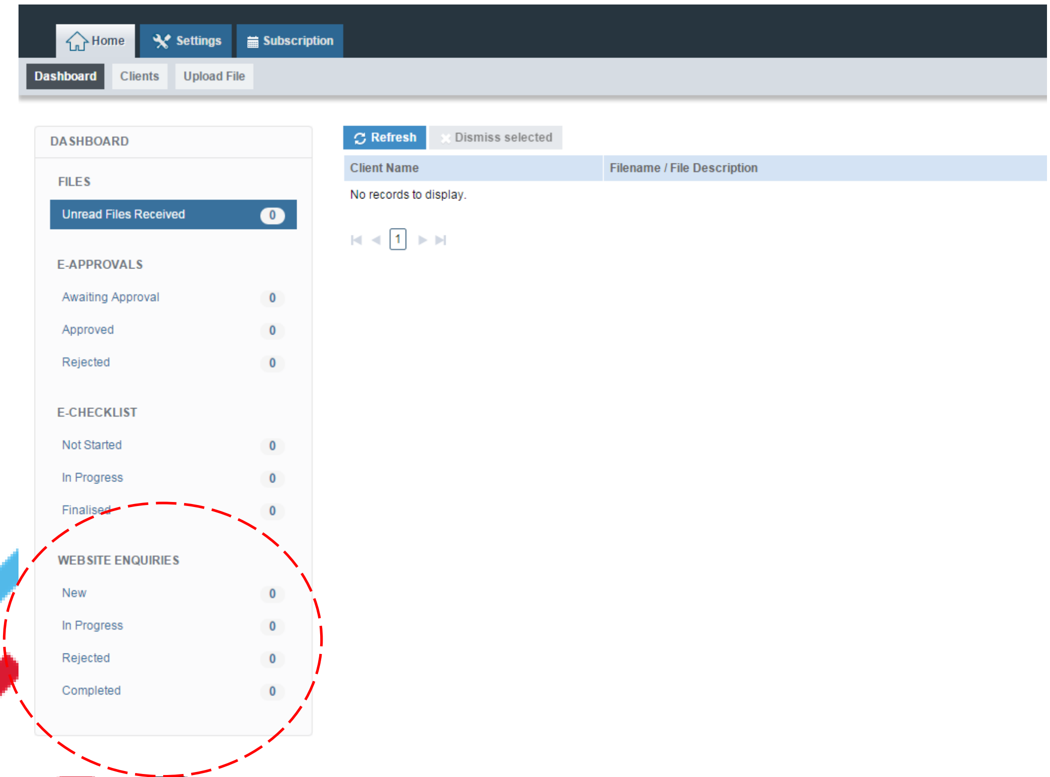
IRIS OpenSpace - Enquiry Forms

A step by step guide to setting up your online enquiry form in OpenSpace

IRIS accountants can now embed an enquiry form into their website to capture enquiries from potential new clients. These enquiries will then be passed directly into their OpenSpace account, with a notification sent to the practice to enable them to action the enquiry and capture new clients, provisioning an OpenSpace account seamlessly

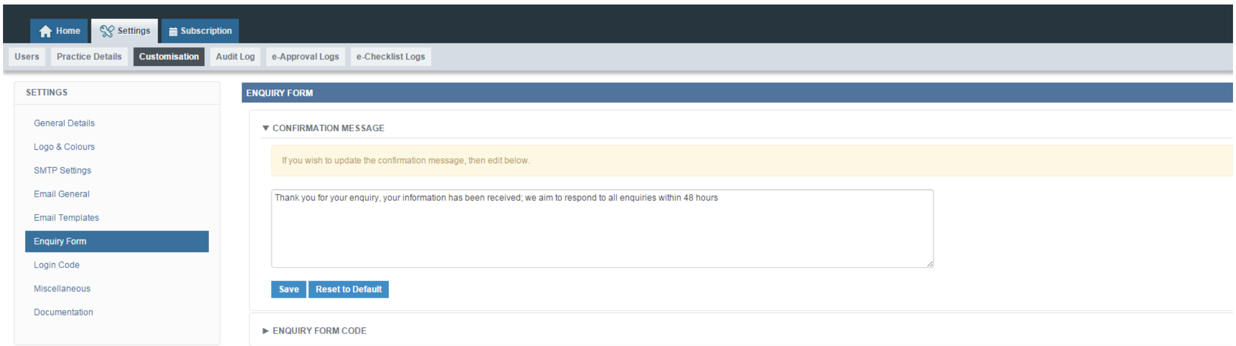
1 In order to use Enquiry Forms from IRIS, you must have an active OpenSpace subscription. All IRIS and KashFlow Connect accountants receive 1GB of free space when setting up an OpenSpace account. To do this, simply visit www.irisopenspace.co.uk

2 Once you have an active OpenSpace subscription, you will see a brand new area on your Home screen, entitled Website Enquiries. It is here that all new enquiries from your website will arrive, along with a notification to let you know it is there



3 The first step to enabling Enquiry Forms is to customise your confirmation message and access the required code within OpenSpace. **To do this, head to Settings > Customisation > Enquiry Forms**

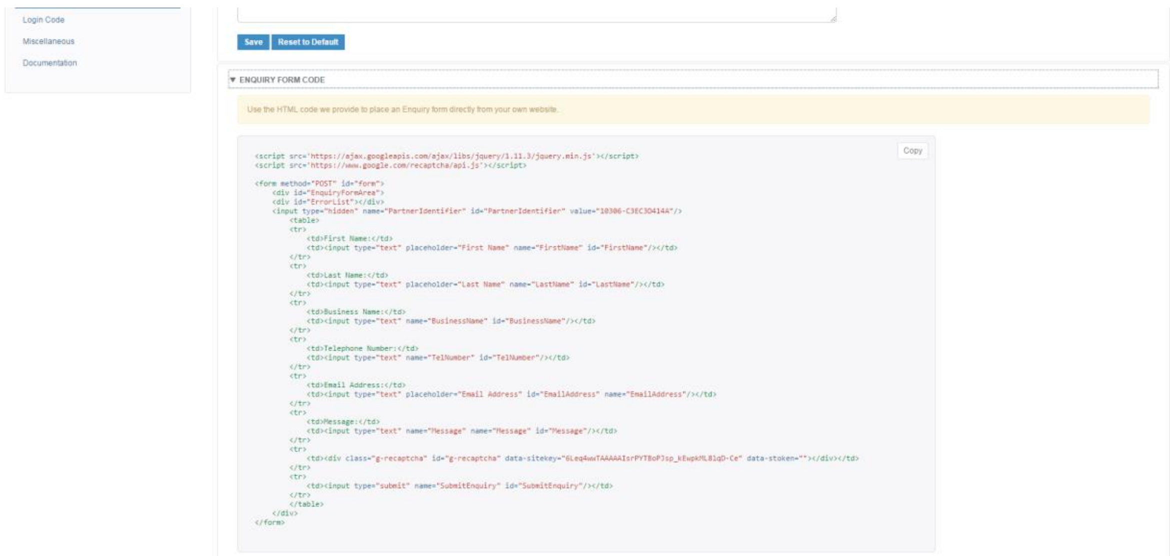
4 The first area to customise is your confirmation message. This is the message that your clients will see once they have submitted an enquiry to your practice.



5 Once you have customised your confirmation message, scroll down the screen where you will find two pieces of code. The first makes up the body of your enquiry form. The second is your captcha code.

Captcha code will enable a form of authentication, powered by Google, to be added to your enquiry form that will verify if the enquiry is genuine and not submitted by an automated program.

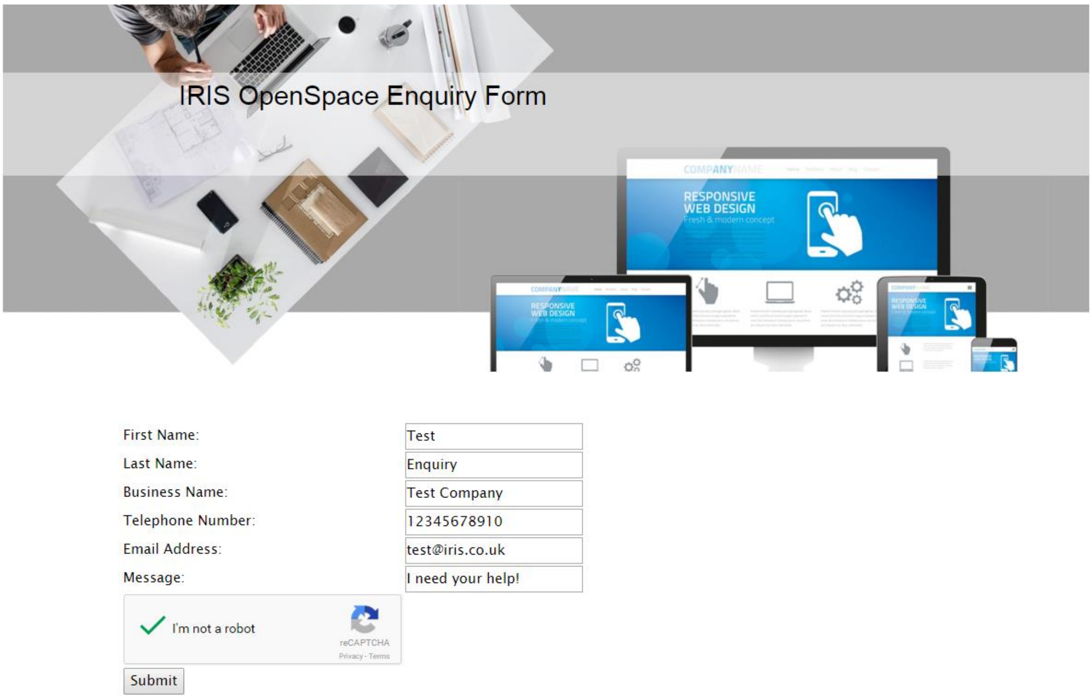
You can click ‘Copy’ if you wish to select this code to be pasted into another area.



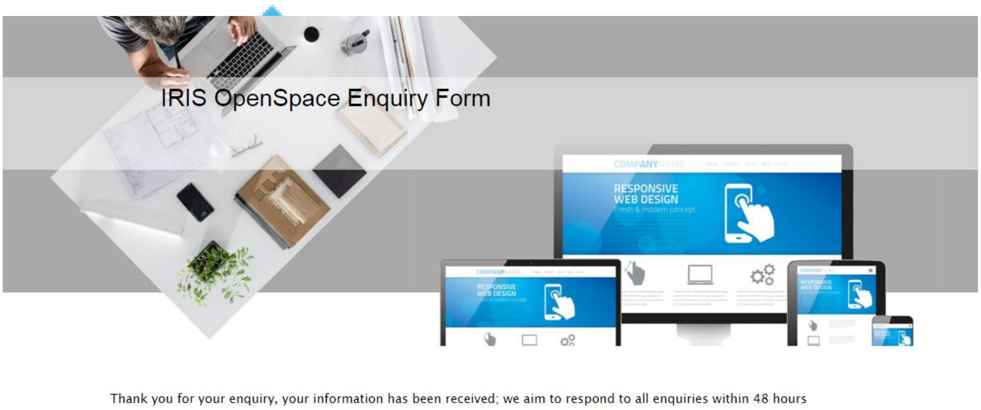
6 At this stage you can pass this code to your web developer, or whoever it may be that looks after your website and online presence. They will be able to use this code to add an enquiry form to your website and can then customise the form to your preference.

By customising the code provided, your website manager can change the font, colour and spacing of the form, as well as its placement upon the screen.

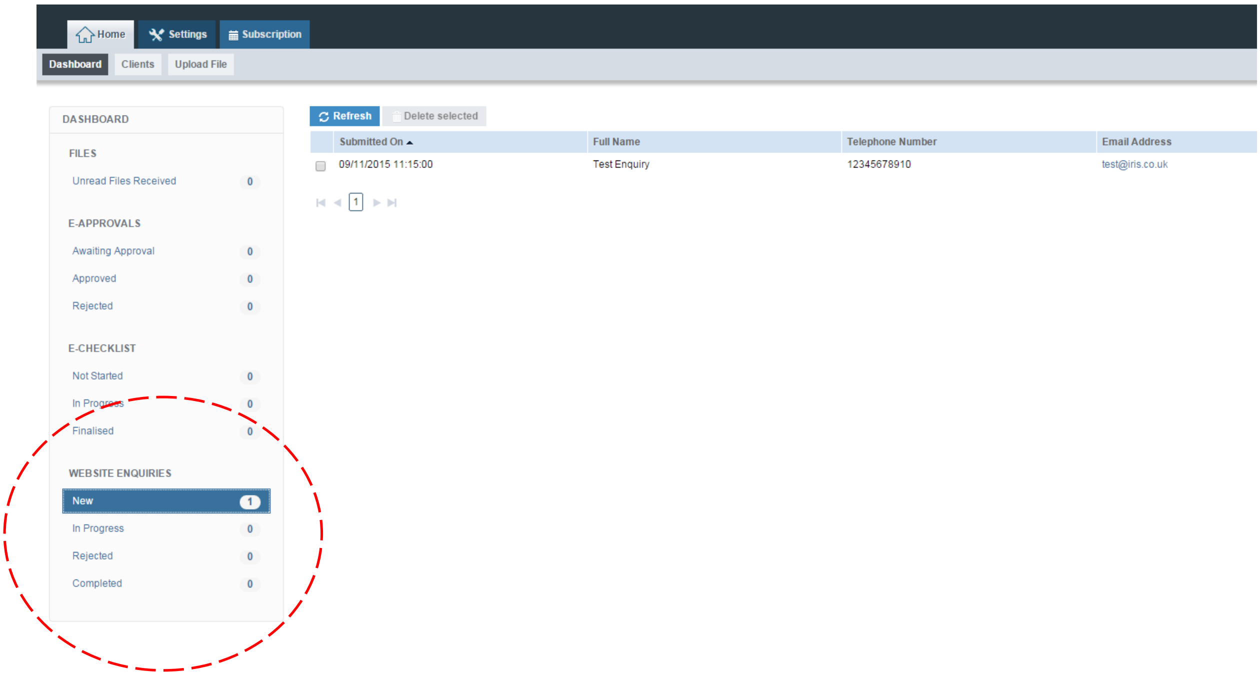
Please Note – The captcha code must be pasted at the very bottom of the screen so that is appears below the enquiry form



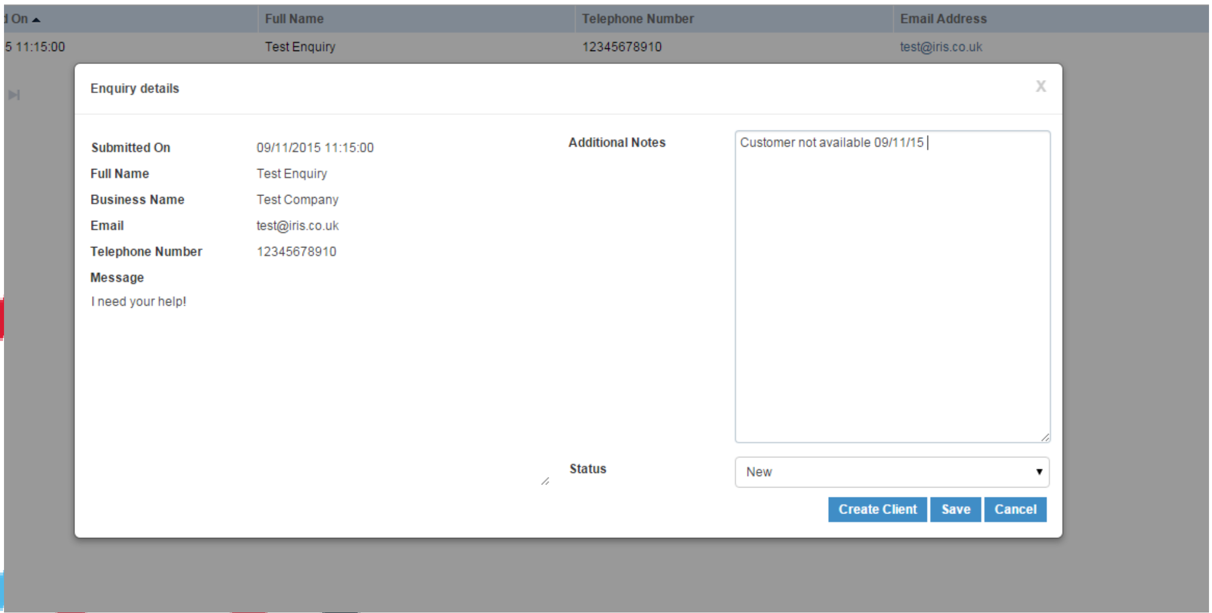
7 Once your form has been loaded onto your website, your clients can send their information to you via an enquiry. Once they have submitted their enquiry, they will see this message



8 The enquiry will now land in your OpenSpace account. The practice will receive a notification to let you know that it has arrived and you can then view the enquiry from your OpenSpace dashboard



9 Clicking on 'New' will display all new enquiries. When on the 'New' screen, you can select an enquiry using the checkbox to the left of the submission date and clicking 'View Enquiry'

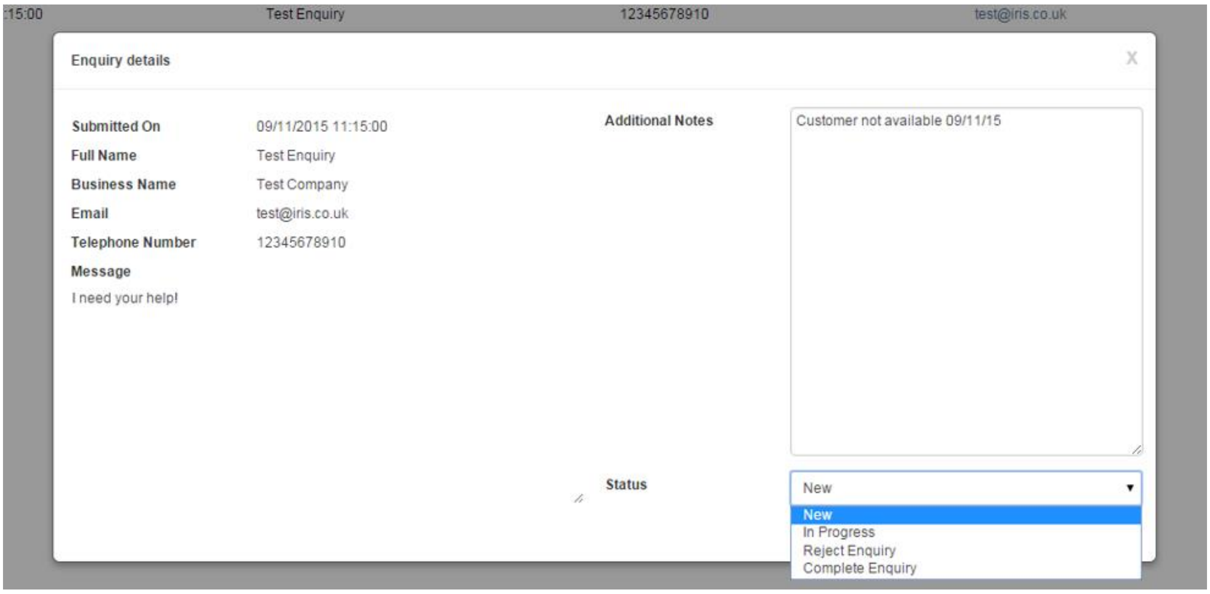


10 At this point, you have a number of options;

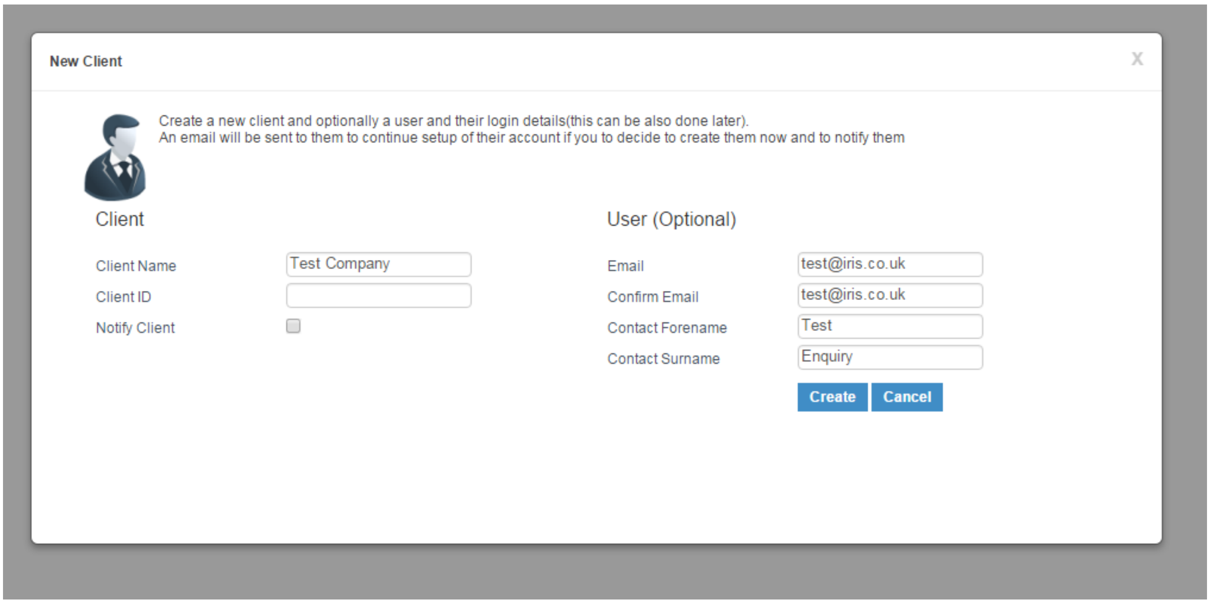
- You can add additional notes to this enquiry and click ‘Save’ to save your progress. The enquiry will be classed as ‘New’

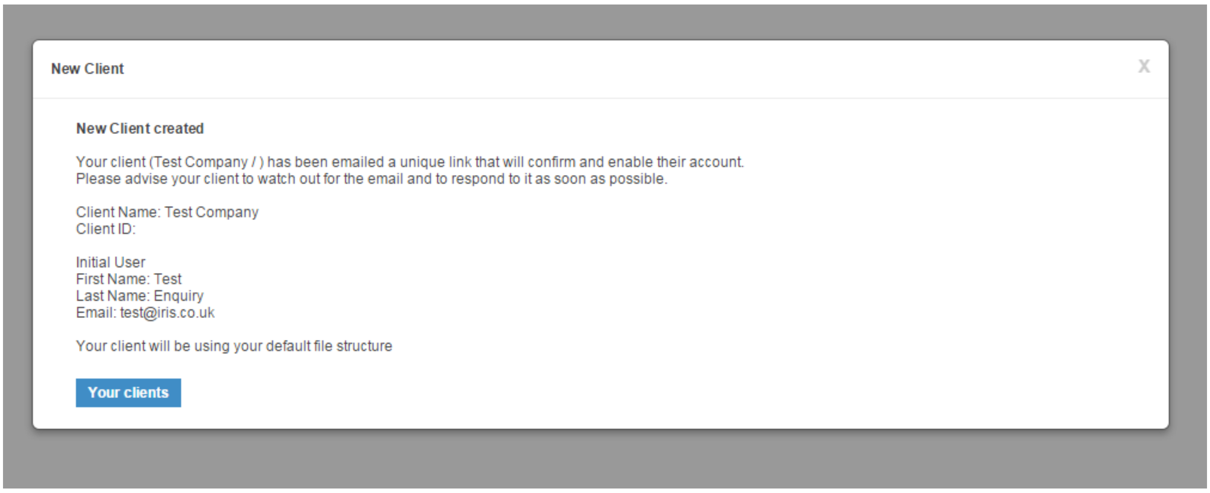
- You can manually change the status of the enquiry using the dropdown box provided. This will move the enquiry to the relevant category on your Dashboard (In Progress, Rejected, Completed)

- You can ‘Create Client’. This will take you to the client creation screen with pre-populated information, ready to create an OpenSpace client. **Once you create the client, they will be sent your customised welcome email, please ensure that you have customised this content prior to creating a client**



11 If you choose to create a client, you will see the client creation box appear. Check the details and click create, an email will automatically be sent to the client





12 The completed enquiry will then be moved to the 'Completed' area and can be deleted if required

If you have any further questions, a step by step video can be found on the IRIS website. Alternatively please contact IRIS support on 0844 815 5551

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