



A Simple, Secure Solution for Credit Card Processing.



SDiFire Accelerates Quote-to-Cash Process - Turns to iSolutions to streamline credit card payments, Collections, and PCI DSS compliance

THE SDIFIRE STORY

As SDiFire migrated its ERP and CRM systems to the cloud, one of the key components national sales manager Joe Cagiano was determined to add was streamlining the sales process for his internal sales team and the payment process for customers. Sales previously created quotes in PDF format and then emailed them to customers. Customers would then print, sign and scan the forms with credit card payment info that the sales team would manually process—to turn quotes into orders and begin the fulfillment process.

“This method created a lot of extra work for us and our customers,” says Cagiano.

“ We wanted to automate the steps on both ends so we could quickly begin fulfillment and then deliver products to our customers and receive payments sooner.

Joe Cagiano, National Sales Manager

iSolutions Quickly Deploys Credit Card Payment Solution

The first step in achieving this mission came when SDiFire teamed up with Admiral Consulting Group to deploy Microsoft Dynamics Business Central, which runs in the cloud. This gave SDiFire an enterprise-class ERP platform that the accounting and sales teams can access from anywhere—including the New Jersey headquarters and sales offices across the country.

When SDiFire worked with Admiral to integrate third-party software with Business Central to process credit card payments, the mission temporarily stalled as the first solution did not meet the requirements. “We were also frustrated with how long it took to resolve issues,” Cagiano adds. “We almost gave up on integrating credit card payments into our sales process.”

That’s when Admiral suggested SDiFire turn to iSolutions, and the situation was quickly resolved.

“iSolutions understood exactly what we wanted and allowed us to talk about our challenges directly with their software developer upfront,” says

Cagiano. “This gave us confidence iSolutions could resolve our quote-to-order issues. In addition to committing to implementing a solution within 10 days, they promised to keep working with us until the solution delivered on all the requirements.”

Quotes and Payments Occur with the Click of a Button

iSolutions provided exactly what Cagiano wanted by creating a quote-to-cash process within the iSolutions credit card payments and collections solution. Within Business Central, the SDiFire sales team can create sales quotes and click on a button that automatically emails quotes to customers. Within each email, customers can click on a link to make credit card payments.

The integration set up by iSolutions then automatically routes the transaction back to Business Central, which creates a sales order and kicks off the fulfillment process. The iSolutions integration also helps Business Central coordinate shipping logistics and apply any additional charges, such as taxes. Once an order is shipped, the iSolutions process charges the customer’s credit card, emails a receipt to the customer, and notifies Business Central that the invoice has been paid.

“The iSolutions credit card payment process runs seamlessly in the background,” Cagiano points out. “For our sales team, it all happens in Business Central. And for our customers, the link takes them to an intuitive screen to enter their payment information. Because it’s so smooth, they don’t realize the iSolutions process is running in the background.”

Compliance and Collections Also Enhanced

Another benefit for SDiFire is that the iSolutions process is PCI DSS compliant. The internal sales and accounting teams never see, and they do not interact with customer credit card information at any time. iSolutions protects the data from cybersecurity threats and does not allow access.

Once the iSolutions credit card payment process proved to work well, SDiFire began to look at additional ways to leverage the technology. “We now have a collections process devised by iSolutions we can use for customers that we extend credit to,” says Cagiano. “This is particularly helpful for customers with multiple invoices. We can email



Industry

Safety test and inspection equipment



Challenges

Streamline credit card processing for internal sales teams and customers to accelerate converting sales quotes into sales orders and to initiate payment and fulfillment processes.



Solution

iSolutions Credit Card Processing and Collections for Microsoft Dynamics 365 Business Central.



Key Results

- Reduces sales time handling quotes and orders 50% by automating quote-to-cash process.
- Provides customers with fast and easy way to pay invoices by credit card.

them a single statement with all the invoices, and the iSolutions link allows them to pay for all the invoices at one time, or they can choose to pay specific invoices.”

Cagiano estimates the administrative time the internal sales team spends on creating quotes and turning them into sales orders has decreased by 50%, and he suspects customers have reduced the time they spend on credit card payments by a similar amount. “The iSolutions process is also helpful when the sales team is on the road or when a technician is visiting a customer that needs products,” Cagiano adds. “They can execute transactions right on their phone.”

Flexibility to Integrate with Other Accounting Processes

Looking ahead, Cagiano appreciates how iSolutions offers the flexibility and the willingness to integrate credit card payments and collections with other accounting processes. “We are considering a third-party solution for managing credit terms with customers, and we know iSolutions will be very responsive in helping us determine how their technology can tie in,” says Cagiano.

For other businesses that need to improve their credit card payment and collections processes, Cagiano highly recommends collaborating with iSolutions: “The level of customer service iSolutions provides is unbelievable. They answer questions quickly are always available to hop on a call quickly to work through things. And on top of this, their solution simply does what it’s supposed to do in processing credit card payments and streamlining collections.”



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Joe Cagiano, National Sales Manager



WHY ISOLUTIONS?

Versatility

Take payments anywhere your customers are – in store, online, via mobile.

Convenience

Integrate easily with Microsoft Dynamics 365 Business Central.

Security

Protect your customers’ & business information with industry-leading security solutions.

Support

We have the best customer service in the biz. We are here for you.



For information on how iSolutions can help your business achieve similar credit card payment processing and collections results, contact iSolutions today

GET IN TOUCH

317-602-1579

isolutionspayments.com