

Agent Residuals in Iris

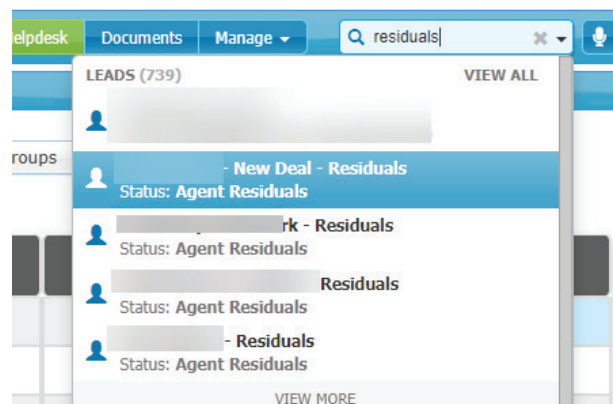
Section 1 - How it works

1. Every rep code in Iris will get an Iris user and a residual record.
2. Residual Records will be under the Group – Agent ISO
3. The Status of these Records will be either “Agent Residuals” or “Agent Residuals 1”
 - a. Every month, when the new residuals are ready, the status of the record will change from/ to either “Agent Residuals” or “Agent Residuals 1”.
 - b. The Agent will get a notification of the status change, which is the indicator that Residuals are ready to grab

Status Breakdown:

1. **Application Submitted Agent/ISO** - This application has been received.
2. **Under Review** - An underwriter has received your merchant application and is working on your account.
3. **Pended Additional Information** - The account is pended waiting on additional information. The Underwriter will reach out to you directly with specifics.
4. **Pended No Response** - Underwriter has reached out for additional documentation and has not received anything back.
5. **Declined** - This account was declined. The Underwriter will send you additional details directly.
6. **Send to Processor** - The account is approved by Underwriting and will be boarded to the processor.
7. **Merchant is Live (Closed/Won) or Merchant is Live (Processor Import)** - The account has been boarded to the processor. A deployment representative will reach out to you directly with tech setup information.
8. **Agent Residuals, or Agent Residuals 1** - Your residuals have been added to the CRM and are ready for you to download.

4. All Agents with subagents that are not paid by AFS will get the residuals for their subagents on their main residual record.
 - a. This follows the same logic as the email addresses Accounting used to email to
5. Agents can search the word “Residuals” to find their Residual record in their portfolio



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Section 2 - Viewing and Downloading Residual Reports

1. Search the word residuals
2. Click on your residual record to go to that lead
3. At the bottom of the screen go to attachments to view/download your residual report

The screenshot displays the Iris system interface for a Residuals record. The top navigation bar includes 'Leads', 'New Lead', 'Calendar', 'TurboApp', 'Tools', 'Residuals', 'Helpdesk', 'Documents', and 'Manage'. The main content area is divided into several sections:

- Contract Status Report**: Includes tabs for Internal & UW, Account Info, Acct Info Cont'd, TSYS/Avidia Pricing, First Data Info, First Data Pricing, and New FD Pricing Tab.
- FD Risk Parameters**: Includes tabs for Recruiting Additional User (0), Recruiting Profile, and Owner Info.
- Tech Equip/software Info**: Includes tabs for ApexNow Tech Setup, FD - Clover, and E-Sign.
- Signapay VAR**: Includes Signapay Prod Price.
- Email New Document with E-Signature**: Includes a 'Select Document' dropdown and a 'Preview Email' button.
- Submitted By** and **Status** fields.
- Attachments (5)**: A list of files with columns for date, filename, size, and actions (Email, Download). Two files are visible: 'Jun 2022_RepCode-5...20_Res...xls' (11.63 KB) and 'Jun 2022_RepCode-5...11_Res...xls' (86.98 KB).
- Current Lead Status**: Category: Residuals, Status: Agent Residuals. Includes a 'Save' button and creation details.
- Assigned Users**: Search User field and '+ Assign' button.
- Actions**: Delete, Duplicate, Link, Board Merchant, and Align Fields buttons.
- Associated Merchant & Lead Records**: Leads section.
- Proposal**: '+ Create New Proposal' button.
- Lead Group**: Agent ISO.
- Lead Campaign**: None.
- Lead Source**: Recruiter.

Blue callout boxes provide instructions:

- 'Category will be residuals' points to the 'Current Lead Status' section.
- 'Agent/admin assts will be assigned.' points to the 'Assigned Users' section.
- 'Click on attachments to view the uploaded documents' points to the 'Attachments' tab.
- 'Residual Attachments will include the rep code/month of residual report.' points to the file list.
- 'Check the box and click download files to download. Or click on the attachment to open it.' points to the checkboxes and file names in the attachment list.
- 'Linked to Recruiting record. (agent cannot access this record)' points to the 'Associated Merchant & Lead Records' section.
- 'Group is Agent ISO' points to the 'Lead Group' dropdown.