IRIS Transaction Guide

A step-by-step guide to viewing your batches and transactions

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Overview

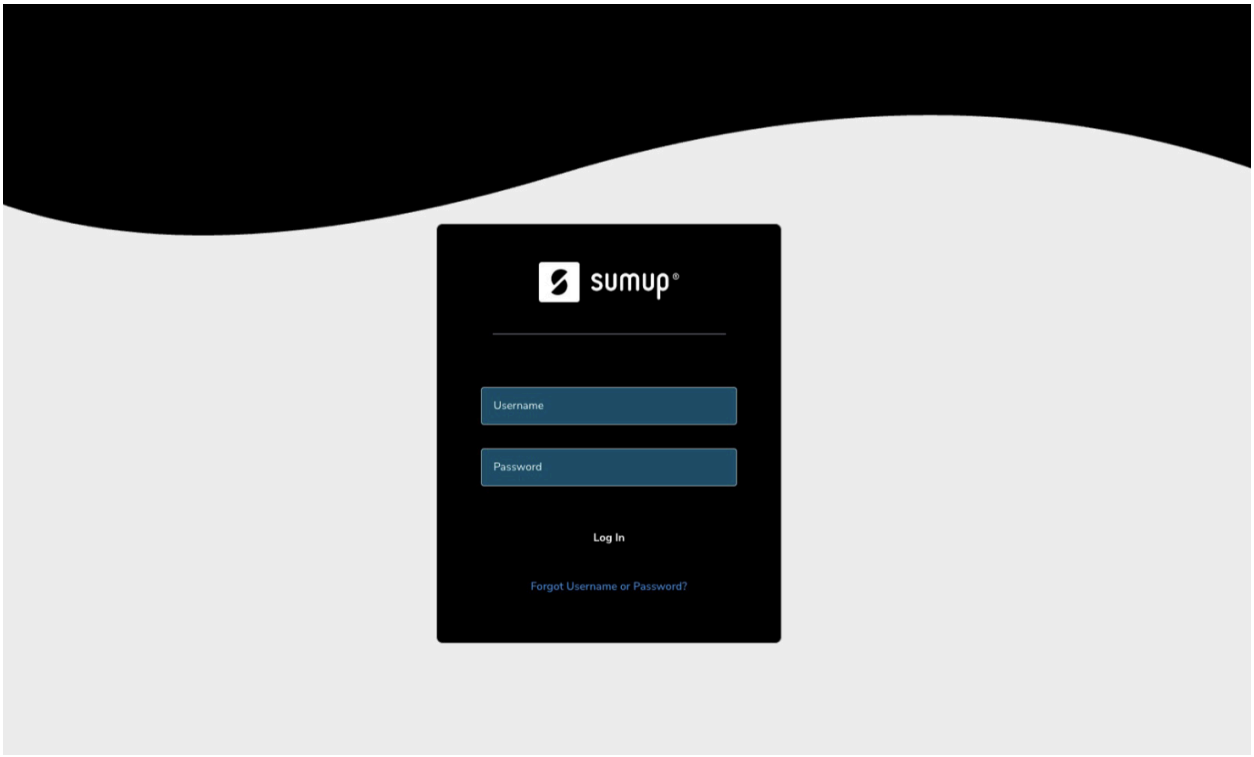
This guide will walk you through how to locate your batch and transaction data using the IRIS dashboard. There are two main tasks covered:

1. Finding your daily batches for a specific date range
2. Diving into a specific transaction for detailed information

Part 1: Finding Your Daily Batches

Follow these steps to view your batch deposits for a given time period.

1. Log in to your IRIS dashboard at your usual login portal.

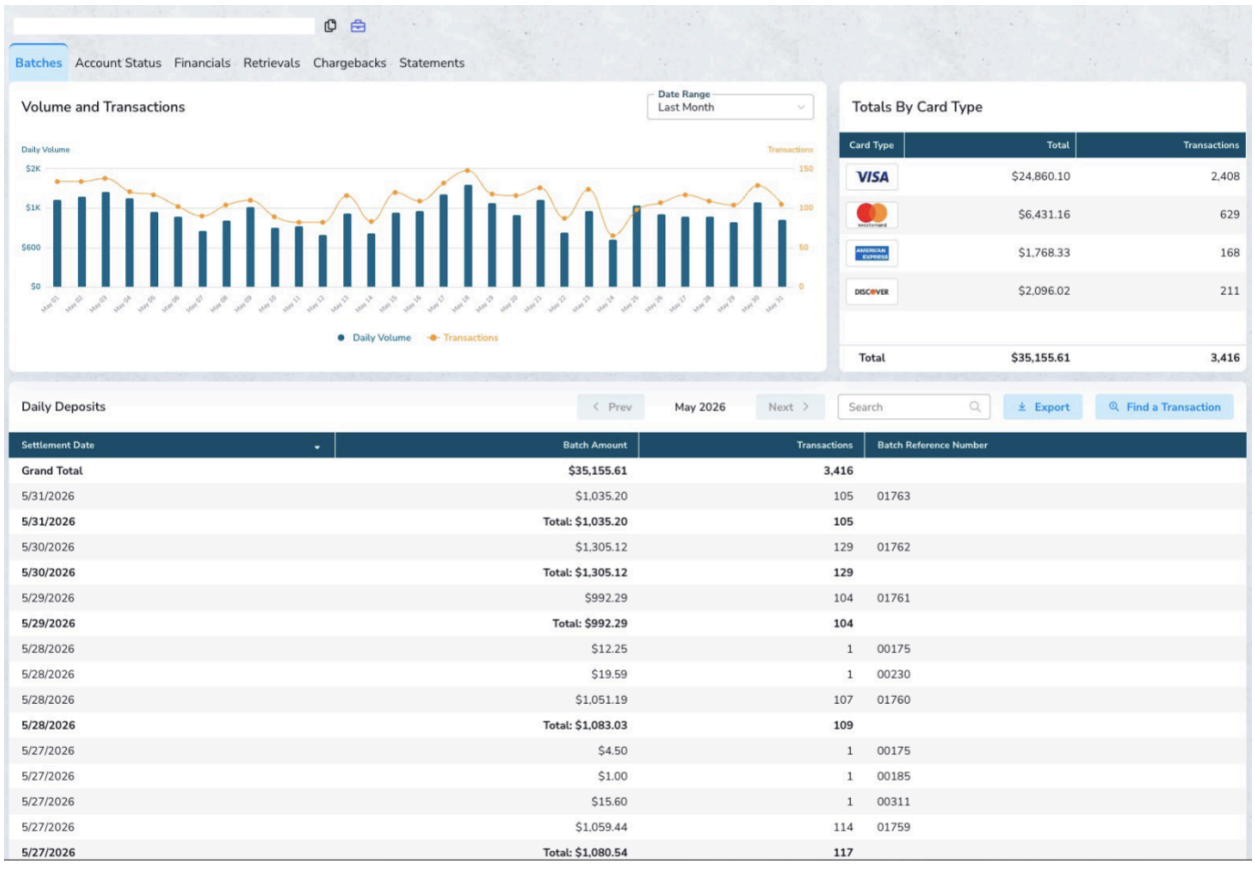


2. Once logged in, your home screen will automatically display the current month's transactional data by default.

3. To search a different time period, locate the "Volume and Transactions" section on your home screen. Click the "Date Range" dropdown and choose from the pre-set options, or scroll to the bottom and select "Custom Range" to enter your own start and end dates.



4. Once your date range is set, locate the “Daily Deposit” section at the bottom of your screen. Scroll through the list to find the batch(es) for your Gong-cha location.



Tip: Batches are organized by date. Use the scroll bar to navigate through multiple days quickly.

Part 2: Finding a Specific Transaction

If you need to look up details on a specific transaction, follow the steps below. Before you begin, make sure you know the date the transaction occurred.

Important: The One-Day Offset

IRIS displays transaction batches based on their settlement date, which is typically one business day after the transaction date. This means:

To find a transaction from 5/1, you will click on the TOTAL from 5/2. Always look one day ahead of the transaction date.

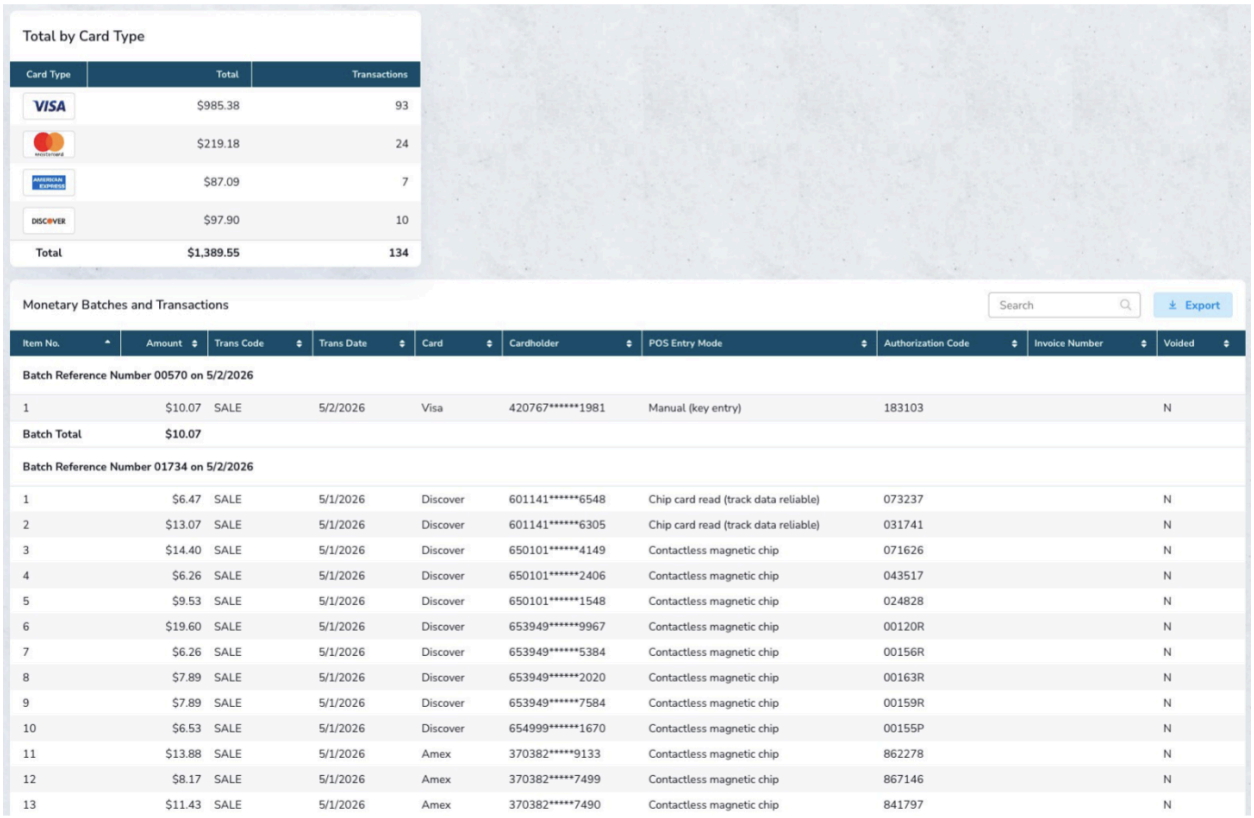
1. In the "Daily Deposit" section, locate the bolded TOTAL for the date *one day after* the transaction you are researching, and click on it.



Daily Deposits — Prev — May 2026 — Next — Search — Export — Find a Transaction

Settlement Date	Batch Amount	Transactions	Batch Reference Number
Grand Total	**$35,155.61**	**3,416**	
5/1/2026	$11.98	1	00125
5/1/2026	$1,326.37	133	01733
5/1/2026	**Total: $1,338.35**	**134**	
5/2/2026	$10.07	1	00570
5/2/2026	$1,379.48	133	01734
5/2/2026	**Total: $1,389.55**	**134**	
5/3/2026	$1,461.56	138	01735
5/3/2026	**Total: $1,461.56**	**138**	
5/4/2026	$15.24	1	00154
5/4/2026	$1,350.31	120	01736
5/4/2026	**Total: $1,365.55**	**121**	
5/5/2026	$1,153.52	117	01737
5/5/2026	**Total: $1,153.52**	**117**	

2. A detailed list of all transactions from the prior day will appear. These are the transactions that settled into that batch.



Total by Card Type

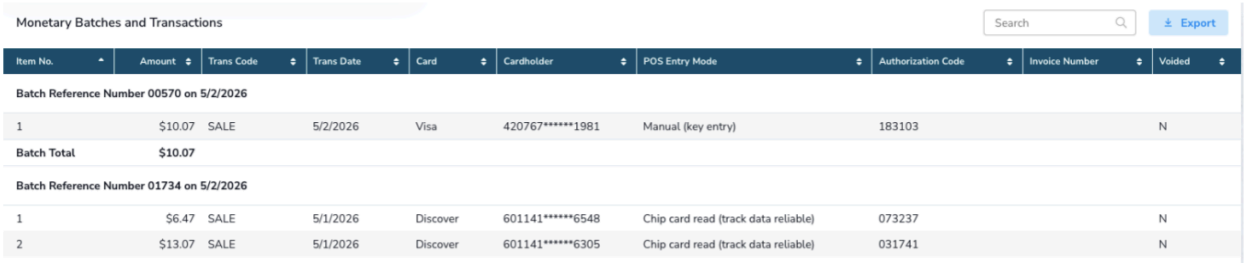
Card Type	Total	Transactions
VISA	$985.38	93
	$219.18	24
	$87.09	7
DISCOVER	$97.90	10
Total	**$1,389.55**	**134**

Monetary Batches and Transactions — Search — Export

Item No.	Amount	Trans Code	Trans Date	Card	Cardholder	POS Entry Mode	Authorization Code	Invoice Number	Voided
Batch Reference Number 00570 on 5/2/2026									
1	$10.07	SALE	5/2/2026	Visa	420767******1981	Manual (key entry)	183103		N
Batch Total	**$10.07**								
Batch Reference Number 01734 on 5/2/2026									
1	$6.47	SALE	5/1/2026	Discover	601141******6548	Chip card read (track data reliable)	073237		N
2	$13.07	SALE	5/1/2026	Discover	601141******6305	Chip card read (track data reliable)	031741		N
3	$14.40	SALE	5/1/2026	Discover	650101******4149	Contactless magnetic chip	071626		N
4	$6.26	SALE	5/1/2026	Discover	650101******2406	Contactless magnetic chip	043517		N
5	$9.53	SALE	5/1/2026	Discover	650101******1548	Contactless magnetic chip	024828		N
6	$19.60	SALE	5/1/2026	Discover	653949******9967	Contactless magnetic chip	00120R		N
7	$6.26	SALE	5/1/2026	Discover	653949******5384	Contactless magnetic chip	00156R		N
8	$7.89	SALE	5/1/2026	Discover	653949******2020	Contactless magnetic chip	00163R		N
9	$7.89	SALE	5/1/2026	Discover	653949******7584	Contactless magnetic chip	00159R		N
10	$6.53	SALE	5/1/2026	Discover	654999******1670	Contactless magnetic chip	00155P		N
11	$13.88	SALE	5/1/2026	Amex	370382*****9133	Contactless magnetic chip	862278		N
12	$8.17	SALE	5/1/2026	Amex	370382*****7499	Contactless magnetic chip	867146		N
13	$11.43	SALE	5/1/2026	Amex	370382*****7490	Contactless magnetic chip	841797		N

3. You can filter and sort these transactions by:

- Total amount
- Transaction type
- Authorization code



Monetary Batches and Transactions

Search | Export

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Tip: Use the authorization code filter if you have the code from a customer receipt — it's the fastest way to pinpoint an exact transaction.

Troubleshooting

A batch or transaction isn't showing up

• Make sure your selected date range includes the settlement date (one day after the transaction date), not the transaction date itself.

• Confirm you are viewing the correct Gong-cha location if you manage multiple stores.

• Allow up to 24 hours for new transactions to fully settle and appear in IRIS.

The date range isn't filtering correctly

• Try selecting "Custom Range" from the dropdown and manually entering your start and end dates to ensure accuracy.

Need Additional Help?

If you are unable to locate a transaction or have questions about your IRIS dashboard, please reach out to your SumUp account representative. We're here to help ensure your Gong-cha locations run smoothly.