**Importing via KashFlow**

**Importing postings for a sole trade via KashFlow (Sub-heading)**

Step 1 – Entering KashFlow login credentials

1. Within Personal Tax | Select Setup | Practice Options
2. Click KashFlow
3. Enter valid KashFlow credentials
4. Select Ok | Confirmation will be presented that the credentials have been accepted

Step 2 – Linking KashFlow client

1. Within Personal tax | Trades, Profession or Vocation | Sole Trade or Partnership
2. Select the Sole trade | View
3. Click the magnifying glass next to the ‘KashFlowClient’ field
4. A ‘KashFlow Client’ screen will appear
5. Select ‘Link to KashFlow client’ | select the corresponding client | Ok
6. Close the Business client maintenance screen

Step 3 – Importing Postings from KashFlow

Once the above has been established, to import postings from the link client the following should be completed:

* Within Personal tax | Trades, Profession or Vocation | Sole Trade or Partnership
* Select the Sole trade
* Select Import Postings | Import from KashFlow

Once the above has been selected, the postings summary screen will appear where postings from KashFlow will appear and IRIS will automatically attempt to select a IRIS category which can be altered manually.

MTD specified clients which have Update periods set up will be displayed down the left had side of the summary screen, selecting between the update periods will display the postings related to that date range.

Please note: Import will be completed on a per period basis.

**Importing postings for UK Land and Property from KashFlow (Sub-heading)**

Step 1 – Entering KashFlow login credentials

1. Within Personal Tax | Select Setup | Practice Options
2. Click KashFlow
3. Enter valid KashFlow credentials
4. Select Ok | Confirmation will be presented that the credentials have been accepted

Step 2 – Linking KashFlow client

1. Within Personal tax | UK Land and Property | Property Income
2. Select the Property | View
3. Click the magnifying glass next to the ‘KashFlowClient’ field
4. A ‘KashFlow Client’ screen will appear
5. Select ‘Link to KashFlow client’ | select the corresponding client | Ok
6. Close the Business client maintenance screen

Step 3 – Importing Postings from KashFlow

Once the above has been established, to import postings from the link client the following should be completed:

* Within Personal tax | UK Land and Property | Property Income
* Select FHL Property Summary or Other Property Summary | Import from KashFlow

Or

* Within Personal tax | UK Land and Property | Property Income
* Select a property | View
* Import postings | Import from KashFlow

Using the 2nd import option will automatically direct all postings from KashFlow to the corresponding selected property.

Once the above has been selected, the postings summary screen will appear where postings from KashFlow will appear and IRIS will automatically attempt to select an IRIS category which can be altered manually.

MTD specified clients which have Update periods set up will be displayed down the left had side of the summary screen, selecting between the update periods will display the postings related to that date range.

Please note: Import will be completed on a per period basis.

Within the summary screen a ‘Property’ will need to be selected in order to import the postings from KashFlow to the corresponding property in IRIS.