# IRIS enhances Firm Management solution for modern accounting firms



IRIS, a provider of accounting and business solutions, has announced significant enhancements to its IRIS Firm Management (IFM) solution, focusing on improved document management capabilities tailored for modern, rapidly growing accounting firms. The updates aim to address the challenges posed by technology sprawl and increasing operational complexities, particularly as these firms expand their service offerings and client bases.

Jim Dunham, the president and general manager of IRIS Americas, stated, "Modern accounting firms are growing quickly, expanding their service lines and client bases. However, this rapid growth often introduces technology sprawl, added costs and complexity. To tackle today's challenges, firms need an all-in-one solution that simplifies operations and helps them scale their business. That's why we created IRIS Firm Management — purpose-built from strategic acquisitions and shaped by four decades of collaboration with our customers."

One of the key features of the updated IRIS IFM is its integrated document management solution, which now allows firms to store, organise, and retrieve crucial documents in compliance with complex regulatory requirements. The enhancement includes automatic retention of documents for standard durations, template forms for maintaining consistency and integrity, and a detailed audit trail that tracks access and actions taken on documents. This allows for secure sharing of encrypted files with clients through a user-friendly drag-and-drop upload functionality.

In addition to document management, users can create unlimited and customisable reports with guided steps, facilitating access to real-time insights via interactive analytics dashboards. The software offers advanced data visualisation tools and filtering options, enabling users to refine views and analyse data sets such as client information, geographic data, accounts receivable, and work-in-progress, all contributing to a unified account overview.

The interface has also been streamlined to include hierarchical menus to improve accessibility while a new period-lockdown feature has been introduced to bolster security by preventing changes to key functions. Furthermore, the solution supports cloud-based receipt storage and allows for tailored user preferences to optimise workflows.

Complementing these software updates, IRIS has also introduced a new Centralised Customer Success Function designed to enhance engagement and customer experience throughout various stages of their journey. This initiative aims to merge customer-facing resources into a cohesive global team that collaborates closely with departments such as Account Management, Renewals, Product, Marketing, and Customer Service.

Dave Burns has been appointed as the chief customer officer to lead this new function. Previously serving as the interim chief revenue officer at IRIS Software Group, Burns will oversee this unified team and work in partnership with global leaders across client-facing segments. "At IRIS, our customers are our top priority," Burns remarked. "We design and improve our products based on customer feedback and we strive to deliver exceptional customer experiences throughout our customers' end-to-end lifecycle. The launch of this new Customer Success function is just another way that IRIS is continually working to ensure our customers have a seamless and convenient experience from start to finish. We are excited about this evolution and confident it will significantly benefit both our customers and IRIS."

The updates to IRIS Firm Management and the establishment of a centralised customer success strategy highlight a strategic shift towards enhancing functionality and client engagement in the face of evolving business needs. These innovations demonstrate the company's commitment to providing solutions that facilitate growth while addressing the complex demands of modern accounting firms.

Source: [Noah Wire Services](https://www.noahwire.com)

## Bibliography

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4. <https://www.prnewswire.com/news-releases/iris-americas-expands-its-fully-integrated-iris-firm-management-ifm-solution-302345866.html> - Quotes Jim Dunham on the rapid growth of modern accounting firms and the need for an all-in-one solution like IRIS Firm Management.
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