

IRIS | OpenSpace

BENEFITS

- ▶ Electronic approval functionality enhances security and allows clients to approve any PDF document within minutes including tax returns for free
- ▶ Quick and easy to use - exchange documents at the touch of a button
- ▶ Brand-able client portal so integration with your website means sharing documents couldn't be easier
- ▶ Safe and secure with industry standard SSL encryption and password controlled access on an individual basis
- ▶ Fulfill your GDPR obligations faster
- ▶ Respond to requests regarding the right to data portability, the right to be forgotten, or the right to data access with a click of a button
- ▶ Keep an audit trail for compliance



Secure data exchange is a big step towards GDPR compliance

IRIS OpenSpace

Improve client collaboration with simple, safe document exchange and approval

Overview

As the pace of accountant-client interaction increases, there is a need to maintain accuracy and efficiency. While having a conversation over the phone is convenient, when discussing complex issues it's far better to work through shared documents, such as tax returns, draft accounts and payroll reports, with the client to avoid any confusion or misunderstandings.

The challenge

However, posting documents to clients for review is slow and expensive. Emailing documents is certainly quicker and cheaper, but there are significant security issues, especially when sending personal information. As the May 2018 GDPR deadline is fast approaching more and more accountants are using IRIS OpenSpace to securely exchange information with clients.

The solution

IRIS OpenSpace addresses these concerns and saves practice time, too. It's an easy to use, cloud-based solution that enables accountants to exchange documents with their clients in a secure environment. There is no software to install, run or maintain for you or your clients. Removing this IT overhead represents a significant saving of time and cost.

Transforming the client-accountant relationship

Where in the past it could take several weeks of document exchange before all the issues were resolved, IRIS OpenSpace enables a speed of interaction that transforms the accountant-client relationship from a transactional one to a truly collaborative one. You can send draft accounts, tax returns, financial statements and payroll reports to your clients and receive bank statements, payroll slips and trial balances in return.

The system automatically notifies clients that there are documents awaiting their review and approval, so they can log in with their own username and password to download and review the items.

Workflow integration

IRIS OpenSpace fully integrates with:

IRIS Accountancy Suite: any document prepared in the IRIS Accountancy Suite can be published into IRIS OpenSpace as part of the normal workflow. IRIS Client Dashboards provides instant access to all files received from clients and jobs are automatically updated with the status of document approval in IRIS Practice Management.

“The electronic approval functionality in IRIS OpenSpace is very easy to use and clients understand it straight away. They just log in to review the document and then simply click to approve. The turn-around time for client tax returns has changed dramatically and what used to take a week or longer now can take five minutes or even less, plus we are reducing the cost of stationery and postage.”

— Martin Watt, Partner, Bon Accord Accountancy

IRIS Payroll Solutions: reports generated in IRIS Payroll for Accountants, IRIS Bureau Payroll, IRIS Payroll Professional, Earnie Executive and Earnie Business can be published to IRIS OpenSpace for clients to download and approve electronically.

IRIS OpenSpace is not restricted to IRIS Accountancy Suite: documents outside of IRIS can also be uploaded into IRIS OpenSpace by you and your clients for exchange and/or review.

e-Approval - accelerating the review and approval process

Your clients can approve any PDF document within minutes. Having received an alert indicating a document is awaiting their approval, they view and approve the document using their smartphone or laptop, whichever they prefer. You'll then receive notification once the document has been approved. This ability to shorten the time it takes to gain client feedback and approval is invaluable, especially when HMRC deadlines are fast approaching.

Supports your compliance with the Electronic Communications Act

With IRIS OpenSpace, documents are stored in a secure environment on the web. Clients have their own unique login, allowing them access only to their documents and no one else's. Importantly, e-Approval also maintains a full audit trail. Document approval tracking keeps tabs on who has signed which documents, and a log of secure and tamperproof approved PDFs is kept. The whole process is compliant with the provisions of the Electronic Communications Act and speeds up the collaboration process between accountant and clients.

e-Checklists - effortless collection of client tax information

Eliminate the slow and painful process of collecting relevant tax information from clients with Electronic Checklists that collect tax information seamlessly over the internet.

Customisation - create your own branded client portal

Add your own logo and colour scheme so clients clicking through from your website have a great and consistent experience of your brand.

Try it now -
free of charge
iris.co.uk/openspace

