

IRIS AutoMail

Client correspondence made easy with IRIS

Produce all your client letters automatically and keep a record of correspondence, using IRIS AutoMail

In document-driven industries such as accountancy, how a practice approaches and executes its customer correspondence and document automation is critical in meeting its business objectives.

Highly-personalised and effective business communications can exceed client expectations, increase customer satisfaction and improve loyalty. IRIS AutoMail enables practices to create business communications tailored to the individual with the right content, graphics, signatures, attachments and enclosures.

The system can be configured to reflect the requirements of the practice for example correspondence can be printed or emailed individually or in a batch. There are 50 standard letter templates within the system and the possibility to create any number of unique additional documents if required. Practice Managers can determine when letters are sent to clients by setting relevant triggers, such as tax return reminders.

When a trigger is met a new letter is created and automatically populated with the appropriate contact details. It can then be personalise before being sent out. Examples of templates available:

- Year-end reminder and/or planning
- Trust tax returns
- Tax return reminder/submission/confirmation of submission
- Tax planning
- SA303 cover
- Personal tax checklist
- R40 cover
- Reference for a third party (e.g. credit application)
- Payment reminder
- Engagement letters

Key benefits

- Save time - letters are automatically populated with relevant client details
- Quickly and easily edit letters using Microsoft Word functionality
- Reduce dependence on clerical staff when producing professional day-to-day correspondence

Data mining for increased benefits

Take advantage of the data mining functionality within IRIS Practice Management to tailor your correspondence to the relevant clients.

For example an invitation to join a practice Golf Day can be easily created and mailed to the clients that enjoy playing golf. Alternately a new service could be promoted to individuals with income above a certain threshold. IRIS AutoMail automates correspondence to save time while helping you to provide a personalised response to clients.

Efficiency through full integration

Working with the single central IRIS database makes IRIS AutoMail even more efficient as it eliminates the need to re-key information.

This increases productivity and improves accuracy. Major benefits are realised when used in conjunction with the other elements of the IRIS Accountancy Suite.

- *IRIS Practice Management* - enables advanced control and monitoring of the tax returns as well as enabling a truly paperless office.
- *IRIS Time & Fees* - makes it easier to monitor work in progress, record time spent, raise bills, send statements and control debtors. With *IRIS Time & Fees* you can ensure that all work is charged for and all fees collected.
- *IRIS Practice Reporting* - real time reports provide greater visibility into your business to help drive your practice forward.
- *IRIS Accounts Production* - create final accounts for sole traders, partnerships, limited companies and charities. The close integration enables client-specific accounts to be disallowed and brought forward in the next period, saving time re-using previous selections.