

Vindicia CashBox for Salesforce



Build Insight and Enhance Customer Satisfaction

Turn to Vindicia[®] CashBox[®] for Salesforce Basic and Premium to access your subscription billing data in your Salesforce CRM solution. When you work with subscription billing data and other customer information through a single platform, you'll save your team time while building business insight serving customers more easily.

CashBox for Salesforce Basic: Experience Agile Reporting and More

Your company relies on Salesforce in many processes beyond sales, such as customer support, marketing, and reporting. Available free to CashBox clients, CashBox for Salesforce Basic adds CashBox data to the wealth of information you access in Salesforce. With CashBox for Salesforce Basic, you view subscriptions and transactions through the familiar Salesforce interface. Slice and dice data using the ad hoc analysis capabilities in Salesforce to better track progress towards goals. Or run out-of-the-box reports and use dashboards to improve visibility into key metrics. You can even make simple updates to account information through Salesforce, and take advantage of subscription billing data in customer support and Salesforce-enabled marketing activities.

CashBox for Salesforce Basic Helps You:

- Gain efficiency by reviewing customer data in one location
- Build insight by integrating subscription data into dashboards and reporting
- Save time as you incorporate subscription billing status into marketing campaigns and support ticket tracking
- Realize higher returns on your investment in CashBox and Salesforce

CashBox for Salesforce Premium: Serve Customers Better and More Efficiently

CashBox for Salesforce Premium delivers the customer service and sales capabilities of CashBox through Salesforce. Rather than having to use multiple tools to manage opportunities and billing, team members use one efficient interface to help customers, saving time and improving service.

You can manage the whole quote-to-cash process from within Salesforce using CashBox for Salesforce Premium. Create subscriptions, quotes, and approval flows in Salesforce. Manage subscriptions and additional purchases or issue credits and refunds just as easily. Data entered through Salesforce synchronizes with CashBox automatically. You work in Salesforce, but all payment data is handled in the PCI-compliant CashBox environment.

CashBox for Salesforce Premium Helps You:

- Increase sales by creating accurate quotes faster
- Win new customers by developing custom quotes and pricing more easily
- Serve customers more efficiently by managing subscriptions, additional purchases, credits, and refunds in one location
- Take advantage of the familiar Salesforce environment for billing while supporting PCI compliance

Get More Value from CashBox and Salesforce

Use CashBox for Salesforce Basic to:

- Drive insight into key metrics
- Make more informed decisions
- Improve marketing and customer support
- View subscription and other customer data in one location

Use CashBox for Salesforce Premium to:

- Accelerate quote-to-cash processes
- Increase sales

Visit the [Salesforce AppExchange](#) to get started.

CashBox for Salesforce in Action

As a Salesforce client, your company uses the familiar Salesforce environment to do everything from building customer insights to serving clients better. And you use Vindicia CashBox to handle subscription billing and keep customers connected to your products. Integrate CashBox and Salesforce—you'll know more about your customers and serve them more efficiently.

Without CashBox for Salesforce, business users who rely on both Salesforce and CashBox lack an easy way to work with billing and customer data. When CashBox for Salesforce Basic brings subscription data into Salesforce, you access customer-related data in one location. Finance users save time as they dig deep into key metrics. Marketers readily tie subscription status to promotions. And your support team can incorporate subscription and billing status into ticket tracking.

Your sales team and customer service agents who work in Salesforce need access to the data in CashBox even more than business users. CashBox for Salesforce Premium lets your sales team manage opportunities faster, helping them close more deals. Customer service agents gain similar efficiency as they manage subscriptions, purchases, credits, and refunds through Salesforce.

Feature Highlights

CashBox for Salesforce Basic

- View and update CashBox customer account information in Salesforce
- View subscriptions and transactions in Salesforce
- Incorporate normalized CashBox data into your Salesforce apps, processes, and workflows
- Use CashBox data in Salesforce in out-of-the-box and configurable reporting and dashboard tools

CashBox for Salesforce Premium: Subscriber Acquisition Features

- Support the entire quote-to-cash process within Salesforce
- Create customer accounts in Salesforce that automatically integrate with CashBox at purchase time
- Generate custom quotes in Salesforce; CashBox populates relevant fields, such as billing amounts and billing dates
- Establish approval flows for discounts and more
- Use custom buttons to modify, cancel, and preview changes to purchases

CashBox for Salesforce Premium: Subscriber Management Features

- Manage and change payment methods in one location while maintaining PCI compliance
- View and manage subscriber payment details, such as billing dates, purchase history, and billing amounts, in one location
- Empower service agents to issue credits that support customer satisfaction and retention
- Issue and manage refunds in one location

US Headquarters

Vindicia, Inc.
2988 Campus Drive
Suite 300
San Mateo, California
94403-2531
P +1 650 264 4700
F +1 650 264 4701
vindicia.com/contact-us

ABOUT VINDICIA

Vindicia, an Amdocs company, offers comprehensive subscription management solutions that help businesses acquire and retain more customers. Providing much more than just a billing and payments system, the company's SaaS-based subscription management platform combines big data analysis, strategic consulting and proprietary retention technology. Vindicia provides its clients with more recurring revenue, more customer data, better insights, and greater value throughout the entire subscriber lifecycle. That's why they call us the Subscription People. To learn more visit www.vindicia.com.

Copyright © 2018 Vindicia, Inc. All rights reserved. Vindicia, the Vindicia logo, Vindicia CashBox, Vindicia Select, and the designated trademarks herein are trademarks of Vindicia, Inc. in the U.S. and/or other countries. All other brands or product names are the trademarks or registered trademarks of their respective holders. 0218

