

Classic Approach

Companies usually have several systems - CRM and PSP. If a client buys one-time services, then there are no problems. But some businesses require more complex invoice schemes:

- implement non-linear breakdown of payments
- invoicing of several parallel training courses
- constant need to sell additional services
- payment deposit management

paymaze
TRUE ITEM service

CRM

- Leads
- Deals
- **Clients**
- Orders
- **Accounts**

PSP

- **Clients**
- **Accounts**
- Payments
- Refunds

Creatio

PAYSIMPLE

stripe

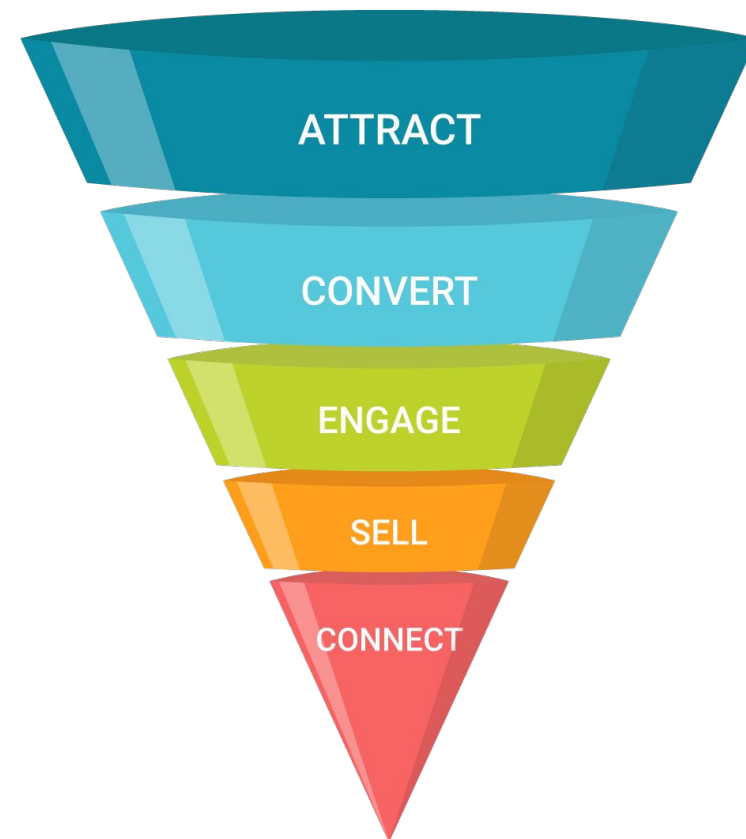
FONDY

LIQPAY >>

Problems of the Classical Approach

If a company uses several systems in parallel without two-way integration, it will always face such problems:

- Multiple client bases
- Several systems and UIs for managers
- Complexity with end-to-end reporting
 - There is no single sales funnel
 - Lead to MRR ?
 - Lead to ARR ?
- Difficulties with changing (or launching new one) PSP

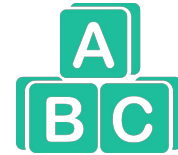


Client Profile



Sports and Leisure

- Sports centers
- GYM's
- Sport sections



Education and Professional Schools

- Programming and design
- Foreign languages
- Floristics, etc.



SaaS / PaaS / IaaS

- Software Subscriptions
- Rental equipment
- Service Subscriptions

Business Needs:

- accept **payments** (credit and debit cards, cache and other)
- control and **reduce debt**
- Extended payment **statistics** in CRM

Payment management

The screenshot shows the 'Платежи' (Payments) section of the CRM. A table lists various payment records with columns for 'Номер' (Number), 'Статус' (Status), 'Клиент' (Client), and 'Сумма' (Sum). A context menu is open over the first row (PM-7), showing options like 'Выборить несколько записей', 'Выборить все', 'Экспорт в Excel', 'Импорт данных', 'Настроить журнал изменений', 'Отправить платеж клиенту', and 'Отменить счет'. The left sidebar contains navigation items: Продажи, Платежи, Итоги, Лента, Лиды, Контрагенты, Контакты, Активности, Продажи, Заказы, Договоры, Счета, and Документы.

Номер	Статус	Клиент	Сумма
PM-7	Оплачено		7 676,00
PM-3	Возврат		1 000,00
PM-9	Оплачено		300,00
PM-1	Возврат денег		1,00
PM-4	Ошибка	Andrew Baker (sample)	1 000,00
PM-12	Ожидает оплаты	Andrew Baker (sample)	455,00
PM-2	Отменен	Andrew Baker (sample)	123,00
PM-8	Ошибка	Andrew Baker (sample)	300,00
PM-6	Ожидает оплаты	Andrew Baker (sample)	867,00
PM-5	Отменен	Andrew Baker (sample)	100,00
PM-13	Не выставлен	Andrew Baker (sample)	10,00
PM-11	Ошибка	Andrew Baker (sample)	275,00
PM-10	Ошибка	Andrew Baker (sample)	223,00

- All actions with payments in CRM
 - Create / cancel / refund payments
 - Adding accounts
- Automatic binding of payment to the client
 - No payment confirmation required
- Aggregated data for reporting
 - All payment data in CRM
- Quick connection to the new payment systems
 - LiqPay, Fondy, PaySimple
 - Stripe 2checkout, Braintree, WePay, ... *

* according to the request of the client



Security

- paymaze supports high level of payment systems protection
 - HTTPS - all data is encrypted
 - API only with public and private keys
- paymaze does not store any personal or finance data
 - information only about payments and subscriptions
 - only archive of operations for reconciliation or restoration

Payment services



Already **available**



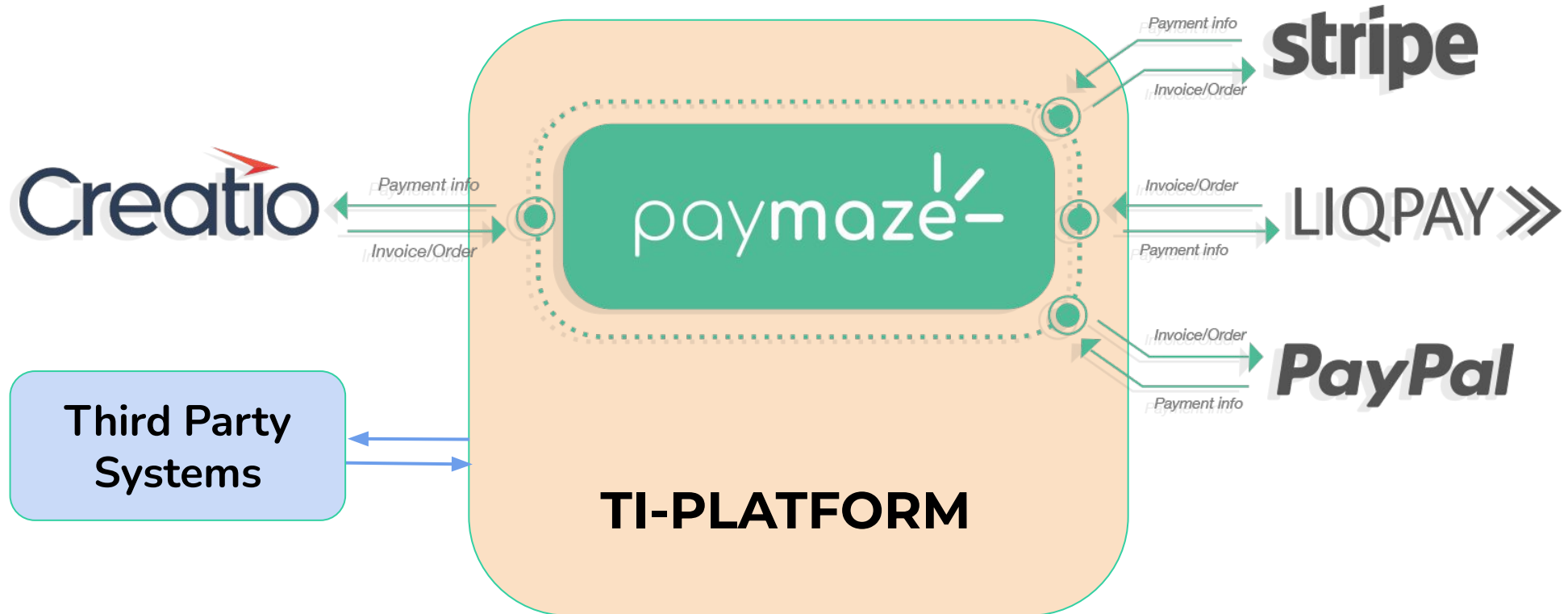
On **development** stage



Backlog



How it works



Advantages

- Connecting multiple accounts to the single payment system
- Manage payments and subscriptions from the Creatio interface
- Work with several payment systems in parallel
 - depending on account parameters
 - depending on payment types
 - depending on the client location
- Automatic change of statuses in CRM upon payment receipt
 - account status / client status / subscription status



Price

paymaze **Connector- 199 \$ / month**

- Basic Support 5x8
- 8 hours onboarding (Customer Success)

Connecting other payment systems

- Any system from the backlog is **FREE**
(If it is paid as an annual subscription)



About TRUE ITEM

15 years of **experience** in implementing OSS/BSS solutions for telecoms.

- **2007-2015** – as **Orga Systems Ukraine**.
- **2015-to the present** – independent company **True Item**.

Service delivery **experience**:

- Europe
- Middle Asia
- Latin America.

Our strong point

- 15 years of experience in telecom automation
- subscription and payment management automation

Thank you!



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