

Case Study: Custom CRM for Payroll, Contracts, and Compliance

x2 client base growth

42% operation time reduction

x100 lower cost to scale per client

[Read case study >>>](#)



Centralizing Core Operations in One Platform

Project overview

Industry: Business Support Services / Startup Ecosystem

Tech stack: PHP, Laravel, AWS, Nova

Integrations: Poland gov APIs

Summary

Our client is a company managing legal and financial processes for international workers in Poland, who needed a centralized tool to automate how contracts, invoices, and payroll were handled between clients, managers, and internal control teams.

We built a platform to handle complex workflows tied to legal contracts, payroll approval, client interactions, and compliance with Polish regulations for international workers. Manual processes, fragmented tools, and a lack of central coordination were limiting the company's ability to scale operations and deliver consistent service.

Key results

x2
client base
growth

42%
operational
time
reduction

x100
lower cost to
scale per client

Growing Fast Meant Growing Pains

Business description

Client:	FBA, Poland
Industry:	Business Support Services / Startup Ecosystem
What they do:	B2C service provider for international workforce

FBA supports international professionals working in Poland by handling their legal setup, contract processing, and salary disbursements. Each client relationship involves coordination between the worker (client), their assigned manager, and an internal control department. The business model depends on legal accuracy, clear documentation, and strict compliance with employment and tax laws.

Pain points

Payment workflows relied on chat or email threads without tracking

Scalability costs made growth unlikely

No unified system for managing expirations or tax thresholds

Invoices required frequent corrections

Client and internal communication was spread across tools

” We were drowning in spreadsheets and messengers — now the entire payroll and operation process is structured and auditable. “

— Olena Tkaczuk, CEO, FBA

Turning Process Chaos into Scalable Structure

Solution we built

We designed and built a role-based CRM system that mimics the way FBA works — but with automation, status tracking, and compliance logic built in. CRM is tailored to FBA's operations, covering client data, contracts, invoices, salary workflows, and document storage. It includes role-based access, billing-linked file uploads, and process dashboards.

Key Solution Components

Client Profile Management

Client Profile Management. Centralized client cards with validated data (gov ID, visa, banking), editable by clients, approved by managers.

Legalization Tracking

We implemented handling of different document types and expiration dates to trigger workflow blocks and notifications.

Invoice Engine

Auto-numbering, tax calculations (VAT, NP, ZW), editable multi-line items, approval flows, and correction logic.

Contract & Salary Module

Dual track for various employment types with automatic gross-net calculations and tax threshold alerts.

Payroll Request Workflow

Full approval pipeline with statuses, comment threads, signature requests, and dashboard integration.

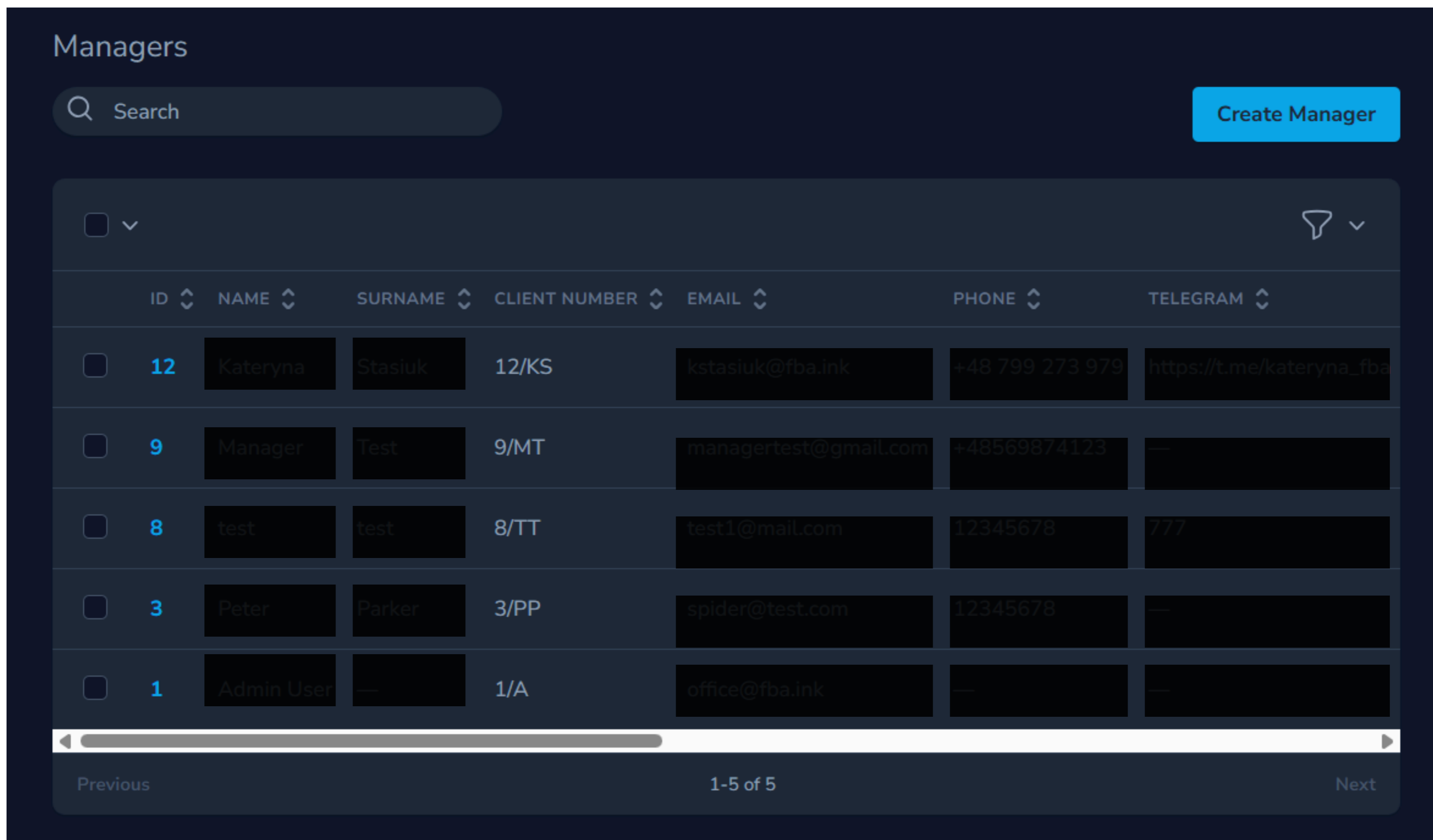
Bank Statement Handling

Managers upload monthly statements, which clients can view but not edit.

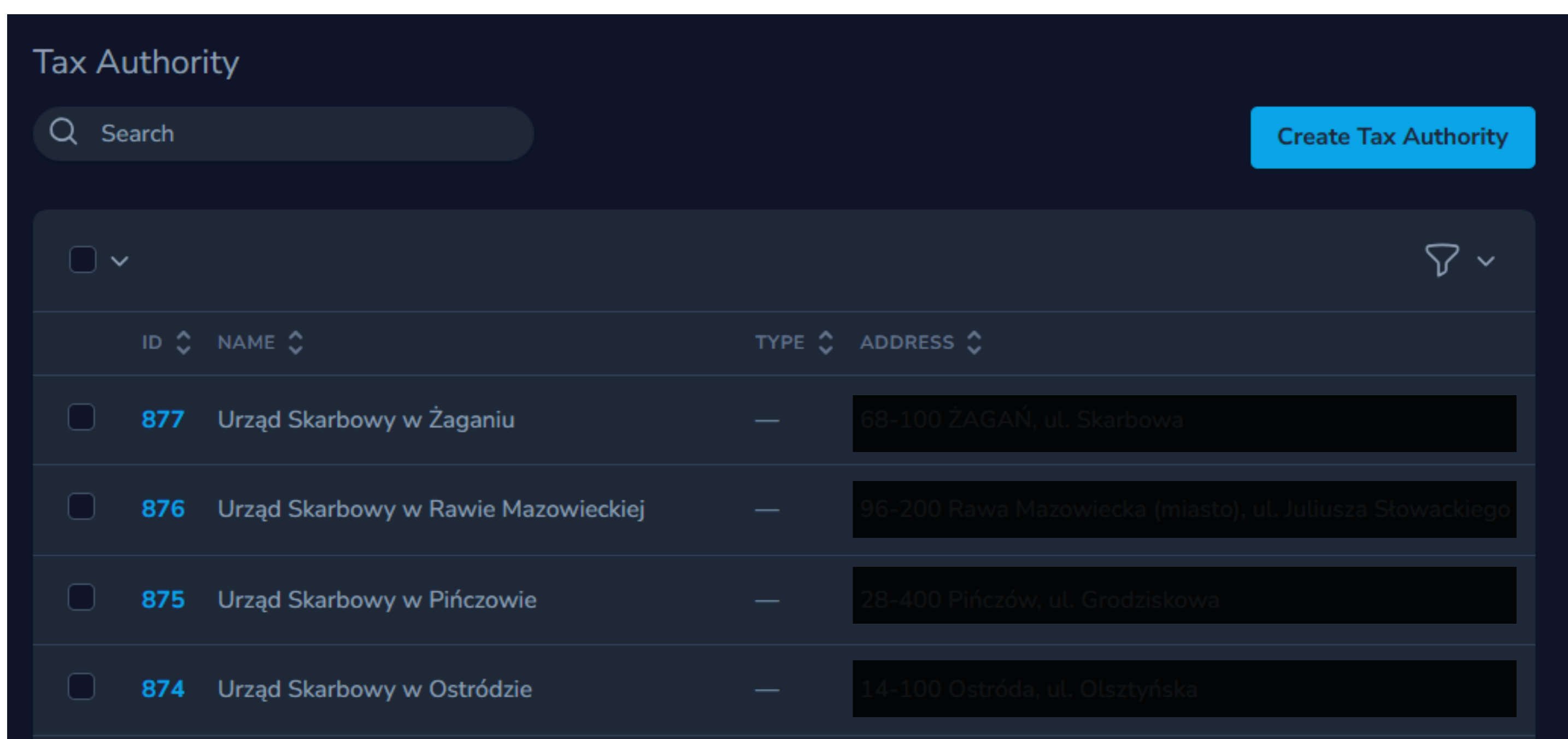
CRM user interface and features

All modules have an individual dashboard displaying data for the entity, with enabled features for filtering, editing, deleting and record creation.

! The CRM UI below has client data blurred for privacy

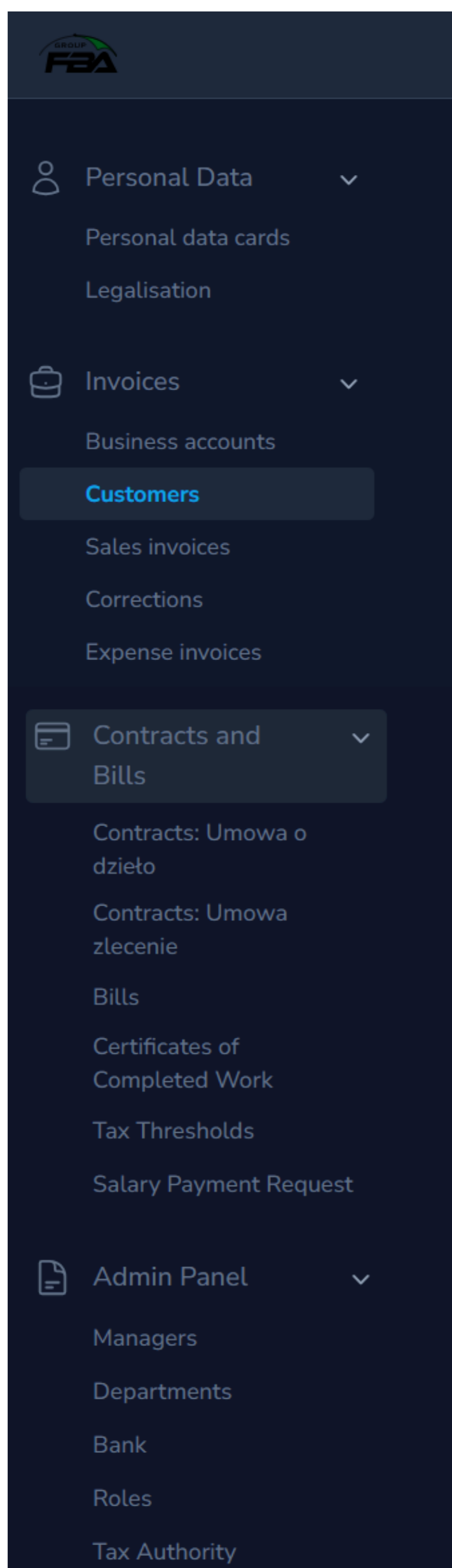


View 1. Dashboard for Managers module

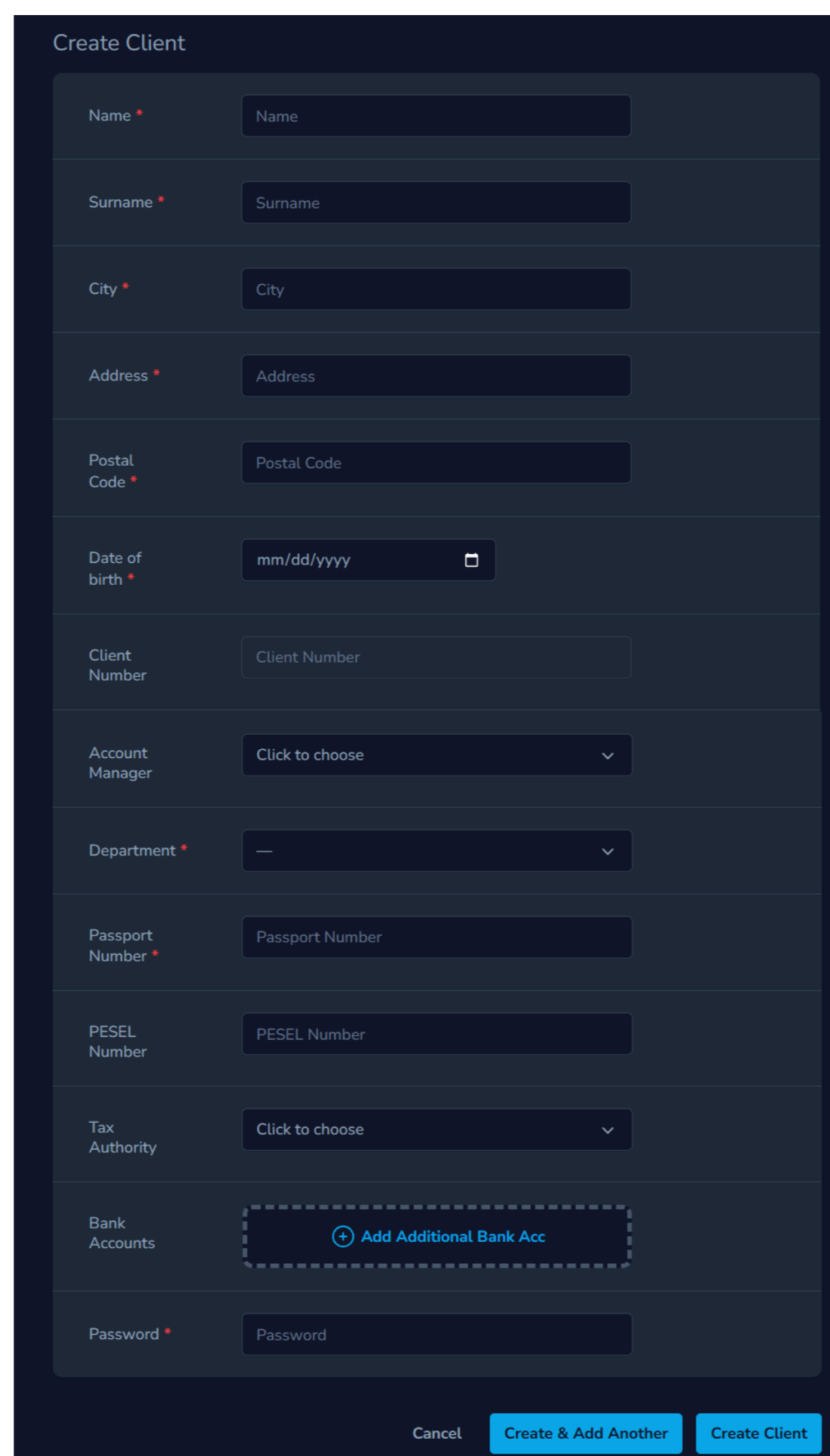


View 2. Dashboards Tax Authority records stored in CRM

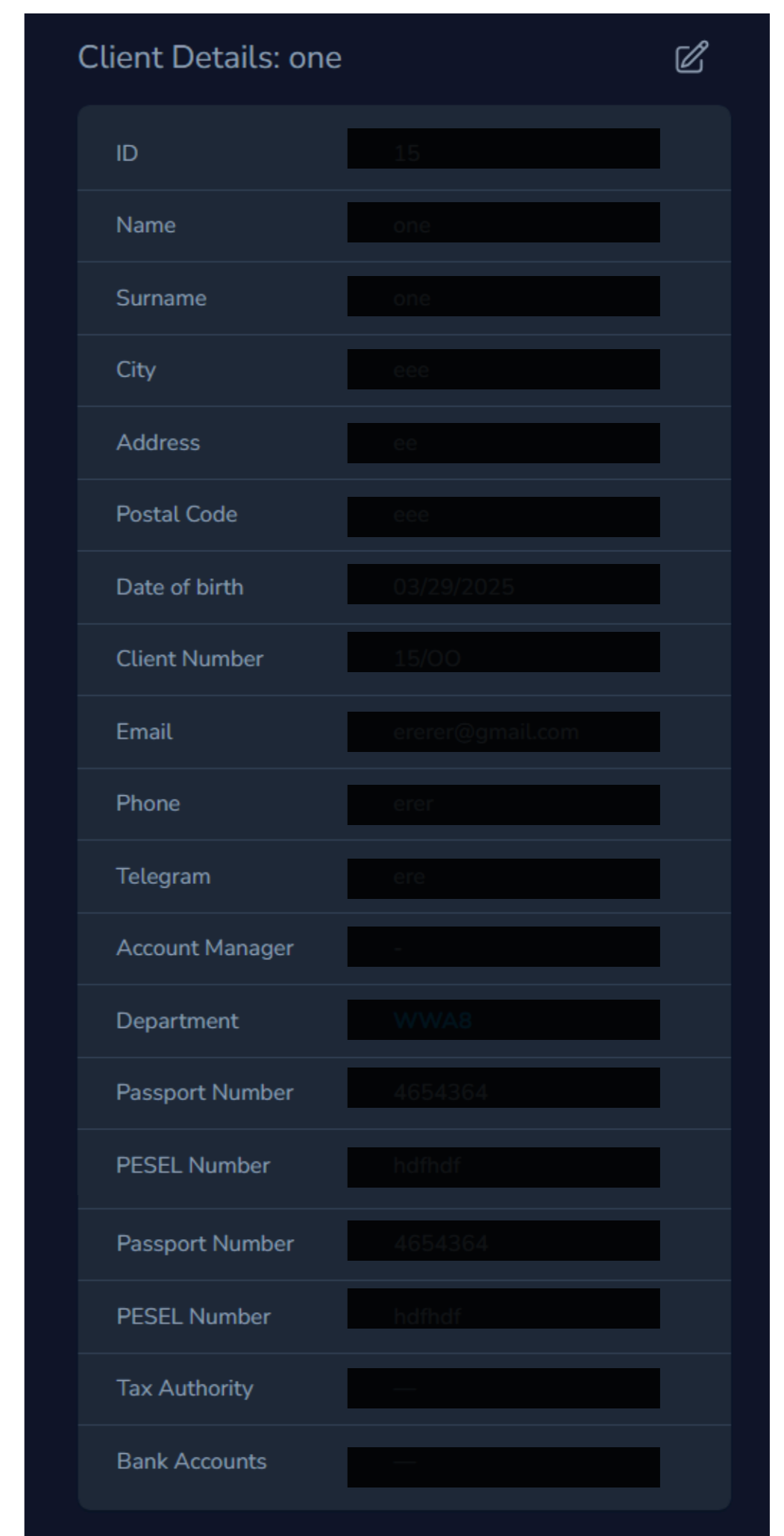
Each module includes a dedicated dashboard, that gives users clear, structured access to their data. Built-in tools for filtering, editing, and record management have significantly improved data accuracy, reduced admin time, and made daily operations more efficient.



View 3. CRM menu panel



View 4. Dialog window for creating new entity (applicable for every module)



View 5. Preview of a card showing client payment request

As a result, coordination between departments became structured, delays were reduced, and visibility into each step of payroll and document processing was significantly improved.

A System That Delivered Real Business Value

Results

x2

client
base
growth

42%

operational
time
reduction

x100

cheaper
scaling per
client

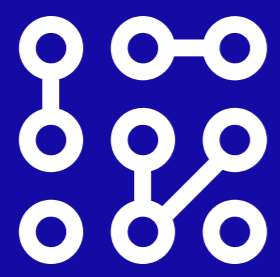
The solution we delivered to FBA solved their challenges by centralizing all client-related workflows into one place, automating error-prone processes like invoice creation and salary approvals, and enforcing legal compliance through validation rules and status restrictions.

Before Solution	After Solution Launch
Manual invoice creation and corrections	Automated with validation and review, versioned in CRM
Payroll requests handled manually, error-prone	Fully structured, 3-stage approval
Document coordination scattered across tools	Centralized with integrated dashboards & statuses
Contract/visa tracking needed manual follow-up	Automated reminders and access rules
Legal compliance dependent on human checks	Enforced through system rules and statuses

Client's testimonial

” Before this system, we were constantly chasing paperwork and trying to figure out what step came next. Now everything is in one place — we see what's done, what's pending, and what needs our attention. It's made our payroll and document process much faster and way less stressful. “

— Olena Tkaczuk, CEO, FBA



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