



Document Management

Save Time with IRIS Document Management



IRIS

Save Time with IRIS Document Management Solutions

Document management isn't just about making sure your files are saved in the right location. It provides your firm with the tools it needs to streamline processes, saving you time and money.

Here are four key ways that document management can help your firm do more with your time and become more profitable.

Collaboration Done Right

When used correctly, teamwork and collaboration can be powerful tools. They allow members of your team to support each other and can help you achieve more. However, if managed poorly or not given the right tools, collaboration can demand more, leading to a net loss in value.

Teamwork is not a dictatorship where one person takes control and tells everyone what to do. Instead, great collaboration hinges on clear communication from everyone, allowing every team member to have a voice and a role within the project. However, the tools you use in your team should feel unobtrusive, making it easy for everyone to use. Clunky cumbersome programs that make communication more difficult, will often be unsure or avoided.

IRIS's document management solution helps you get the most out of teamwork by providing a stable, cloud-based solution that facilitates collaboration between all workers. Whether you work together in an office or have remote or hybrid workers, we make it easy to track and share information within your team.



Avoid Duplications

In a perfect world, your firm should have a clear naming convention for files on projects. This will make it easy to track files, know which file needs to be worked on, and which tasks have been completed. However, the reality many firms are faced with are duplications.

Duplications are when files or client accounts are duplicated in different locations due to slightly different names. For example, you might have a client named John Smith, and one team member works entirely on an account labeled John Smith, whereas another member has the same client saved under the name Smith, John.

These simple duplications waste time. Your team will complete the same task multiple times for each duplication. Duplication also takes time to identify and remove, further wasting your time that could be spent on your clients and more profitable tasks.

IRIS's document management solution helps you fight against duplications in the past, present, and future.

To help fix your past duplications, our solutions help standardize your existing files, accounts, and documents. By doing this, you're able to easily identify and eliminate duplicates.

To help fix your present problems, IRIS's document management solution provides you with an audit trail for any document. We make it easy to track when files were updated, who updated them, and which information is the most up to date and relevant. We make sure that the information is always relevant and up to date.

When looking forward to the future, our document management solutions provide an automated and standardized solution for your documents. Whenever you or your clients upload a document, it is automatically scanned, labeled, and stored in your firm's database. This will help you save time moving forward, by giving you the information you need when you need it.



Client Preparation and Buy-in

Your clients are the lifeblood of your firm, but sometimes they can be frustrating to work with. Your best clients come prepared to meet with you with their essential documents they need, and are ready to work with you. However, you also have clients who are forgetful and unorganized, and working with them can lead to wasting time as they try to remember their banking or work information to get access to key documents.

IRIS document management solutions help you prepare your clients for meetings by providing them with a secure client portal. Through that portal, you can request specific documents and information you need to help them. They then have the opportunity to upload, view, and manage that information before meeting with your team.

Document Storage and Retention Compliance

Your firm is required to store client information securely. Some information you are responsible for securely storing for years, while others must be stored for the lifespan of your client. As your firm grows and takes on more clients, managing this long-term storage requires more time, where you effectively store necessary documents and follow the best practices in destroying expired documents.

IRIS's document management solutions provide a secure, standardized document retention and storage solution. We ensure that your files are stored in an evergreen format that will be accessible throughout the document's lifespan. We also help you create an automated document retention program, including secure storage and removal.

Get Started with IRIS

[IRIS's document management solutions](#) provide you with a better way for your firm to get work done. Get started today and see how IRIS can help your firm save time and money.



IRIS Americas is part of IRIS Software Group. It exists to take the pain out of processes and let professionals working in CPA firms and businesses comply with regulations, drive productivity, and better engage with key stakeholders. Its brands include IRIS Star Practice Management, IRIS FMP, IRIS Innervision, IRIS Practice Engine, Doc.It, PSI Payroll, AccountantsWorld, Senta and Conarc.

IRIS works with thousands of CPA firms in North America, including 52 of the top 100 CPA firms in the US, and provides innovative solutions to serve accountancy customers in the North American market, making IRIS the go-to partner for CPAs. IRIS has over 100,000 UK and international customers, with 80% having a tenure of five or more years.

