

Multifunctional Payment Processing CRM

The system is a payment processing CRM for multiple types of businesses: real estate and marketing agencies, debt collection companies, law and HR firms. It provides customers with a wide range of services such as operation and management tools, sales automation tools and helpdesk together with integrated dialer.

Project type: secure CRM solution

InToSoft team: 3 specialists

Team structure: architect, senior developer, QA engineer

Project duration: 8 months

Technologies: PHP 5.5, jQuery, MySQL 5.6, Memcached, JSON, SOAP, Apache 2.4

Environments: PHP Storm, Debian 8, Git.

Platform: Web

About the client

The client is a premier sales automation software company, serving clients in the payments industry.

Challenge

By the time the cooperation started, the client had already developed a part of the system. InToSoft team thoroughly analyzed the existing architecture and managed to find approach that helped to implement business and functional requirements without sacrificing the system's performance.

Project

The solution represents a secure web system hosted by a certified PCI Level 1 compliant service provider. Boasting over 30 current integrations, it offers informative reporting for clients in formats conducive to determining productivity and growth. The combination of a dialer and a CRM provided for payments industry can as well be used in many other business domains.

With its help users can:

- Create a streamlined sales process workflow. The system can automate everyday operations via tracking contacts, progress of deals and forecasting revenue.
- Manage more accounts with less sales efforts. Commonly used fees with default values supported by the system allowed to prevent errors during merchant boarding
- Save time and reduce manual efforts by submitting accounts to multiple processors up to 3X faster.

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- Ensure transparent merchant transaction reporting provided by a white-labeled merchant portal. Advanced portfolio reporting visualizes required figures on batches, transactions, deposits, chargebacks/retrievals, etc. with further simple retrieval of monthly PDF statement.