

# IRIS OpenSpace - Enquiry Forms

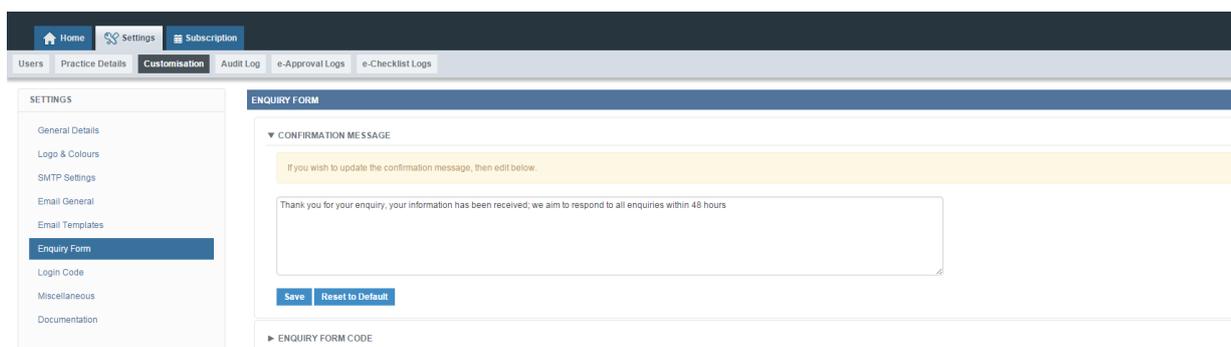
## A step by step guide to setting up your online enquiry form in OpenSpace

IRIS accountants can now embed an enquiry form into their website to capture enquiries from potential new clients. These enquiries will then be passed directly into their OpenSpace account, with a notification sent to the practice to enable them to action the enquiry and capture new clients, provisioning an OpenSpace account seamlessly

- 1 In order to use Enquiry Forms from IRIS, you must have an active OpenSpace subscription. All IRIS and KashFlow Connect accountants receive 1GB of free space when setting up an OpenSpace account. To do this, simply visit [www.irisopenspace.co.uk](http://www.irisopenspace.co.uk)
- 2 Once you have an active OpenSpace subscription, you will see a brand new area on your Home screen, entitled Website Enquiries. It is here that all new enquiries from your website will arrive, along with a notification to let you know it is there

The screenshot displays the IRIS OpenSpace dashboard interface. At the top, there is a navigation bar with 'Home', 'Settings', and 'Subscription' tabs. Below this is a secondary navigation bar with 'Dashboard', 'Clients', and 'Upload File' options. The main content area is divided into two columns. The left column, titled 'DASHBOARD', contains several sections: 'FILES' with 'Unread Files Received' (0), 'E-APPROVALS' with 'Awaiting Approval' (0), 'Approved' (0), and 'Rejected' (0); 'E-CHECKLIST' with 'Not Started' (0), 'In Progress' (0), and 'Finalised' (0); and 'WEBSITE ENQUIRIES' with 'New' (0), 'In Progress' (0), 'Rejected' (0), and 'Completed' (0). The 'WEBSITE ENQUIRIES' section is circled with a red dashed line. The right column shows a table with columns 'Client Name' and 'Filename / File Description', and a message 'No records to display.' with a pagination control showing '1'.

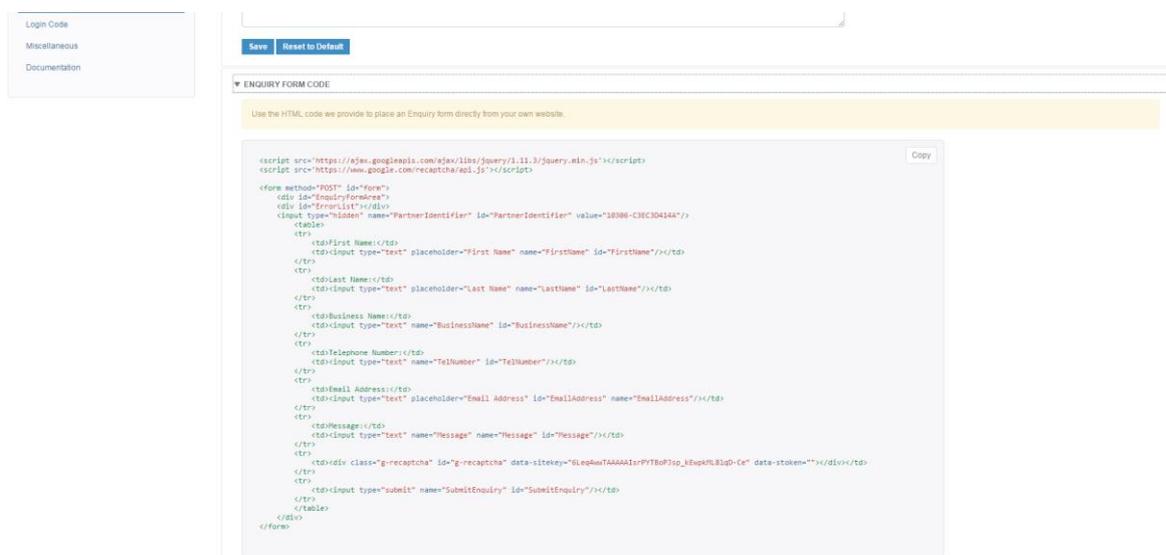
- The first step to enabling Enquiry Forms is to customise your confirmation message and access the required code within OpenSpace. **To do this, head to Settings > Customisation > Enquiry Forms**
- The first area to customise is your confirmation message. This is the message that your clients will see once they have submitted an enquiry to your practice.



- Once you have customised your confirmation message, scroll down the screen where you will find two pieces of code. The first makes up the body of your enquiry form. The second is your captcha code.

Captcha code will enable a form of authentication, powered by Google, to be added to your enquiry form that will verify if the enquiry is genuine and not submitted by an automated program.

You can click 'Copy' if you wish to select this code to be pasted into another area.



- At this stage you can pass this code to your web developer, or whoever it may be that looks after your website and online presence. They will be able to use this code to add an enquiry form to your website and can then customise the form to your preference.

By customising the code provided, your website manager can change the font, colour and spacing of the form, as well as its placement upon the screen.

**Please Note** – The captcha code must be pasted at the very bottom of the screen so that it appears below the enquiry form



The image shows a top-down view of a desk with a laptop, a smartphone, and a tablet. The laptop screen displays the IRIS OpenSpace Enquiry Form. The form fields are filled with test data: First Name: Test, Last Name: Enquiry, Business Name: Test Company, Telephone Number: 12345678910, Email Address: test@iris.co.uk, and Message: I need your help! Below the form is a reCAPTCHA verification box with a green checkmark and the text 'I'm not a robot'. A 'Submit' button is located at the bottom left of the form.

First Name:	Test
Last Name:	Enquiry
Business Name:	Test Company
Telephone Number:	12345678910
Email Address:	test@iris.co.uk
Message:	I need your help!

I'm not a robot  reCAPTCHA  
Privacy - Terms

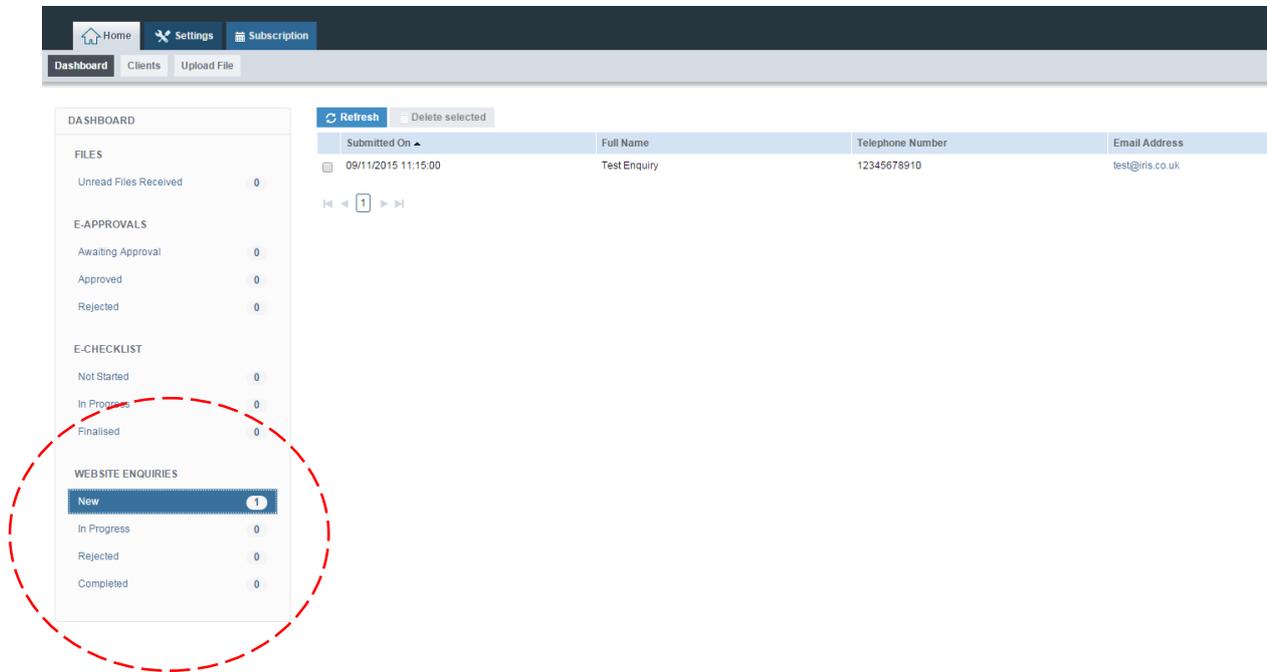
Submit

- Once your form has been loaded onto your website, your clients can send their information to you via an enquiry. Once they have submitted their enquiry, they will see this message

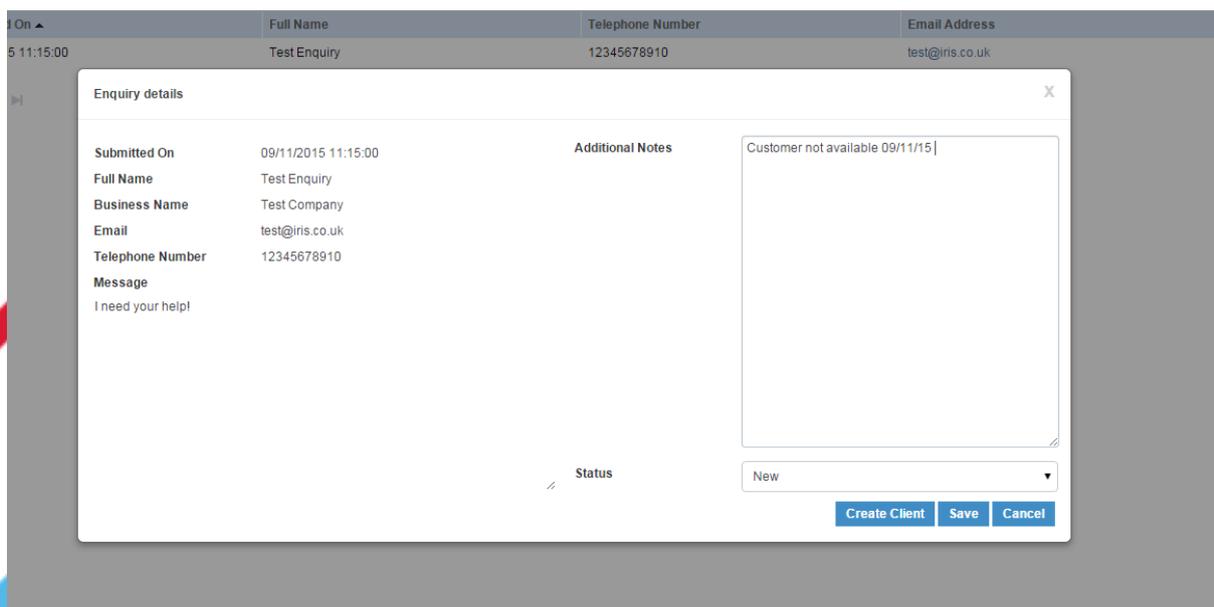


Thank you for your enquiry, your information has been received; we aim to respond to all enquiries within 48 hours

- 8 The enquiry will now land in your OpenSpace account. The practice will receive a notification to let you know that it has arrived and you can then view the enquiry from your OpenSpace dashboard



- 9 Clicking on 'New' will display all new enquiries. When on the 'New' screen, you can select an enquiry using the checkbox to the left of the submission date and clicking 'View Enquiry'



10 At this point, you have a number of options;

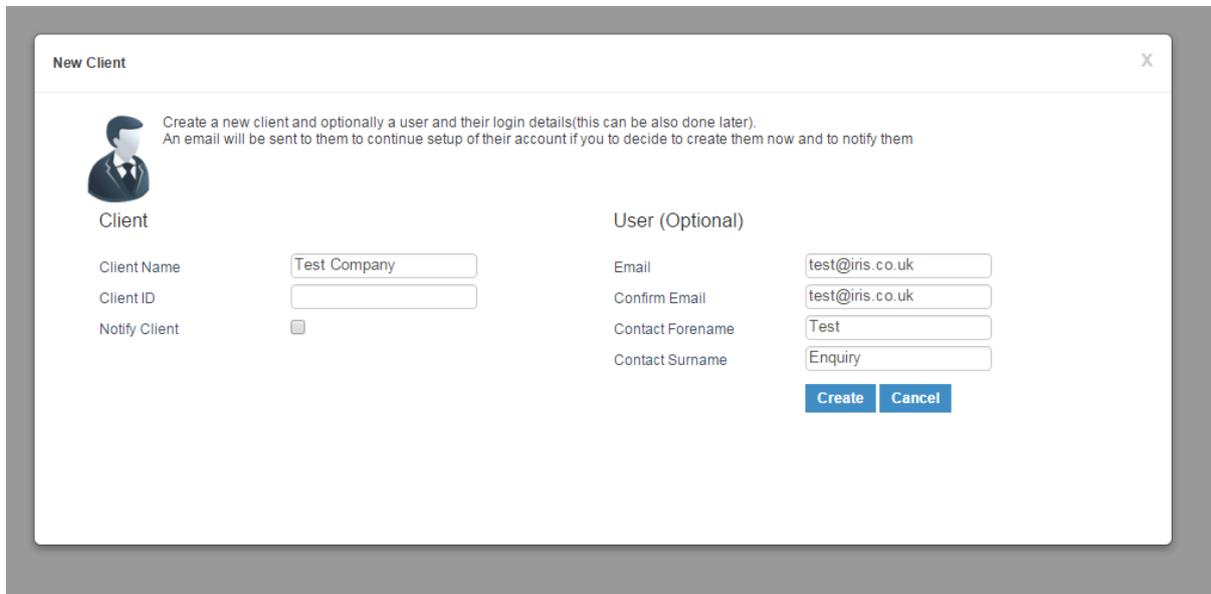
- You can add additional notes to this enquiry and click 'Save' to save your progress. The enquiry will be classed as 'New'
- You can manually change the status of the enquiry using the dropdown box provided. This will move the enquiry to the relevant category on your Dashboard (In Progress, Rejected, Completed)
- You can 'Create Client'. This will take you to the client creation screen with pre-populated information, ready to create an OpenSpace client. **Once you create the client, they will be sent your customised welcome email, please ensure that you have customised this content prior to creating a client**

The screenshot shows a web application window titled 'Test Enquiry' with the ID '12345678910' and the email 'test@iris.co.uk'. The window contains an 'Enquiry details' form with the following fields:

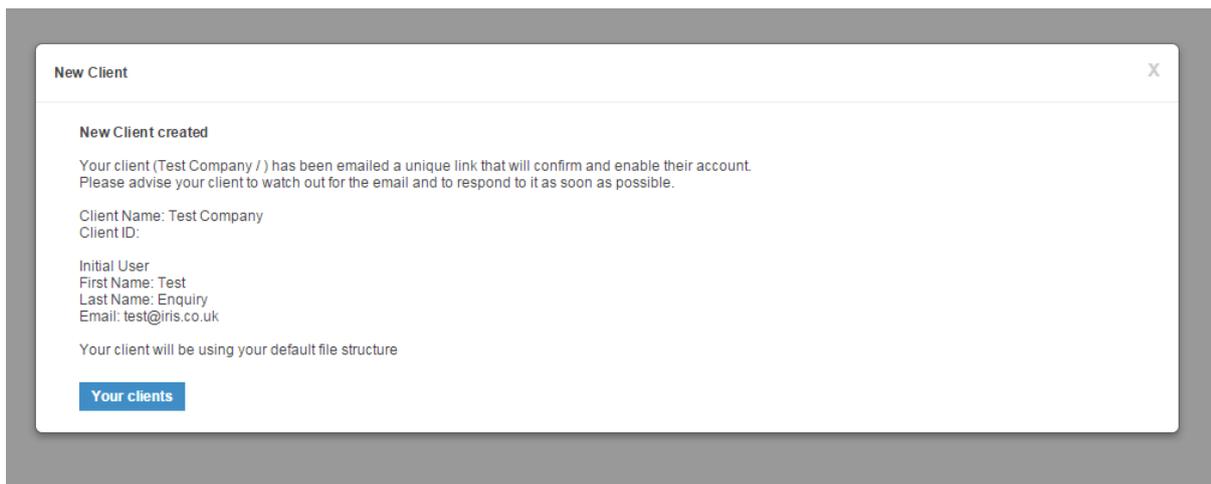
Submitted On	09/11/2015 11:15:00	Additional Notes	Customer not available 09/11/15
Full Name	Test Enquiry		
Business Name	Test Company		
Email	test@iris.co.uk		
Telephone Number	12345678910		
Message	I need your help!		

At the bottom right, there is a 'Status' dropdown menu with the following options: New (selected), In Progress, Reject Enquiry, and Complete Enquiry.

- 11 If you choose to create a client, you will see the client creation box appear. Check the details and click create, an email will automatically be sent to the client



The screenshot shows a 'New Client' modal window. At the top, it says 'Create a new client and optionally a user and their login details (this can be also done later). An email will be sent to them to continue setup of their account if you to decide to create them now and to notify them'. Below this, there are two columns: 'Client' and 'User (Optional)'. The 'Client' column has fields for 'Client Name' (filled with 'Test Company'), 'Client ID' (empty), and a 'Notify Client' checkbox (unchecked). The 'User (Optional)' column has fields for 'Email' (filled with 'test@iris.co.uk'), 'Confirm Email' (filled with 'test@iris.co.uk'), 'Contact Forename' (filled with 'Test'), and 'Contact Surname' (filled with 'Enquiry'). At the bottom right of the form are 'Create' and 'Cancel' buttons.



The screenshot shows the 'New Client created' confirmation message. It states: 'Your client (Test Company / ) has been emailed a unique link that will confirm and enable their account. Please advise your client to watch out for the email and to respond to it as soon as possible.' Below this, it lists the client details: 'Client Name: Test Company', 'Client ID:', 'Initial User', 'First Name: Test', 'Last Name: Enquiry', and 'Email: test@iris.co.uk'. It also notes: 'Your client will be using your default file structure'. At the bottom left, there is a 'Your clients' button.

- 12 The completed enquiry will then be moved to the 'Completed' area and can be deleted if required

If you have any further questions, a step by step video can be found on the IRIS website. Alternatively please contact IRIS support on 0844 815 5551