The Integrations Process

This document describes all of the stages and steps in an Integrations project. Following the steps outlined below helps Paytronix clients and partners complete successful and timely projects. This process applies to both new integrations as well as updates or changes to existing integrations.

Discovery

Once the Paytronix Technical Consultant (TC) or sales representative learns of the client's desire to integrate a partner to the Paytronix system, the TC works with the client to understand the goals of the project and synthesizes the project goals for the Integrations team. The TC will define clear, concise project goals and scope. For example: The Paytronix Café wants to build a REST-integrated website that includes registration, reverse enrollment, log in, account balance, user information display, and update capabilities. Once the TC and client have defined the goals of the integration, the TC will consult the Paytronix Integrations team for evaluation. If the high level flow is possible, the project continues.

Requirements

The requirements stage consists of all parties finding and defining the technical requirements and details of the project. The TC schedules an Integration Deployment Interview (IDI) to discuss the project with the TC, client, integrator, sales representative, and integrations team member. Afterwards Paytronix creates a work order that contains all responsibilities and any applicable costs. The work order is sent to the client and/or partner for approval. Once the work order is executed, the project can move forward. The TC then creates a schedule for the project and sends it to everyone involved in the project. All parties review and approve the schedule. Integrations sends a welcome email to the client and integrator, which includes credentials for our test server. This step can only happen if all previous steps have been completed.

Development

The Development stage consists of the integrator building the integration and testing it to ensure that it works as expected. During this process the Integrator should reach out to our Integrations team when technical questions arise. The TC will ensure that the Integrator has test cards and a user on the test server. The TC will also assist the integrator in adjusting cards as necessary, or provide training on how to do so.

The Integrator must QA the integration. During this time, the TC will answer any program-related questions. After the Integrator has completed testing, the client must QA the integration. It is important that the client tests all use cases and approves of all error and/or success messages. If changes are necessary, the Integrator must develop and test the changes before moving to the next stage in the process.

Certification

The Certification stage consists of the Integrations team verifying that correct calls and flows are used by the integration. This stage functions similarly to the Apple app review process, in that it comes after all development and testing is complete.

The client or integrator first notifies Integrations that all development, QA, and testing is complete. Integrations determines the next available slot for the first round of certification. Depending on the time of year, certification start times can be anywhere from several days to several weeks out. By the time certification is scheduled to begin the client or integrator must ensure that the Integrations team has everything it needs to access and test the integration.

For each certification round, Integrations either certifies or fails the integration. In the event of a failure, the team provides feedback on the areas that need improvement. Integrations will complete a round of certification in a minimum of five business days of receiving all necessary testing materials. If the integration fails any round of certification, the project will go back to the development stage. If the client exceeds three rounds of certification, additional fees may apply.

Launch

This stage consists of the integration going live. Most work during this stage is typically monitoring and solving configuration issues. After certification, the TC verifies differences between Paytronix test and production servers. Any configuration changes are communicated to stakeholders. Integrations will then send the production credentials for the Paytronix server. Lastly, all parties monitor the integration after go-live.