



Getting Started Guide

IRIS Payroll Professional

September 2016



Contents

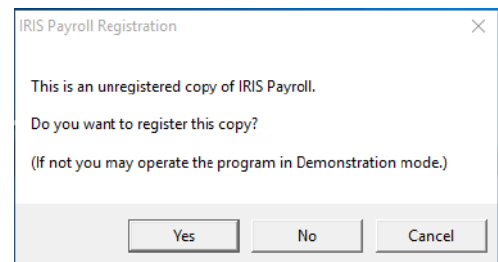
Getting Started	3
Registering IRIS Payroll Professional	3
Logging in to IRIS Payroll Professional.....	3
Setting up a Company.....	4
Payments & Deductions	5
Adding employees	5
General Tab	5
Period Tab.....	5
Salary Tab	6
Rates Tab	6
Tax/NI Tab.....	6
Pay/Deds Tab	6
To-date Tab.....	6
Bank Tab	7

Getting Started

This is a guide to setting up and using IRIS Payroll Professional. The default system settings enable you to get up and running quickly and easily however you can modify these to suit your own requirements.

Registering IRIS Payroll Professional

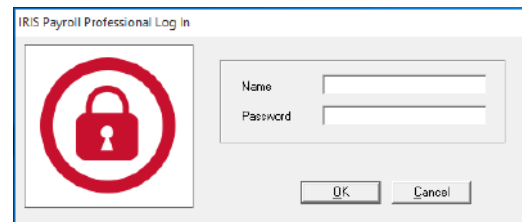
1. When you first enter the system after installing you will see the following screen. Click **Yes**



2. Complete the details exactly as they appear on your Licence and click **Enter**. Your **Licence Details** will then appear in the bottom field
3. Click **OK**
4. A message will be displayed saying IRIS Payroll Professional must close before the registration can finish. Click **OK**

Logging in to IRIS Payroll Professional

1. Double-click on the IRIS Payroll Professional icon on your desktop or run it from the **Start** menu
2. In the **Name** field type **Payroll**
3. Leave the **Password** field empty and click **OK**

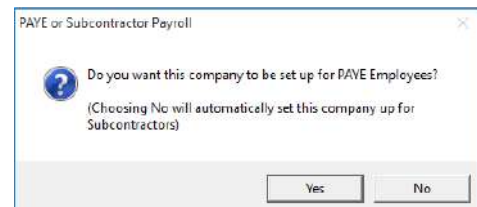
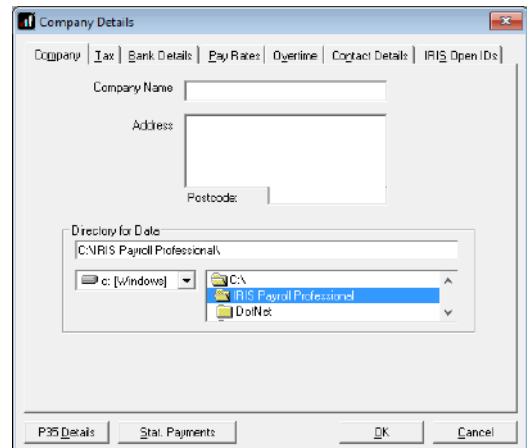


Setting up a Company

When logging in, a screen showing the **Payroll Date** will be displayed. Click **OK**.

To create a company:

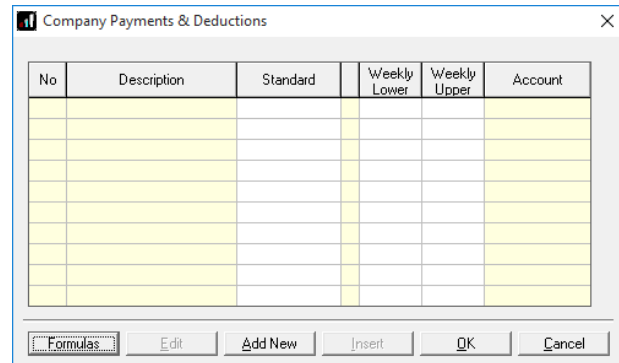
1. Select **Company | Create New Company**
2. Select the **Company** and complete the **Company Name, Address and Postcode**
3. Select the **Tax** tab and complete the **Tax District, Account No, Ref No and District No** fields. Make sure the **Current Tax Year** and **Use Tax Rates** fields are correct
4. On the **Bank Details** tab, complete the **Bank/Building Soc Name, Branch, Address, Sort Code, Account No and Account Name** fields
5. Select the **Pay Rates** tab - if you have no employees who are paid by the hour you can ignore this tab. Enter the basic rates of pay in £ per hour of all your employees by clicking the **Add New** button. Give the rate a title in the **Narrative** field and a £ per hour in the **Amount** field
6. On the **Overtime** tab, enter the multiplication factors for overtime, for example 1.5 for time and a half
7. Click **OK**
8. A message will be displayed, click **Yes** to set up the company for PAYE Employees. A confirmation message will be shown, click **Yes**. For a Subcontractors payroll click **No**. For this guide we are creating a PAYE Company



Payments & Deductions

Even straight forward payrolls may have employees who have things added to their pay such as expenses, or deducted from pay such as Council Tax. In this section we will advise how to set these up. However, if you never add anything to, or deduct anything from your employees' basic pay, you can ignore this section.

1. Select **Company | Alter Payments / Deductions**
2. Click **Add New** and then **Yes** to confirm you want to use the Wizard
3. Follow the on-screen instructions
4. Repeat for each payment and deduction you require
5. Click **OK**



No	Description	Standard	Weekly Lower	Weekly Upper	Account

More detailed information on setting up payments and deductions can be found under **Help | IRIS Payroll Professional Help**.

Adding employees

To add a new employee:

1. Select **Employee | Add New Employee**


The **Employee details** screen will open

General Tab

2. On the **General** tab, complete the mandatory fields - these are highlighted yellow; other fields are optional

Period Tab

3. Select the **Period** tab and set the **Pay Period** and **Pay Method**. Enter the next week/month number for which the employee is to be paid in the **Next Tax Pay Period** field

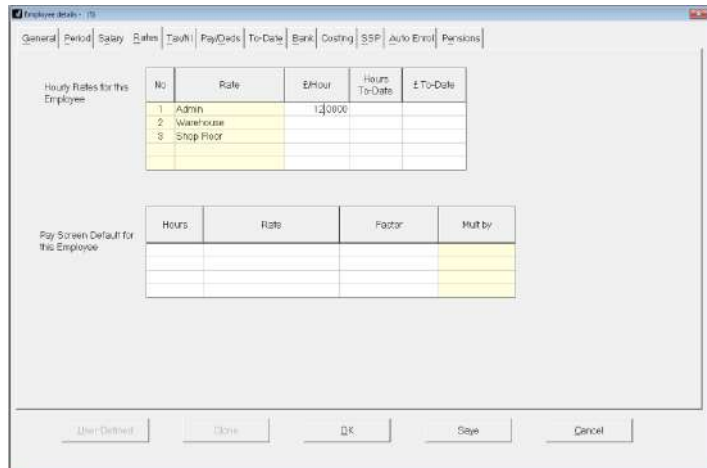


Salary Tab

- On the **Salary** tab, enter either the **Period** or **Annual Salary** for employees not paid by an hourly rate

Rates Tab

- If you pay employees using hourly rates, select the **Rates** tab
- Enter the hourly rate **£/Hour** for the employee next to the relevant **Rate**
- In the **Pay Screen Default for this Employee**, enter the number of hours the employee normally works in the **Hours** column



No	Rate	£/Hour	Hours To-Date	£ To-Date
1	Admin			
2	Warehouse	13.0000		
3	Shop Floor			

Hours	Rate	Factor	Mult by

- Choose the appropriate rate of pay from the **Rate** drop-down
- In the **Factor** column, choose **Basic**

Tax/NI Tab

- Click on the **Tax/NI** tab. If you have a P45 (for the current tax year) enter the **Tax Code**, **Gross Pay** and **Tax Paid**
- Click the **Starter Details** button and choose the relevant statement. The **Tax Code** will be set accordingly to the statement chosen
- Enter the **NI Number** and select the **NI Rate**
- If the employee is a **Director**, tick the box and enter the **Tax Week Number** in which the employee was made a Director and click **OK**

Pay/Deds Tab

- Select the **Pay/Deds** tab and from the **Description** drop-down, choose the first payment or deduction that applies to this employee. If the amount or percentage is the same each pay period, enter it in the **Standard** field. Repeat this process for all payments or deductions applicable to the individual

To-date Tab

- If it is the start of the new tax year, you should not enter anything on this tab. Otherwise you need to enter all the To-Date values for each employee

Bank Tab

16. For employees being paid directly in their bank accounts, select the **Bank** tab and enter the bank account details for the individual
17. Click **OK** to complete the process

You are now ready to run your first payroll, having set up the company and employees. We would advise, if applicable, that you run IRIS Payroll Professional in parallel with your existing payroll software for a few periods to ensure everything you entered is correct and you are confident that you know how to deal with situations as they arise.

For further help and assistance, please see the **Help** menu for a variety of Guides and **IRIS Payroll Professional Help**; the online Manual.

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	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