLE WORDS

Find the 7 words to match the 7 clues. The numbers in parentheses represent the number of letters in each solution. Each letter combination can only be used once, but all letter combinations will be necessary to complete the puzzle.

CLUES:

1. IR35 legislative framework (10)
2. Purpose of HMRC penalties (9)
3. Independent worker via PSC (10)
4. Status Determination Statement (3)
5. Statutory minimum hourly pay (10)
6. Financial exposure from tax errors (9)
7. HMRC investigation term (7)

LETTER GROUPS:



Submit your completed Hidato & 7 Little Words to bdm.k@sapphireinfo.net for a chance to win a **£100** M&S e-gift card. Winners will be chosen through a random drawing from all correct entries and announced in our upcoming newsletter.

MTD FOR ITSA IN 2026: IS YOUR FIRM READY FOR THE NEXT PHASE?

Making Tax Digital for Income Tax Self Assessment is no longer on the horizon — it is here. Firms that act now will lead; those that wait will scramble

From April 2026, sole traders and landlords earning above £50,000 must maintain digital records and submit quarterly updates to HMRC. The threshold drops to £30,000 in April 2027 and £20,000 in April 2028. For accounting firms, this is a fundamental shift in how compliance work is structured, delivered, and priced.

ROLLOUT TIMELINE

Phase	Who Is Affected	From
Phase 1	Sole traders & landlords — income over £50,000	April 2026
Phase 2	Sole traders & landlords — income over £30,000	April 2027
Phase 3	Sole traders & landlords — income over £20,000	April 2028

FOUR ACTIONS FIRMS MUST TAKE NOW

1 IDENTIFY SEGMENT AFFECTED CLIENTS

Review your client list and flag all sole traders and landlords by income threshold and phase date. Many will be unaware they are in scope — proactive communication now prevents a last-minute rush and positions your firm as the trusted guide through the transition.

2 MIGRATE TO MTD-COMPATIBLE SOFTWARE

Quarterly submissions require HMRC-recognised software. If clients still rely on spreadsheets or manual records, begin migration now. Assess whether QuickBooks, Xero, or FreeAgent best fits each client's workflow and start onboarding well ahead of the April deadline.

3 REDESIGN YOUR SERVICE MODEL

Annual cycles no longer fit an MTD world. Quarterly touchpoints create a clear pricing opportunity — introduce MTD service tiers with bookkeeping reviews, digital record health checks, and submission management as core chargeable elements.

4 EDUCATE CLIENTS

Quarterly updates are not full tax returns, but they do require accurate digital records maintained year-round. Short guides, webinars, and automated reminders reduce errors and build client confidence before the deadline arrives.

Sapphire Info Solutions is MTD-ready. We provide digital bookkeeping and quarterly update preparation through MTD-compatible workflows — giving your firm the capacity to serve a growing MTD client base without increasing overhead.

MTD for ITSA is not a compliance burden — it is a business development opportunity. The firms that embrace it earliest will build the strongest client relationships.

HMRC INVESTIGATIONS ARE RISING — HOW TO PROTECT YOUR CLIENTS IN 2026

HMRC's enforcement activity has reached record levels. Here is how UK accountants can stay ahead and protect clients from costly penalties

Armed with real-time MTD data and the Connect system, HMRC is targeting businesses and individuals with unprecedented precision. SMEs with inconsistent VAT records, directors drawing low salaries alongside high dividends, and businesses in cash-heavy sectors are all in scope. Behaviour-based penalties can reach 100% of unpaid tax — making preparation essential.

KEY PENALTY CATEGORIES

Penalty Type	Trigger	Maximum Exposure
Late Filing	Missing SA or CT deadlines	Up to £1,600 per return
Inaccuracy	Errors from careless to deliberate	30–100% of lost revenue
Failure to Notify	Not registering for VAT, PAYE, SA	Up to 30% of unpaid tax

FOUR WAYS TO REDUCE CLIENT RISK

1 ANNUAL COMPLIANCE HEALTH CHECKS

Structured reviews across VAT, PAYE, and corporation tax catch gaps before HMRC does — and create a chargeable service your clients will value.

2 PROACTIVE VOLUNTARY DISCLOSURE

Errors disclosed before HMRC opens an enquiry attract significantly lower penalties. Advising clients to act first builds the kind of trust that retains them long term.

3 DIGITAL RECORD-KEEPING

Ensure all clients use HMRC-compatible software, retain records for the statutory minimum, and reconcile monthly rather than annually.

4 FEE PROTECTION INSURANCE

Professional fees during an HMRC enquiry are rarely covered by standard business insurance. Fee protection is a low-cost add-on and a reliable revenue stream for your firm.

Sapphire Info Solutions provides meticulously maintained bookkeeping and VAT records that stand up to HMRC scrutiny — so you can focus on the advisory conversation, not the paperwork

The best defence against HMRC is clean records, timely filings, and an accountant who acts before problems arise.

FOR MORE INFORMATION

To find out how Sapphire can help your business, visit our website sapphireinfo.co.uk or contact us at info@sapphireinfo.net

SAPPHIRE GLIMPSES



Client Visit



Client Visit



Cricket Tournament



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Client Visit



Client Visit



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Call @ 020 3002 6314

- ✉ info@sapphireinfo.net
- 🌐 www.sapphireinfo.co.uk
- 📍 4 Whiteleys Parade, Uxbridge Road, Hillingdon, Uxbridge UB10 0PD

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