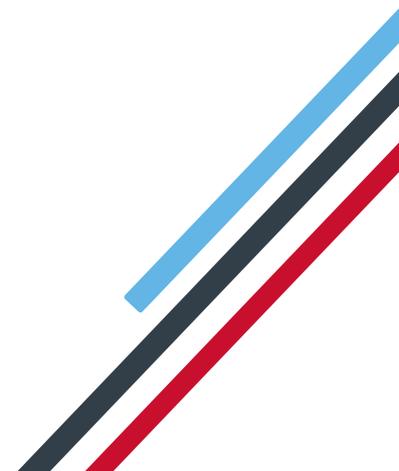# Getting Started Tutorial – Creating a Company

IRIS Payroll

April 2016

Contents

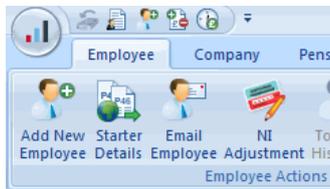# Creating a Company Tutorial

The IRIS Payroll Getting Started Tutorials are designed to guide you through common payroll tasks using step by step instructions.

Remember there is a **Help** button on most screens, which will always give assistance specific to that task.

In this tutorial we assume that the **Ribbon** is fully expanded, (i.e. IRIS Payroll is maximised, taking up the whole of your screen) so you should be able to see the buttons and groups in full. This tutorial covers IRIS Payroll Business and IRIS Bureau Payroll; anything product specific will be highlighted.

IRIS Payroll maximised   **Smaller IRIS Payroll screen**
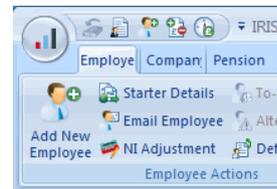
## Creating a Company

When you first run IRIS Payroll, you are required to create a Company with a few minimum details, which are highlighted in orange, (although you can cancel that process, if you need to). This tutorial explains how to add further company details after that initial set up, as well as how to create a brand new company from scratch.
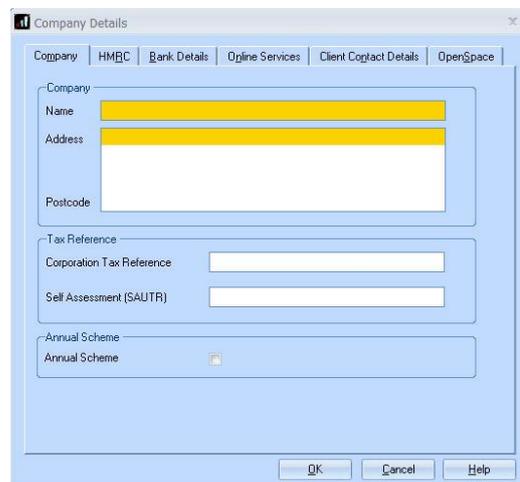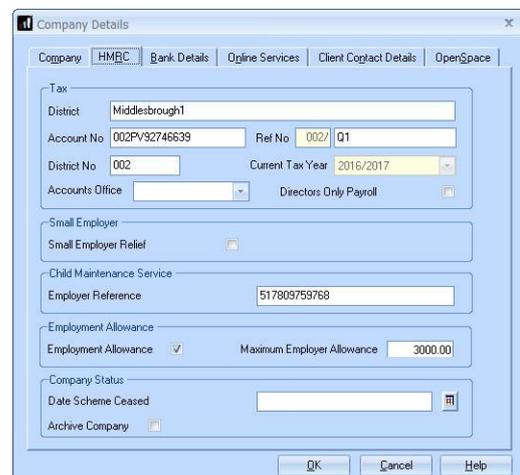
Creating a Company when you first run IRIS Payroll

If you have just installed the software and are running it for the first time, for IRIS Bureau Payroll only you will see the following message.
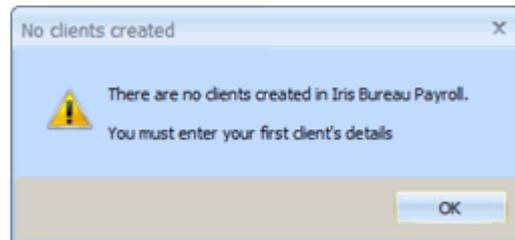
For both IRIS Payroll Business and IRIS Bureau Payroll you will then see a blank company form with some fields highlighted in orange.

These highlighted fields are the minimum details you need to enter to be able to **Save** the Company. It is a good idea to enter as much information as you have, but we will just concentrate on the minimum you need first. The **Company Details** screen will open on the **Company** tab.

1. In the **Name** field, enter the Company Name

2. In the **Address** field, enter the first line of the Address

3. Click on the **HMRC** tab

4. Enter the following Tax details: **Account No**; **Ref No** and **Tax District No** (If you aren't sure where to find these, click on the **Help** button on this screen for further guidance)

5. Click **OK** to save the Company's details

Selecting a Company

When you are ready to enter further company information:

IRIS Payroll Business

If you want to enter details for a different company which you have created previously, click on **Companies** on the **Selection Side Bar** to open your list of companies then open the relevant Company by double-clicking its name in the list.
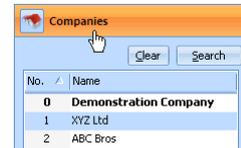
IRIS Bureau Payroll

In IRIS Bureau Payroll if you want to enter details for a different company which you have created previously, click on **Bureau Dashboard** on the **Selection Side Bar** to view your list of companies in the Bureau Dashboard then open the relevant Company by click on its name in the list.
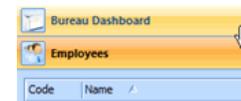
Updating Company Details

1. On the **Ribbon**, click on the **Company** tab and then the **Company Details** button

2. The **Company Details** screen opens with the **Company** tab selected by default

3. In the **Address** field, enter any address details you have

4. Enter the **Postcode**
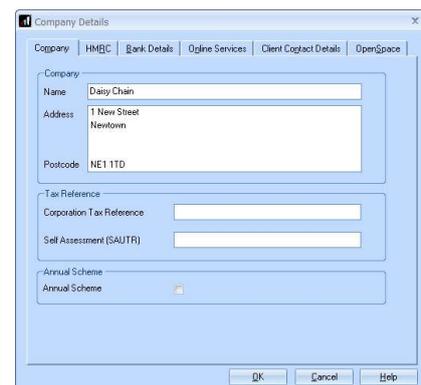
5. Click on the **HMRC** tab

6. If the Company is for a Directors Only Payroll, ensure you tick the box **Directors Only Payroll**

7. Tick the **Small Employer Relief** box if this company qualifies as a Small Employer for the current tax year (click the **Help** button for more details if you aren't sure)

8. If the Child Maintenance Service have given you an **Employer Reference**, enter it here (you will only be given an Employer Reference if one or more of your employees is paying child support via a Deduction of Earnings Order)

www.iris.co.uk/customer
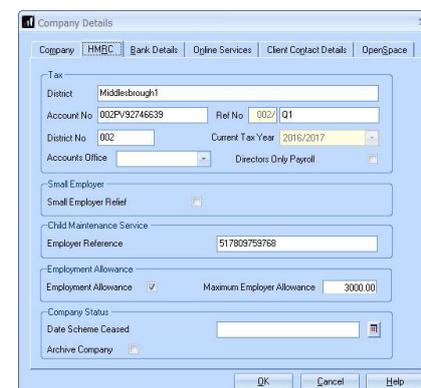
9. **Employment Allowance** – if you are eligible to claim, tick the box. If you are claiming Employment Allowance and you are starting to use the software part way through the year you need to enter the amount already claimed. This is done from the **HMRC | Month end Summary (P32)**, see the **RTI Guide**, accessed from the **Help** menu, for further details

10. Click on the **Bank Details** tab

11. If you plan to pay your employees by BACS, you need to enter all of the company bank account details as well as the BACS information here

    Click the **Help** button if you need guidance on what the different fields are
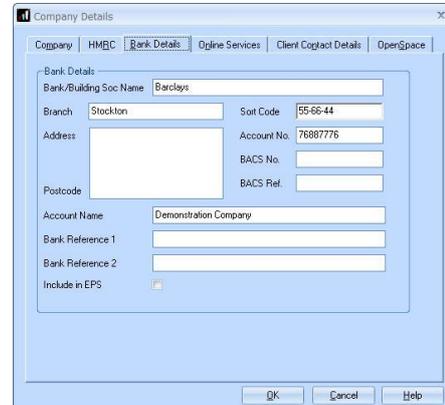
12. **Account Name** is completed for you (you can change it if you need to)

13. Click the **Online Services** tab

    ■ **IRIS Payroll Business**

       Enter your contact details. (These are the details that HMRC will use to contact you about any issues with online messages)

       Enter your **Log In Details**. These are obtained when you register with HMRC for online filing (you can do this by clicking the **Online Filing Registration** button on the **Online filing** tab – view the **Manual** on the **Help** tab for more details)
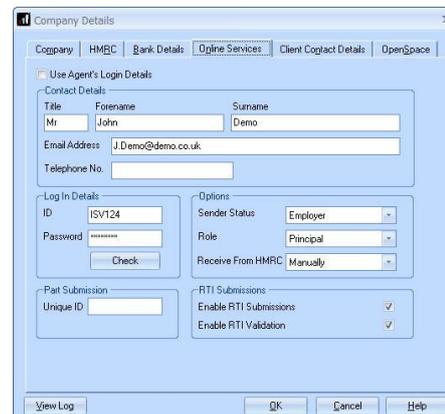
    ■ **IRIS Bureau Payroll**

       Use Agent's Login Details is ticked by default. Agent's Login Details are entered by clicking on the **HMRC** button in the Bureau Dashboard. Click **HMRC** and then click **Edit** to enter the Agent contact details

       If you want to enter contact details for an individual company, un-tick **Use Agent's Login Details**. (These are the details that HMRC will use for contacting you about any issues with online messages)

       You can now enter the **Log In Details**

       Log In Details are obtained when you register with HMRC for online filing. (You can do this by clicking the **HMRC** button on the Bureau Dashboard and clicking **Register** from the HMRC Clients Online page - view the **Manual** on the **Help** tab for more details)

14. Click the **Check** button if you want to make sure that your **Log In Details** are valid and that your connection to HMRC is working

15. Complete the **Options** section by selecting the appropriate **Sender Status** and **Role** from the drop-downs. You also need to select how you wish to receive messages from HMRC from the drop down – for details on the options click the **Help** button

16. **Enable RTI Submissions** will be ticked automatically. This allows you to send RTI Submissions to the Government Gateway (see **Help | RTI Guide** for more information)

17. This step is for IRIS Bureau Payroll only

    Click the **Client Contact Details** tab

    Complete **Client Contact Details**. The email address is used for emailing client reports. For further information on **Emailing Client Reports** see **Help | Manual**

18. Click **OK** to save the company details

19. If you are using OpenSpace, this tab gives you the opportunity to select the **Client ID** and **Client Name** – see the Help for further details
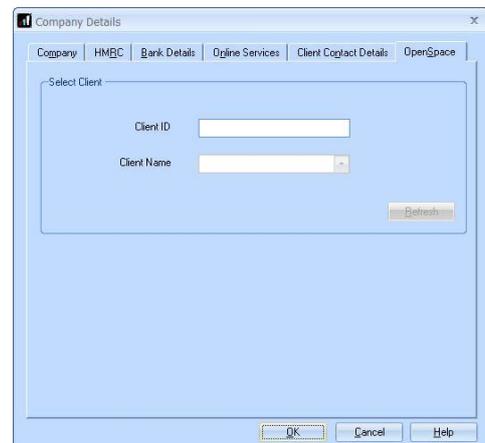
Further Information

For more information about **Create New Company** and **Company Details**, see the **Company Tab** section in the IRIS Payroll Manual; click on the **Help** tab and then click on **Manual**.

.IRIS

Additional Software and Services Available

IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary contributions, produce files in the right format for your pension provider* and generate the necessary employee communications.

IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600	Tel: 0300 200 3200
Fax: 0844 366 7828	Tel: 0300 200 3211 (new business)
Email: helpdesk@ir-efile.gov.uk	

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel: 0844 815 5700	Tel: 0844 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0844 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0844 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0844 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0844 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0844 815 5681	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk