



# IRIS Professional Services Can Help Your Payroll Business Thrive

A woman with short, dark, curly hair and glasses is smiling while looking at a laptop. She is wearing a mustard-colored button-down shirt. The background is a blurred office setting with a lamp and some plants. The image is overlaid with geometric shapes: a large dark blue triangle in the top left, a blue rectangle in the middle left, an orange rectangle in the middle, and a blue triangle in the bottom right.

IRIS

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In today's fast-paced business environment, the efficiency of your payroll operations is more crucial than ever. That's where IRIS Professional Services Team steps in - designed to streamline and elevate your payroll processes from start to finish. IRIS payroll isn't just a software platform; it's a comprehensive solution for businesses aiming to refine their payroll systems with precision and professionalism.

The IRIS Professional Services Team provides:

## Streamlined Data Migration

The idea of transferring data might seem daunting, but with IRIS, it's anything but. We specialize in migrating your existing client data securely and efficiently, ensuring no critical information is left behind.

IRIS offers 3 levels of data migration assistance:

- **Full-Service Conversion:** The Client Success Manager will assist in creating client shells, customizable according to industry verticals and other nuances. Then, with your assistance, the data conversion team will extract your current payroll data from your platform. The IRIS conversion team will take on the task of importing your employee data and current year history, into the IRIS software platform, with check-by-check detail for current year plus one.

- **On-Site Conversion:** Senior Conversion Consultants will complete the full conversion at your location. This is a popular option for payroll firms with larger, more complex or niche client bases and for those that simply prefer to keep all data onsite with face-to-face coordination and conversion. The IRIS will import your employee data and current year history, with check-by-check detail for current year plus one.

- **Assisted Conversion:** This option is available if no data exports are available from the current payroll platform. In this case, the conversion team will enter your employee data and current year history wages by quarter into the system manually for the current year.

## White-Glove Onboarding

Transitioning to IRIS is straightforward with the help of your dedicated team of training, data conversion experts, and Client Success Manager. They will ensure a successful switch from your current software.

Our structured onboarding process, led by your IRIS Client Success Manager, promises minimal disruption to your operations. We make sure your staff is thoroughly trained on the new software, making the change seamless for your team and organization.



## Accessible Data File Extracts

The IRIS Professional Services Team can help you effortlessly extract and manipulate your payroll data. We can also assist in obtaining essential 3rd party integration files, like retirement reports, positive pay files, census files, and more.

This service provides unparalleled access and transparency into your operations, empowering you to make informed, data-driven decisions.

## Custom Time Reports

IRIS Professional Services offers unparalleled support in accessing your custom time files from various sources, including point-of-sale systems, home healthcare systems, and non-partner timekeeping solutions. Our tailored reporting capabilities are designed to meet the unique needs of your payroll service business, providing valuable insights into your payroll operations and helping you identify areas for improvement.

## Comprehensive Training & Support

With IRIS, you're never alone. Our robust training program ensures you have a solid understanding of our products and services, so you and your clients can hit the ground running. We listen to your needs and then deliver customized training geared toward how you operate your business and to help you use the technology in the most efficient and effective manner.

Our commitment doesn't end with the initial training. As you continue to use IRIS, our support team comprised of payroll experts remains available to address any questions or issues you may encounter. We offer consistent and reliable support, including regular software updates, new features, and a U.S.-based help desk staffed with payroll experts. This ongoing assistance ensures that you can maximize the benefits of IRIS over time without any downtime. With IRIS, you're not just adopting new software; you're gaining a long-term partner dedicated to your success.

## We Don't Take Customer Support Lightly

At IRIS, we know how tough it can be to keep up with the constantly changing payroll and HR landscape. With new rules, regulations, and tech advancements, delivering consistent services is a challenge. That's where we come in to provide:

- **Personal Service:** We value personal service as much as you do. Our goal is to help you scale your business without losing the competitive edge that got you here.
- **Comprehensive Support:** From initial training and client onboarding to software support and ongoing consultation, we've got you covered.

- **Expert Assistance:** Count on our live, U.S.-based customer service from experienced professionals who are ready to assist you.

Join IRIS and experience the difference that expert, personalized support can make for your payroll service business.

[Contact us](#) so one of our payroll experts can help guide you on which solution is the best fit for your business.



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.

