

Powerful IRIS CRM & Agreement Express Integration for Fully Automated Underwriting

Sync Agreement Express with IRIS CRM for a true end-to-end experience for growing ISOs and other payments companies.

VANCOUVER, CANADA, May 16, 2022 /EINPresswire.com/ -- Agreement Express and IRIS CRM have teamed up to build a true end-to-end experience for growing ISOs and other payments companies. By combining the sales and back office processes, this powerful integration between a CRM and underwriting tools is fundamental to [rapid growth of a merchant portfolio](#).

With this new product development, IRIS CRM automatically syncs data to [Agreement Express's](#) underwriting tool and runs all necessary fraud, AML, and KYC checks. By using data already gathered in the CRM, users no longer have to duplicate efforts by rekeying data. Real time insights are sent from Agreement Express to help your sales team prioritize their outreach and save time.

Agreement Express and IRIS CRM together [maximize underwriter efficiency](#), seamlessly sharing data back and forth so key data, including KYC, AML, and fraud checks, are always accurate and up to date.

The integration between IRIS CRM and Agreement Express works in 4 simple steps:

1. An IRIS CRM status update submits a merchant to Agreement Express for review
2. Agreement Express pulls third party data to generate a score and report for the merchant.
3. An underwriting decision is reached and sent to IRIS CRM and the merchant
4. Data is made available in IRIS CRM for analysis and further action



Once underwriting is completed, merchants can be easily boarded to major processors including Fiserv, Global Payments, Worldpay, Paysafe, and more!

The Agreement Express and IRIS CRM teams can help you enable the integration so your organization can begin using this seamless process to facilitate real-time visibility and decision making about choosing and monitoring the right merchants.

This integration is available now. To learn more, visit: <https://agreementexpress.com/agreement-express-iris-crm-integration/>

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About Agreement Express:

Agreement Express is onboarding automation software for the financial services industry. The platform fully digitizes and automates the customer onboarding experience with responsive forms, custom workflows, and automated risk assessment. Agreement Express enables global Fortune 500 companies to scale their operations and grow their businesses worldwide.

About IRIS CRM:

IRIS CRM is a leading merchant services CRM designed specifically for the unique needs and challenges of independent sales organizations (ISOs), payment facilitators, and their merchants. IRIS CRM provides reporting on more than 340,000 active merchants each month and offers ISOs the ability to handle all of their merchant acquisition, onboarding, support, and residual income calculations through a single platform. By automating and streamlining the most repetitive and time-consuming tasks performed by ISOs, IRIS CRM enables agents, support staff, and management to spend less time on manual processes and more time on generating new revenue.

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