# IRIS CONNEX

Live Feature Releases

Demonstrations

Q&A Chat

# IRIS Connex Presenters

Features and Q&A Presented By:

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# Every Month IRIS CRM Reports On

| 375,000+ | 63 Million+ | $5.5 Billion+ |
| --- | --- | --- |
| Active Merchants | Transactions | 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 | RAVENETWORKS | 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 | RAVENETWORKS | 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 |

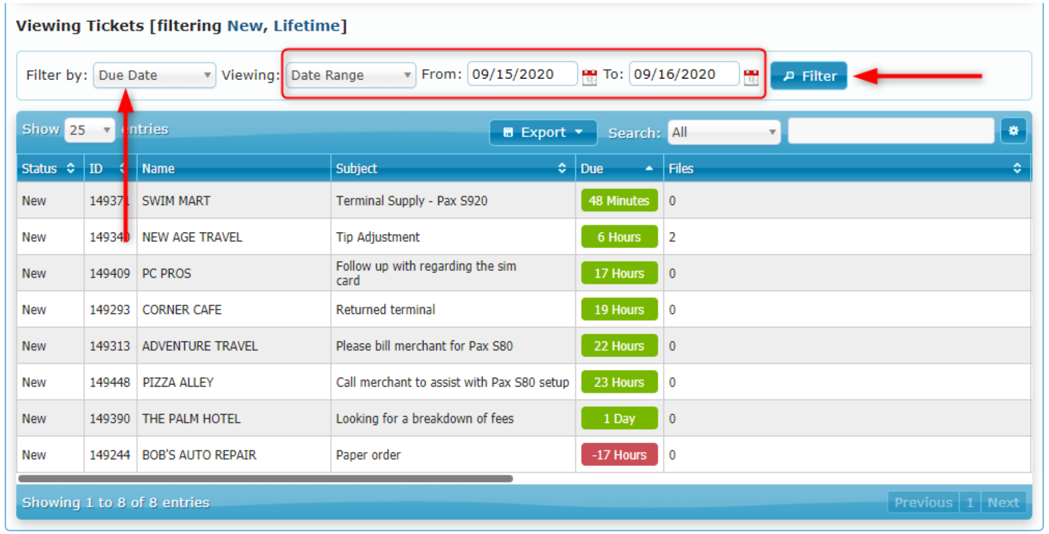
Showing 1 to 10 of 56 entries Previous 1 2 3 4 5 6 Next

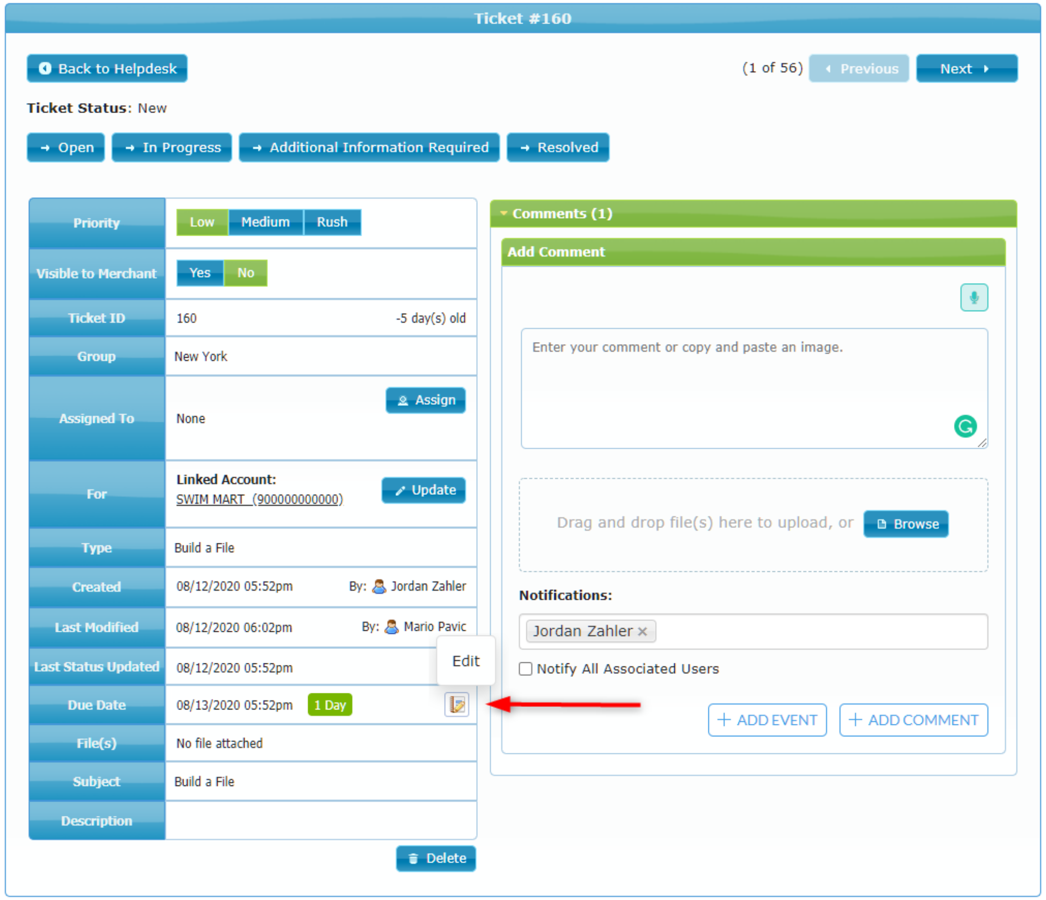
Due dates provide insight into your Helpdesk's priorities.

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

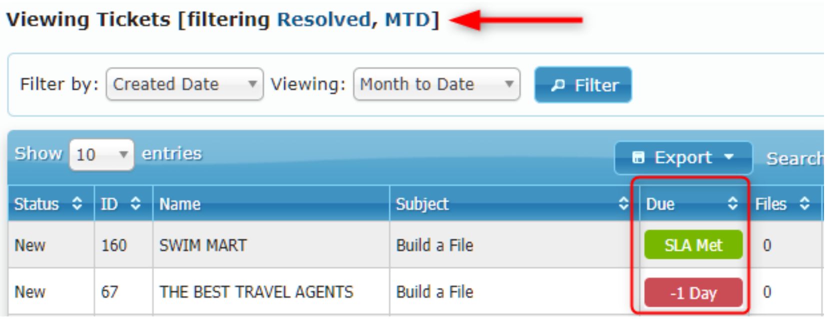
SLAs can be counted by business days or calendar days.

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




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.



LIVE DEMO:

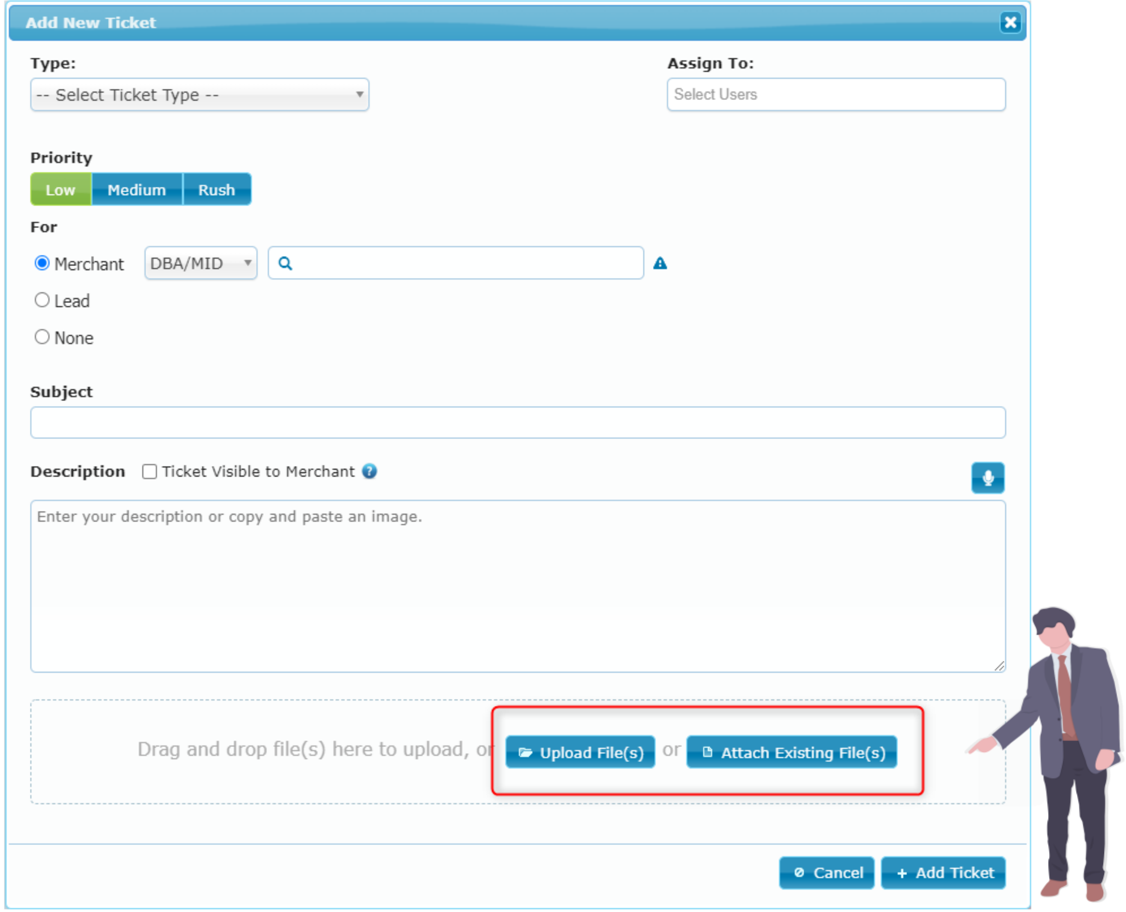
# Due Dates for Tickets

# New Feature: Attach Existing Files to Tickets

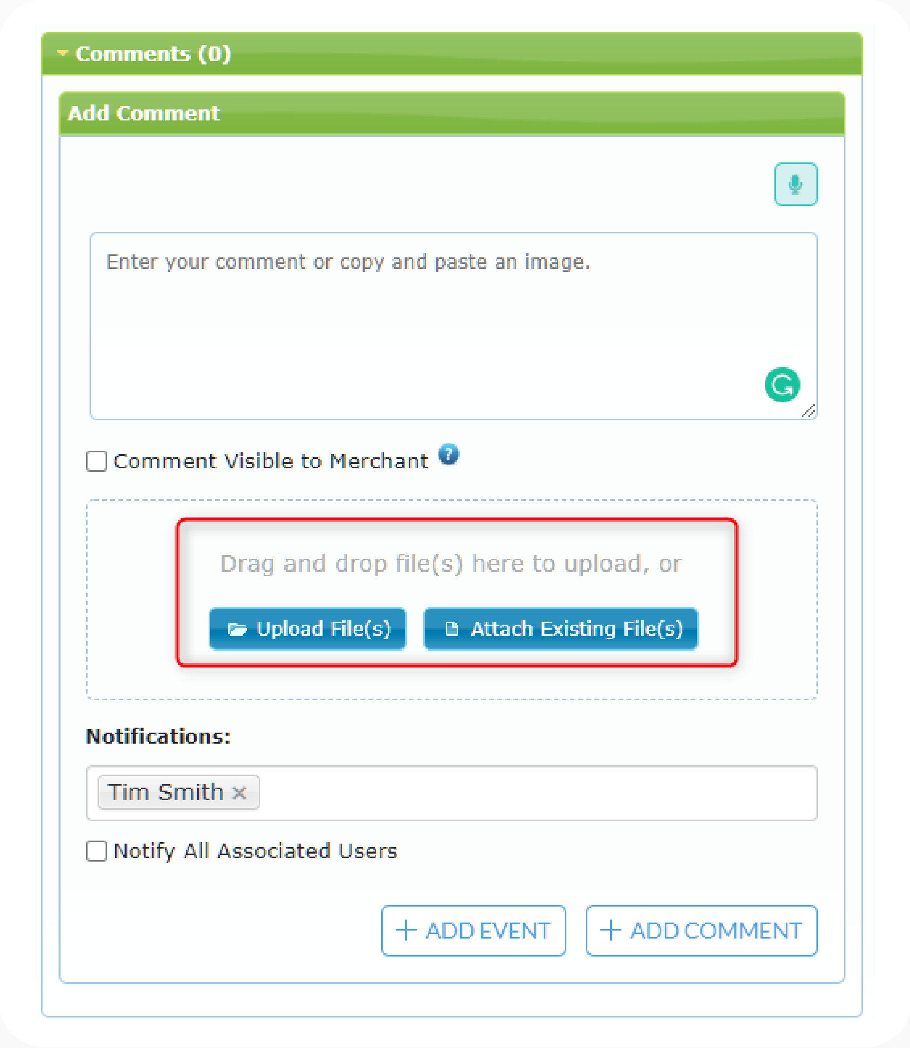
Attach files to Tickets that are already stored in your CRM.

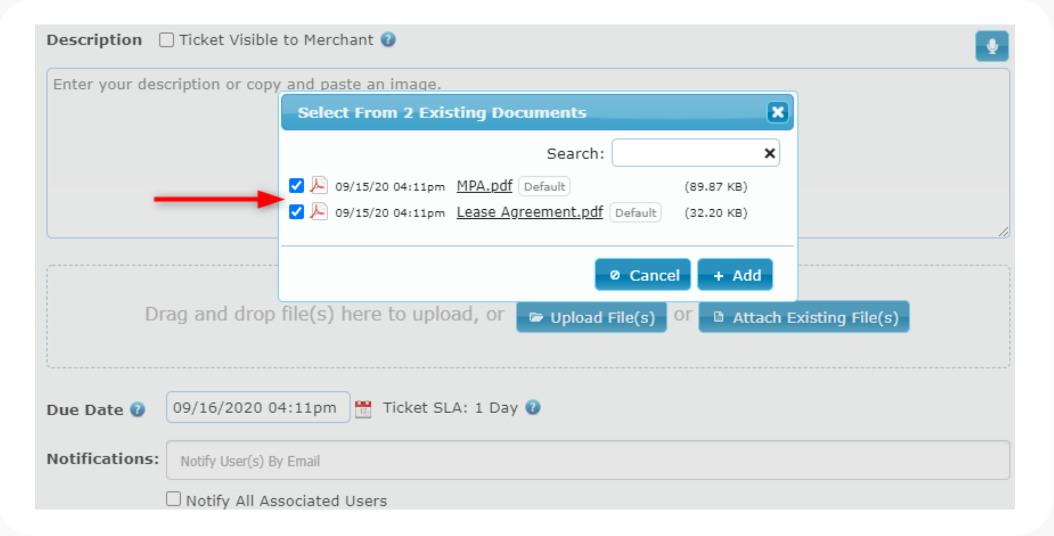
Select any existing file from a Lead, Merchant or TurboApp record and use those documents within your tickets instantly.

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

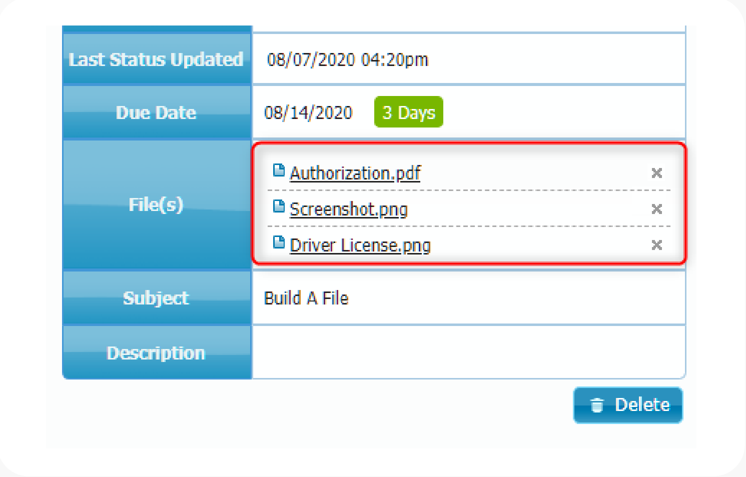


Click on the new Attach Existing Files button to display every related file.




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



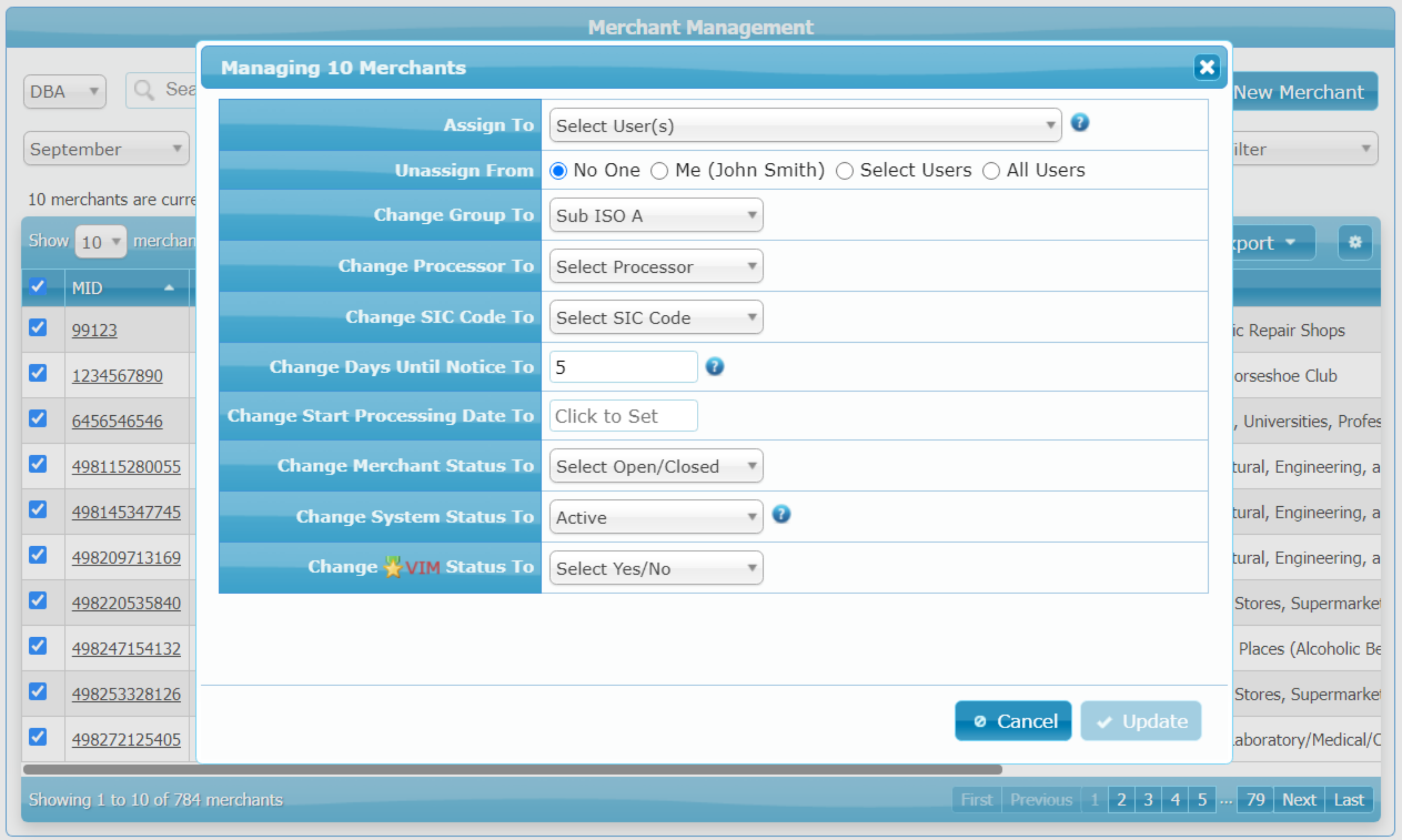

IRIS CRM

LIVE DEMO:

# Helpdesk Ticket Files

IRIS CRM

# Major Enhancement: Merchant Management




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.

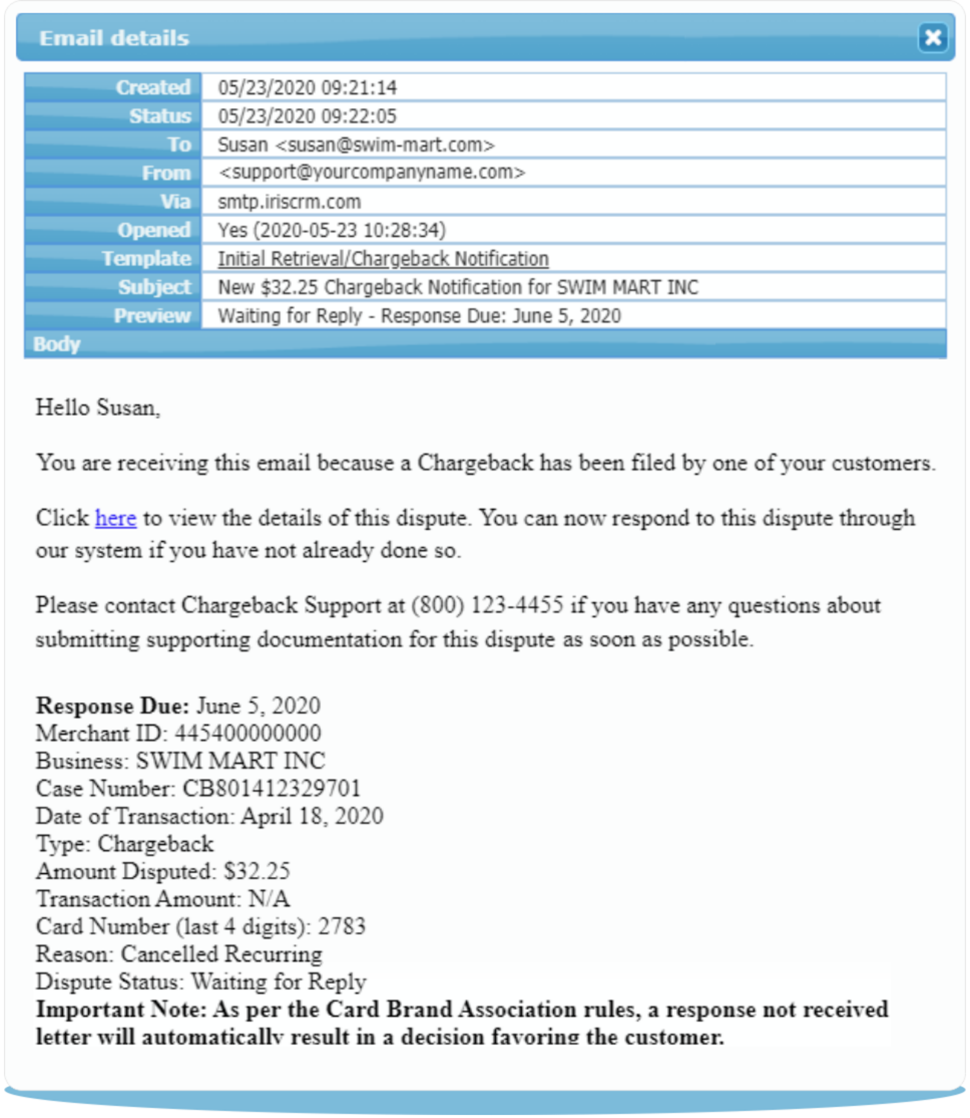
# New Feature: Dispute Responder

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.


| 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 | 445[illegible]0000 | Chargeback | First Data - Tier 1 |
| SWIM MART INC | 445[illegible]000 | Chargeback | TEST- First Data - Omaha |
| SWIM MART INC | [illegible]00 | Chargeback | TEST- First Data - Omaha |
| SWIM MART INC | 44[illegible]0000 | 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"

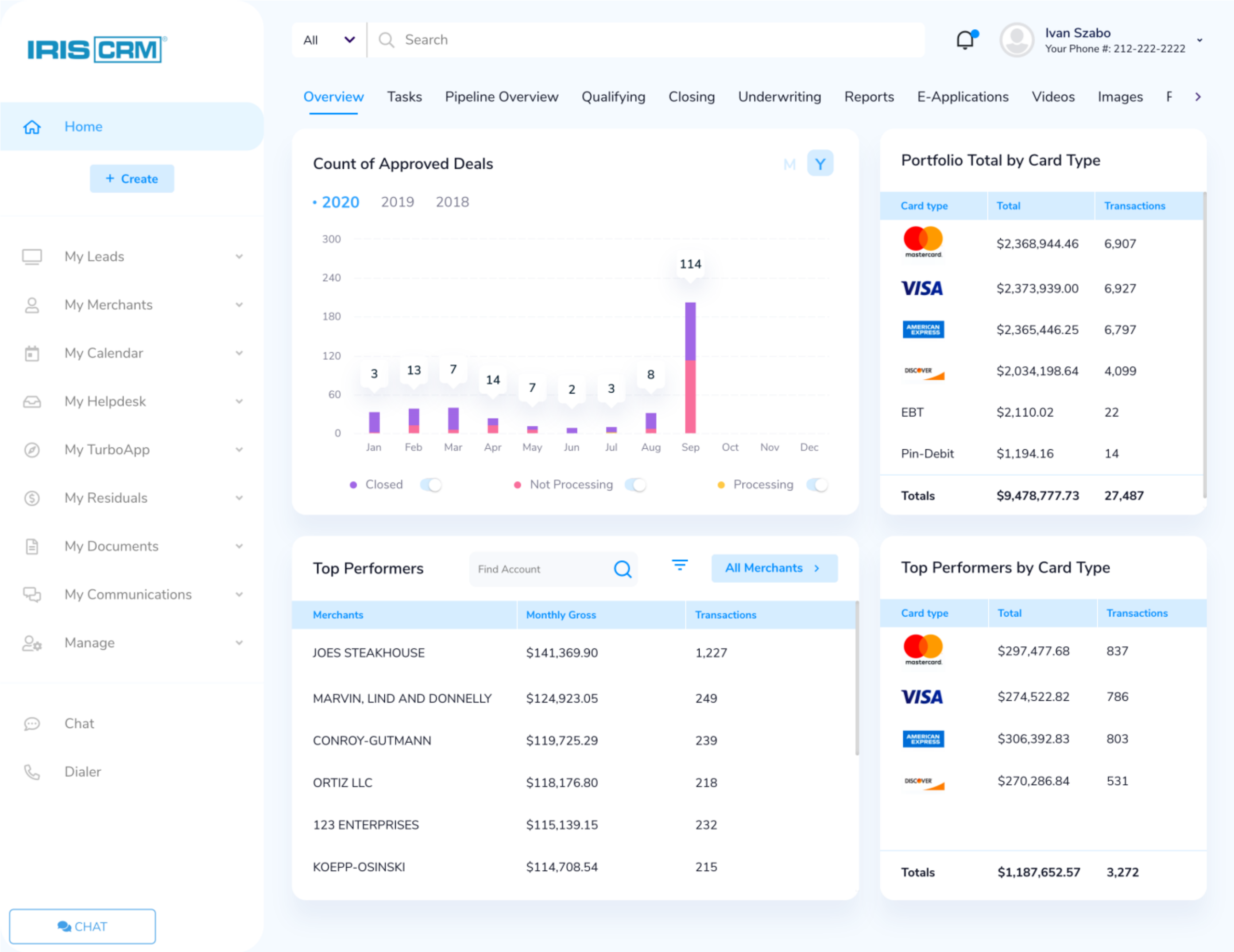
LIVE DEMO:

# Email Best Practices

IRIS CRM

# 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:

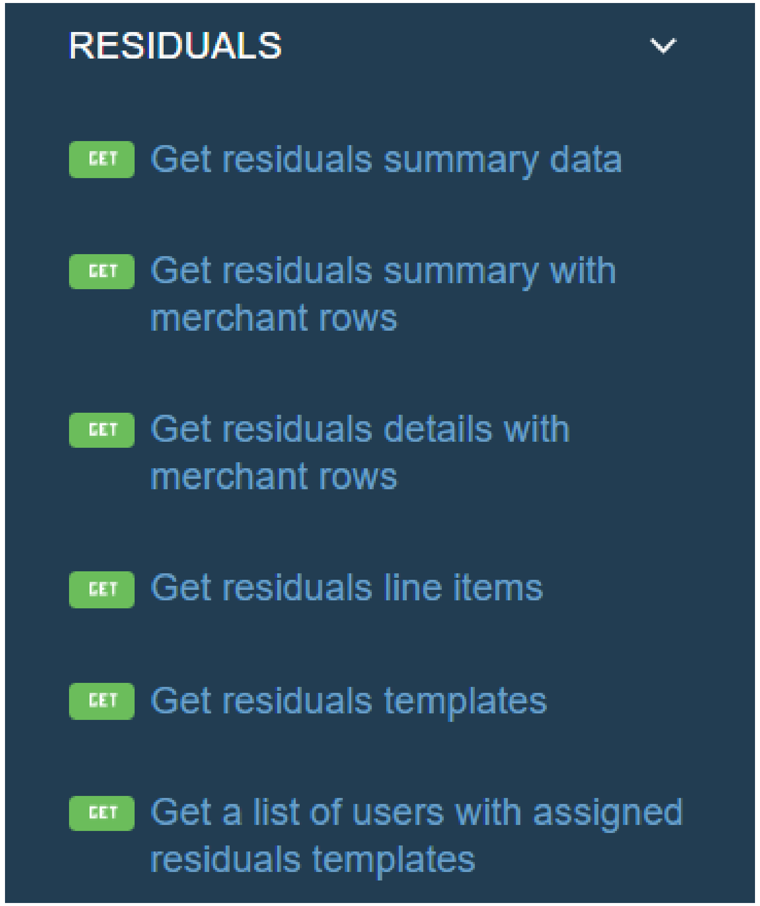
New UI Design

# 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.

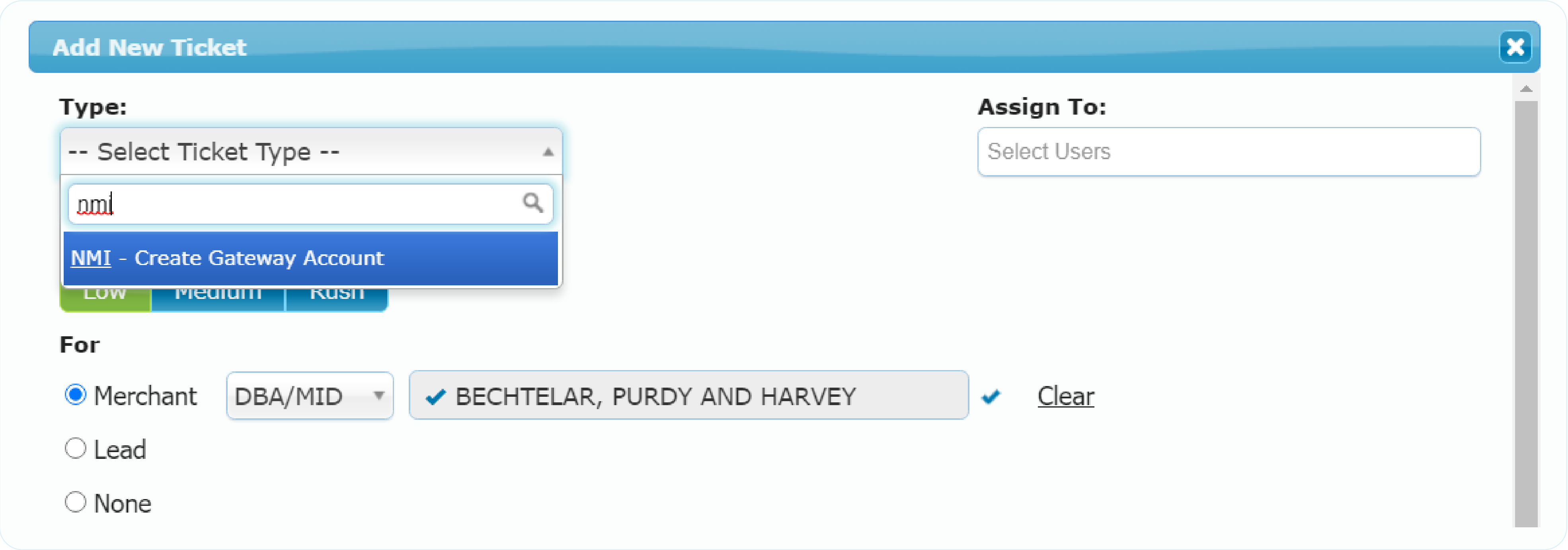
Receive instant notifications when new residual reports are published or when line items are added.



LIVE DEMO:

# Residuals API

# Coming Soon: NMI Gateway Boarding

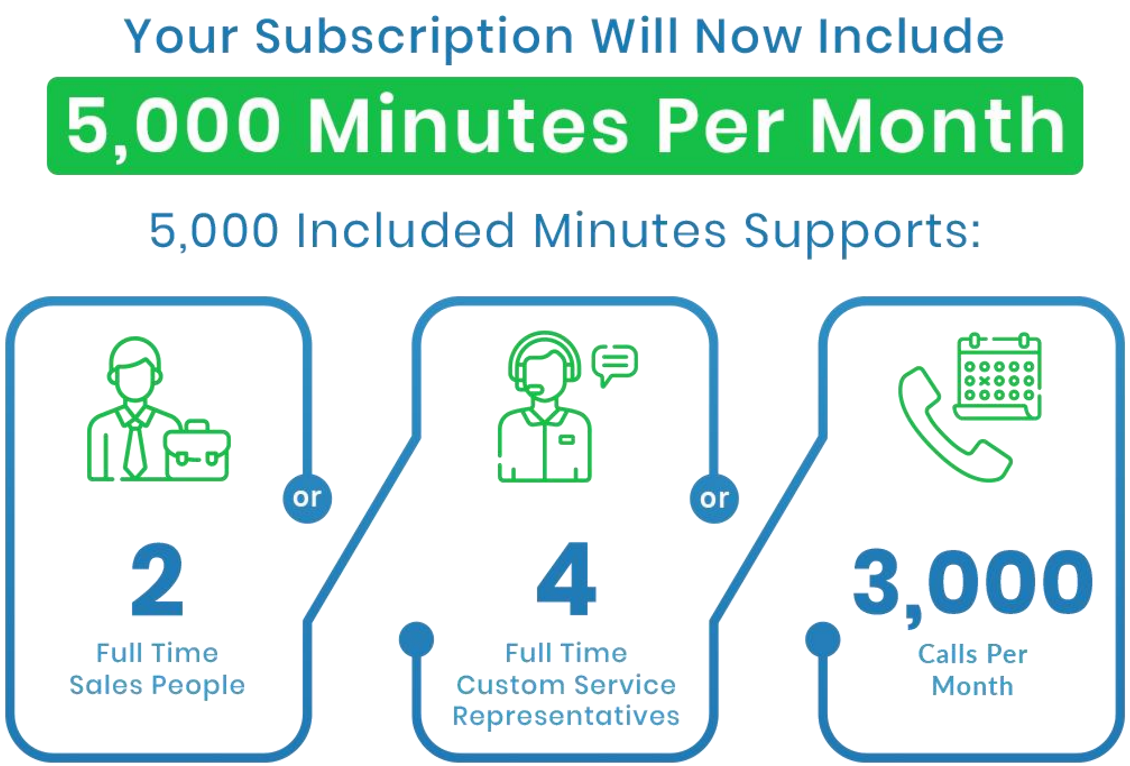



From the "Add New Ticket" dialogue box, choose:

"NMI – Create Gateway Account"

LIVE DEMO:

# NMI Gateway Boarding

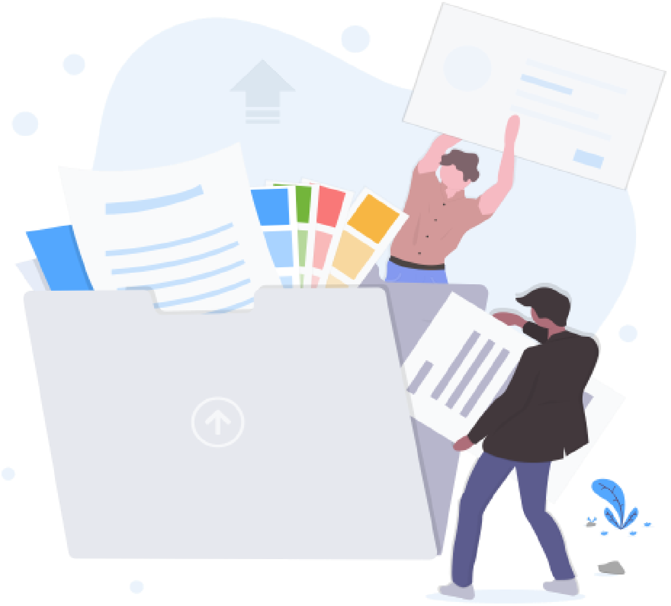



# Power your remote sales and support teams

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 → | IRIS CRM → | Receiver |

**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  Find Account  All Merchants

| Merchants | Monthly Gross | Transactions |
|---|---|---|
| JOE'S STEAKHOUSE | $164,337.50 | 1,400 |
| MARVIN, LIND AND DONNELLY | $145,834.88 | 296 |
| ORTIZ LLC | $135,350.98 | 259 |
| WAELCHI-HEGMANN | $133,361.86 | 252 |
| **Top Performers Total** | **$1,358,726.40** | **3,760** |
| **Portfolio Total** | **$10,874,738.19** | **31,304** |

Top Performers by Card Type

| Card type | Total | Transactions |
|---|---|---|
| mastercard | $350,572.05 | 985 |
| VISA | $326,763.29 | 933 |
| AMERICAN EXPRESS | $332,708.13 | 888 |
| DISCOVER | $304,137.43 | 600 |
| Totals | $1,358,726.40 | 3,760 |

## Create Account

Copy User Profile: John Smith

- 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