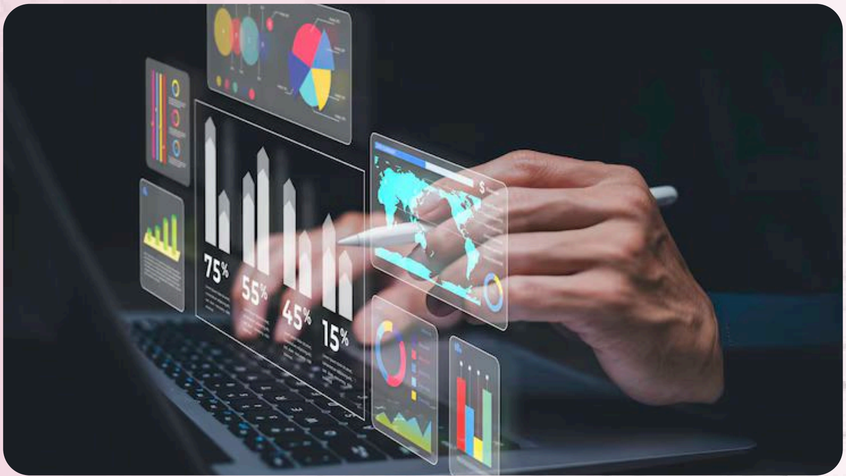
AVION TECHNOLOGY, INC.

CRM Modernization for Financial Services with Salesforce



Project Summary

Project type:Website,Mobile App

Status: Completed

It is an online platform designed to provide financial solutions tailored for alarm dealers and security companies. Their platform facilitates various services aimed at supporting the growth and stability of these businesses.

Challenges:

A financial services organization specializing in dealer-based funding programs, was operating on a legacy custom CRM platform that lacked the flexibility, automation, and scalability required to support growing business needs.

Key challenges included:

- Manual processes for assigning sales agents and calculating commissions
- Static dealer program multipliers lacking automation or visibility
- Fragmented reporting, causing inefficiencies in funding reconciliation
- No integration with external monitoring services or financial systems
- Repeated API pulls for credit reports leading to increased operational costs

It needed a robust, scalable, and secure CRM upgrade, ideally leveraging the Salesforce ecosystem, to automate complex logic, centralize reporting, and enhance data visibility across the organization.

Solutions:

01 Multi-Agent Commission Management:
Enabled dual account ownership per dealer with dynamic percentage splits (25–100%) and automated commission calculations via Apex.

02 Dealer Multipliers by Term:
Built a salesforce CPQ-driven matrix to assign term-based dealer multiples, adjustable via Lightning Web Components (LWC).

03 Automated Financial Calculations:
Used Apex and formulas to compute Gross to Dealer, Deductions, and Net Payouts, all reflected in application records and reports.

04 Advanced Reporting & Exports:
Delivered real-time salesforce dashboards and Visualforce-powered bank report templates with CSV export functionality.

05 Credit Report Caching:
Stored Experian credit data securely in custom Salesforce objects to cut recurring API costs.

06 Global Search & Print Tools:
Enhanced data access with global search, print-ready layouts, and CSV exports using standard Salesforce components.

Tech Task:

- Frontend: HTML, CSS, JavaScript (legacy); Bootstrap or jQuery
- CRM:Salesforce CRM, Salesforce Admin, Apex Programming, LWC, Salesforce Edition Org(based on client requirement).
- Backend: PHP (custom), MySQL
- APIs: Experian API, TransUnion API (for credit pulls)
- Reporting: PHP CSV generation, jsPDF or HTML print styling for PDFs
- Authentication: Session-based, role-based access control
- Hosting: LAMP stack (Linux, Apache, MySQL, PHP)
- Tools: Basecamp (project management), FTP for deployment
- Security: Data masking, encryption for sensitive data (e.g., SSNs, credit reports)

Results:

40% Faster Agent Setup:
Dual-ownership and commission split automation cut manual setup time significantly.

Improved Payout Accuracy:
Dynamic funding calculations eliminated manual errors and disputes.

Enhanced Reporting Compliance:
Fully bank-ready reports aligned with financial templates.

30% Savings in Credit Report API Calls:
Cached reports drastically reduced repeat charges from Experian.

Increased Operational Control:
Centralized monitoring service setup gave full control over third-party service rates.

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