

A GUIDE FOR IRIS ACCOUNTANCY SUITE FIRMS • 2026

Keep IRIS. Fix what's around it.

An honest look at the friction inside IRIS firms right now — and how to modernise the document side without giving up the tax and accounts software you rely on.

Written for partners who chose IRIS for good reasons, and are starting to find those reasons outweighed by the friction.



Two posts. The same story.

Public, unprompted, and months apart. The complaint underneath both is the one partners quietly recognise.



We've had three price increases in four years, usually with no notice at all. When I try to contact IRIS, I get an auto-reply saying the email inbox is no longer monitored.

ANONYMOUS · ACCOUNTINGWEB · MAY 2025



I raised a support ticket in October. By December I still hadn't had a resolution. I'm not sure if it's because they've moved their support offshore, or because they just don't care.

ANONYMOUS · ACCOUNTINGWEB · AUGUST 2025



Four IRIS frustrations, one pattern.

1

The cost keeps climbing

Repeated price rises, often with no notice — for a product that hasn't moved at the same pace.

2

Stuck on the desktop

Mobile is limited, remote work means a VPN, approving on a Saturday is a chore.

3

No sense of a future

No meaningful AI, no clear roadmap. The tools feel like they're in maintenance mode.

4

Support has slipped

A ticket queue measured in weeks. Staff stopped escalating and started building workarounds.

- None of this is a reason to rip out IRIS. It's a reason to fix the layer sitting on top of it.



A cloud move is coming.

TODAY

IRIS Accountancy Suite

Legacy desktop line



OVER TIME

Elements

The IRIS cloud platform

The IRIS Accountancy Suite is the legacy desktop line. Over time, IRIS is moving firms onto its cloud platform, Elements.

THE POINT

There's no fixed end-of-life date. But the direction is set — so modernising now, on your own terms, beats waiting for a migration that picks the timing for you.



AND THE TIMING JUST GOT HARDER

One return a year? Not anymore.

Making Tax Digital for Income Tax is now live. Affected sole traders and landlords now file four quarterly updates plus a final declaration — not one annual return.

5x

filings per client, per year

860k+

in the first £50k+ wave (HMRC)

Every record you chased once in January, you now chase four times a year. IRIS still files it. The work around the filing just **multiplied**.

02

SECTION TWO • THE JOBS TO BE DONE

The 15 jobs where the day stalls.

Not features. The recurring, deadline-bound jobs every IRIS practice runs — ranked by how much they hurt when they stall.



RANKED BY URGENCY & FREQUENCY

The jobs IRIS firms run.

Critical

High

Steady

- 1 Chasing client records before a deadline**
 SA & CT SEASON · NOW · QUARTERLY UNDER MTD Critical
- 2 Getting a return reviewed, signed & e-approved**
 PREPARED IN IRIS · SIGN-OFF STUCK IN INBOXES Critical
- 3 AML / KYC onboarding before work starts**
 15-20 STEPS · MLR 2017 EXPOSURE Critical
- 4 Finding the file when HMRC enquires**
 IRIS FILED IT · THE TRAIL IS SCATTERED Critical
- 5 Knowing every job's status across the practice**
 VISIBILITY · SPREADSHEET + HEADS High
- 6 Engagement letter out & signed**
 ONBOARDING · MANUAL TEMPLATES High
- 7 Year-end accounts approval loop**
 REVIEW · EMAIL BACK-AND-FORTH High
- 8 Collecting a fee / payment on completion**
 3RD-PARTY · DISCONNECTED STEP High
- 9 Reviewing & approving from a phone**
 REMOTE · IRIS DOCS ARE DESKTOP-BOUND High
- 10 Tax-payment reminders so clients don't miss**
 31 JAN / 31 JUL · MANUAL Steady
- 11 Logging every client email, call & note**
 COMMS HISTORY · SCATTERED Steady
- 12 Version control on working papers**
 TAX PREP · "WHICH IS FINAL?" Steady
- 13 Re-using the same process for every client**
 REPEATABILITY · IN PEOPLE'S HEADS Steady
- 14 Archiving to be audit-ready by default**
 CLOSE-OUT · MANUAL FILING Steady
- 15 Handover when a team member leaves**
 CONTINUITY · UNDOCUMENTED Steady



THE FOUR THAT HURT MOST

The four jobs that hurt most, from **pain to outcome.**

Each is the same shape: a trigger, the point it stalls today, and the version where the workflow moves itself. Follow the line down.

THE TRIGGER

The moment the job begins

WHERE IT STALLS • MANUAL

The point it breaks down today

THE FIX • WÓRKIRO

The version that moves itself

01 Chasing records before the deadline

02 Review, sign-off & client approval

03 AML & onboarding before work starts

04 Finding the file when HMRC enquires



Chasing records before the deadline.

THE TRIGGER

A deadline's coming. Returns can't start because the records aren't in. IRIS is ready — the client isn't.



WHERE IT STALLS • MANUAL

Email after email, by hand. 200 clients chased three times each is 600 messages — with no view of who's replied.



THE FIX • WÓRKIRO

One secure link, a checklist the client ticks off, reminders that automatically send themselves. You see “3 of 6 uploaded” at a glance.



THE OUTCOME

Records arrive early, not at the deadline. The chase becomes a dashboard.



Review, sign-off & client approval.

THE TRIGGER

The return is prepared in IRIS. Now it needs a manager's yes, then the client's signature.



WHERE IT STALLS • MANUAL

It sits in an inbox. Nobody's sure if it's approved, rejected or waiting. The deadline burns while it waits.



THE FIX • WÓRKIRO

Approval as a tracked task with real outcomes — approved, rejected, approved-with-conditions. Each triggers the next step. E-signature, timestamped.



THE OUTCOME

Approvals happen in minutes, from a phone. No thread to dig through, full audit trail.



AML & onboarding before work starts.

THE TRIGGER

A new client signs. Before any work: ID, proof of address, risk rating, engagement letter.



WHERE IT STALLS • MANUAL

15–20 steps across email, a drive and a spreadsheet three people maintain. Miss one and you're exposed under MLR 2017.



THE FIX • WÓRKIRO

One guided workflow: request, collect, verify, rate, e-sign — captured against the client as it happens.



THE OUTCOME

A complete trail, retrievable in seconds for a monitoring visit. Days of chasing become one tracked flow.



Finding the file when HMRC enquires.

THE TRIGGER

HMRC enquires on a 2023 return filed in IRIS. You need the working papers and the approval, today.



WHERE IT STALLS • MANUAL

Files split across a drive, an inbox and a desktop. Was the final version the one emailed, or the one saved?



THE FIX • WORKIRO

Every version stored against the client, in context, with full history. Searchable by anyone on the team.



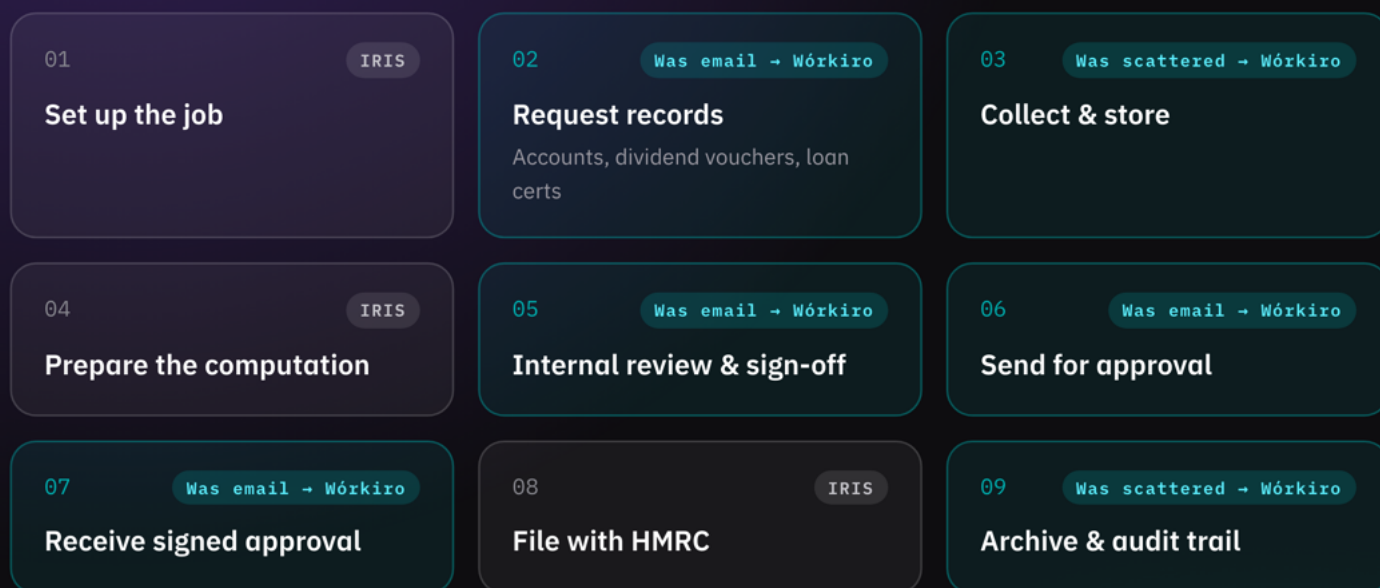
THE OUTCOME

Audit-ready by default. You answer HMRC the same day, with the timestamped trail attached.



IRIS still does the tax. Wórkiro **does the rest.**

☐ STAYS IN IRIS ☒ JOINS THE WÓRKIRO WORKFLOW



Steps 1, 4 and 8 stay in IRIS, untouched. The six steps in between join into one workflow that moves itself — full audit trail, nobody chasing.



Set it up once. It runs **itself**.



Task Guidance

The how-to for a job travels with the task — which documents, what “good” looks like. Nothing gets re-explained.



Task Outcomes

Approved, rejected, sent back — you define the outcomes that matter, and each one fires the next step automatically.

IN ONE LINE

Documents tell you what you have. Workflows tell you what to do with them — so work moves without the chasing.



AI IS ALREADY IN THE PRODUCT

Real AI today, not a roadmap.

- ✓ Documents classify themselves as they arrive.
- ✓ Ask Claude, CoPilot or ChatGPT inside Wórkiro — “what's the status with this client?”
- ✓ AI thread summaries for your team, never shown to clients.

Tell clients you use modern, intelligent tools — then show them. Ahead of the curve, not chasing it.



Not our words. **Theirs.**

“

I know instantly what's been sent, what's been signed, and what's still waiting. I don't have to chase anymore.

Ben Symons

Director, Serenity Accounting & Bookkeeping

“

Wórkiro has completely changed how confidently we work with clients — especially those less tech-savvy.

Laura Carnevale

Director & Principal, Cantor Carnevale & Co

“

Of the three systems we tested, Wórkiro was the best fit — and moving to the cloud cut our server costs in half too.

Julia Docker

Practice Manager, Informed Choice

03

SECTION THREE • THE MIGRATION

Moving off IRIS is the fear.

The thought of moving years of documents keeps most firms in place.
Here's the straight version — myths, reality, and **the actual process**.



What partners **worry** about.

“Migration would take months.”

THE REALITY

Most firms migrate in weeks. Wórkíro's team runs it. Your involvement is minimal.

“We can't afford any downtime.”

THE REALITY

There is none. Migration runs in the background while your team keeps working.

“We might lose or corrupt records.”

THE REALITY

Everything migrates, fully audited and verified. Nothing leaves IRIS until you confirm.

“Historical migration will be expensive.”

THE REALITY

It's included. No charge per document, no charge per year of history.



Seven steps. We do **the work.**

1 Scoping call

A specialist maps your setup — folders, doc types, integrations. No prep needed.

2 System setup

They build your Wórkíro — structure, users, integrations — with you.

3 Verify & client matching

You check a sample and confirm before the full migration starts.

4 Migration in the background

Transferred, structured, verified. Progress updates throughout.

5 Training your team

Step-by-step guidance so everyone's confident from day one.

6 Go live

Your specialist is beside you for any first-day hiccups.

7 Ongoing support

You move to the support team — phone, email, help centre.

ON PARALLEL RUNNING

Many firms run IRIS and Wórkíro side by side for two weeks — though most stop checking IRIS after the first 24 hours.



The objections, answered.

“We've always done it this way.”

It worked up to a point. But the profession moved and the document tools didn't. The question is whether carrying on is still the best choice.

“The migration will be disruptive.”

Wórkíro manages it end to end. No downtime, run both in parallel until you're confident. A few weeks of transition for a much better position.

“We don't have budget for more software.”

Staying isn't free either — annual rises, lost staff time, slow support. For most firms, Wórkíro pays for itself within six months.

“Our clients won't use a portal.”

No login, no password — clients get a secure link, click, upload. Adoption has been above 85% on ease of use alone.



You keep IRIS. You fix **the layer on top.**

WÓRKIRO HANDLES

- ✓ Secure client collection
- ✓ All-job visibility
- ✓ Version-controlled storage
- ✓ Guided workflows
- ✓ Review & approval
- ✓ Client comms log
- ✓ Mobile app
- ✓ AI classification
- ✓ UK support
- ✓ Managed migration

STAYS IN IRIS

- Tax & accounts prep and filing
- Bookkeeping / accounts production
- Payroll

IN ONE LINE

IRIS handles the compliance. Wórkiro handles everything around it — documents, tasks, approvals, comms, mobile, support. They work together.

READY WHEN YOU ARE

See your own return, live.

30 minutes. No commitment. Bring one real workflow — we'll show you exactly where the stalls go.

Book a free demo

workiro.com/book-a-demo

TRUSTED BY 65,000 PROFESSIONALS ACROSS REGULATED FIRMS

WHAT TO DO NEXT

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