IRIS Customer Benefits

New product updates, functionality and offers included with the IRIS Accountancy Suite

.IRIS

The only choice for UK accountants

With over 37 years' experience, IRIS is the UK's leading provider of fully integrated accountancy solutions. IRIS offers customers the greatest choice of specialist accountancy software and services managed under four leading brands - IRIS, PTP, KashFlow and Keytime.

We take the time to forge lasting relationships with our customers, built on trust and our desire to see them succeed. That is why IRIS customers continue to work with us year after year.

By focusing on the UK accountancy sector, we have an unrivalled understanding of the regulatory challenges and business pressures that accountants face, that is why over half of UK accountants trust IRIS as their chosen software provider.

We use our deep domain expertise to deliver world-class software and services that give our customers tangible business benefits.

We strive to maintain a culture of excellence in everything that we do, with the single purpose of ensuring our customer's success - every day.

IRIS is working hard to ensure that we provide the technology and skills to enable you to respond to these challenges.

We organise our products into three product families designed to meet all your compliance needs more efficiently, increase productivity through better business decisions and to improve collaborative online relationships with your customers, using the cloud, to strengthen the bond between you and your valued clients.

During the last 36 months we have delivered six major releases as well as nine minor releases, to ensure your practice remains compliant with the latest mandates whilst delivering a host of new features to help you run your business more efficiently and get closer to your clients.

In this booklet we aim to highlight the major changes, to ensure you understand these capabilities and are able to take advantage of them.

We also highlight a series of benefits of your subscription that you may not be aware of.

Membership of the IRIS KashFlow Connect partner programme empowers you and your customers to work together collaboratively through integrated online bookkeeping.

*Sign up for free at **iris.co.uk/kashflowconnectpartner***

Our vision is to
"Connect accountants, businesses and their employees, enabling them to efficiently manage their financial and compliance requirements to achieve success."

For instance IRIS OpenSpace, included in every IRIS subscription, allows you to publish documents to your clients online and get instant e-approvals from them, shortening cycle times and reducing your costs.

IRIS Client Dashboards are also included, enabling you to efficiently manage all aspects of your client relationships from one application. This new application is incorporated within your subscription.

We hope you find this booklet useful in expanding the adoption of all the new capabilities of IRIS, in your business, and maximising business value in your organisation every day.

"No accountant ever takes the decision to move to a new software platform lightly, but we feel in a much better place since migrating to IRIS. It has been worth the investment."

Laurence & Esther Collins,
Magic Accountancy Services

*If you have any questions about any of these benefits or capabilities of IRIS please feel free to call **0844 815 5723** or email **membership@iris.co.uk***
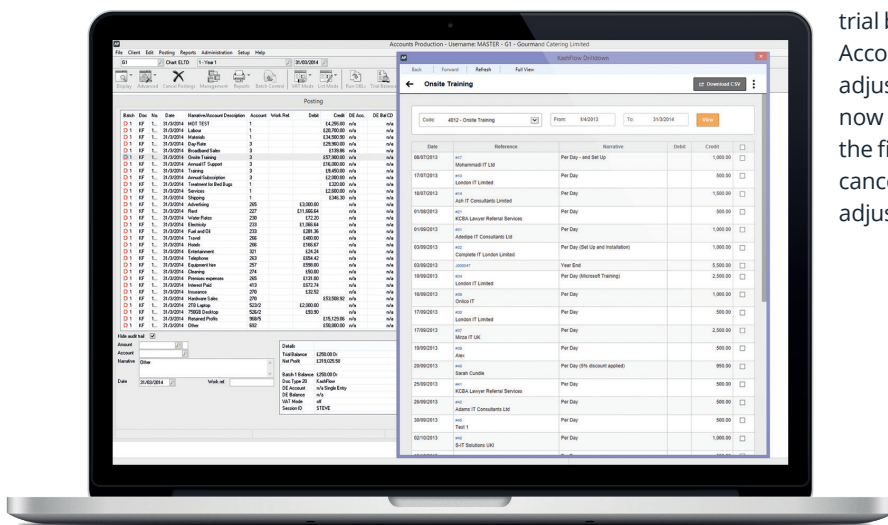
Recent changes to IRIS Accountancy Suite

As a UK owned and operated business, IRIS understands the UK compliance regime better than anyone. Our employees represent the largest body of knowledge of UK legislation and compliance for accountancy, payroll and HR. And we endeavour to deliver our products before compliance changes are implemented by HMRC and Companies House.

Beyond compliance, IRIS is committed to providing improvements to our products to increase your productivity and drive greater efficiencies within your practice. Over the following pages you will find a selection of these product enhancements to improve your everyday use of IRIS Accountancy Suite.

Instant access to clients' KashFlow transactions

You can seamlessly access Trial Balance data from KashFlow within IRIS Accounts Production and dril-down from the posting entries directly to the transactional data within KashFlow where any amendments can be made directly in the source data. All changes are then immediately reflected within the IRIS posting ensuring any corrections are made once and reflected throughout both products ensuring complete books. This is available from within the postings screen, on-screen trial balance and Interactive Reports, reducing the risk of errors and significantly improve the efficiency of producing the final accounts as part of your seamless IRIS workflow.

After the initial opening of the trial balance from KashFlow in IRIS Accounts Production, any subsequent adjustments made in KashFlow will now seamlessly flow into and update the final accounts posting without cancelling any previously imported adjustments.

Streamlining the final accounts creation process

IRIS Interactive Reports provide you with a complete workflow for viewing, editing, linking working papers and other useful documentation and finalising your accounts. These allow you to edit every aspect of your final accounts directly from the on screen preview, providing you with instant access to change client details, account descriptions, change, add or remove notes and disclosures as well as allowing you to add, amend or cancel postings.

The workflow within IRIS Interactive Reports has been designed so that you can preview the printout on screen, generate the output file as either a PDF or Microsoft Word document, finalise the accounts and access the iXBRL tagged versions all within one single reporting screen. IRIS Interactive Reports will speed up the review and creation of final accounts, giving you everything you need as part of your normal workflow thus ensuring maximum efficiency.

The changing face of UK accounts

The new UK GAAP (FRS 101, 102 including section 1A and 105) represents the largest accounting reporting change in over a decade. In our autumn 2014 release we introduced the ability to create accounts under the new financial reporting standards FRS 101 & 102 including the option for early adoption, ensuring you had ample time ahead of the mandate to cater and understand the required changes. Our Spring 2015 release saw the second phase of the changes with the introduction of full automated iXBRL tagging of FRS 101 and 102 Limited Company accounts.

While these new taxonomies no longer contain a minimum tagging list for HMRC's soft landing approach, the IRIS compliance guarantee is second to none meaning that IRIS will identify and tag your accounts automatically against the full taxonomy, saving you the time and complexity of learning the intricacies of the new taxonomy.

In Spring 2016 we released our New UK GAAP Compliance Phase 3 that included FRS 102 Section 1A and FRS 105 capability, the new reporting standards for small and micro-entities. But more than keeping you compliant, importantly our Spring 2016 release included enhancements to make the transition to New UK GAAP as easy and efficient as possible. To this end, FRSSE 2015 is now included within UK GAAP rather than FRS 102 making it quicker and easier to prepare your FRSSE client accounts.

Following an update to the Statement of Recommended Practice for Charities and Limited Liability Partnerships (LLPs) we also include the ability to produce FRS 102 and FRSSE 2015 compliant accounts for both including early adoption (for LLPs).

Automated comparative FRS postings

When selecting FRS 101 or FRS 102 as your accounting standard when you add a new posting entry, IRIS now automatically creates the FRS duplicate posting entry for the comparative year and copies in the trial balance from your existing UK GAAP posting making the restating of the comparatives an even more efficient process. When selecting FRS 102 you can also sub categorise the posting to clearly show when section 1A has been applied.
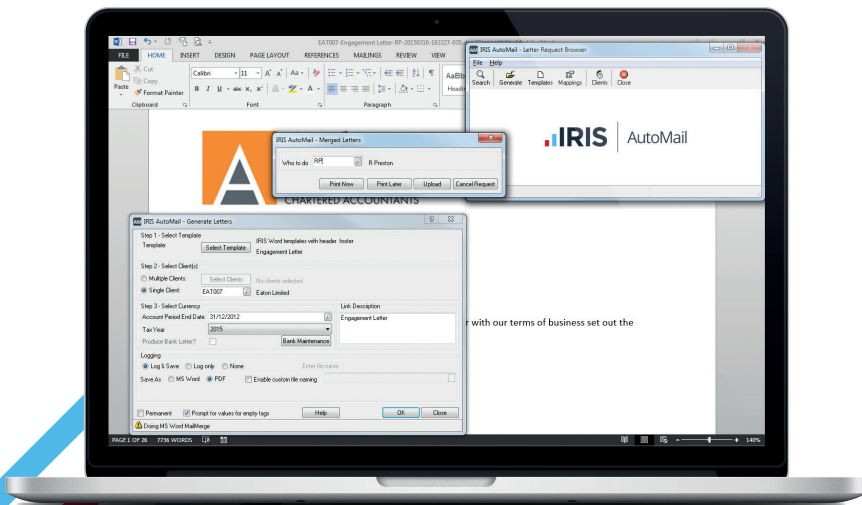
NEW UK GAAP Transition Impact Calculator

We have also developed a New UK GAAP Transition Impact Calculator that is available from our new FRS Hub. This reads your IRIS database to help you size the challenge that the transition will be for your practice so you can make more informed decisions and plans.

FRS Assistant

However FRS-compliant the software, it cannot take away all the effort of the transition. We can't make the decisions that lie at the heart of the new framework around choosing what to disclose and what accounting policy to adopt. We have therefore created an FRS Assistant accessible from our main program toolbar that will help you choose which standard to adopt and provide links to the sections of the standard that will apply to your client. This will make finding the information you need to ensure you make the appropriate accounting policy choices and necessary disclosures as easy as possible.

New FRS Hub - *iris.co.uk/FRS*

At IRIS we pride ourselves on providing you with exceptional services and have created a New UK GAAP or FRS 'Hub' a microsite to provide you with the latest tools, guides, training and insight on the changes. We have also launched a new range of FRS training options. Classroom training, recorded videos and on-site training and consulting to ensure we can provide whatever you need to master this transition.

Collaborative client communications

IRIS AutoMail has always saved you time when generating printed letters for your clients, but we have increased those time-savings even further by integrating it with IRIS OpenSpace.

Any letters generated from IRIS AutoMail or reports from IRIS Practice Management, Time or Fees can be generated as a PDF, uploaded to IRIS OpenSpace and client notified and electronic approval requested all from within your normal workflow of the job, streamlining not only the process but also the time to get a response from your clients.

Client document sharing & e-Approval

Thousands of accountants are already using IRIS OpenSpace in the cloud to electronically share documents with their clients, and gain their electronic approval. IRIS OpenSpace, included in your subscription, has been optimised for mobile devices, so your staff and customers can view, share and approve documents on their smart phones and tablets as well as their PCs. IRIS OpenSpace now allows you to create an online enquiry form for deeper website integration and a cleaner first impression, as well as multiple approvals so you can request approval on a single document from multiple users. IRIS OpenSpace now has integration with IRIS Docs and more comprehensive integration with IRIS Accountancy Suite.

IRIS Charity Format enhancements

The UK has seen a significant increase in the number of academy schools and all indications are that this will continue to rise. All academies need to submit audited accounts and this functionality ensures you can produce final accounts for all your academy clients. Our Charity formats also now support accounts for non-for-profit companies limited by guarantee.

Working Paper file functionality

Our Autumn 2016 release also includes new functionality to create fully hyperlinked working paper files by enabling you to create links to your external Excel workpaper file from within the interactive accounts reports providing digital cross referencing. This also provides you with the ability to link other documents to figures on the interactive accounts reports.

Along with creating digital cross referencing, reviewing your set of accounts becomes an effortless digital process with drill down capability to see backing documentation at a click of a button, providing a fully digital end to end process.

Enhanced auto populated accounting policy and disclosures

With the move to new UK GAAP we have extended the auto populated accounting policies, disclosure and notes to help ease the transition.

Large client functionality

We have also added the ability to make numerical data screen entries with up to 12 characters and a new feature to enable rounding to millions similar to that for rounding to thousands for those with larger clients.

Tax synergies through integration

Creating personal tax returns and completing P11Ds just became much easier with our integrated payroll and tax solutions. Earnings information within EARNIE and IRIS Payroll for Accountants is automatically pulled through to IRIS Personal Tax, eliminating the need to re-enter. Additionally, tax deducted at source and details of any benefits received information held within IRIS Payroll for Accountants is also available to IRIS Personal Tax, extending your tax efficiency.

Greater practice insight and better business decisions

Achieving practice-wide visibility and getting instant answers to critical questions can be a time consuming task. Introduced in 2013, IRIS Practice Dashboards provides complete practice insight. It includes a Staff Analysis Dashboard enabling you to see what has been billed by staff for all clients in a specific time period providing easy comparisons and analysis.

Complete 360 degree digital tax solution

Through the combination of electronic checklists, interactive reports and electronic approval, IRIS provides you with a completely paperless solution for personal self-assessment, removing time wasting complexities of moving and rekeying information from paper to software.

Eliminate the slow and painful process of collecting relevant tax information from clients with customisable, electronically published checklists from IRIS Personal Tax into IRIS OpenSpace that collect tax information seamlessly over the internet and populate their tax return at the click of a button. Amendments can be made during the review process through interactive reports directly from the return saving critical time during the busiest of periods.

Cut down the client signing response time with electronic approval in IRIS OpenSpace, instantly upload the return to your client portal and your client can electronically sign the return on any device, instantly returning it to IRIS Personal Tax for electronic submission to HMRC. The combination of these digital features streamlines the tax return process saving time and money.

Fixed Asset Register

Managing fixed assets throughout their lifetime with IRIS Fixed Asset Register enables you to verify and report on tangible assets instantly and whenever required.
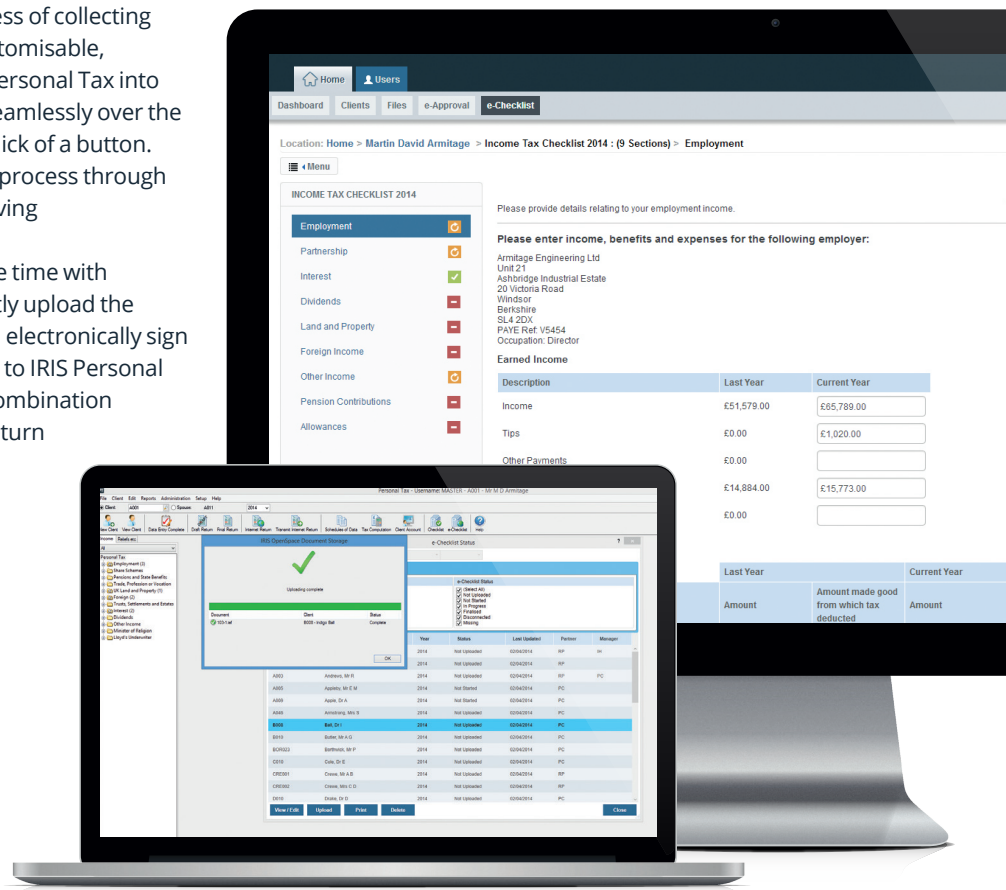
Now with a recently added import tool that automatically creates the asset register with all your client's assets direct from a CSV file.

Corporation tax quarterly payments

The manual calculation of quarterly instalment payments can take a great deal of time and must be paid before the deadline to avoid incurring penalties. IRIS Business Tax frees up your time and gives you one less thing to worry about by scheduling such payments and calculates interest payments where applicable.

Client account for corporation tax

The client account feature for corporation tax clients offers significant productivity benefits. The client account allows users to keep track of the amounts due by the client and make comparisons with HMRC's financial statements.

Simplifying the burden of compliance with Companies House Online Services (CHOS)

Through IRIS Company Secretarial and CHOS, you have access to all data available from Companies House for clients and non clients including the new Companies House Beta Service which gives free access to data held on the UK register of companies and the ability to E-file full iXBRL compliant accounts to Companies House. Accounts that have previously been tagged and prepared for HMRC can be submitted to Companies House at the push of a button, eliminating potential transposition or tagging errors and delivering significant time savings.

Collaborate with your clients with integrated cloud bookkeeping

IRIS acquired KashFlow, one of the UK's leading cloud bookkeeping providers to SMEs and accountants, in October 2013, to improve the way in which accountants and their clients collaborate over their financial performance and reporting. To help accountants work more efficiently with their clients online, IRIS has introduced the IRIS KashFlow Connect Partner Programme that provides a range of tools and benefits to help client adoption of KashFlow.

KashFlow can be tailored to your brand and delivered as your own value added service allowing you to strengthen your relationship with your clients.

IRIS has also made significant improvements to KashFlow including seamless integration with IRIS Accounts Production, meaning there is no need to re-enter your clients' trial balance to generate their final accounts. Bank feeds within KashFlow is a major time saving feature for both accountants and their clients allowing quick easy matching of bank transactions to invoices.

Integration goes even further with our new KashFlow Payroll product, a great companion to small businesses that want to work alone or with their accountant to provide a payroll service.

IRIS has re-launched KashFlow with a complete refresh of the user interface and improved performance, a new responsive design that works on any mobile device, and introduced three product versions. No two clients are the same, so IRIS now provides three editions of KashFlow to meet the needs of your various clients, and these editions are priced to suit any budget.
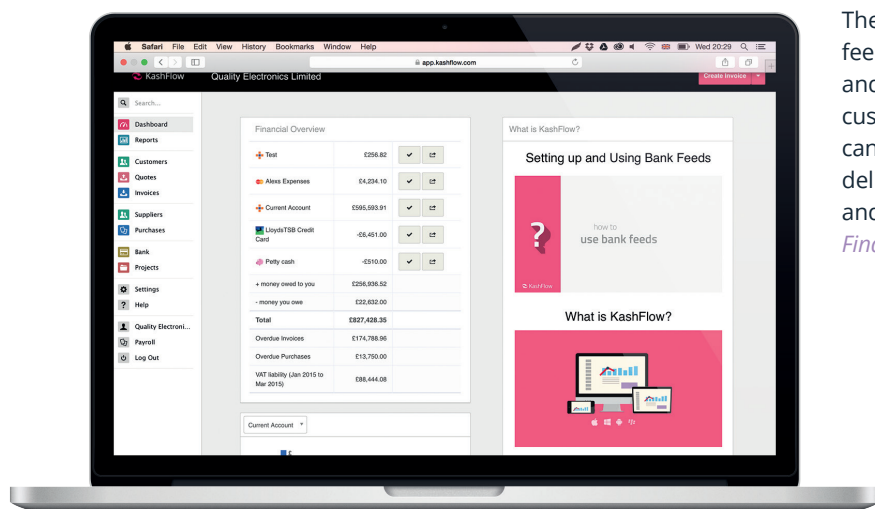

Mandatory online filing of employment related securities

Our spring 2015 release also included the new HMRC form 42 replacement ERS 15, a new HMRC produced spreadsheet enabling electronic filing of employment related securities via their government gateway following the introduction of mandatory e-filing.

Complete Automatic Enrolment Solution

Automatic enrolment (AE) legislation is very complex. At IRIS we have developed the industry's most comprehensive automatic enrolment solution - the IRIS AE Suite - comprising of three elements Assessment, Communications (pension letters) and Electronic Payslips and P60s.

The IRIS AE Suite has been developed through the close relationships with pensions providers and The Pensions Regulator as well as customer feedback. The solution works within your payroll and is not a 'middleware' solution. With over 4,935 customers assessing over 643,342 employees you can relax in the knowledge that the IRIS AE Suite will deliver push button automation, taking the admin and stress out of automatic enrolment compliance. *Find out more at **iris.co.uk/aesuite***

Easier client management

IRIS OpenPortal, the new main menu screen, has been significantly enhanced to include the IRIS Client Dashboards. A great way to manage your clients with additional tabs for client search, client dashboard information, add key client information and add new clients to your IRIS system.

Not only will this save you time, allowing practitioners to quickly and easily manage and search for clients, it is also possible to access all online published client communications held in IRIS OpenSpace without leaving IRIS Accountancy Suite.

Adding new clients to your practice has never been simpler either, with the new IRIS Accounts Production simple client creation. Reduce the laborious task of creating new clients within IRIS with a range of options to suit your client needs as well as the ability to add clients directly in IRIS OpenPortal.

Clients and appointments can be created directly from Companies House; simply enter the registered number of the company you would like to import and IRIS does the rest. Not only does this feature reduce the time required to create new clients it also reduces potential errors by eliminating typos as the information comes directly from the public record.
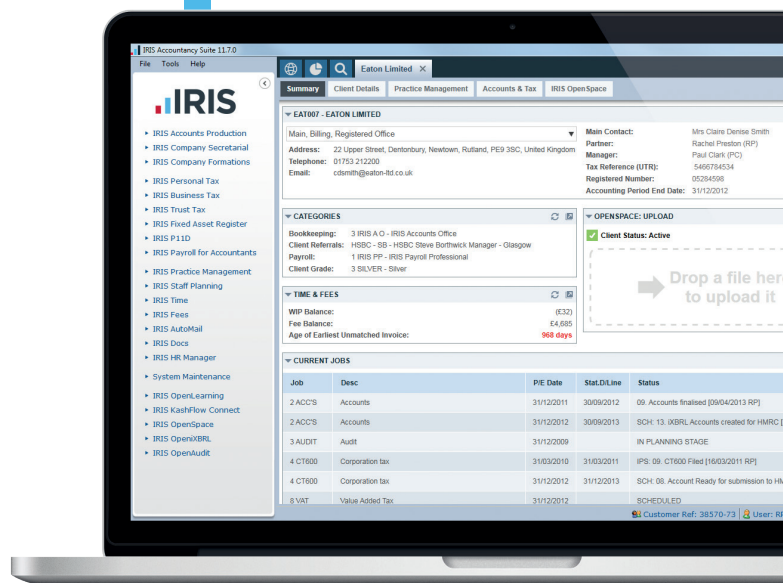
Alternatively, using the simple client wizard, the process of creating a new client in IRIS Accounts Production has been significantly simplified. The basic client information required to create the client can all be entered within a single screen, including importing the business officers from Companies House.

Produce lending-ready P&L and cash forecasts supported by graphical what-if analysis

IRIS partners with GearShift to enable business advisors to provide high-value advice to clients using the insight locked away in their data.

With GearShift, advisers can help clients make smarter business decisions by predicting what lies ahead, creating solutions and reporting on the impact. Gearshift forecasting is the most comprehensive forecasting tool on the market, providing lending-ready P&L and cash forecasts supported by graphical what-if analysis.

- *Full forecast P&L and balance sheet for working with lenders and banks*
- *Create an automatic forecast in minutes using actuals from KashFlow*
- *Model and overlay different scenarios using the what-if analysis tool*
- *Forecast your client's CT liability in advance*
- *Use the business plan tool to create a professional 'bank ready' business plan for your clients*
- *Create beautiful graphical reports and share with your clients using IRIS OpenSpace*

IRIS Business Tax - Interactive reporting

We are always looking for ways to turn mandates in compliance into productivity enhancements to benefit the staff in your practice. With the PDF mandate from HMRC for CT600's for periods beginning on or after 1st April 2015, we have enhanced our corporation tax reporting with interactive reporting on the latest CT600 forms. Saving you valuable time, you can now drill-down to the data entry sources from the on screen CT600 and make amendments directly without having to leave the reporting window or workflow.

- Improved navigation

The IRIS Autumn 2016 release includes significant improvement to the navigation within IRIS Business Tax in the form of a tree view. All data entry options are displayed on screen so that you can go from one section to another quickly and easily without the use of menus. Processing business tax has never been more efficient.

Value added benefits of your subscription

Over the last few years IRIS has introduced a number of new product modules that can increase your productivity as well as improve client communication and collaboration.

These are included in your subscription and integrated into the solutions that you are already using day-to-day. The products below are all included in your IRIS subscription.

IRIS OpenPortal

Each time you start IRIS OpenPortal it provides access to all your installed IRIS applications along with the benefits of online communication such as news feeds, industry information and instant access to the latest support materials. You get instant sight of any HMRC or Companies House downtime as well as useful product hints and tips. It also includes IRIS Client Dashboards.

IRIS Client Dashboards

This central dashboard gives you a 360 degree view of your clients, not only putting all the critical client information at your finger tips but direct access to key functions within IRIS Accountancy Suite.

It allows you to access multiple clients simultaneously making your day-to-day activities and switching between client jobs seamless.

IRIS OpenSpace

This cloud-based document exchange and e-Approval system is integrated into your IRIS Accountancy Suite. It allows you to publish documents to your clients in real time, through a cloud portal, that offers an individual account through which they view and e-approve documents as well as send information in return.
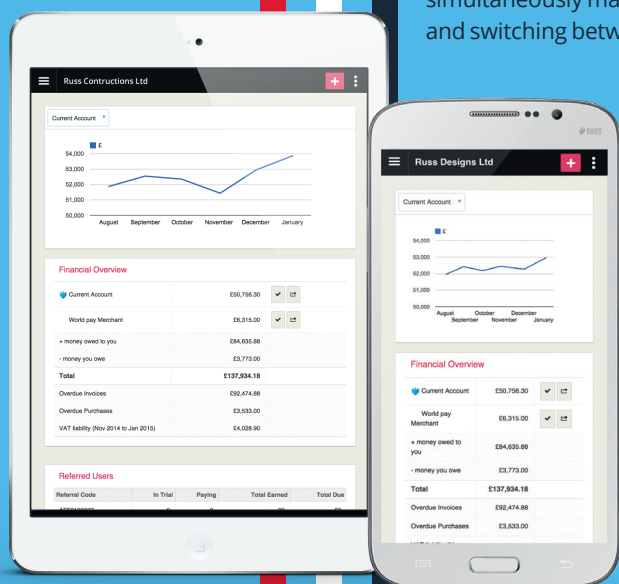
IRIS OpenSpace is a secure, reliable solution to document collaboration that works on any web browser as well as mobile devices. It can also be integrated as a secure login area for your website.

New functionality enables accountants to incorporate branding, colours and logos to provide a fully branded client portal.
*Watch the video at **iris.co.uk/ openspace***

Complimentary IRIS OpenPayslips licence for your practice

Increase your practice payroll processing efficiency and reduce your carbon footprint with a complimentary IRIS OpenPayslips licence. Use it within your practice to distribute digital payslips to your employees.

IRIS KashFlow Connect Partner Programme

KashFlow is a fully integrated part of the IRIS Accountancy Suite, enabling bookkeeping data to seamlessly and accurately flow from clients records straight through to final accounts production in one single uninterrupted process.

This enables accountants to spend more time building collaborative relationships with their clients and providing advice around real-time financial information.
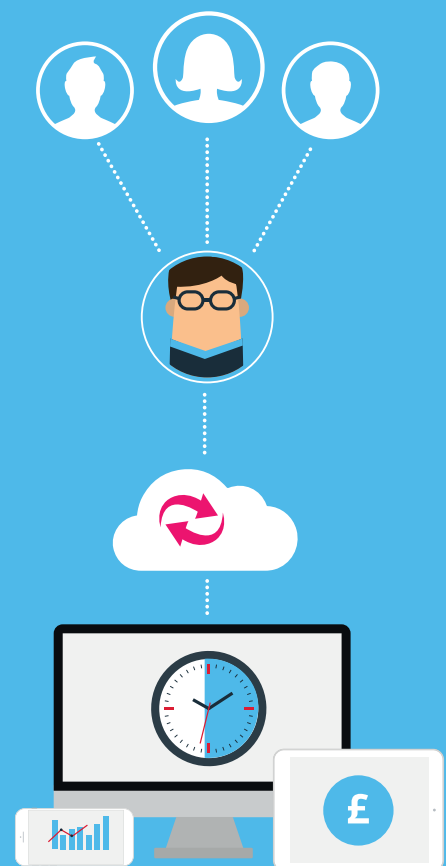
To help accountants introduce these online bookkeeping benefits to their customers, IRIS has launched the IRIS KashFlow Connect Partner Programme; a flexible and comprehensive programme that provides unrivalled access to training, marketing materials, expert 24/7 support and advice.

The IRIS KashFlow Connect Partner Programme is designed to help practices of all sizes achieve their growth aspirations, and provide a first class service to their clients.

The programme also includes the IRIS KashFlow Connect client manager; allowing you to tailor what your clients are able to see and do within the KashFlow system, including the ability for you to brand their experience with your practice logo and colours.

All KashFlow Connect partners receive a complimentary, KashFlow licence for internal use, enabling them to receive the same productivity benefits as their customers.

Sign up for free at
iris.co.uk/kashflowconnectpartner

"If clients have any reservations at all, seeing is believing - they are always impressed by just how user-friendly KashFlow is."

Laurence & Esther Collins,
Magic Accountancy Services

*If you have any questions about any of these benefits or capabilities of IRIS please feel free to call **0844 815 5723** or email **membership@iris.co.uk***

Refresher training & IRIS events

IRIS products are constantly evolving and we recognise that keeping up to date is a challenge, which is why we provide free annual refresher training with your subscription.

Refresher training webinar

This web-based course ensures that you and all your staff can be up to date and taking advantage of all the latest benefits of your subscription.

Webinars & events

We also run periodic webinars and events, alongside our flagship annual IRIS World event, full details of which are available on our website. ***iris.co.uk/webinars*** & ***iris.co.uk/events***

Attendance to IRIS World

IRIS World is the largest customer event of its kind in the UK for accountants, designed to give an overview of all the latest IRIS developments. ***iris.co.uk/irisworld***

IRIS OpenLearning

IRIS OpenLearning is available anywhere, anytime so you can learn at your own pace. There's no need to take staff away from their day job which means reducing the downtime and lost billable hours.

It's the easy way to induct new staff or ensure your current workforce are completely up to speed and everyone who successfully completes a module will receive IRIS certification.
Start your free trial here ***iris.co.uk/openlearning***

The IRIS Advantage

No one likes to do work twice (or more), that's why at IRIS we have always worked to the philosophy of 'enter once, use everywhere'. For more than 37 years our solutions have focused on integrated technology based around a single centralised database.

Many other vendors talk about how their products share data and are integrated, but the IRIS single centralised database provides true integration. This gives the benefits of reduced data entry, complete practice visibility and ultimate control over your practice that can be reviewed through practice reporting and business intelligence. With all the facts in one place your practice can make better, faster and more accurate business decisions.

A truly integrated platform increases productivity and accuracy, delivering unparalleled efficiency.

Our customers tell us that they save 22 hours per employee per month on average, using integrated IRIS solutions.

We understand that compliance is core to your business and IRIS provides leading compliance applications to the accountancy profession, but as your needs have grown over recent years we have expanded our portfolio and introduced two new families of products, one to further enhance productivity and one to improve client collaboration.

Extending the benefits of an integrated suite of solutions, all of these new products work seamlessly on a single common platform.

So whether you use IRIS for its traditional compliance applications, or communication with our collaboration suite, you know that you have a single practice wide view of your business, your clients and their business performance.

No one else covers all your existing and emerging technology needs so comprehensively. The alternative is to buy technology for multiple 'point solution' providers with silos of information stuck in each separate application, no single common view of your business, and multiple technologies and suppliers to manage.

All of this is backed up by a range of support services, training and consulting to ensure you get the most from your IRIS investment.

Compliance

IRIS has 37 years experience in providing compliance solutions for UK accountants and as the market leader, no other supplier is better placed to ensure your practice stays ahead of legislation.

Our focus is on minimizing the legislative burden upon your practice and providing ultimate efficiency through true integration. For us, it's about making sure that our software gets it right first time.

The UK legislative landscape is constantly growing in complexity and volume, what with the introduction of HMRC and Companies House's digital strategies as well as the continuing convergence to International Accounting Standards.

The 2015 budget announcement of the digital tax account or tax return replacement is further proof that technology is dictating legislation, and you need a software partner who has a proven track record of putting compliance first whilst continuing to deliver enhancements for your practice.

Our market-leading suite of tax solutions provide extensive completion of all return types and have been designed to streamline the tax return process with a completely digital and paperless workflow; from e-Checklists for tax detail collection to interactive tax returns through to client e-Approval of tax returns.

We have a strong relationship with HMRC and are working closely with them on their private and public beta programmes to ensure we are ready in plenty of time for making tax digital so you can be confident we will provide everything you need.

Generation of final accounts needn't be a compliance burden with IRIS Accounts Production. We save you time and reduce errors through simplifying the accounting process with the latest Interactive Reports that enhances your normal workflow, whilst providing you with comprehensive functionality and reporting to deliver superior statutory accounts.

Through IRIS Company Secretarial you can achieve effortless company formation and administration. The relevant Companies House forms are automatically generated as you make changes within any application, eliminating time consuming manual tasks.

RTI and auto enrolment needn't be taxing with our efficient payroll management solutions. Reduce payroll complexities and simplify the payroll run with seamless IRIS integration and powerful cross company/ client control.

44% of all tax returns
filed by third party software with HMRC are completed using IRIS software

"We have to be absolutely confident that what we produce complies with new legislation and meets filing deadlines. It is vital that we have a software provider that we trust to enable us to do this."

Paul Aplin, AC Mole & Sons

Productivity

In today's fast moving business world, it's vital to be able to make rapid, accurate business decisions, based on a comprehensive and complete view of your business. IRIS provides a business productivity suite that provides you with reports, analytics and business intelligence tools enabling you to quickly and easily review your entire practice, its performance and that of your clients, enabling you to improve your agility through fully informed decision making.

Leveraging the benefits of a single centralised database that sits at the heart of our compliance suite, our productivity suite offers practice wide visibility at the touch of a button.

IRIS Practice Management gives you an integrated view of all client data, relationships and activities. It works as the hub of your business to help you plan, manage, track and control staff, clients, jobs and communications by utilising the central IRIS database.

Our Practice Management solutions enable flexible, efficient workflows, deliver a seamless billing process and eliminate revenue leakage through complete staff planning and control.

IRIS Time & Fees is a powerful tool for monitoring work in progress, ensuring all time and expenses are recorded and charged for and efficiently collecting fees.

Effective client communications is at the heart of our productivity solutions with IRIS OpenSpace integrated within your standard workflow, allowing you to efficiently send client communications at any point in the job cycle.

Swapping between jobs and clients has never been simpler with IRIS Client Dashboards. It streamlines client management by providing a single 360-degree client view with instant access to all the vital information you need to work on multiple clients at any one time. This effortless multi-tabbed, client navigation is uniquely enabled by integration within IRIS and accessed from the IRIS OpenPortal home screen.

Ensuring productivity and efficiency within an accountancy practice is no easy feat. You need to keep abreast of all activities within the practice, without slowing down the workflow.

IRIS Practice Dashboards provides graphical reporting and analytics to your business, allowing you to drive profitable jobs through extensive KPIs and dashboard drill-down. IRIS Practice Dashboards offer complete practice insight and improves management control.

IRIS Docs makes paperless document management a reality by combining all the cost-savings, space-savings and environmental benefits to enable you to be a greener practice. It provides electronic access to the correct documents, emails and all outputs from your IRIS software - whenever and wherever you need them. All your documents, all your correspondence, all in one secure place - available to all practice staff, all the time.

"IRIS Practice Management produces a great deal of relevant information in a very short space of time to help us maintain tight management control of our expanding business."

Paul Woodburn, Robin Oatridge

Collaboration

For generations, the traditional accountant and client relationship has been focused on end-of-year compliance, through occasional face-to-face meetings and telephone interactions. However, the digital confidence of today's small business owners means there is an opportunity to transform this relationship into a more valuable, collaborative, advice focused one thanks to the advent of cloud technology.

In recognition of this, IRIS provides a complete suite of cloud-based collaboration tools that not only help to improve your presence on the web, but also help to build a dialogue with your clients that is efficient and profitable. These tools help move the client relationship away from being focused on receipts and tax returns, and towards one that is focused on strategic, year round support using real time financial information.

The accountancy profession is enthusiastically embracing our new cloud collaboration suite with over 7,600 UK practices now using at least one cloud module to work in a better way with well over 226,000 of their clients.

The key to this success is the way those tools seamlessly integrate and work with your existing IRIS solutions within your practice, enabling efficient, frictionless collaboration.

The collaboration suite includes everything you need for your online presence: we can work with you to design your website, integrate client login facilities for document sharing and e-Approval, as well as

collaborative cloud bookkeeping and payroll with our KashFlow solutions. All are re-brandable using your own practice identity.

IRIS OpenWebsite allows you to deliver a professional website for your business to attract new customers, as well as communicate to existing clients. IRIS provides a range of options from template websites to complete bespoke development, and all can be integrated with the rest of the collaboration suite.

IRIS OpenSpace is a secure online file sharing and document collaboration system that helps all UK accountants work more collaboratively with their clients. It allows you to instantly share documents, such as tax returns and accounts, with your clients and have them immediately e-approved and returned. With the addition of new functionality, you can incorporate your branding, colours and logos - both online and in all communications, providing a fully branded portal to your clients

For practices that offer their clients payroll services, IRIS OpenPayslips reduce your payslip distribution costs and increase payroll efficiency with secure web-based payslip distribution via an online employee portal, or tablet and smartphone application.

Every SME wants to focus on their business and not their record keeping. KashFlow is an award-winning online bookkeeping software designed for UK small business owners, to give them better control and understanding of their business finances. It simplifies bookkeeping, invoicing and keeping track of accounts, meaning this information is always accurate and up to date. As their accountant, you are also able to access this real-time information, and with KashFlow's integration into IRIS Accounts Production, it allows you to become their trusted business advisor - rather than the 'number cruncher'.

As a companion to KashFlow we offer KashFlow Payroll for those SMEs that wish to run their own payroll, or have their accountant do it for them. KashFlow is supported by an extensive partnership programme for accountants looking to get their clients using cloud bookkeeping.

"Improving our efficiency by using solutions such as IRIS Docs and IRIS OpenSpace to process more work means we've been able to increase our turnover without raising our fees in recent years and process more client work with the same number of staff."

Clive Myers, Myers & Co

Over 466,650 *users of our cloud applications*

Our vision is to

"Connect accountants, businesses and their employees, enabling them to efficiently manage their financial and compliance requirements to achieve success."

IRIS Customer Benefits

To gain full value from your IRIS subscription, make sure you are utilising all of the following additional benefits:

- Use of IRIS OpenSpace for client document exchange and approval

- 12 month use of leading KashFlow online bookkeeping solution for your practice

- Use of IRIS KashFlow Connect - manage all client accounting information from a single dashboard for any clients using KashFlow

- 12 month use of IRIS OpenPayslips when using any IRIS payroll product

- Auto enrolment health check

- Access to IRIS OpenPortal - main menu within the suite containing vital industry and client information

- Access to Tolley Tax Data and special offers on online products & reference books

- Access to qualified UK support team and online support materials

- Access to IRIS OpenLearning for annual refresher training

- Entry to IRIS events and online webinars

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