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Build a CRM system based on Drupal Commerce

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PRESENTATION AGENDA

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Recent project case:
Swiss NGO –
**ONLINE CRM
SYSTEM
INTEGRATED WITH
AN ONLINE SHOP**

1. Client profile & requirements (Ilona)

2. Project challenges (Ilona)

3. Data migration from old CRM system to new (Mike)

4. Custom accounting reports & Invoice reminder letters (Mike)

5. Payment and invoicing with payment slips and FDS for payment status (Giannis)

6. CRM system demo (Mike & Giannis)

CLIENT PROFILE & REQUIREMENTS

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Client Profile

- Swiss non-profit-organisation affiliated to foundation
- trades over 500 products (books / ebooks / publications / memberships etc.)
- Switzerland & internationally

Requirements

- Online CRM System integrated with an online shop
- Invoicing and payment solution
- Accounting requirements
- Digital Marketing and self-administration

2 MAIN AREAS OF CHALLENGE

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Data import from existing systems:

- Contacts from old CRM system

- Products and clients from Drupal 7 online shop (Ubercart)

- Privat contact lists from employees

Technical & architecture challenges

- New CRM and online shop built on Drupal 8 and Drupal Commerce

- Drupal 7 Website has to be keep temporarily and the new online shop integrated in this main website

- No Drupal module for Commerce and payment provider (i.e. PostFinance)

Data migration: from old CRM system to new

DATA MIGRATION

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From Old CRM

- The client was using a custom CRM solution
- They delivered a single CSV file with 15000 rows
- We used this file to generate current and old subscriptions and user profiles

From D7 Übercart website

- Migrated user profiles
- Migrated around 1000 products, images, taxonomy terms

CHALLENGES

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- The profile data structure is complex
- The profiles from CSV were matched against the profiles from Drupal 7 and the contents were merged
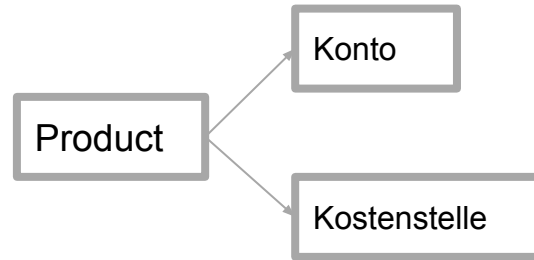- The CSV file was manually processed

MIGRATE MODULE

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- The migrate module is very flexible. Used it in combination with

  - migrate_plus

  - migrate_tools

  - migrate_source_csv

  - commerce_migrate

Custom reports

USE CASE (ACCOUNTING)

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```
                    ┌──────────┐
                 ┌─▶│  Konto   │
  ┌──────────┐  /   └──────────┘
  │ Product  │─
  └──────────┘  \   ┌──────────────┐
                 └─▶│ Kostenstelle │
                    └──────────────┘
```

- ❖ Due Value
- ❖ Value Paid
- ❖ Value Pending

- ❖ Vat standard
- ❖ Vat reduced

- ❖ Vat standard paid
- ❖ Vat reduced paid

- ❖ Value paid for CH
- ❖ Value paid for World

- ❖ Value paid for members
- ❖ Value paid for non members

- ❖ Due value member
- ❖ Due value non-member

- ❖ Dates

OUR SOLUTION

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- Created a custom entity
- Completely denormalized data structure
- Everything became a property of the entity

Advantages

- We were able to use views for displaying, sorting, filtering and aggregating
- Effortless extensibility

Disadvantages

- We had to create and maintain a custom entity
- We had to implement views integration
- We need to keep the reports in sync with the current information

DRUPAL CONSOLE

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- Drupal console is command line interface (CLI) for Drupal

- Works only with Drupal 8 and does a heavy use of Symfony components

- Has some functionality overlapping with Drush

- Is mainly used for generating boilerplate code

Create an entity

- Entities creation is very simple

- Drupal Console will ask a series of question about your new entity and will generate the boilerplate code

```
→      [        ]  git:(ZP-4677) ✗ vendor/bin/drupal geco


// Welcome to the Drupal Content Entity generator
Enter the module name [address]:
> generic


Enter the class of your new content entity [DefaultEntity]:
> DefaultEntity


Enter the machine name of your new content entity [default_entity]:
> default_entity


Enter the label of your new content entity [Default entity]:
> Default entity


Enter the base-path for the content entity routes [/admin/structure]:
> /admin/structure



Do you want this (content) entity to have bundles (yes/no) [no]:
> no


Is your entity translatable (yes/no) [yes]:
> no


Is your entity revisionable (yes/no) [yes]:
> no
```

Invoice reminder letters

USE CASE

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- The client wanted to be able to generate up to 3 invoice reminder letters (letter + order items + invoice slip)
- The letter must be different for each reminder
- They wanted to be in charge of the process, manually generating the letters
- They wanted to be able to download all the reminder letters in a single pdf

What we did:

- We created different reminder states for the order and per user language
- The client can generate a reminder either per order or in bulk via a specific view
- We assigned a letter template for each state
- We provide a views bulk operation to trigger a reminder letter generation
- We provided another bulk operation for downloading the PDF

INVOICE REMINDERS

| Ansicht | Mahnungen | Rechnungen | Devel |

Masquerade as... ⚪   **Switch**

Startseite » Verwaltung » Commerce » Bestellungen » 92666

Reminder State: 3. Mahnung

Reminder	Generation date
erinnerung.pdf	Fr, 08/03/2019 – 13:52
2-mahnung.pdf	Fr, 08/03/2019 – 16:20
3-mahnung.pdf	Fr, 08/03/2019 – 16:21

Set to Letzte Erinnerung

Order ID	Status Mahnungen	Rechnungsdatum vor
	– Any – ▾	dd / mm / yyyy

Anwenden

Action

-- Select action -- ▾

Apply to selected items

☐	ORDER ID	RECHNUNGSDATUM	ADRESSE	MAHNUNGEN	STATUS	OPERATIONEN
☐	92666	19/02/2019 – 09:55	4d AG Giannis Pagonas strasse 18 LI–9490 Vaduz	• erinnerung.pdf (24.13 KB) • 2-mahnung.pdf (24.17 KB) • 3-mahnung.pdf (24.08 KB)	3. Mahnung	Bearbeiten
☐	92667	19/02/2019 – 11:50	4d AG Giannis Pagonas strasse 18 LI–9490 Vaduz	• erinnerung.pdf (24.26 KB) • 2-mahnung.pdf (24.3 KB)	2. Mahnung	Bearbeiten
☐	92668	19/02/2019 – 13:35	4d AG Giannis Pagonas strasse 18 LI–9490 Vaduz	• erinnerung.pdf (24.26 KB)	Erinnerung	Bearbeiten
☐	92669	19/02/2019 – 13:35	4d AG Giannis Pagonas strasse 18	• erinnerung.pdf (24.25 KB)	Erinnerung	Bearbeiten

Payment & invoicing with payment slips
FDS for payment status

THE PROBLEM

- Limited Drupal 8 modules for integration of various Payment Gateways

- Complex integration with Postfinance API

- Complex implementation of offline Invoice Payment Slips with ISR

- Complex implementation of Postfinance FDS for automatic payment update

THE SOLUTION

- Use of Wallee, a 3rd party service which integrates easily with various different Payment Gateways

- Creation of a Drupal 8 module which integrates Wallee with Drupal Commerce

USE CASE

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- Integrate Commerce payments with PostFinance

- Use offline payments (invoice with ISR slip)

- Use online payments (Visa & Mastercard)

- Easily configure and use Invoices

WALLEE:
EFFORTLESS PAYMENTS EASY SETUP

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With wallee we could easily configure all of the above requirements:
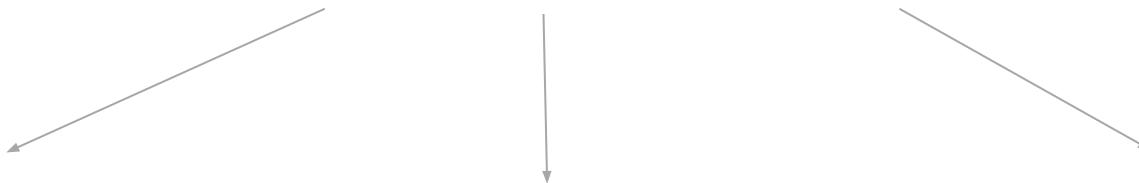
1. PostFinance ISR Processor
Simple configuration of offline payments via Invoice with ISR

2. PostFinance E-Payment E-Commerce
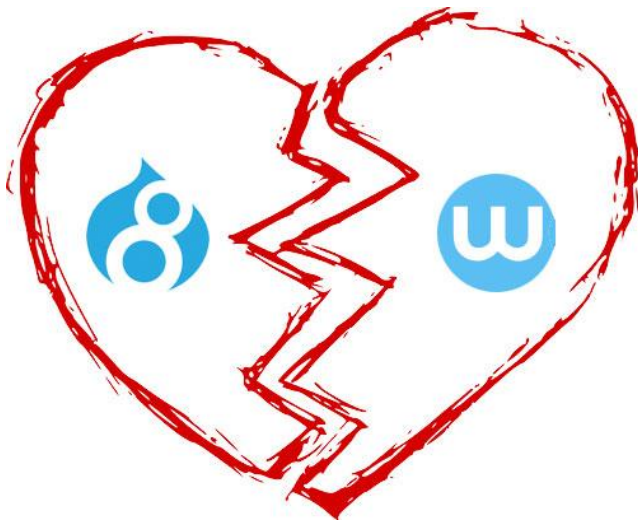Simple integration with Postfinance for Credit Card online payment

3. Invoice Templates
Configure custom Invoice templates using twig

WALLEE INTEGRATION
VIA WALLEE PHP API

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Currently no Wallee - Drupal integration

MEET WALLEE D8 MODULE OVERVIEW

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01 Connection to wallee

02 Provides Offline Payment Method (via invoice with ISR)

03 Provides Online Payment Method (via PostFinance Credit Card payment)

04 Automatically update Drupal invoice and order state, when a payment is made

MEET WALLEE D8 MODULE
WALLEE CONNECTION

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01

wallee
connection

Zurück zur Website   ≡ Verwalten   ★ Verknüpfungen   👤 admin

🛒 Commerce   Inhalt   Commerce   Kontakte   Struktur   Design

Startseite » Verwaltung » Konfiguration » Web-Dienste

Space ID

1111

Wallee Application User Id

2222

Wallee Application User Password

xOLQdF7DVjVo08l5tJE/7Id6QAwF3MMHLfoCDpLwoZm=

Webhook Identity Key

688qYZfM3rbFfI9aoVaVTOZa1+yXRuzLoxEcBccGpw=

Customer Email *

In case the custom has no email, currently wallee needs an email otherwise it crushes.

MEET WALLEE D8 MODULE
PAYMENT METHOD MAPPING

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O1

payment
methods
mapping

MEET WALLEE D8 MODULE AUTOMATION CONFIGURATION

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01

automation configuration

MEET WALLEE D8 MODULE
OFFLINE PAYMENT (INVOICE WITH ISR)

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02 Offline Payment (via Invoice), step 1

| Ansicht | Bearbeiten | Mahnungen | Rechnungen |

Masquerade as...   **Switch**

Startseite » Verwaltung » Commerce » Ordini » 92552

Wallee Transaktion-ID	Zeitstempel Transaktion	Rechnungsstatus
Keine Rechnungen vorhanden		

Create/Update Invoice

MEET WALLEE D8 MODULE
OFFLINE PAYMENT (INVOICE WITH ISR)

02 💡 Offline Payment (via Invoice), step 2

Ansicht	Bearbeiten	Mahnungen	Rechnungen

Masquerade as... **Switch**

Startseite » Verwaltung » Commerce » Ordini » 92552

Wallee Transaktion-ID	Zeitstempel Transaktion	Rechnungsstatus
1602100	03-02-2019 08:02:21	Invoice is being prepared
Refresh State

Create/Update Invoice

MEET WALLEE D8 MODULE
OFFLINE PAYMENT (INVOICE WITH ISR)

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02 💡 Offline Payment (via Invoice), step 3

Wallee Transaktion-ID	Zeitstempel Transaktion	Rechnungsstatus
1602100	03-02-2019 08:02:21	OPEN

Invoice Preview

Kundennummer 2000189
Rechnungsdatum 03.02.19
Rechnungsreferenz 92552

Giannis Pagonas
APOLLONOS 18
GR-15351 Pallini

BESCHREIBUNG	MENGE	STÜCKPREIS	STEUERSATZ	TOTAL
KdS 136 BE V Wangen	1	60.00 CHF	0 %	60.00 CHF

MEET WALLEE D8 MODULE
ONLINE PAYMENT (CREDIT CARD)

03 ♕ Online Payment (via Postfinance Credit Card)

zehnplus GmbH   37.00 CHF
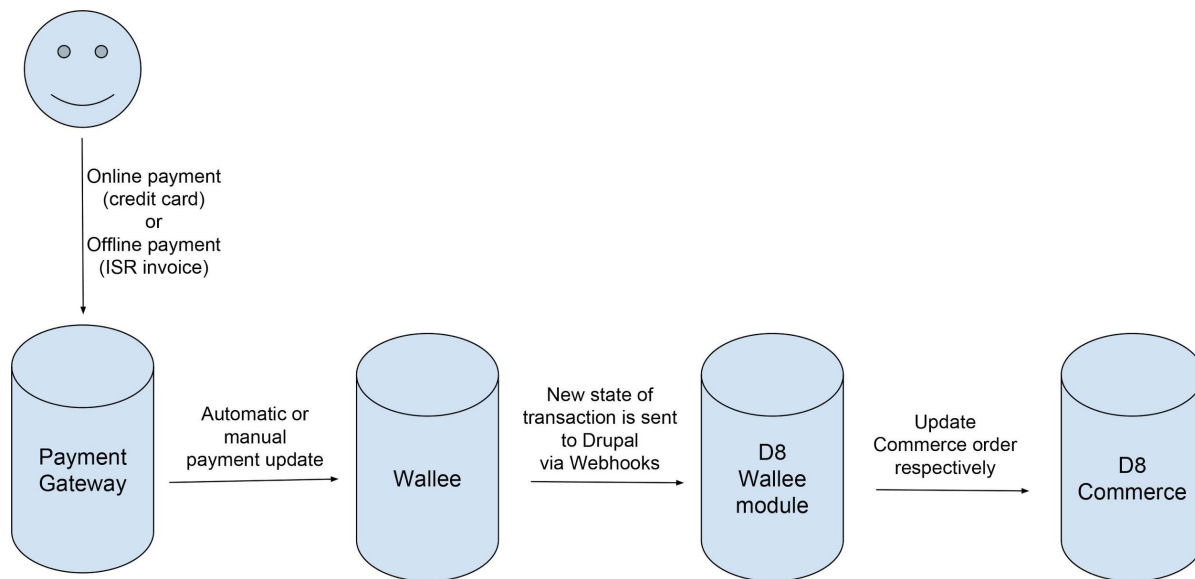
KARTENBRAND *

ZAHLEN

Transaktion stornieren

MEET WALLEE D8 MODULE
AUTOMATIC PAYMENT STATE UPDATE

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04 🚀   Automatic Invoice & Order state change upon payment

CRM system demo

CRM SYSTEM DEMO

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1. Front End: Online shop

2. Backend: Contacts & Commerce
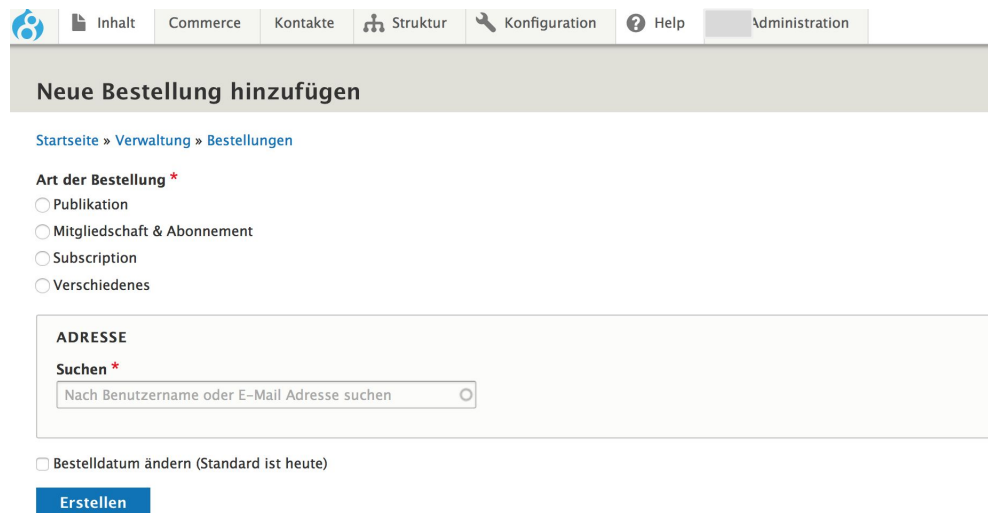
3. Backend: Adding a contact

4. Backend: Adding a order

5. Backend: Accounting & Reminders

| Inhalt | Commerce | Kontakte | Struktur | Konfiguration | Help | Administration |

Neue Bestellung hinzufügen

Startseite » Verwaltung » Bestellungen

Art der Bestellung *
- ◯ Publikation
- ◯ Mitgliedschaft & Abonnement
- ◯ Subscription
- ◯ Verschiedenes

ADRESSE

Suchen *

Nach Benutzername oder E-Mail Adresse suchen ◯

☐ Bestelldatum ändern (Standard ist heute)

Erstellen

Meet zehnplus

MEET ZEHNPLUS: LEADING DIGITAL SERVICE PROVIDER

- **Founded in 2008, Zürich**: a unique blend of IT and service experts with **over 10 years** experience delivering projects for customers.

- In-depth knowledge of digital solutions, **using both transformational and latest AI technologies** for optimising all processes.

- Successfully digitalised many systems and environments for **customers of all sizes.**

- **Experts in process integration** together with flexible and fast support.

- **Drupal Profis** with over 10 years of experience.

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ergon

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Lucerne University of
Applied Sciences and Arts
HOCHSCHULE
LUZERN

ARTEK

Sunrise

Universität
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Bildungszentrum
BVS St.Gallen

upc cablecom

GSK
SHAS
SSAS
Gesellschaft für Schweizerische
Kunstgeschichte

pro natura

ZOLLINGER

ABB

ZURICH

HSO

CREDIT SUISSE

BUSINESS SERVICES & PRODUCTS
OVERVIEW

01

We provide **strategic consultancy** in Digital Transformations, IT and Knowledge Management.

02

We build **custom digital solutions**, from E-commerce CRM platforms through billing systems to self-care portals. (customer facing)

03

We build **data management** & **customer service platforms** to make businesses more efficient.

04

We are continuously investing in revolutionising technologies in the field of **AI, robotics** and **automatisation.**

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Thank you

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