

# IRIS CRM<sup>®</sup>

Leading Payments Industry Platform  
Created To Grow Your ISO

Leads > Boarding > Merchants > Maintenance > Residuals

# 2021

**Top 22 Features  
of IRIS CRM**

**Sell Faster. Sell Smarter.**

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# Top 22 Features of IRIS CRM for 2021

## C O N T E N T S



- Direct Boarding To NMI Gateway Integration
- Fiserv Reporting for Payment Facilitators Integration
- Merchant Reporting Through SAM by Netevia for SignaPay Integration
- TSYS Retail ISO ELAPP Boarding Integration
- TSYS Wholesale ISO Equipment Management
- Priority Payments MX Connect Reporting Integration
- Aurora Payments Merchant Portfolio Reporting Integration
- Worldpay Vantiv IQ ISO Reporting Integration
- Merchant Data Sharing
- Merchant Services Helpdesk API
- Merchant Services Residuals API
- Copy User Profiles
- Dispute Responder
- Merchant Mass Actions
- Non-Integrated Processor Reporting
- E-Sign Status Update Automation
- IRIS CRM Mobile Application Enhancements
- Import Residuals Line Items by Spreadsheet
- Track Any Link From Email
- Upload Lead Files to TurboApp
- Google Maps Integration
- Set Helpdesk Ticket SLAs in Business Days

## Direct Boarding To NMI Gateway Integration

IRIS CRM's new [NMI boarding integration](#) allows **ISOs** to seamlessly onboard merchants using their own NMI Reseller API credentials. During the onboarding process, ISOs can set up pricing for the NMI gateway account as well as enable powerful value-added services to help merchants gain access to new features while helping ISOs grow.

Direct boarding to NMI's payment gateway is a new feature that is available to all IRIS CRM clients as part of their existing subscription, and it is simple to set up in just a few steps.



# Fiserv Reporting for Payment Facilitators Integration

Payment facilitators can now view Fiserv merchant account information, deposits, adjustments, retrievals, and chargebacks right from within IRIS CRM.

By incorporating Fiserv Payment Facilitator reporting into IRIS CRM's advanced merchant reporting tools, ISOs can get the full view of their overall portfolio's performance. Learn more about IRIS CRM's [Fiserv Reporting for Payment Facilitators Integration](#).

## NEW INTEGRATION

# Fiserv Reporting For Payment Facilitators

### Top Performers

Datasource: **Fiserv Payfac** Deposits From: 2/01/2021 To: 2/15/2021 Refresh

| Merchants                     | Monthly Gross         | Transactions  |
|-------------------------------|-----------------------|---------------|
| JOE'S STEAKHOUSE              | \$95,657.90           | 842           |
| ORTIZ LLC                     | \$90,970.17           | 168           |
| BOYER-BRAKUS                  | \$85,969.04           | 163           |
| CHAMPLIN, NOLAN AND VONRUEDEN | \$85,316.25           | 165           |
| CONROY-GUTMANN                | \$84,286.19           | 172           |
| TOM'S DINER                   | \$83,853.11           | 166           |
| MARVIN, LIND AND DONNELLY     | \$83,085.33           | 165           |
| KOCH-NIKOLAUS                 | \$82,059.98           | 168           |
| ZIEMANN INC                   | \$80,477.63           | 151           |
| KOEPP-OSINSKI                 | \$80,124.26           | 151           |
| <b>Top Performers Total</b>   | <b>\$851,799.86</b>   | <b>2,311</b>  |
| <b>Portfolio Total</b>        | <b>\$6,496,755.62</b> | <b>19,479</b> |

[View All >>](#)

Find Account  DBA/MID  Search

Closed 
  Not Processing 
  Processing

### Top Performers by Card Type

| Card Type     | Total               | Transactions |
|---------------|---------------------|--------------|
| MasterCard    | \$221,842.37        | 593          |
| VISA          | \$218,979.33        | 591          |
| Discover      | \$192,638.81        | 522          |
| AMEX          | \$188,998.35        | 378          |
| <b>Totals</b> | <b>\$822,458.86</b> | <b>2,084</b> |

### Portfolio Total by Card Type

| Card Type     | Total                 | Transactions  |
|---------------|-----------------------|---------------|
| MasterCard    | \$1,610,610.86        | 4,868         |
| VISA          | \$1,621,478.79        | 4,886         |
| Discover      | \$1,624,943.92        | 4,834         |
| AMEX          | \$1,384,953.59        | 2,792         |
| EBT           | \$1,471.11            | 15            |
| Pin-Debit     | \$376.55              | 7             |
| <b>Totals</b> | <b>\$6,243,834.82</b> | <b>17,402</b> |

### Approved Deals

| Month    | Processing | Not Processing | Closed | Total |
|----------|------------|----------------|--------|-------|
| Feb 2020 | 29         | 0              | 0      | 29    |
| Mar 2020 | 23         | 0              | 0      | 23    |
| Apr 2020 | 58         | 0              | 0      | 58    |
| May 2020 | 18         | 0              | 0      | 18    |
| Jun 2020 | 45         | 0              | 0      | 45    |
| Jul 2020 | 32         | 0              | 0      | 32    |
| Aug 2020 | 45         | 0              | 0      | 45    |
| Sep 2020 | 6          | 0              | 0      | 6     |
| Oct 2020 | 11         | 0              | 0      | 11    |
| Nov 2020 | 11         | 0              | 0      | 11    |
| Dec 2020 | 12         | 0              | 0      | 12    |
| Jan 2021 | 47         | 0              | 0      | 47    |
| Feb 2021 | 32         | 0              | 0      | 32    |

For Instructions About These Features Visit <https://help.iriscrm.com>

## Merchant Reporting Through SAM by Netevia for SignaPay Integration

IRIS CRM's Merchant Reporting Through SAM by Netevia for SignaPay Integration brings Netevia SignaPay reporting into IRIS CRM's advanced merchant reporting suite.

ISOs can now analyze their Netevia SignaPay reporting alongside the portfolio-wide metrics in a single place. Learn more about IRIS CRM's [Merchant Reporting Through SAM by Netevia for SignaPay Integration](#).



## TSYS Retail ISO ELAPP Boarding Integration

IRIS CRM enables automatic boarding of TSYS ELAPP merchants and other IRIS-compatible processing networks through the TurboApp boarding module.

ISOs also have the ability to view residuals, batches, deposits, transactions, statements, disputes, and other account information. Learn more about the [TSYS Retail ISO ELAPP Boarding Integration](#).



## TSYS Wholesale ISO Equipment Management

TSYS Wholesale ISOs can now view up-to-date information on merchants' TSYS terminals and software, as well as add new equipment as required. You can find the list of the existing TSYS Equipment associated with a merchant on the Merchant Details page, under the Account Status tab (in the Equipment accordion).

Check out the IRIS CRM blog for more information about how to set up and use [TSYS Wholesale ISO Equipment Management](#).

We've also enhanced TSYS Equipment Management to give ISOs the ability to update and copy TSYS equipment. For merchants with multiple locations and a large number of terminals, managing multiple V-numbers has traditionally been an enormous headache, particularly when configuration changes have to be made for each individual terminal – a repetitive and error-prone process.

With the new TSYS Equipment Management enhancements– designed specifically to make V-number management easier for TSYS Wholesale ISOs – those headaches are now a thing of the past. Learn more about [Updating and Copying TSYS Equipment for Wholesale ISOs](#).

 The screenshot shows the Merchant Details page for SWIM MART INC. The 'Account Status' tab is selected, and the 'Equipment (4)' accordion is expanded. Below the accordion is a table listing existing processing equipment and software.
 

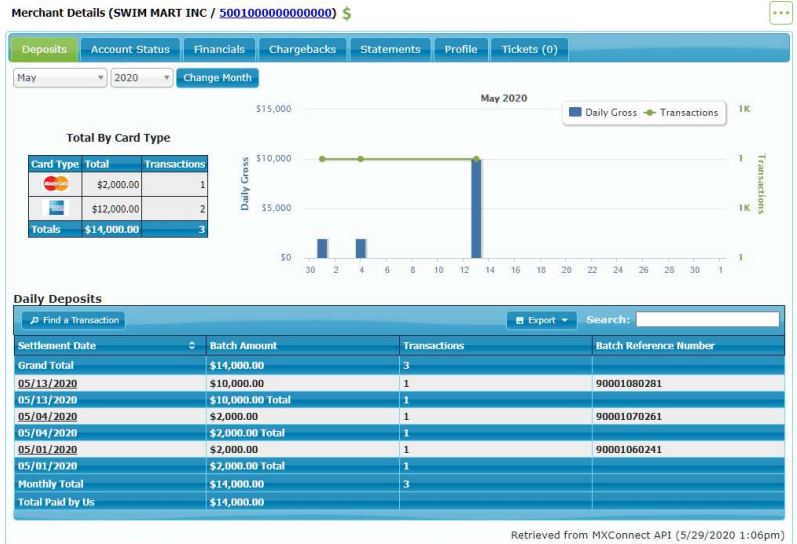
| V Number | File Update Date   | BIN    | MCC  | Agent  | Chain  | Store # | Terminal # | Hardware / Software | Actions                         |
|----------|--------------------|--------|------|--------|--------|---------|------------|---------------------|---------------------------------|
| V505183  | 07/27/2020 6:10 AM | 402820 | 5812 | 000000 | 654321 | 1234    | 5183       | DEJAVO              | [Refresh] [Add] [Edit] [Delete] |
| V505271  | 07/27/2020 6:10 AM | 402820 | 5812 | 000000 | 654321 | 1234    | 5271       | DEJAVO              | [Refresh] [Add] [Edit] [Delete] |
| V5063537 | 07/27/2020 6:10 AM | 402820 | 5812 | 000000 | 654321 | 1234    | 3537       | DEJAVO              | [Refresh] [Add] [Edit] [Delete] |
| V5063547 | 07/27/2020 6:10 AM | 402820 | 5812 | 000000 | 654321 | 1234    | 3547       | DEJAVO              | [Refresh] [Add] [Edit] [Delete] |



## Priority Payments MX Connect Reporting Integration

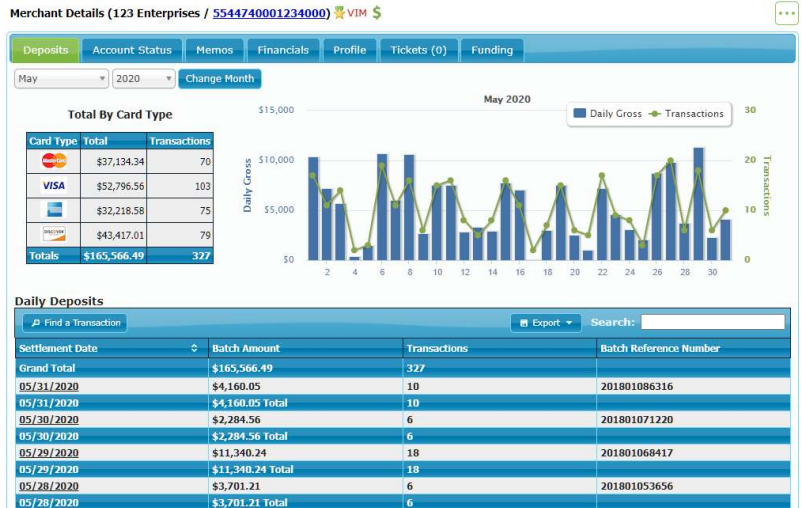
IRIS CRM released a new reporting integration with Priority Payments MX Connect.

ISOs can now view MX Connect merchant information, chargebacks, and daily batches with transactions right inside their Merchant Services CRM. The integration is easy to set up in just a few easy steps, which you can read about in our [Priority Payments MX Connect Reporting integration](#) article.



## Aurora Payments Merchant Portfolio Reporting Integration

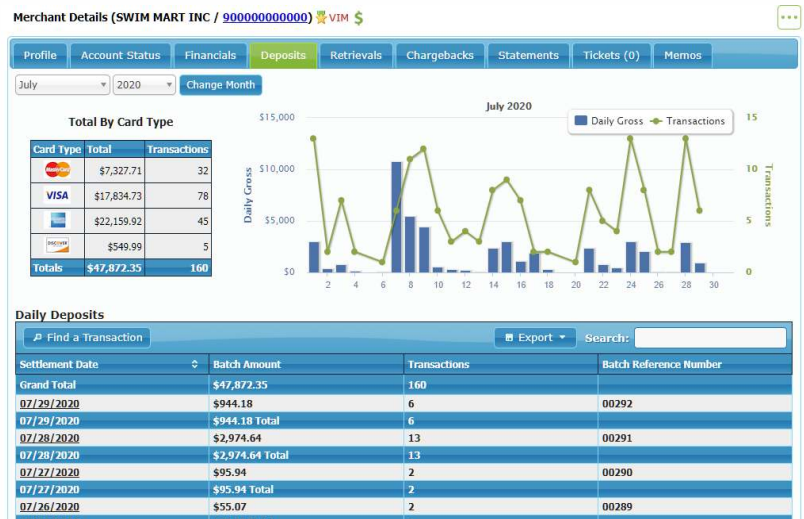
With IRIS CRM's Aurora Payments integration, ISOs can now add a new Aurora Payments data source in the CRM and use it for retrieving transaction reporting data for accounts that are processing through the Fiserv (First Data) and TSYS networks. Learn how to set up and start using [IRIS CRM's Aurora integration](#) today!



## Worldpay Vantiv IQ ISO Reporting Integration

ISOs can now enable the Vantiv IQ Portal integration to automatically retrieve Worldpay merchants' account information, retrievals, chargebacks, and statements on a daily basis.

In addition to the Vantiv IQ Portal data source, your CRM also retrieves the merchants' deposits automatically from the eMAF feeds. Check out the [Worldpay Vantiv IQ ISO Reporting Integration](#) announcement for more information on how to set up and use the Vantiv IQ integration.



## Merchant Data Sharing

ISOs with merchants distributed across multiple CRM clients of IRIS CRM have long needed a way to easily share their merchant data between sites.

The Merchant Data Sharing update addresses the need for sharing merchant data by providing an easy way for clients to set up data-sharing connections between their CRM sites.

ISOs can now instruct IRIS CRM to quickly and securely transfer selected merchant data from one CRM site to another, based on easily configurable data-sharing rules. Learn more about [Merchant Data Sharing](#).

Merchant Data Sharing Management Page

[Back To Administration](#)

Use Merchant Data Sharing to add merchants and send their data (account info, batches & transactions, etc.) between IRIS CRM sites. Both sites must set up the relationship and the sender sets the parameters for which merchants to include.

**Receiver Connections**

Sites that will receive merchant data from your site. [+ Add New Receiver Connection](#)

Show 10 entries  Show Deleted

| Portfolio Key              | Portfolio Name | Receiver | Status |
|----------------------------|----------------|----------|--------|
| No data available in table |                |          |        |

Showing 0 to 0 of 0 entries [First](#) [Previous](#) [Next](#) [Last](#)

**Sender Connections**

Sites that will send merchant data to your site. [+ Add New Sender Connection](#)

Show 10 entries  Show Deleted

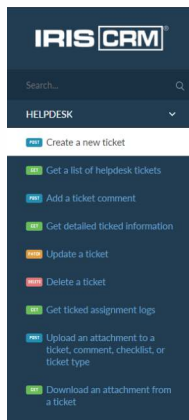
| Portfolio Key              | Portfolio Name | Sender | Status |
|----------------------------|----------------|--------|--------|
| No data available in table |                |        |        |

Showing 0 to 0 of 0 entries [First](#) [Previous](#) [Next](#) [Last](#)



## Merchant Services Helpdesk API

The Helpdesk API now enables you to manage and update your IRIS CRM Helpdesk from an existing ticketing system. No need to work with two separate systems for managing tickets – we make it easy to integrate with existing processes thanks to the IRIS CRM's [Merchant Services Helpdesk API](#).



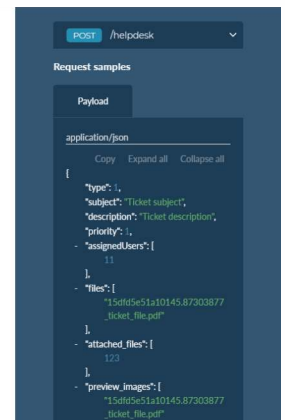
### Create a new ticket

Create a new ticket

AUTHORIZATIONS: Token

REQUEST BODY SCHEMA: application/json

|                    |                                             |
|--------------------|---------------------------------------------|
| type               | integer                                     |
| Type id            |                                             |
| subject            | string                                      |
| Ticket subject     |                                             |
| description        | string                                      |
| Ticket description |                                             |
| priority           | integer                                     |
| Enum: 0 - 1 - 2    | Priority (0 - Normal, 1 - Medium, 2 - Rush) |
| assignedUsers      | Array of integer                            |
| files              | Array of string                             |
| attached_files     | Array of integer                            |



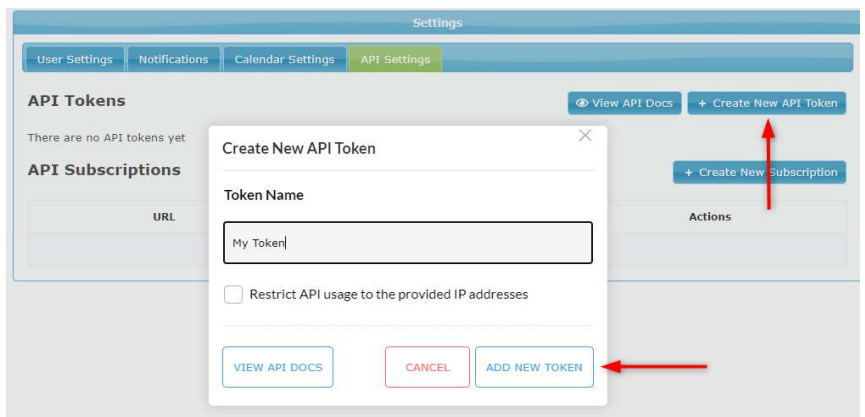
Access the API documentation hosted in your site by going to <https://yoursitedomain.iriscrm.com/api>

Additionally, when merchants create tickets in the IRIS CRM Helpdesk it is now also possible to send the information on the ticket to an external system. The Helpdesk API makes it easier than ever to keep track of and manage tickets.

## Merchant Services Residuals API

The [Merchant Services Residuals API](#) is the latest of the Open API extensions added over the last 12 months, which also include the Lead, Merchant, and Helpdesk APIs.

Access the API documentation hosted in your site by going to <https://yoursitedomain.iriscrm.com/api>



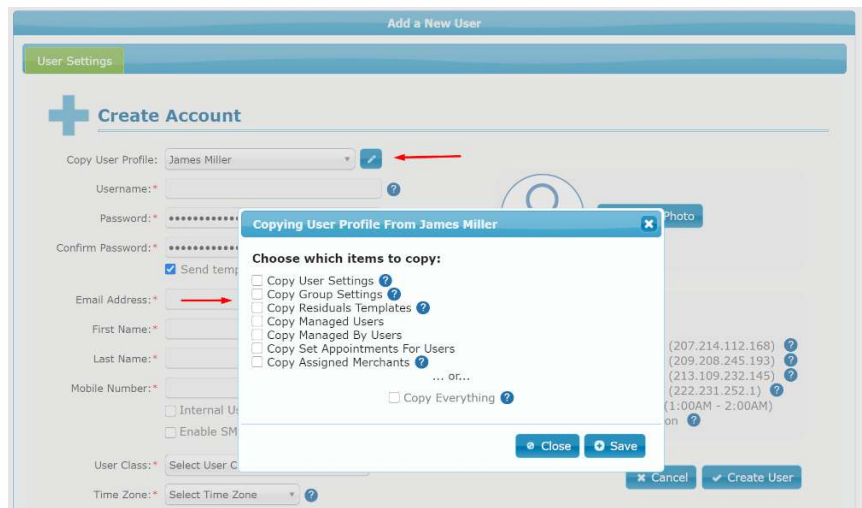
IRIS CRM Residuals API opens the door to endless possibilities to integrate your residual reports data with other systems. For example, you may want to download specific fields from your monthly residuals reports into an external data warehouse, accounting system, or business intelligence tool. IRIS CRM gives your developers access and flexibility to calculate residuals income like never before.

## Copy User Profiles

ISOs that normally manage a large number of users and user groups frequently find that adding a new user can turn into a labor-intensive task.

To help streamline the process and reduce the amount of effort needed to add a new user, we have added the ability to Copy User Profiles in your favorite Merchant Services CRM. You can now simply copy the settings from an existing user profile to the new user being added, and create your new user in seconds.

Check out the [Copy User Profiles](#) article to learn more about how to set up and use the Copy User Profiles feature.



## Dispute Responder

The Dispute Responder ensures that your merchants will always be alerted the instant a new dispute is entered with Fiserv. Never again will a merchant lose a case

because they failed to receive the notification, or received it so late there wasn't time to put together a compelling response.

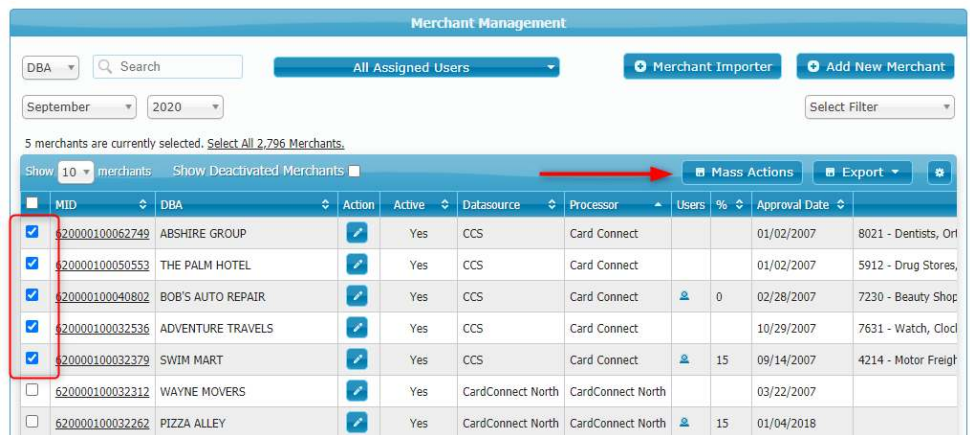
Dispute Responder also makes filing response significantly faster and easier, providing both the ISO and the merchant with all of the information necessary to compile evidence and begin a response on day zero, from a single dashboard, in a matter of a few clicks. Learn more about [IRIS CRM's Dispute Responder](#).

| Response Due | Chargeback Date | Transaction Date | Original Amount | Dispute Amount | Cardholder Account | Reason                                         | Case Number  | Disposition | Action              | Status     |         |
|--------------|-----------------|------------------|-----------------|----------------|--------------------|------------------------------------------------|--------------|-------------|---------------------|------------|---------|
| 04/06/2021   | 02/15/2021      | 02/15/2021       | \$37.04         | \$37.04        | 5555****9146       | INCORRECT TRANSACTION AMOUNT OR ACCOUNT NUMBER | 427332577044 | OUTSTANDING | WAITING FOR REPLY   | 09/21/2020 | Reply   |
| 04/05/2021   | 02/14/2021      | 02/14/2021       | \$11.11         | \$11.11        | 5555****6817       | CARDHOLDER DISPUTE                             | 926005411256 | OUTSTANDING | SUBMISSION APPROVED | 09/20/2020 | Details |
| 04/03/2021   | 02/13/2021      | 02/13/2021       | \$1.47          | \$1.47         | 5555****0685       | CREDIT NOT PROCESSED                           | 928902821171 | OUTSTANDING | SUBMISSION DENIED   | 09/19/2020 | Reply   |

## Merchant Mass Actions

Your favorite Merchant Services CRM comes with the ability to perform [Merchant Mass Actions](#).

With Merchant Mass Actions, you can now update groups, processors, data sources, assigned users, as well as perform many other actions on selected merchants.



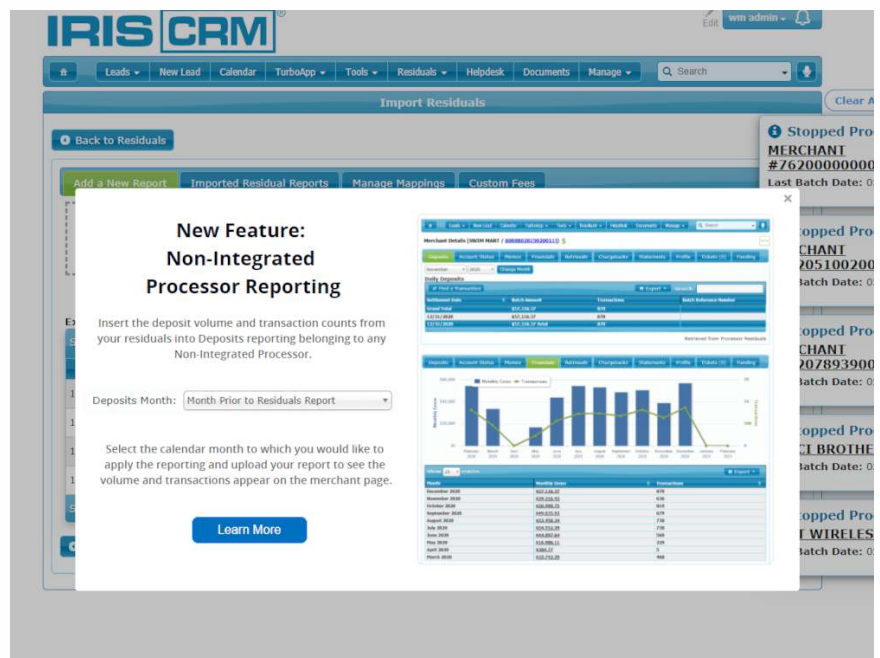
The screenshot shows the 'Merchant Management' interface. At the top, there are filters for 'DBA', a search bar, and a dropdown for 'All Assigned Users'. Below that, there are date filters for 'September' and '2020', and a 'Select Filter' dropdown. A message states '5 merchants are currently selected. Select All 2,796 Merchants.' Below this, there are buttons for 'Show 10 merchants' and 'Show Deactivated Merchants'. A red arrow points to the 'Mass Actions' button. Below the buttons is a table of merchants with columns for 'MID', 'DBA', 'Action', 'Active', 'Datasource', 'Processor', 'Users', '%', and 'Approval Date'. Five rows are selected with checkboxes.

| MID                                 | DBA             | Action            | Active                              | Datasource | Processor         | Users             | %  | Approval Date |
|-------------------------------------|-----------------|-------------------|-------------------------------------|------------|-------------------|-------------------|----|---------------|
| <input checked="" type="checkbox"/> | 620000100062749 | ABSHIRE GROUP     | <input checked="" type="checkbox"/> | Yes        | CCS               | Card Connect      |    | 01/02/2007    |
| <input checked="" type="checkbox"/> | 620000100050553 | THE PALM HOTEL    | <input checked="" type="checkbox"/> | Yes        | CCS               | Card Connect      |    | 01/02/2007    |
| <input checked="" type="checkbox"/> | 620000100040802 | BOB'S AUTO REPAIR | <input checked="" type="checkbox"/> | Yes        | CCS               | Card Connect      | 0  | 02/28/2007    |
| <input checked="" type="checkbox"/> | 620000100032536 | ADVENTURE TRAVELS | <input checked="" type="checkbox"/> | Yes        | CCS               | Card Connect      |    | 10/29/2007    |
| <input checked="" type="checkbox"/> | 620000100032379 | SWIM MART         | <input checked="" type="checkbox"/> | Yes        | CCS               | Card Connect      | 15 | 09/14/2007    |
| <input type="checkbox"/>            | 620000100032312 | WAYNE MOVERS      | <input checked="" type="checkbox"/> | Yes        | CardConnect North | CardConnect North |    | 03/22/2007    |
| <input type="checkbox"/>            | 620000100032262 | PIZZA ALLEY       | <input checked="" type="checkbox"/> | Yes        | CardConnect North | CardConnect North | 15 | 01/04/2018    |

## Non-Integrated Processor Reporting

Every ISO owner needs to be able to quickly and accurately see how their business is performing. IRIS CRM understands how important it is to have access to these key analytics, and IRIS has an advanced reporting suite to provide key merchant volume and transaction data for all clients.

In the past, data for non-integrated processors was limited and difficult to analyze in IRIS CRM. Now, ISOs have a centralized reporting center that includes key merchant transaction and volume data for merchants using both integrated or non-integrated processors. Learn more about [Non-Integrated Processor Reporting](#).



## E-Sign Status Update Automation

Manually updating lead data in your CRM takes up your administrative team's time and attention. IRIS CRM's E-Sign Status Update Automation feature was developed to streamline the experience, reducing the amount of time and effort it takes to maintain accurate, up-to-date lead data in IRIS CRM.

Leads can now be automatically updated to a specified Signed Lead Status after a merchant signs and submits an agreement. Now, ISOs are no longer required to perform time-intensive manual data entry to ensure that lead data is accurate and up-to-date. Learn more about [IRIS CRM E-Sign Status Update Automation](#).

### Current Lead Status



Category: **Urgent**

Status: Attention BDC

✓ Save

Created: 12/09/2020

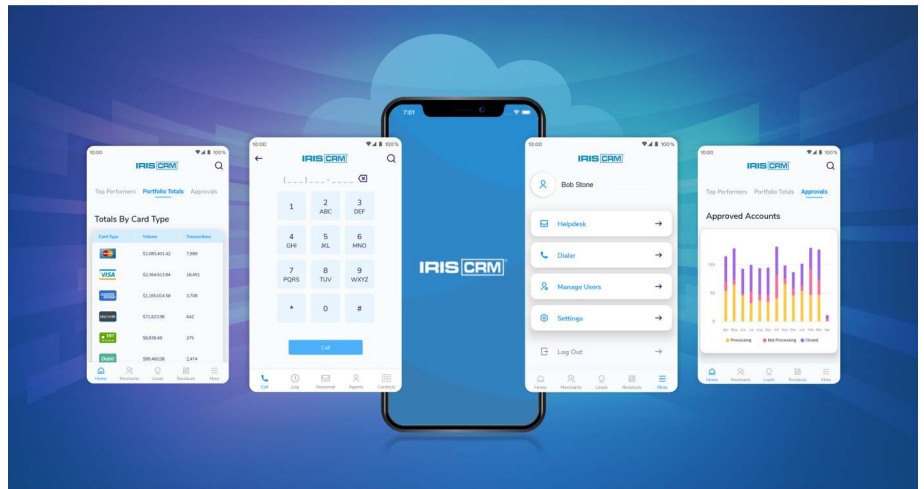
In Current Status: less than a minute

Last Saved:  4 days ago

## IRIS CRM Mobile Application Enhancements

IRIS CRM's recently updated mobile app is a powerful on-the-go solution for ISO administrators, sales agents, and merchants.

We have now developed 3 powerful new features to make IRIS CRM's app even more effective, including mobile app notifications, e-signature on mobile, and more! Learn more about the [enhancements to the IRIS CRM mobile app](#).

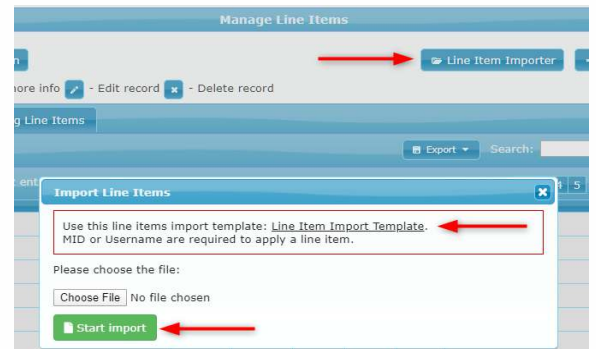




## Import Residuals Line Items by Spreadsheet

In the past, adjustments to residual reports could only be made one line at a time. With the Import Residuals Line Items by Spreadsheet feature in IRIS CRM, ISOs can make adjustments by adding multiple line items at once.

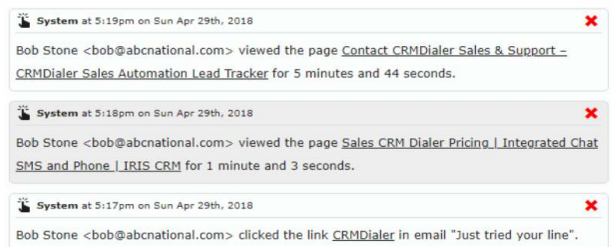
ISOs upload a simple Excel template and they can make far more efficient adjustments, like adding income or expense line items to users or merchants. You can directly download the [Line Item Import Template now](#), and if you'd like to learn more check out the [Import Residuals Line Items by Spreadsheet](#) article.



## Track Any Link From Email

IRIS CRM Visitor Tracking empowers ISOs to gain detailed insight into prospects' business needs by providing real-time updates as prospects click through their websites — and now their marketing emails as well!

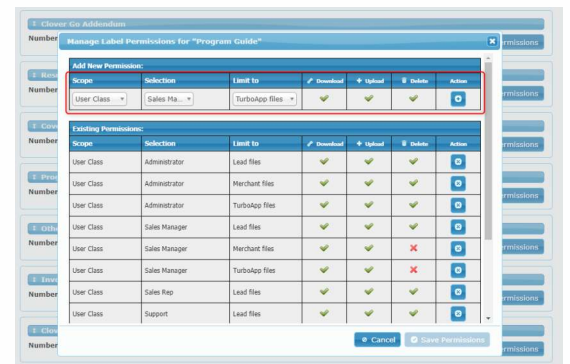
Once a site/sites are set up with tracking, ISOs can enable email visitor tracking by clicking the “Track Visitors” checkbox when sending out an email. Learn more about [IRIS CRM's Visitor Tracking feature](#).



## Upload Lead Files to TurboApp

IRIS CRM's TurboApp received a significant boost in value with the Upload Lead Files to TurboApp feature, which allows ISOs to upload lead files in new applications. Now it is easier than ever to add supporting files to TurboApp applications, which can accelerate the merchant onboarding process to leading processors including TSYS, Worldpay, First Data Omaha, First Data North, Priority Payment Systems, and [Paysafe](#).

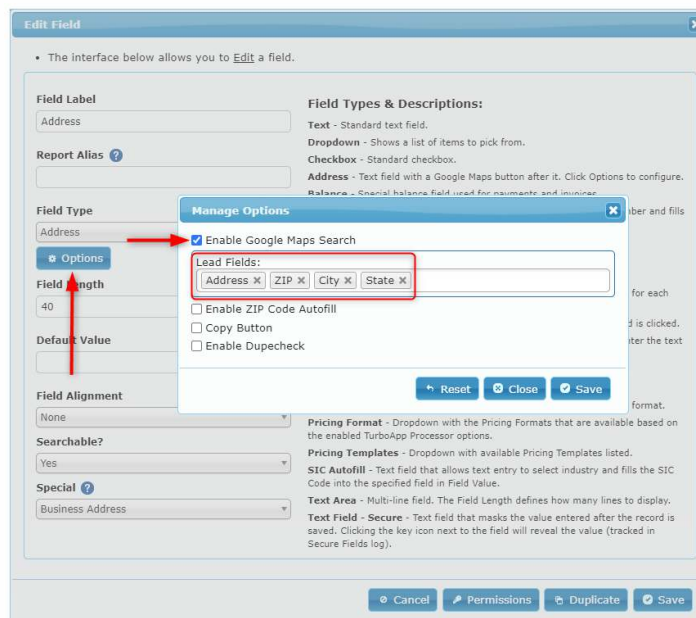
Learn how you can begin using the [Upload Lead Files to TurboApp](#) enhancement to onboard more merchants in less time.



## Google Maps Integration

IRIS CRM released a Google Maps integration, enabling users to automatically fill in address fields by selecting matching search results through Google Maps!

Entering a client's information is easier than ever thanks to the Google Maps integration and, together with IRIS CRM's leading suite of ISO productivity tools, ISOs can now be more efficient and accelerate growth. Learn more about IRIS CRM's [Google Maps integration](#).



## Set Helpdesk Ticket SLAs in Business Days

IRIS CRM improved the Helpdesk with the Set Helpdesk Ticket SLAs in Business Days enhancement. Now, ISOs have more flexibility in their Helpdesk and can manage customer support far more efficiently.

| Type                         | Total Tickets | Days to Resolve | Business Days Only | Status | Actions                 |
|------------------------------|---------------|-----------------|--------------------|--------|-------------------------|
| General DDA Change           | 15            | 3               | ✓                  | ✓      | Delete Edit Auto Assign |
| Gateway Setup                | 1             | 0               | ✓                  | ✓      | Delete Edit Auto Assign |
| Flight Risk                  | 1             | 0               | ✓                  | ✓      | Delete Edit Auto Assign |
| TSYS - Update Pricing (Auto) | 1             | 0               | ✓                  | ✓      | Delete Edit Auto Assign |

IRIS CRM Helpdesk Ticket Types are custom ticket types that ISOs can organize with various workflows to provide solutions for specific issues their teams are facing.

SLAs for Helpdesk Tickets can now be set to business days to ensure that everyone is aware of the timeframe and on the same page. Learn more about the value of [setting Helpdesk ticket SLAs in business days](#).



## INTEGRATIONS

