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# Custom CRM For a Canadian Marketing Company

**AUTOGRAPH AUTHENTIC** SINCE 1991

**Industry:**
Retail & E-commerce

**Duration:**
3 years

**Team:**
full-stack engineer, tech lead, project manager, QA specialist, designer

How developing a custom CRM system allowed a marketing and promotions company to unlock deep drill-downs into customer data and boost advertising campaigns' conversion rate by **34%** while cutting down cost per lead by **21%**.
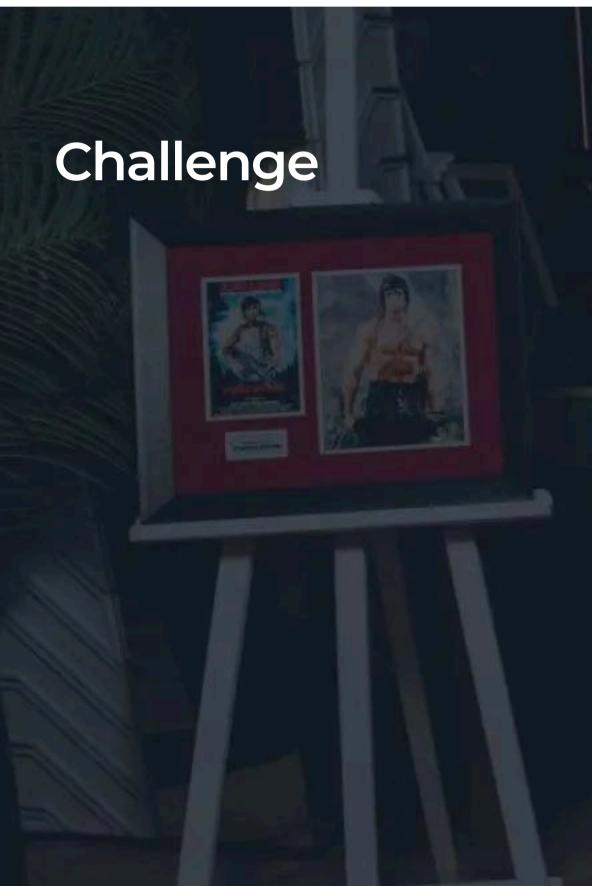
## Challenge

Until 2020 our client's business was mainly offline. They placed easels with signed items or rare collectibles on various locations (restaurants, sporting events, shopping malls, etc.) and accepted via them paper bids that were processed manually by the company's personnel.

At that time, the company addressed *instinctools to help them move the process of accepting bids and buying unique items online. As more offline businesses have gone digital after 2020, our client needed to create a unified platform for placing bids online and increasing online sales of unique goods by moving sales to eBay and Amazon platforms.

## Challenge

The main task for the *instinctools team was custom CRM development with the core functionality allowing to support and process large volumes of data. The following key requirements were set regarding the use case of the software:

- An easy & convenient way to create contacts;
- Inventory support and basic tracking for collectibles;
- The ability to systematically add bids into the system;
- Reports creation and management.

After a while, when the business set a goal to reach a new market and expand its target audience, the requirements for the CRM solution were extended with new features and integrations. Furthermore, our client wanted to give end customers a single user-friendly website to find easels' catalogs and locations, choose interesting items and place bids online.

So the *instinctools dedicated team was augmented with two more full-stack engineers and a designer to start working on the online auction system creation and a CRM optimization with the integration of e-commerce platforms and payments systems.

## Solution

A web-based CRM solution is mainly built on Angular with the object-relational database system PostgreSQL.

Our solution is synchronized with e-commerce platforms: Shopify and eBay, and gathers all the information about customers and their purchases in one single data storage, significantly simplifying the sales reporting process. Sales managers now can generate detailed reports in the CRM, drilling down various parameters: team efficiency and KPIs, commission rates, etc.

Earlier all employees entered inventory, sales, customers, and other data into the system manually. We automated this process and integrated an all-in-one inventory management software, inFlow, synchronized with the CRM system.

## Key features

**Web-based CRM:**

- Easy-to-use interface for adding new bids into the system and their later processing.
- Automatic contacts creation after adding new bids.
- Reports generation and management with export to MS Excel function.

**Inventory management:**

- Keep records on the stock balance of collectibles.
- Manage collectibles (adding new, editing, deleting options, etc.).
- Create requests for full-cycle product items processing (request / shipment / delivery confirmation / returns / return confirmation).
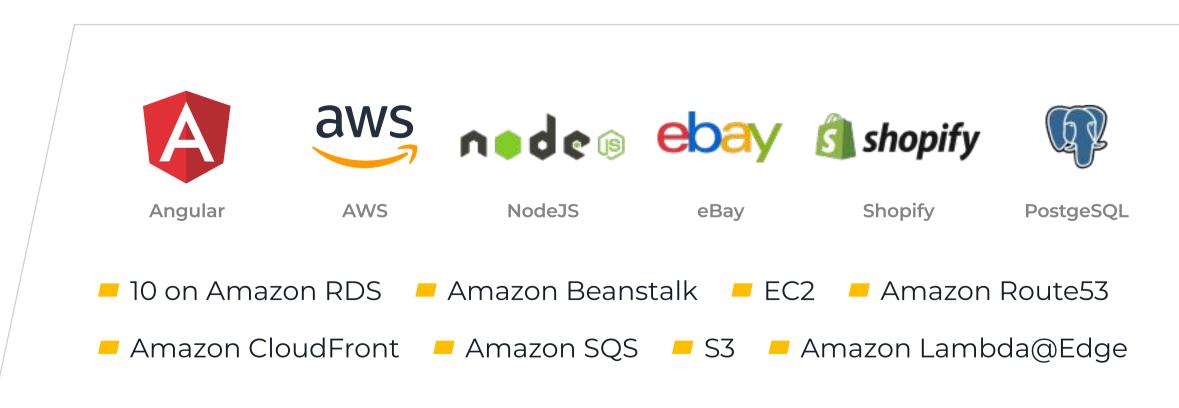
**Online bidding platform:**

- Auction map with locations of easels.
- Possibility to place bids without registration.
- User-friendly and SEO-optimized page.

## Technologies

| Angular | AWS | NodeJS | eBay | Shopify | PostgreSQL |
|---------|-----|--------|------|---------|------------|

- 10 on Amazon RDS
- Amazon Beanstalk
- EC2
- Amazon Route53
- Amazon CloudFront
- Amazon SQS
- S3
- Amazon Lambda@Edge

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