

softheme

Integrating PortaBilling

with Salesforce CRM





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softtheme

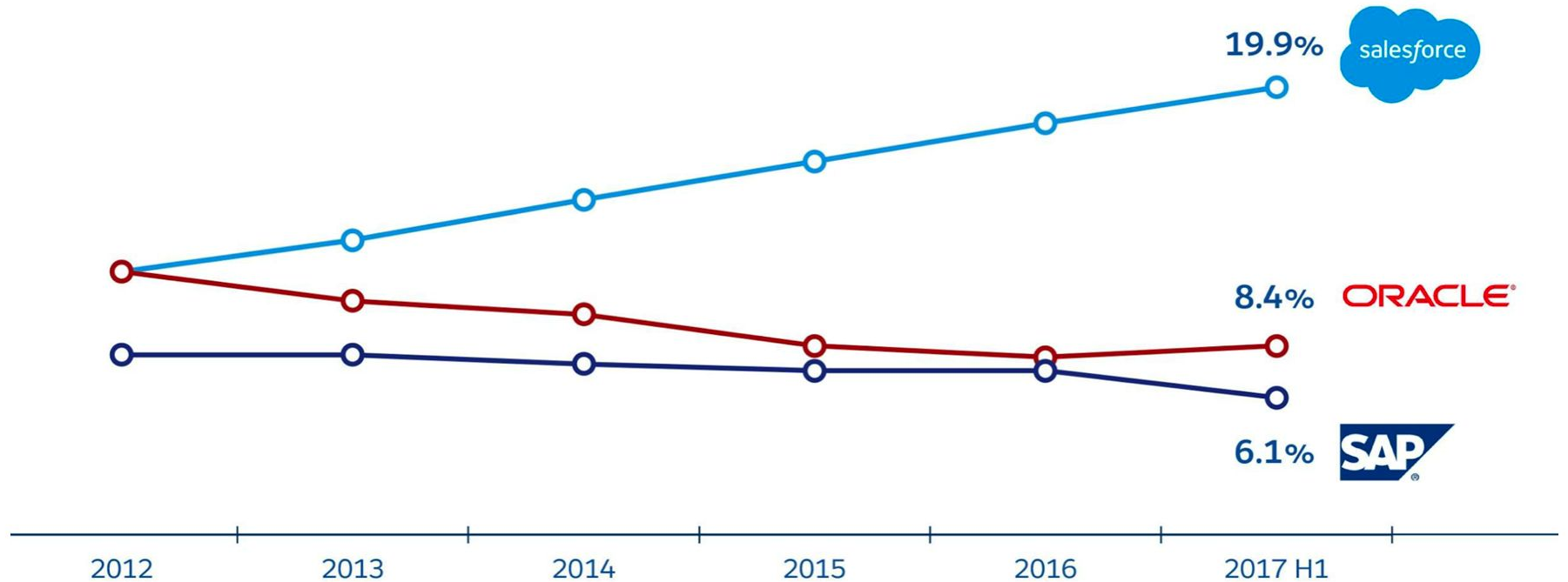
What is Salesforce?

A photograph of a modern glass skyscraper with a large blue Salesforce logo overlaid on the facade. The logo consists of a blue cloud shape with the word 'salesforce' in white lowercase letters. The building's glass reflects the sky and surrounding environment. Red geometric shapes, including chevrons and diagonal bars, are overlaid on the image, framing the text and logo.

salesforce

Salesforce. #1 in CRM, Sales, Customer Service, and Marketing

Worldwide CRM applications 2017 market share by IDC



Source: IDC Worldwide Semiannual Software Tracker, October 2017. Sales, Customer Service and Marketing Applications refer to IDC-defined functional markets within the broader CRM Applications market. Salesforce and Adobe were statistically tied for the #1 position in the worldwide marketing applications market due to a difference of less than one percent in their 1H17 revenues.

Customer Success Platform for the Fourth Industrial Revolution



COMMUNITIES

Customer, partner, and employee experiences



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Integration Goals

- To Target Campaigns in Salesforce
- To Supplement Salesforce Data
- To Record Upsells in PortaBilling



To Target Campaigns

- The ability to filter existing customers from PortaBilling, based on different criteria

 PortaOne Customer preview (Total : 1082)

Customer Class
Default customer class

Country
Ukraine

City
- All -

Created Date From
mm/dd/yyyy

Created Date To
mm/dd/yyyy

Products
MainDataProduct
MainMessagingProduct
MainVoiceProduct
MegaCall

Included products combination
SuperCall

To Target Campaigns

- The ability to instantly preview audiences from PortaBilling

LAST NAME	FIRST NAME	STREET	EMAIL	COUNTRY	ST/
Mcfarland	Serenity	888 Stehr Trail		UA	Wy
Leonard	Stella	5257 Jazlyn Stravenue		UA	Ida
Smith	Ellie	21982 Gino Avenue		UA	Me
Grimes	James	8980 Stephen Branch		UA	Soi
Harvey	Jasmine	39477 Dulce Mountains		UA	Iov
Todd	Melanie	47841 Batz Junction		UA	On

To Target Campaigns

- The ability to create standard Salesforce campaigns

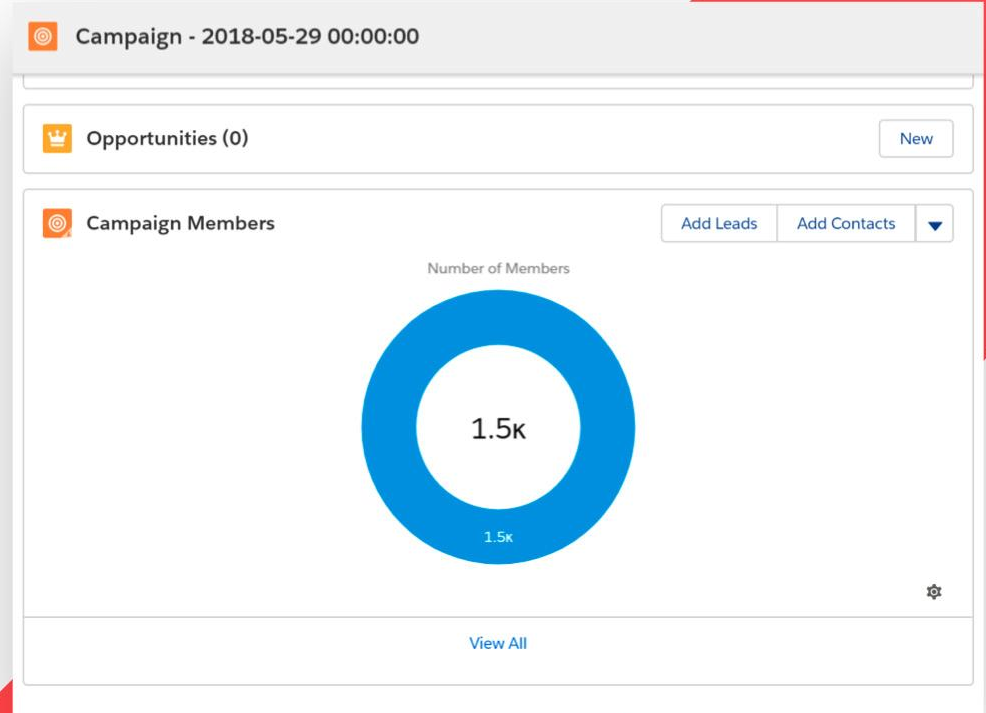
Start Campaign

* Campaign Name	Leads in Campaign
<input type="text" value="SuperCall upgrade campaign"/>	0
Active	Converted Leads in Campaign
<input type="checkbox"/>	0
Type	Contacts in Campaign
<input type="text" value="Email"/>	0
Status	Responses in Campaign
<input type="text" value="Planned"/>	0
Start Date	Opportunities in Campaign
<input type="text"/>	0
End Date	Won Opportunities in Campaign
<input type="text"/>	0
Expected Revenue in Campaign	Value Opportunities in Campaign
<input type="text" value="€100,000"/>	€0
Budgeted Cost in Campaign	Value Won Opportunities in Campaign
<input type="text"/>	€0

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To Target Campaigns

- The ability to pull campaign members from PortaBilling to Salesforce automatically



To Supplement Salesforce Data

- The details of PortaBilling customers are one click away for Leads, Accounts, and Contacts

The screenshot displays the Salesforce CRM interface for a lead record. At the top, the navigation bar includes 'Sales', 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Tasks', 'Files', 'Campaigns', 'Start PortaOne Campaign', and 'More'. The lead record is for 'Abigail Curry' with a status of 'Open - Not Contacted'. The record details include 'Company: Abigail Curry' and 'Phone(2): 735-534-495'. The status bar shows a progression from 'Open - Not Contacted' to 'Working - Contacted', 'Closed - Not Converted', and 'Converted', with a 'Mark Status as Complete' button. The 'PORTABILLING DETAILS' tab is selected, and a message states 'We found no potential duplicates of this lead.'

Title	Company	Phone(2)	Email
	Abigail Curry	735-534-495	

Open - Not Contacted Working - Contacted Closed - Not Converted Converted

ACTIVITY CHATTER DETAILS NEWS **PORTABILLING DETAILS**

We found no potential duplicates of this lead.

To Supplement Salesforce Data

- The ability to access the products and information of addons is done in the very familiar, Salesforce way

The screenshot shows a Salesforce interface with the following components:

- Navigation Tabs:** ACTIVITY, CHATTER, DETAILS, NEWS, **PORTABILLING DETAILS** (selected).
- Form Fields:**
 - ID: 22419
 - Name: Charles Roman
- Section Tabs:** Invoices, **Products** (selected), Service Usage.
- Table:**

	ACCOUNT	NAME	START	END	BALANCE	ADDONS
View	1011506	SuperCall	2018-01-01		0	Add-on 1
View	8031889	MainVoicePr...	2018-01-01		0	
View	8769918	MainVoicePr...	2018-01-01		0	

To Supplement **Salesforce Data**

- The ability to access the payment history of your PortaBilling customers, directly in Salesforce

ACTIVITY
CHATTER
DETAILS
NEWS
PORTABILLING DETAILS

ID

Name

Invoices

Products
Service Usage

INVOICE #	▼ PERIOD	▼ AMOUNT NET	▼ OUTSTANDING AMOUNT	▼ DUE DATE
34289	2018-05-22 21:57:18	\$1.00	\$1.00	22-May-2018
34290	2018-05-22 21:57:25	-\$4.00	\$0.00	22-May-2018
34291	2018-05-22 21:58:22	\$1.00	\$1.00	22-May-2018
34292	2018-05-22 21:58:26	\$1.00	\$1.00	22-May-2018
34293	2018-05-22 21:58:30	\$5.00	\$5.00	22-May-2018
34294	2018-05-22 21:58:34	-\$3.00	\$0.00	22-May-2018

To Record Upsales in PortaBilling



- Upgrade the Subscriptions of products and add-ons in a couple clicks

Change Product Configuration

Customer: Abigail Curry

Account: 7165452

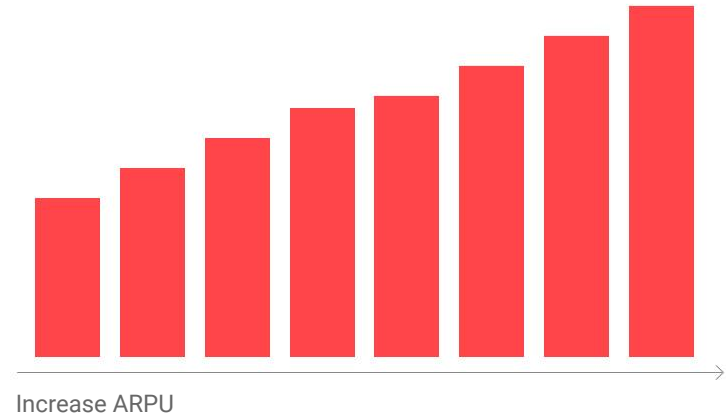
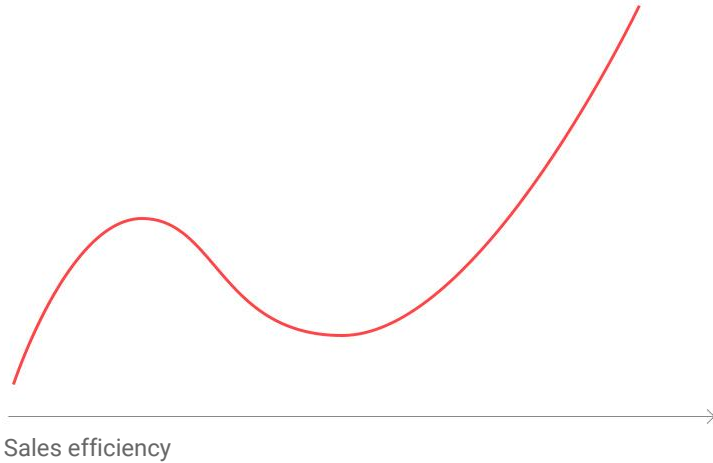
Main Product: SuperCall

Adds	Enabled	Addon Name	Effective to
	<input checked="" type="checkbox"/>	Add-on 1	29-Jun-2018 
	<input checked="" type="checkbox"/>	Add-on 2	29-May-2018 
	<input type="checkbox"/>	Add-on 3	<input type="text"/>

Cancel Save

Summary

- Increases the efficiency of sales
- Increases ARPU



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Thank You!

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