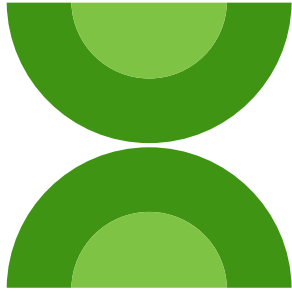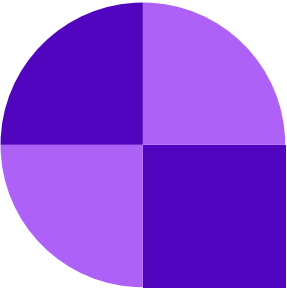# Vindicia Subscribe for Salesforce

Build insight and enhance customer satisfaction

Turn to Vindicia Subscribe (formerly 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 to serve customers more easily.

Vindicia Subscribe 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 Vindicia Subscribe clients, Vindicia Subscribe for Salesforce Basic adds Vindicia Subscribe data to the wealth of information you access in Salesforce.

With Vindicia Subscribe 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.

Vindicia Subscribe 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 Vindicia Subscribe and Salesforce

Vindicia Subscribe for Salesforce Premium: Serve customers better and more efficiently

Vindicia Subscribe for Salesforce Premium delivers the customer service and sales capabilities of Vindicia Subscribe 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. Create subscriptions, quotes, and approval flows in Salesforce. Manage subscriptions and additional

Use Vindicia Subscribe 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 Vindicia Subscribe for Salesforce Premium to:

- Accelerate quote-to-cash processes
- Increase sales

Visit the Salesforce AppExchange to get started.

purchases or issue credits and refunds just as easily. Data entered through Salesforce synchronizes with Vindicia Subscribe automatically. You work in Salesforce, but all payment data is handled in the PCI-compliant Vindicia Subscribe environment.

Vindicia Subscribe 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

Vindicia Subscribe 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 Subscribe to handle subscription billing and keep customers connected to your products. Integrate Vindicia Subscribe and Salesforce—you'll know more about your customers and serve them more efficiently.

Without Vindicia Subscribe for Salesforce, business users who rely on both Salesforce and Vindicia Subscribe lack an easy way to work with billing and customer data. When Vindicia Subscribe 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 Vindicia Subscribe even more than business users. Vindicia Subscribe 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

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

Vindicia Subscribe for Salesforce Premium: Subscriber acquisition features
- Support the entire quote-to-cash process within Salesforce
- Create customer accounts in Salesforce that automatically integrate with Vindicia Subscribe at purchase time
- Generate custom quotes in Salesforce; Vindicia Subscribe 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

Vindicia Subscribe 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

About Vindicia

Vindicia 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. To learn more visit www.vindicia.com.

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