Agent Residuals in Iris

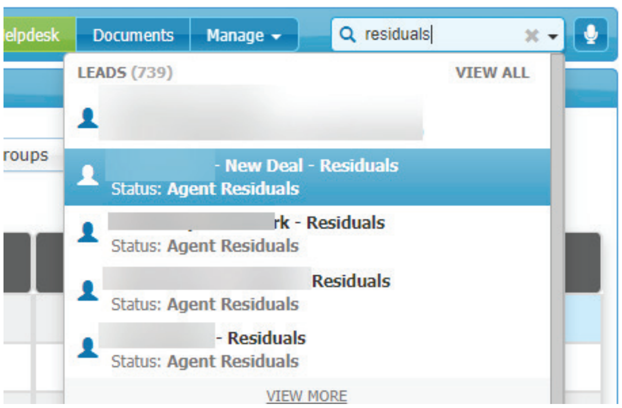
Section 1 - How it works

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