

BillingPlatform for Salesforce

Synchronize Data Throughout the Entire Quote-to-Cash Process

Manage recurring revenue, usage-based billing and tiered rating—all within the Salesforce financial ecosystem.



Accelerate Your Quote-to-Cash Process

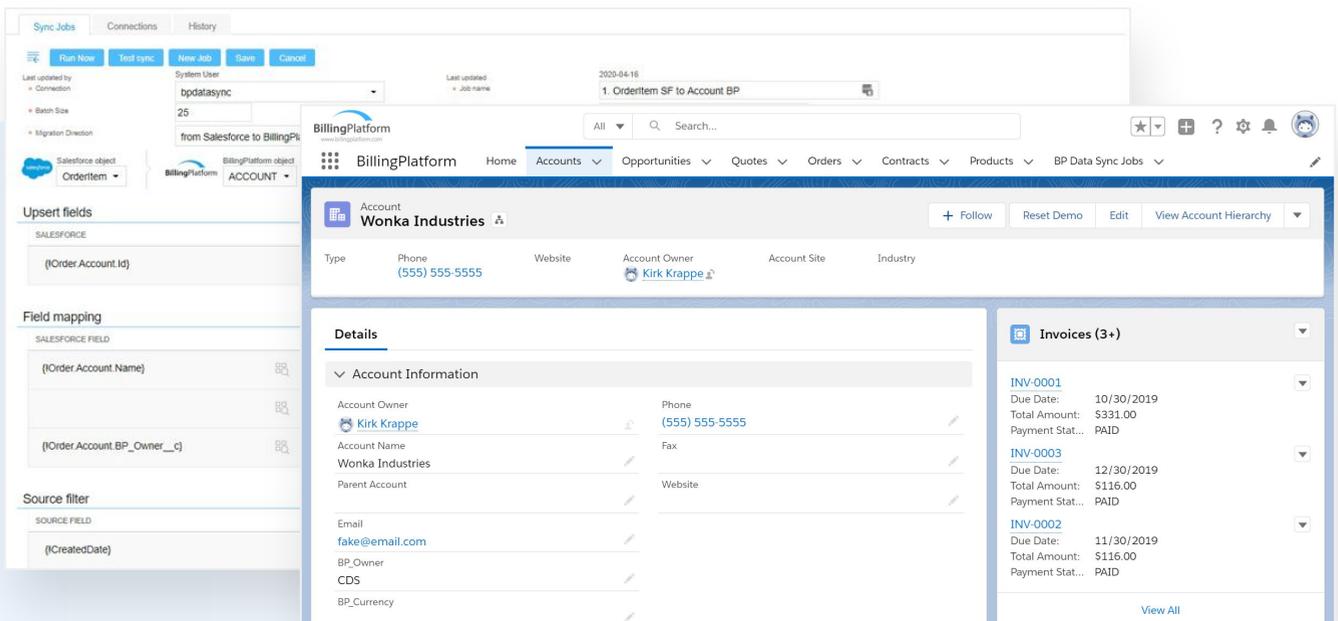
Many of the world’s most successful businesses rely on Salesforce CRM to enable their sales and account management success. But, many of these data-driven companies haven’t connected Salesforce with their billing solution—missing out on valuable insights and process efficiencies.

With BillingPlatform’s connector, billing and invoicing data can be managed in and connected directly to Salesforce. This out-of-the-box connector gives your sales teams the most accurate and up to date information about their customers from quote to cash.

This pre-built, web-based connector automatically transfers data between the world’s #1 CRM and the industry’s leading billing solution.

BillingPlatform connector allows your business to:

- Connect sales teams to billing information
- Connect finance and billing teams directly to the order process in Salesforce
- Provide point-and-click efficiencies for adding or deleting billing fields directly within Salesforce
- Synchronize data between billing and your CRM



Find out how to Accelerate Ideas into Revenue with BillingPlatform for Salesforce [here](#)

Seamlessly Connect Your Billing and CRM

By connecting BillingPlatform to Salesforce, your business establishes immediate transparency between sales, account management and finance teams. This tight integration means your business can accelerate order management, save time and achieve efficiency for your operation.

Save time, reduce errors and improve accuracy of data:

- Seamless synchronization data between systems
- Pull or push data on defined schedules or on-demand
- Map fields with simple point & click configuration
- Update sales and account management in real time
- Eliminate managing multiple systems

Synchronizing Your Quote-to-Cash Processes



Launch Billed Products

Automatically sync products across systems without coding and launch subscription or usage-based pricing within Salesforce



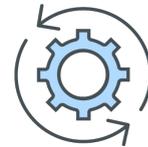
Grow Your Enterprise

The cloud-based architecture of BillingPlatform enables businesses to leverage the Salesforce ecosystem for ease of use while managing high volume billing.



Maximize efficiency

Reduce resources by automating critical and manual tasks, keeping your contacts and accounts in sync.



Configure Opportunities

When creating an opportunity in Salesforce, you can apply subscription, add-on, or one-time products from the BillingPlatform product catalog.



Manage Accounts

Accounts that are created or modified in Salesforce can be automatically synced with BillingPlatform. Every time you run a bill cycle, the account object in Salesforce updates with the invoice and billing history.



Centralize Management

BillingPlatform provides centralized access to products and accounts by syncing with your Salesforce. Within Salesforce, BillingPlatform allows you to configure one-time, recurring or usage-based pricing.

Salesforce + BillingPlatform

Increase Efficiencies Across Your Enterprise

The integration of BillingPlatform and Salesforce allows sales, executives, and IT to see all revenue generated from each client and view revenue metrics across territories. This information is available to all as soon as invoices and activity are rated within BillingPlatform.

The integration means invoices, products and payments from BillingPlatform are synchronized with quotes, opportunities and accounts in Salesforce, providing full insight into the quote-to-cash process.

The BillingPlatform connector delivers actionable insights to your business. Between Salesforce and BillingPlatform dive into KPIs to see recurring revenue trends, customer lifetime value projections, product revenue, insights into outstanding invoices and timing of receivables.

With immediate access to customer information sales has accurate and up-to-date information about their customers as well as a complete picture of the revenue being generated.