Getting Started Guide

IRIS P11D

September 2016
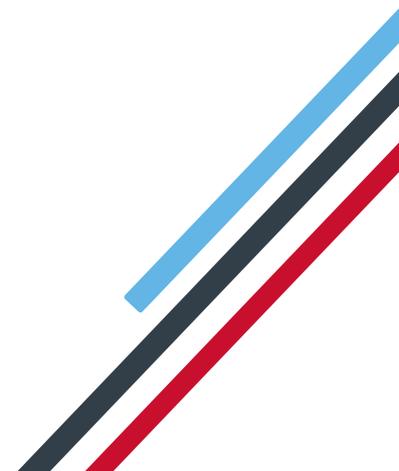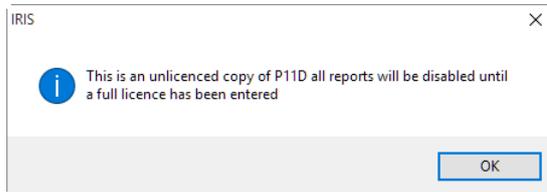
Contents

Stage 1 - Product Password

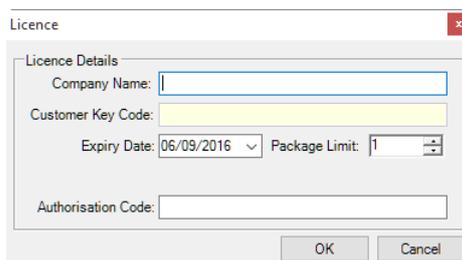1.1   On first opening IRIS P11D you will see this message:

      Click **OK** to continue

1.2   You will then be presented with a password screen. As no password has been set up yet, just click **Login**

1.3   To add/change this password, click on **File | Change Product Password**

Stage 2 - Licencing IRIS P11D

2.1   Select **Utilities | Licencing** option to display the following screen:

Your licence details are provided by IRIS. If you have not already received your licence details, or if you are having any other difficulties installing IRIS P11D, please phone 0844 815 5700.

Company Name - type the name of your company as printed on the Licence Details document. Make sure you use the exact name that has been provided

Customer Key Code - will be automatically generated

Expiry Date - type or select the expiry date as printed on the Licence Details document

Package Limit - enter the number of companies

Authorisation Code - type the authorisation code as printed on the Licence Details document

Tip: If the authorisation code is not accepted try the following:

- Check the **Authorisation Code** very carefully; this must match the number provided by IRIS
- The **Package Limit** must match the number of companies on the details provided by IRIS
- Check the **Expiry Date** in the company details window; this must match the date provided by IRIS
- If you have a bureau licence, make sure that the correct number of companies has been entered, again this must match the details provided by IRIS

2.2   Click **OK** to confirm the licence details

Stage 3 - Create a company

The IRIS P11D reports require basic details of the Employer and Employee. You can either create a company and add employees manually or import the details from payroll.

Creating companies manually

3.1   Click on **Client | Client select** (or use the **Add Employee** or **Add Company** buttons)

3.2   Click **Add**

3.3   You will be prompted to select a **Business** or an **Employee**

3.4   Select **Business** and enter the basic company details, including the name of the business, contact details and any notes or departmental information

3.5   Once the employer has been set up employees can be added by again clicking on **Client | Client select**

3.6   Click the **Add** button and select **Employee** to enter the basic details for the employee

3.7   Once a business and an employee have been created you can start entering benefits

Creating companies via Import

You can link IRIS P11D to other IRIS products, enabling you to quickly create companies and refresh data to include new and amended employees. The links are activated via the **Get Data** and **Refresh Data** buttons on the **Client Details** screen.

To create a new company in IRIS P11D using data from another IRIS product:

3.8   Click on **Client | Client select** to open the **Client Details** screen

3.9 Click on the **Get Data** button

3.10 Select the program from the list containing the company you want to import and click on **OK**. The folder containing the data files of the program you have selected will open

3.11 Search for the data file of the company you wish to link to. For example, if you are using EARNIE and want to link to company number 1, then you need to look for 0001data.mdb

3.12 Select the file and click **Open**. If you are importing from IRIS Payroll Professional or EARNIE, you will be asked if you want to import employees who left the company in a previous tax year

3.13 Click on either the **Yes** or **No** button, depending on your preference. The **Client Details** screen will then display the new company allowing you to add P11D information

Stage 4 - Notes on Getting Started with IRIS P11D

IRIS P11D provides help within the software to guide you through entering employee details and benefits.

Legislation details are provided by HMRC in Booklet 480 (Expenses and Benefits - a Tax Guide). This guide can be found by selecting **Help | Contents,** opening the **FAQ section** and selecting the topic **Reference and P11D Help.**

The following benefit types can be entered into IRIS P11D:

- General benefits
- Loan benefits
- Cars
- Mileage allowance
- Accommodation
- Relocation expenses

The **Benefits** screen is shown in toolbar format, listing the range of benefits that can be entered. Select the benefit type and enter the necessary details for the benefit.

Important note: You can use the evaluation version of IRIS P11D for 7 days. If your evaluation licence expires and you would like to upgrade to the full licence, please:

- Contact the IRIS sales team on 0844 815 5700. You will be provided with registration details on purchase of the full version (i.e. **Authorisation Code** and **Expiry Date**)

- Enter your registration details using the **Licence Details** feature. You can access the **Licence Details** option via **Utilities | Licencing**. See the help topic **Licence Details** for more information

- If you wish to use the evaluation version of IRIS P11D you can use the company name **IRIS Evaluation**. You will not need to enter the registration details (i.e. **Authorisation Code** and **Expiry Date**)

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 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk	Tel: 0300 200 3200 Tel: 0300 200 3211 (new business)

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel: 0844 815 5700 Email: sales@iris.co.uk	Tel: 0844 815 5677 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	gpsupport@iris.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	earniesupport@iris.co.uk