

Success Story

Salesforce CRM integration for one of India's largest POS services provider



Client:

Pine Labs

Industry:

Fintech

Country:

India

Our Role:

Salesforce Integration

About the Client

The client is a leading merchant services platform that became India's first unicorn for the year 2020. Its cloud-based solutions power over 350,000 POS terminals across 3,700 cities and towns in India and Malaysia.

The provider crossed \$120 million in operating revenues for FY 2022 and its valuation hit \$5 billion with plans to further improve time-to-market for its upcoming financial services and products.

Key Facts

\$3B

valuation

>100,000

merchants onboard

\$2.5B

TPV per annum

The Situation

The client had a custom-built lead management system (LMS) for lead generation, merchant onboarding, and tracking of POS machine deployment and transactions. While the LMS helped with finding and nurturing leads, the potential for scalability was very limited and there were extensive costs and resource alignment associated with it.

Hence, the client wanted to integrate Salesforce CRM with their prevailing LMS system for a cost-effective solution to ensure faster, seamless, and scalable merchant management processes. After a thorough evaluation of Salesforce service providers, the client chose Daffodil Software as their technology partner due to our strategic partnership with Salesforce as well as our quinquennial long expertise, which enables us to provide the best cost-value proposition as compared to other vendors.

Our Salesforce experts identified many issues in their existing system, such as tightly coupled code, weak validations, lack of reliable support services and low potential for scalability. Hence, integrating their existing LMS with Salesforce CRM was intended to make the following improvements in the merchant services workflow:

- Enable streamlined LMS data migration across all subsystems
- Generate custom fields based on the type of merchant
- Assist onboarded merchant-side operators to quickly learn the new system's processes
- Provide comprehensive views of the entire field operations workflow for dispatch of the POS hardware`

- Implement airtight authorisations to qualify merchants appropriately before onboarding
- Optimise the incentivisation module and streamline data migration for the billing system

The Solution

The inception stage of development had been challenging for team Daffodil as it required auditing and optimizing the existing codebase for modernizing the entire app. As a result, a number of UX updates and performances.

Daffodil's Salesforce integration experts began by identifying where the LMS was falling short in upscaling the merchant onboarding workflow, POS inventory quality control, audits, automation of processes, and so on.

Uniform Data Migration and Integration

While connecting the existing LMS data to the new CRM-powered system, all merchant accounts, contacts, inventory, billing, and orders had to be migrated. This was implemented successfully and it was ensured that the subsystems such as the Payment Controller, New Billing System (NBS), sales module, Opportunity Pipeline, and service dashboards maintained data uniformity.

Secure Onboarding and Validations

The team leveraged an automated approach for merchant onboarding that does away with manual verification of documents, eliminating any scope of security gaps or human error. After several in-depth lead-level verifications and escalated approvals, the lead is converted to a merchant account. For the creation of the merchant account, based on the type of merchant; be it Retail, Corporate, etc., custom fields are generated for IVR-based information gathering,

making the onboarding a secure and automated procedure.

Support and Issue Tracking

The Daffodil team continues to offer L1 and L2 support for handling potential issues faced when onboarding merchants, migrating data, alignment of merchants with business types and stores, the machine deployment workflow, and so on. All possibilities of issue escalations are accounted for and documentation is provided for resolving them so that there is faster resolution

New Billing System and Reportage

The New Billing System (NBS) is integrated with Microsoft Navision with the option to include add-on modules for facilitating action items that are part of the billing cycle. Components such as unique ID creation for respective accounts, store dispatch of machines, the transmission of bills, proximity-based assignment of on-field executives for fast delivery and setup of POS are all taken care of this way.

Additionally, the efficiency of reportage around transactions, customer behavior, and service resolutions allow for comprehensive graphical representations in the dashboard. A graphical view of the resources enables merchants to keep track of inventory and to align top-performing dispatch and installation executives..

Incentivization

Both monetary and behavioral incentivization for sales executives is managed via Salesforce Channel Incentive Management. There is accurate differentiation between intrinsic and extrinsic incentives. The incentives ecosystem has been purpose-built to motivate sales reps to drive optimized merchant partner attainment, overall sales performance, as well as the organization's bottom line.

Process Modularity

Several modules or sub-applications were developed on Salesforce for Sales, Sales Leadership, Opportunity Management, Issue Tracking, and On-field processes. Each team is tasked with various components of the lead journey, the approval mechanism, and the machine dispatch works on various custom modules tailor-made to streamline each function. Moreover, value-added services such as EMI, UPI, and third-party payment platforms can also be easily integrated.

SOPs and End-to-end Error Handling

As new merchant's representatives are acquainted with their newly integrated CRM, all the processes involved are condensed into easily understandable and detailed SOPs. So merchant training takes very little time, and in addition, the extended support offered by our team enables rapid eradication of errors and proper handling of potential issue escalations.

The Impact

The merchant services provider has been able to switch to the new Salesforce CRM-integrated system quickly. Daffodil Software's turnaround times, enhanced services categorization, and unmatched attention to detail have been immensely appreciated by the provider. Further improvements such as increasing query word limits and more descriptive error handling are currently in the pipeline.

"Now we'll be able to offer merchants a solution that has integrated all kinds of payment solutions in the market. We had been running on stealth mode processing payments worth \$150-\$200 million monthly with over 250 merchant partners including Chroma, Cred, and Reliance Digital,"

CEO – During an interview with the Economic Times

Technology Stack



Services Used









Salesforce

About Daffodil

For more than 20 years, Daffodil Software has been a trusted software technology partner to organizations across the globe. We take pride in our ability to look beyond technologies & deliver innovative solutions.

Daffodil is a CMMI level 3 accredited organization with innovation, tech agility & process orientation rooted deep within the core. Our team of 1000+ technologists strive to shape the tech industry and help businesses elevate their value proposition through technology.

Technology Partnerships & Certifications

Microsoft Partner <small>Silver Application Development partner</small> <hr/> Microsoft Partner <small>Silver Collaboration and Content</small>		
		
		

Awards & Accolades

GRANDVILLE, USA

2885, Sanford Ave SW
#28585, Grandville,
MI 49418 USA

GURGAON, INDIA

9th Floor, Tower B1,
DLF SEZ Silokhera,
Sector 30, Gurgaon
122001

DUBAI, UAE

Suite No.: 407- 412,
Clover Bay Tower,
Business Bay, Dubai
United Arab Emirates

HISAR, INDIA

6th Floor, Metropolis Mall,
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