

IRIS OpenSpace

Integration Guide

Version 1



Introduction

As part of your IRIS OpenSpace subscription, your practice can now access a range of benefits including direct integration with a number of other IRIS systems to streamline and simplify existing processes and data transfer. IRIS OpenSpace currently integrates with the following IRIS systems;

IRIS Accountancy Suite

IRIS OpenTax

KashFlow Connect

IRIS Payroll Business

IRIS Bureau Payroll

IRIS Payroll for Accountants

Earnie IQ

Earnie Payroll Manager

This guide explains how to enable integration between these products and IRIS OpenSpace and where to find further information on the above systems.

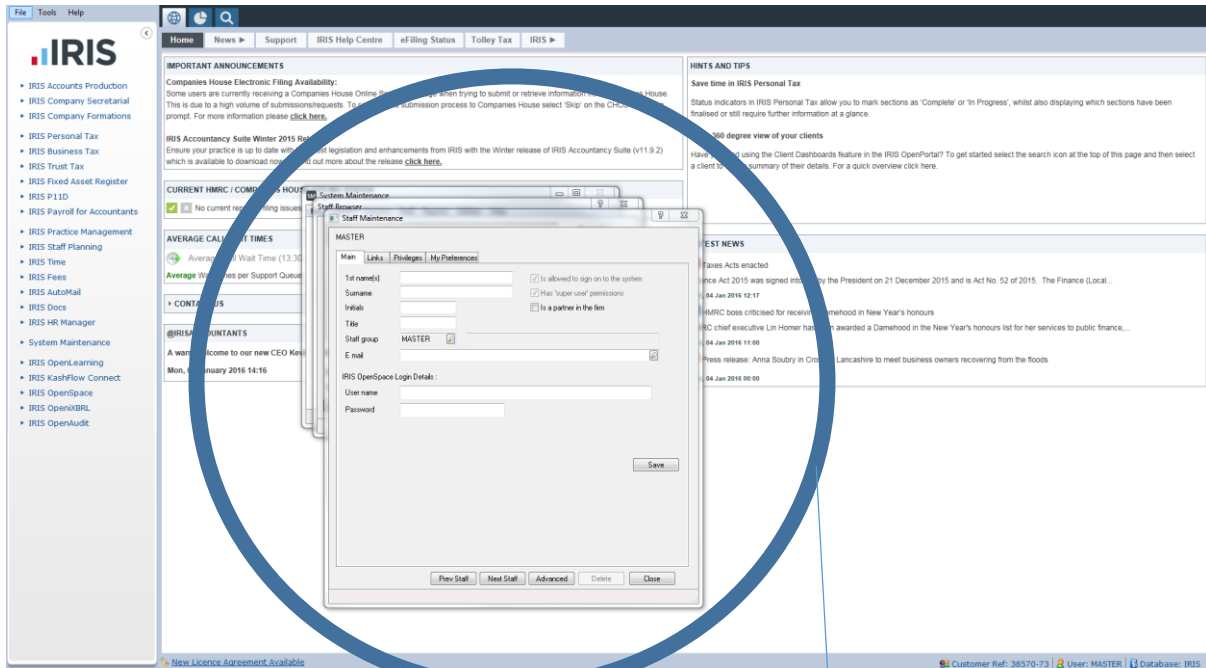
Further information on integration between IRIS OpenSpace and IRIS products can be found at www.iris.co.uk/support/iris-openspace-support

If you require further information on customising IRIS OpenSpace please refer to the **Getting Started Guide**

If you require further information on branding your IRIS OpenSpace portal, please refer to our **Branding Guide**

IRIS Accountancy Suite

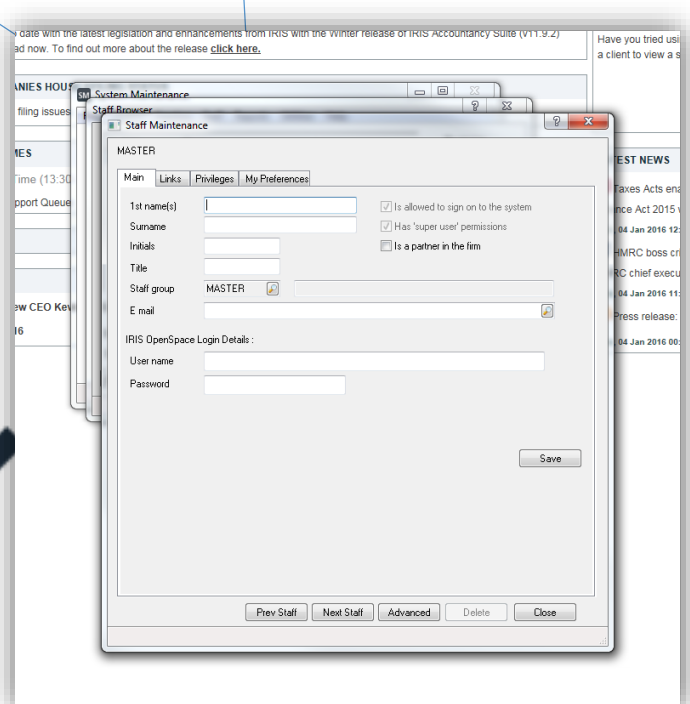
To upload documents to IRIS OpenSpace you must pair your OpenSpace login with your IRIS login. To do this, simply login to the IRIS Accountancy Suite and click on **System Maintenance**, followed by **Staff** and **Staff Maintenance**



Once you have entered your login credentials, check that your 1GB of free space has been activated by logging into IRIS OpenSpace and clicking on **Subscription** followed by **Your Subscription**

For further information on the IRIS Accountancy Suite, please visit

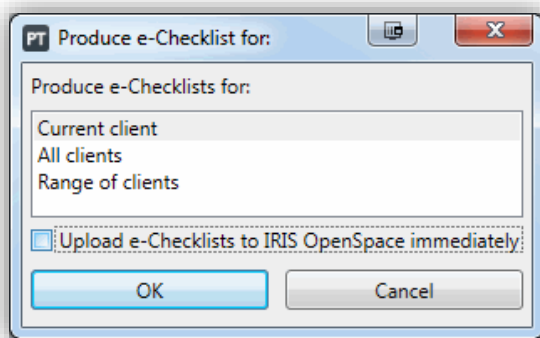
<http://www.iris.co.uk/support/iris-accountancy-suite-support/>



IRIS OpenTax

When using IRIS OpenTax with OpenSpace, you can create and upload a tax e-Checklist for one, all or a range of clients using data mining. There is then an option to upload all e-Checklists immediately to OpenSpace at this point.

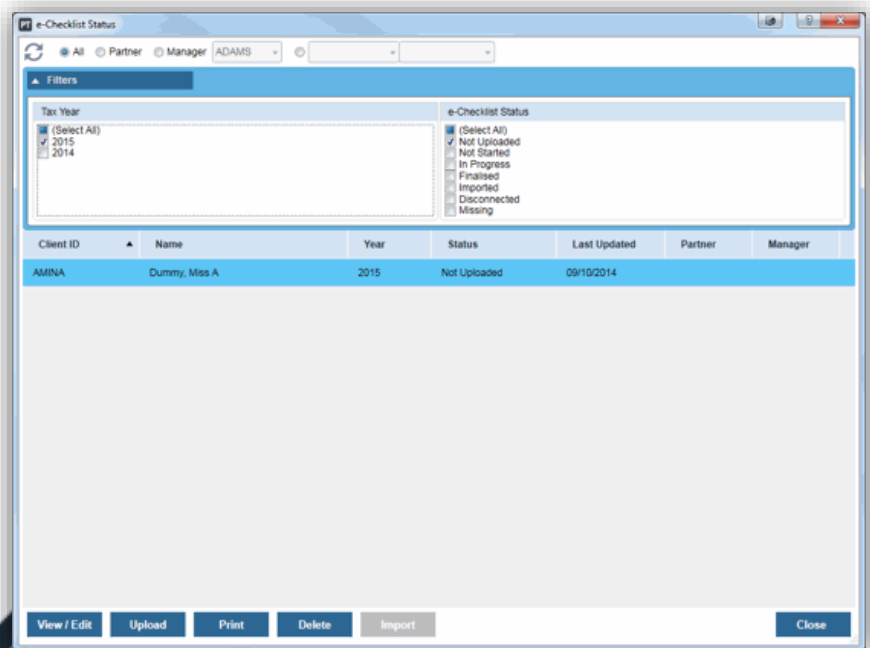
If uploading immediately it is advised that prior to this all clients are checked to ensure their personal details including the email addresses are entered and appearing correctly in their client maintenance screen. To do this, click on **Client** and **View**



To create a new e-Checklist, click on **Administration**, followed by **e-Checklist** and **New e-Checklist**

The following screen will then appear. This screen is used to filter all of the e-Checklists created. They can be filtered using the status options on the right hand side of the screen. The year can also be altered on the left hand side.

Click **View**, followed by **Edit** to review the e-Checklist and alter any questions



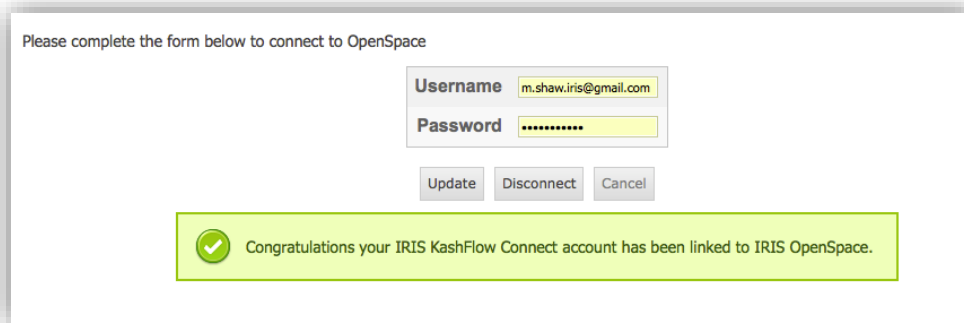
For further information on IRIS OpenTax please visit <http://www.iris.co.uk/cloud-solution/iris-opentax/>

KashFlow Connect

IRIS OpenSpace now integrates with KashFlow Connect, allowing IRIS accountants to upload fully branded management reports to their client's online portal using data already entered into their individual KashFlow account.

To begin using the KashFlow Connect integration, you must first pair your KashFlow Connect and OpenSpace accounts. Doing this will then enable you to match each individual clients accounts based upon data retrieved from your OpenSpace account.

To do this, click on **Your Account**, followed by **OpenSpace Settings**. On this screen you can then enter your OpenSpace login credentials. You will see a confirmation message to confirm that the credentials have been recognised.



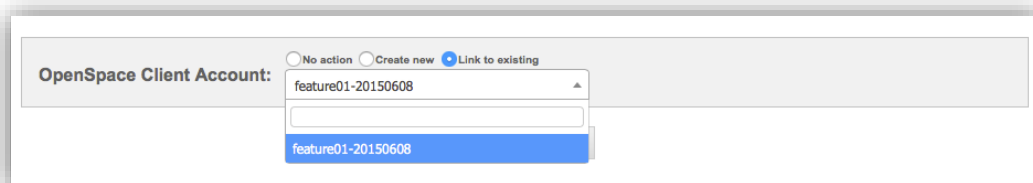
Please complete the form below to connect to OpenSpace

Username

Password

Congratulations your IRIS KashFlow Connect account has been linked to IRIS OpenSpace.

Once this has been done, you must then link your individual client accounts to those on your OpenSpace portal. Alternatively, at this stage you can create a new OpenSpace account for your clients. To do this, click on **Clients**, followed by **Details** once you have selected a client to edit.



OpenSpace Client Account: No action Create new Link to existing

For further information on KashFlow Connect and creating and uploading a branded management report, please visit <https://www.kashflow.com/orbit/>

IRIS Payroll

IRIS OpenSpace integrates with the following IRIS Payroll systems;

IRIS Payroll Professional

IRIS Payroll for Accountants

IRIS Bureau Payroll

Earnie Payroll Manager

IRIS Payroll Business

Earnie IQ

To link your IRIS Payroll system to an existing OpenSpace account, you will need to login to your **Admin** screen on your payroll system.

Once this is done, click on **File, Online Login Details** and select **OpenSpace Login Details**. Enter the username and password you use to login to OpenSpace and click OK.

You must then log back into your payroll system as normal and from the company menu select **Alter Company Details**, then click on the **IRIS OpenSpace** tab. Click Refresh to populate the Client Name dropdown with the available clients in your IRIS OpenSpace account (this is shown in Client ID order)

The screenshot shows a 'Company Details' window with the 'OpenSpace' tab selected. Inside, there is a 'Select Client' section with two input fields: 'Client ID' containing '01' and 'Client Name' containing 'Riverside Hospital'. A 'Refresh' button is located to the right of the 'Client Name' dropdown. At the bottom of the window are 'OK', 'Cancel', and 'Help' buttons.

Select the client from the Client Name dropdown; this will automatically populate the Client ID configured in the IRIS OpenSpace account

For further information on IRIS Payroll integration with IRIS OpenSpace, please visit <http://www.iris.co.uk/support/iris-openspace-support/iris-openspace-with-your-payroll/>