

# IRIS CONNECT

Live Feature Releases  
Demonstrations  
Q&A Chat



# IRIS Connex Presenters

Features and Q&A Presented By:



**Dimitri Akhrin**

President of IRIS CRM



**David Conrad**

Senior Support Specialist of IRIS CRM

# Every Month IRIS CRM Reports On

**375,000+**

Active Merchants

**63 Million+**

Transactions

**\$5.5 Billion+**

In Volume

**Leads > Boarding > Merchants > Maintenance > Residuals**

# New Feature: Visual Helpdesk Due Dates

Viewing Tickets [filtering New, Lifetime]

Filter by: Created Date Viewing: Month to Date Filter

Show 10 entries Export Search: All

Status	ID	Name	Subject	Due	Files	Type	Priority	Assigned
New	160	SWIM MART	Build a File	1 Day	0	Build a File	Low	
New	67	THE BEST TRAVEL AGENTS	Build a File	-2 Days	0	Build a File	Low	Jordan Zahler
New	82	NEW AGE TRAVEL	Build a File	1 Day	0	Build a File	Low	Jordan Zahler
New	164	RAVENNETWORKS	TSYS - Update DDA (Auto)	1 Day	0	TSYS - Update DDA (Auto)	Low	
New	171	TOM'S DINER	Test	3 Days	0	Credit Request	Low	
New	174	MARVIN, LIND AND DONNELLY	Question about equipment	n/a	0	Merchant - Supply Request	Low	Jordan Zahler
New	87	RAVENNETWORKS	TSYS - Update DBA & Address	1 Day	0	TSYS - Update DBA & Address (Auto)	Rush	Jordan Zahler
New	77	OLEG PEN, DDS	Build a File	2 Hours	0	Build a File	Medium	Jordan Zahler
New	135	PC PROS	TSYS - Update DDA (Auto)	-1 Day	0	TSYS - Update DDA (Auto)	Low	
New	84	CORNER CAFE	Build a File	-4 Hours	0	Build a File	Low	Jordan Zahler

Showing 1 to 10 of 56 entries Previous 1 2 3 4 5 6 Next

Due dates provide insight into your Helpdesk's priorities.

Merchants benefit when you have an established SLA framework for each type of incoming ticket type.

SLAs can be counted by business days or calendar days.

Filter your tickets by selecting the Due Date filter and the desired date range.

Ticket #160

(1 of 56) Previous Next

Ticket Status: New

Open In Progress Additional Information Required Resolved

PriorityLowMediumRush

Visible to MerchantYesNo

Ticket ID160-5 day(s) old

GroupNew York

Assigned ToNoneAssign

ForLinked Account: SWIM MART (9000000000000)Update

TypeBuild a File

Created08/12/2020 05:52pmBy: Jordan Zahler

Last Modified08/12/2020 06:02pmBy: Mario Pavic

Last Status Updated08/12/2020 05:52pm

Due Date08/13/2020 05:52pm1 DayEdit

File(s)No file attached

SubjectBuild a File

Description

Comments (1)

Add Comment

Enter your comment or copy and paste an image.

Drag and drop file(s) here to upload, or Browse

Notifications: Jordan Zahler x

Notify All Associated Users

+ ADD EVENT+ ADD COMMENT

Delete

Viewing Tickets [filtering New, Lifetime]

Filter by: Due Date Viewing: Date Range From: 09/15/2020 To: 09/16/2020 Filter

Show 25 entries Export Search: All

Status	ID	Name	Subject	Due	Files
New	14937	SWIM MART	Terminal Supply - Pax S920	48 Minutes	0
New	14934	NEW AGE TRAVEL	Tip Adjustment	6 Hours	2
New	149409	PC PROS	Follow up with regarding the sim card	17 Hours	0
New	149293	CORNER CAFE	Returned terminal	19 Hours	0
New	149313	ADVENTURE TRAVEL	Please bill merchant for Pax S80	22 Hours	0
New	149448	PIZZA ALLEY	Call merchant to assist with Pax S80 setup	23 Hours	0
New	149390	THE PALM HOTEL	Looking for a breakdown of fees	1 Day	0
New	149244	BOB'S AUTO REPAIR	Paper order	-17 Hours	0

Showing 1 to 8 of 8 entries Previous 1 Next

To change a ticket's Due Date, open the ticket, hover your mouse on the right side of the Due Date row, and click on the Edit icon which appears.

Viewing Tickets [filtering Resolved, MTD]

Filter by: Created Date Viewing: Month to Date Filter

Show 10 entries Export Search:

Status	ID	Name	Subject	Due	Files
New	160	SWIM MART	Build a File	SLA Met	0
New	67	THE BEST TRAVEL AGENTS	Build a File	-1 Day	0



LIVE DEMO:

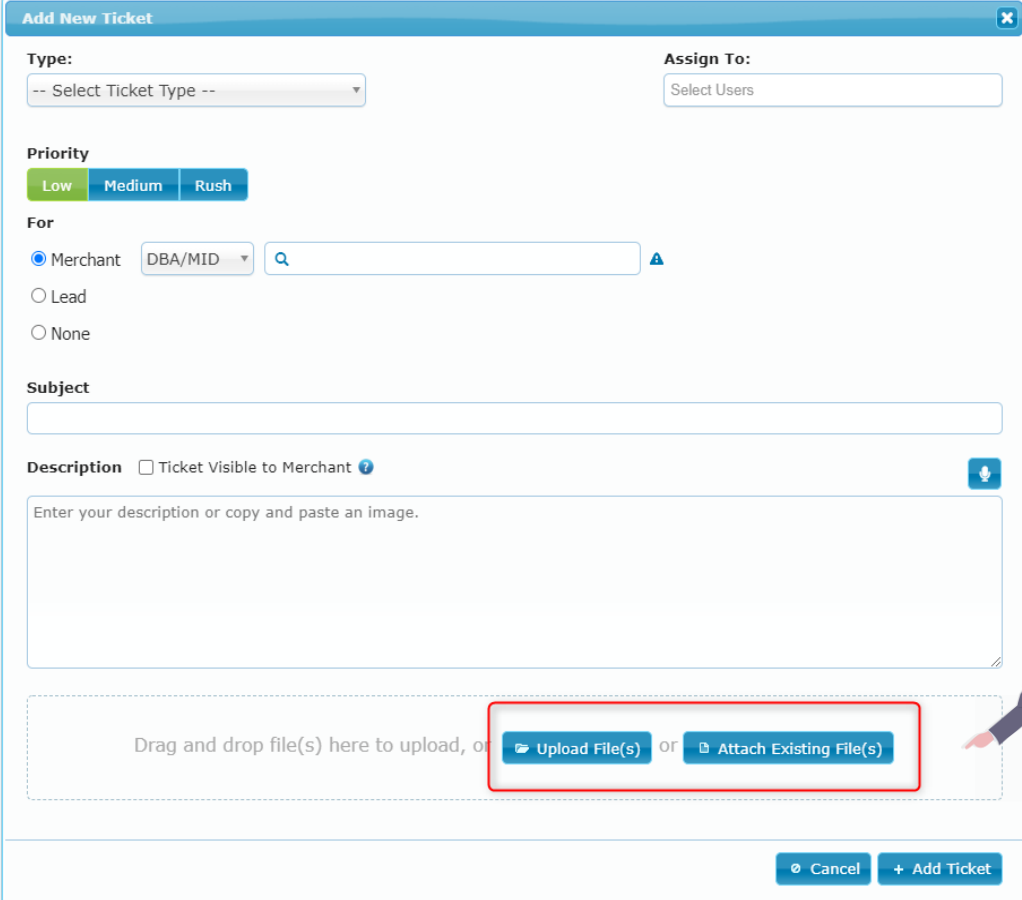
Due Dates for Tickets

# New Feature: Attach Existing Files to Tickets

Attach files to Tickets that are already stored in your CRM.

Select any existing file from a Lead, Merchant or TurboApp record and use those documents within your tickets instantly.

Files from Comments and Checklists are now stored in a central place within the ticket.



**Add New Ticket**

Type: -- Select Ticket Type --

Assign To: Select Users

Priority: Low Medium Rush

For: ☒ Merchant DBA/MID ☐ Lead ☐ None

Subject:

Description: ☐ Ticket Visible to Merchant

Enter your description or copy and paste an image.

Drag and drop file(s) here to upload, or

Upload File(s) or Attach Existing File(s)

Cancel + Add Ticket

Click on the new Attach Existing Files button to display every related file.

**Comments (0)**

**Add Comment**

Enter your comment or copy and paste an image.

☐ Comment Visible to Merchant

Drag and drop file(s) here to upload, or

**Notifications:**

Tim Smith x

☐ Notify All Associated Users

**Description** ☐ Ticket Visible to Merchant

Enter your description or copy and paste an image.

**Select From 2 Existing Documents**

Search:

☒ 09/15/20 04:11pm MPA.pdf Default (89.87 KB)

☒ 09/15/20 04:11pm Lease Agreement.pdf Default (32.20 KB)

Drag and drop file(s) here to upload, or  or

**Due Date** 09/16/2020 04:11pm **Ticket SLA:** 1 Day

**Notifications:** ☐ Notify User(s) By Email ☐ Notify All Associated Users

Attachments from Comments and Checklists will appear within the Files section automatically.

<b>Last Status Updated</b>	08/07/2020 04:20pm
<b>Due Date</b>	08/14/2020 <span>3 Days</span>
<b>File(s)</b>	<div><div>Authorization.pdf x</div><div>Screenshot.png x</div><div>Driver License.png x</div></div>
<b>Subject</b>	Build A File
<b>Description</b>	





LIVE DEMO:

Helpdesk Ticket Files

# Major Enhancement: Merchant Management

The screenshot displays the 'Merchant Management' interface. A modal window titled 'Managing 10 Merchants' is open, allowing for bulk actions on 10 selected merchants. The background shows a list of merchants with columns for DBA, MID, and various IDs. The modal contains the following fields:

Action	Field
Assign To	Select User(s) [dropdown]
Unassign From	<input checked="" type="radio"/> No One <input type="radio"/> Me (John Smith) <input type="radio"/> Select Users <input type="radio"/> All Users
Change Group To	Sub ISO A [dropdown]
Change Processor To	Select Processor [dropdown]
Change SIC Code To	Select SIC Code [dropdown]
Change Days Until Notice To	5 [input]
Change Start Processing Date To	Click to Set [button]
Change Merchant Status To	Select Open/Closed [dropdown]
Change System Status To	Active [dropdown]
Change 🌟VIM Status To	Select Yes/No [dropdown]

At the bottom of the modal are 'Cancel' and 'Update' buttons. The background interface includes a search bar, a date selector (September), and a list of 10 merchants with checkboxes for selection. The status bar at the bottom indicates 'Showing 1 to 10 of 784 merchants' and includes pagination controls.

Mass Actions were added to Merchant Management!

Mass Actions provide a new way for managing merchant and user settings across the entire portfolio quickly.

Quickly perform assignments and split adjustments using a single action.



LIVE DEMO:

Merchant Management

# Conformance Integration



IRIS CRM recently announced our ground-breaking partnership with Conformance Technologies – one of the world’s leading providers of risk assessment and conformance tools for small and midsize businesses (SMBs). With this new partnership, IRIS CRM has fully integrated Conformance Technologies’ PreComm ToolKit™, one of the most powerful cloud-based due diligence tools available today for automated merchant underwriting.

# New Feature: Dispute Responder

Merchants and ISOs are now able to respond to disputes through IRIS CRM on the Fiserv Omaha and Fiserv North networks.

Highly detailed notifications provide at-a-glance access to dispute documents so that merchants can begin compiling a response immediately.

Fast, easy, paperless electronic responses are submitted directly into Fiserv's Dispute Manager.



The image shows a large digital screen displaying the 'Dispute Reporting' interface. Two business men in suits are standing in front of the screen, looking at the data. The screen has a blue header with the title 'Dispute Reporting'. Below the header are four filter boxes: 'All Types X', 'All Processors X', 'All Groups X', and a date/time selector set to 'Month to Date' and '05/01/2020 12:00am'. Below the filters is a 'Show 10 entries' dropdown. The main part of the screen is a table with four columns: DBA, MID, Type, and Processor. The table contains ten rows of data, all for 'SWIM MART INC' with MID '445400000000' and 'Chargeback' type. The processors listed are 'Fiserv', 'TEST- First Data - Omaha', 'First Data - Tier 1', and 'First Data - North'.

DBA	MID	Type	Processor
SWIM MART INC	445400000000	Chargeback	Fiserv
SWIM MART INC	445400000000	Chargeback	Fiserv
SWIM MART INC	445400000000	Chargeback	TEST- First Data - Omaha
SWIM MART INC	445400000000	Chargeback	First Data - Tier 1
SWIM MART INC	445400000000	Chargeback	First Data - Tier 1
SWIM MART INC	445400000000	Chargeback	First Data - North
SWIM MART INC	445400000000	Chargeback	First Data - Tier 1
SWIM MART INC	445400000000	Chargeback	TEST- First Data - Omaha
SWIM MART INC	445400000000	Chargeback	TEST- First Data - Omaha
SWIM MART INC	445400000000	Chargeback	TEST- First Data - Omaha

Email details

Created

05/23/2020 09:21:14

Status

05/23/2020 09:22:05

To

Susan <susan@swim-mart.com>

From

<support@yourcompanyname.com>

Via

smtp.iriscrm.com

Opened

Yes (2020-05-23 10:28:34)

Template

Initial Retrieval/Chargeback Notification

Subject

New \$32.25 Chargeback Notification for SWIM MART INC

Preview

Waiting for Reply - Response Due: June 5, 2020

Body

Hello Susan,

You are receiving this email because a Chargeback has been filed by one of your customers.

Click [here](#) to view the details of this dispute. You can now respond to this dispute through our system if you have not already done so.

Please contact Chargeback Support at (800) 123-4455 if you have any questions about submitting supporting documentation for this dispute as soon as possible.

**Response Due:** June 5, 2020  
**Merchant ID:** 445400000000  
**Business:** SWIM MART INC  
**Case Number:** CB801412329701  
**Date of Transaction:** April 18, 2020  
**Type:** Chargeback  
**Amount Disputed:** \$32.25  
**Transaction Amount:** N/A  
**Card Number (last 4 digits):** 2783  
**Reason:** Cancelled Recurring  
**Dispute Status:** Waiting for Reply  
**Important Note:** As per the Card Brand Association rules, a response not received letter will automatically result in a decision favoring the customer.

Deliver a significant reduction in the workload to your merchants' staff who are responsible for handling dispute management.

Track disputes in real-time with email notifications and automated popups for status changes and processor communications.

Automated email reminders have been created to notify your merchants of approaching due dates so that no dispute is missed ever again.



LIVE DEMO:

Dispute Responder

# 3 Must Have Acronyms For Email Deliverability

## SPF | DKIM | DMARC



Stop sending unauthenticated emails.

Google and Microsoft have been more aggressive with delaying and not delivering emails that are not properly using authenticated domains.

SPF, DKIM and DMARC are mandatory domain configurations required for delivering email to prospects and merchants in 2020.



## Adding a DKIM Record:

DKIM authentication is already configured on your server so that you only need to create two new records in your DNS to point it to the correct server and provide authorization.

Create two new records in your DNS with the following info replacing 'yourdomain' with your actual email domain.

Type: **CNAME**

Host: **iris.\_domainkey.yourdomain.com**

Points to: **dkim.iriscrm.com**

TTL: **1 hour / 3600**

Type: **CNAME**

Host: **iris1.\_domainkey.yourdomain.com**

Points to: **dkim1.iriscrm.com**

TTL: **1 hour / 3600**

**Note** - It is very important that both DKIM records are added to your DNS configuration.

[Click Here to View the Full Email Configuration Guide](#)

## Adding an SPF Record

To add an SPF record, find the TXT record in your DNS settings that has a value starting with "v=spf" and edit that value.

There can only be one record with SPF information in it. If none exists, it can be created. The only change needed is to add "include:\_spf.iriscrm.com" in the record.

Here's an example, that shows an SPF record through which IRIS CRM is designated as being authorized to send emails from your company's domain:

Type: **TXT**

Current Value: v=spf1 +a +mx ~all

New Value: v=spf1 +a +mx **include:\_spf.iriscrm.com** ~all

TTL: **1 hour / 3600**

## Adding a DMARC Record

To receive DMARC reports from a client's domain, it must have DMARC policy added.

\_dmarc.custom\_clients\_domain\_name.com TXT "v=DMARC1; p=none; rua=mailto:dmarc-reports@iriscrm.com; ruf=mailto:dmarc-reports@iriscrm.com; fo=1"

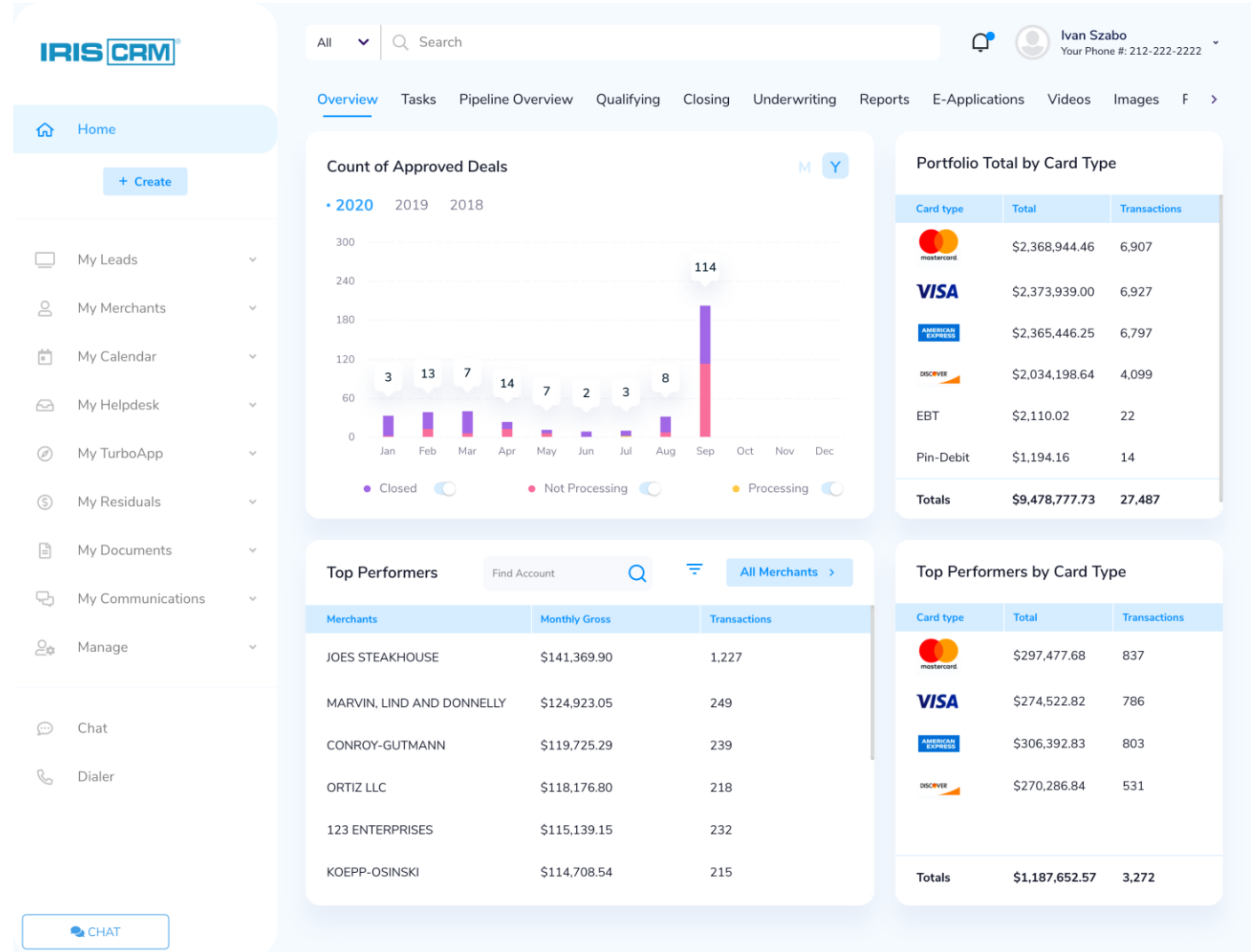


LIVE DEMO:

## Email Best Practices

# New UI Design

Since the beginning of 2020, IRIS CRM has been working on a complete application redesign. We are super excited to announce that your favorite Merchant Services CRM is getting a shiny new look and wanted to share a live demo with you during this sneak peek.





LIVE DEMO:

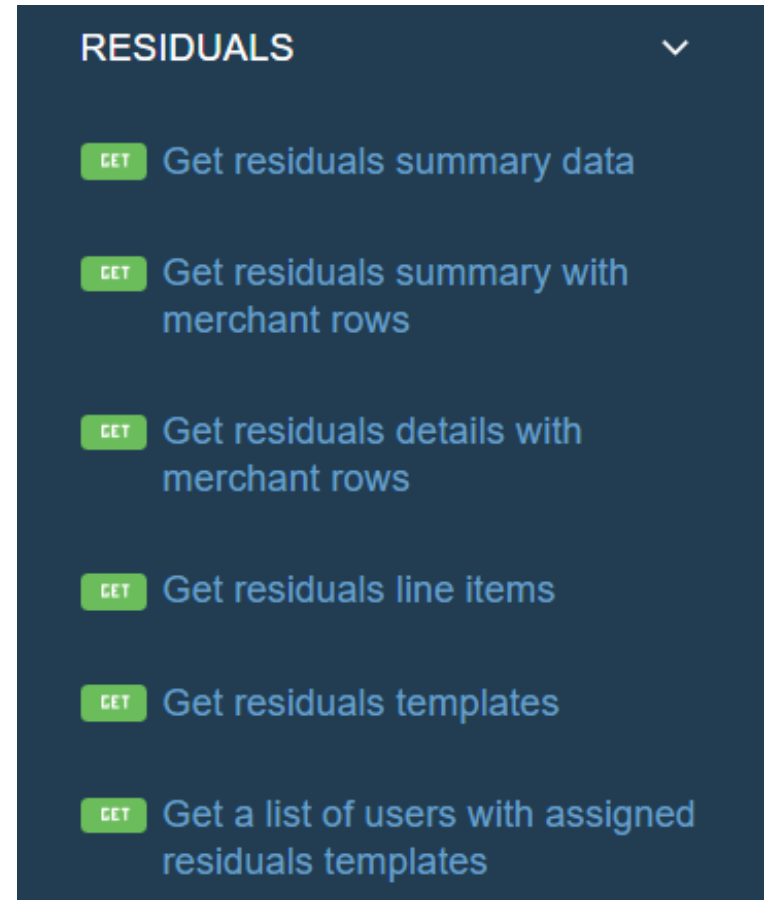
New UI Design

# New Feature: Residuals API

Populate your data warehouse programmatically through this Residuals API and interact with your monthly residual income calculations, line items, and user compensation data.

Line items give you control with the ability to add income or expense calculations that are outside of any residual reports.

Receive instant notifications when new residual reports are published or when line items are added.





LIVE DEMO:

Residuals API

# Coming Soon: NMI Gateway Boarding

Add New Ticket

Type:

-- Select Ticket Type --

nmi

NMI - Create Gateway Account

LOWMediumRUSH

Assign To:

Select Users

For

☒ Merchant

DBA/MID

✓ BECHTELAR, PURDY AND HARVEY

✓ Clear

☐ Lead

☐ None

From the “Add New Ticket” dialogue box, choose:  
“NMI – Create Gateway Account”



LIVE DEMO:

## NMI Gateway Boarding



Your Subscription Will Now Include

**5,000 Minutes Per Month**

5,000 Included Minutes Supports:

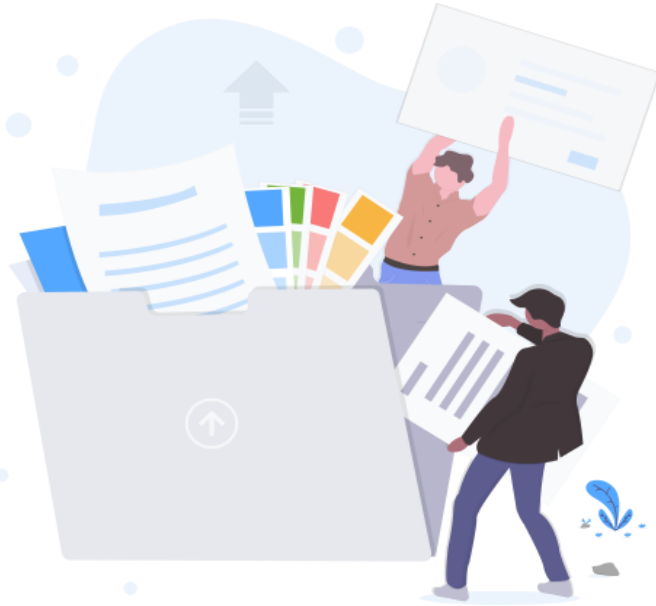


## Power your remote sales and support teams

Your subscription now includes up to 5,000 calling minutes per month.

Use cases for 5,000 minutes include:

- 2 Full-Time Sales Reps
- 4 Full-Time Support Reps
- 3,000 Calls Per Month



# Merchant Data Sharing

Transfer selected merchant data from one IRIS CRM site to another quickly and securely, based on easily configurable data-sharing rules.

10,000  
Merchants

Merchant  
Data







1,000  
Merchants



**Sender** — a client of IRIS CRM who wishes to send specified merchant data to another IRIS CRM client with which it does business.

**Receiver** — a client of IRIS CRM that has a contractual sales relationship with a Sender and requires merchant data to service its portfolio.

# New Features: Coming Soon

Top Performers			Top Performers by Card Type		
<div>Find Account <input type="text"/>   <a href="#">All Merchants &gt;</a></div>					
Merchants	Monthly Gross	Transactions	Card type	Total	Transactions
JOE'S STEAKHOUSE	\$164,337.50	1,400		\$350,572.05	985
MARVIN, LIND AND DONNELLY	\$145,834.88	296		\$326,763.29	933
ORTIZ LLC	\$135,350.98	259		\$332,708.13	888
WAECHLI-HEGMANN	\$133,361.86	252		\$304,137.43	600
Top Performers Total	\$1,358,726.40	3,760			
Portfolio Total	\$10,874,738.19	31,304			
			Totals	\$1,358,726.40	3,760

## Create Account

Copy User Profile:



- New User Interface
- Copy User Profiles
- NMI Boarding
- TSYS Wholesale Copy Equipment
- E-Signature Via Mobile App
- Residual Auditor & Buyrate Verifier

# Thank You From IRIS CRM For Joining!

Please send questions and feedback:  
[team@iriscrm.com](mailto:team@iriscrm.com)