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Integrating PortaBilling

with Salesforce CRM

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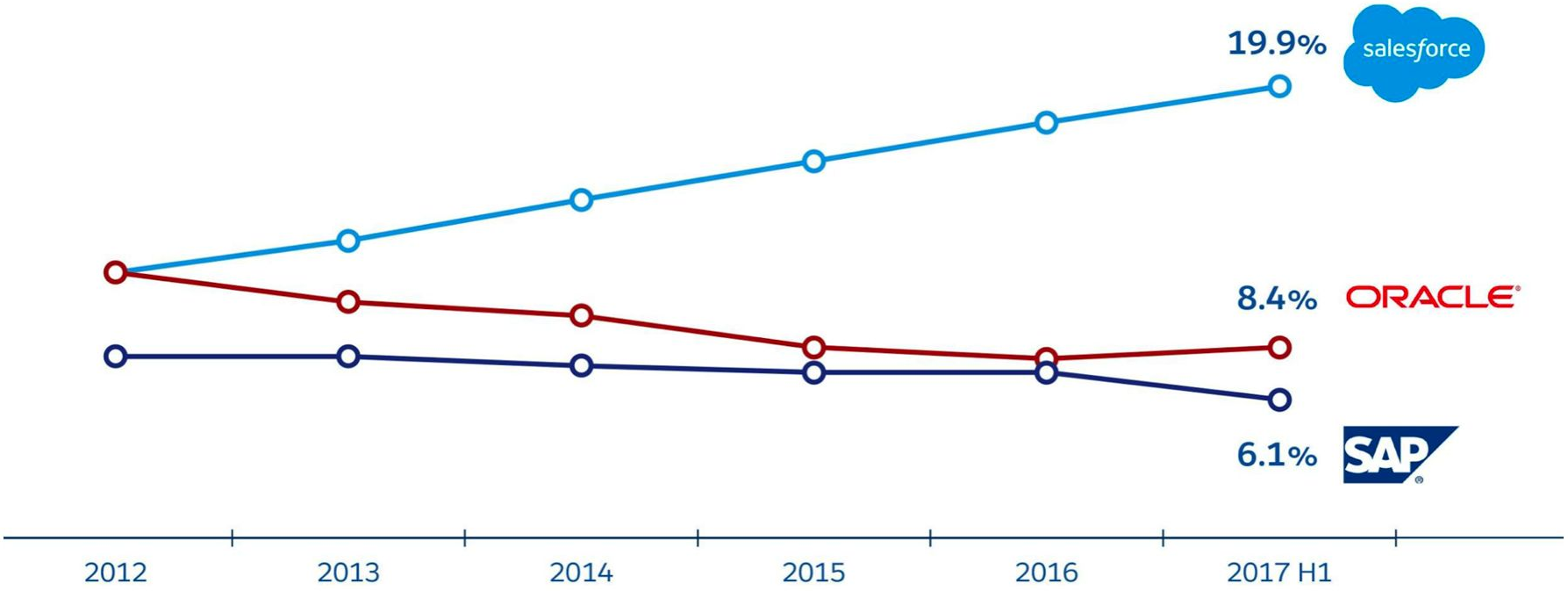
What is Salesforce?

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

SERVICE
Drive service transformations

SALES
Transform sales from lead to cash to loyalty

COMMERCE
Intelligent, unified shopper experiences across any channel

COLLABORATION
Quip team collaboration platform

MARKETING
Deliver personalized consumer engagement at scale

INDUSTRIES
World's #1 CRM reimagined for your industry

Stephanie Herrera
Co-Founder, PepUp Tech

TRAILHEAD | EINSTEIN | LIGHTNING | IOT | HEROKU | ANALYTICS | APPEXCHANGE

SALESFORCE PLATFORM

#1
B2C & B2B Platform

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Integration Goals

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

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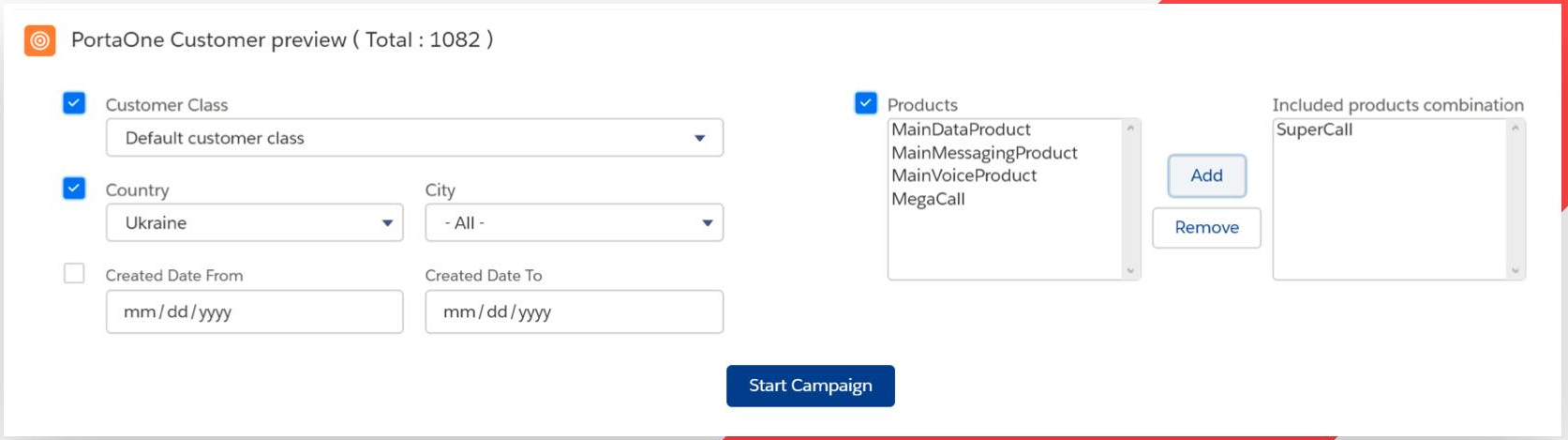
To Target Campaigns

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



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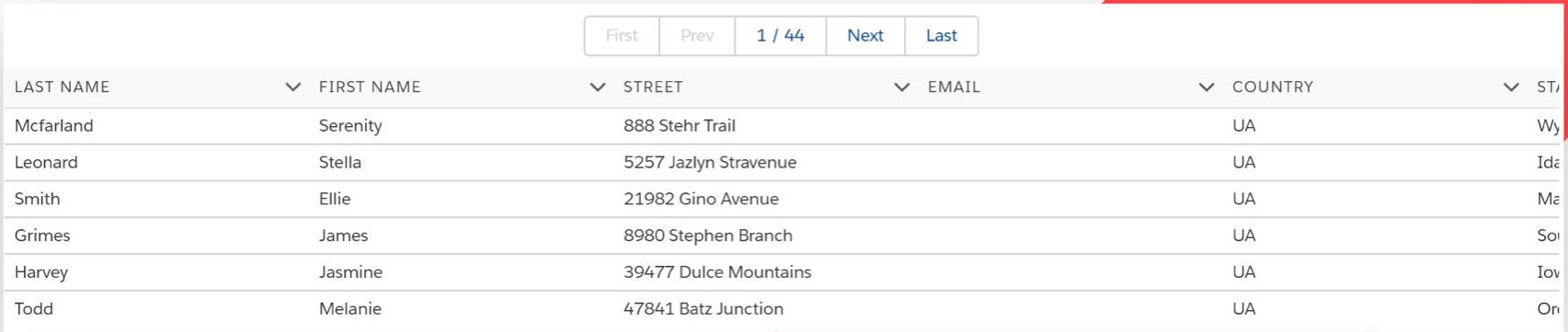
To Target Campaigns

- The ability to instantly preview audiences from PortaBilling



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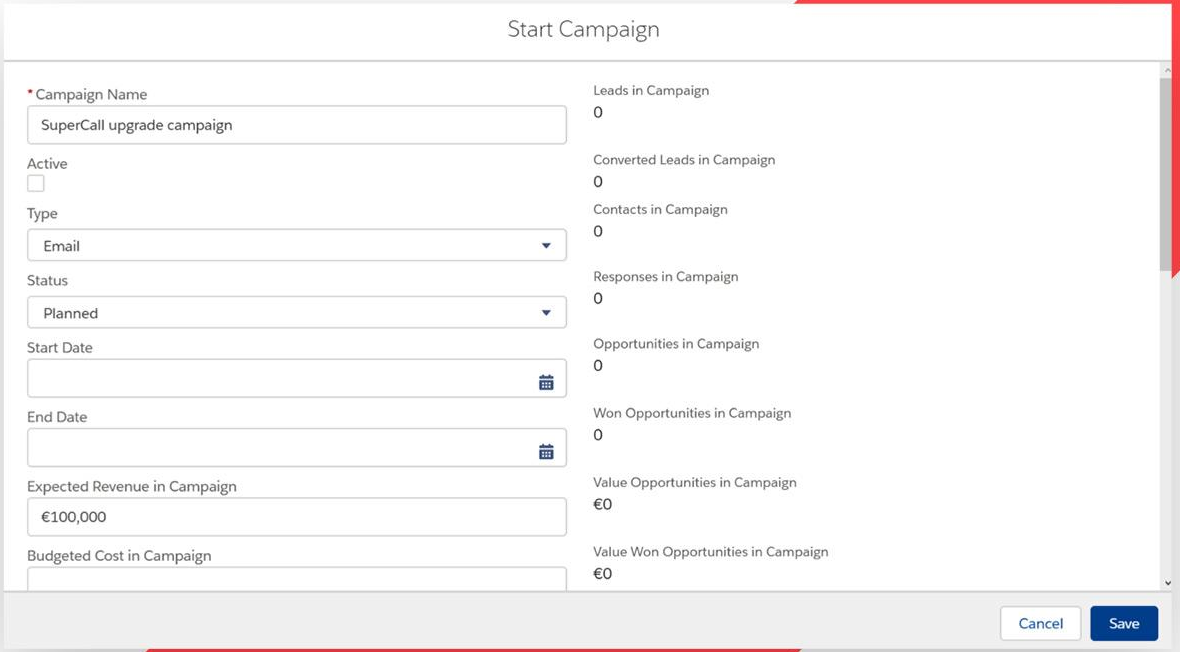
To Target Campaigns

- The ability to create standard Salesforce campaigns



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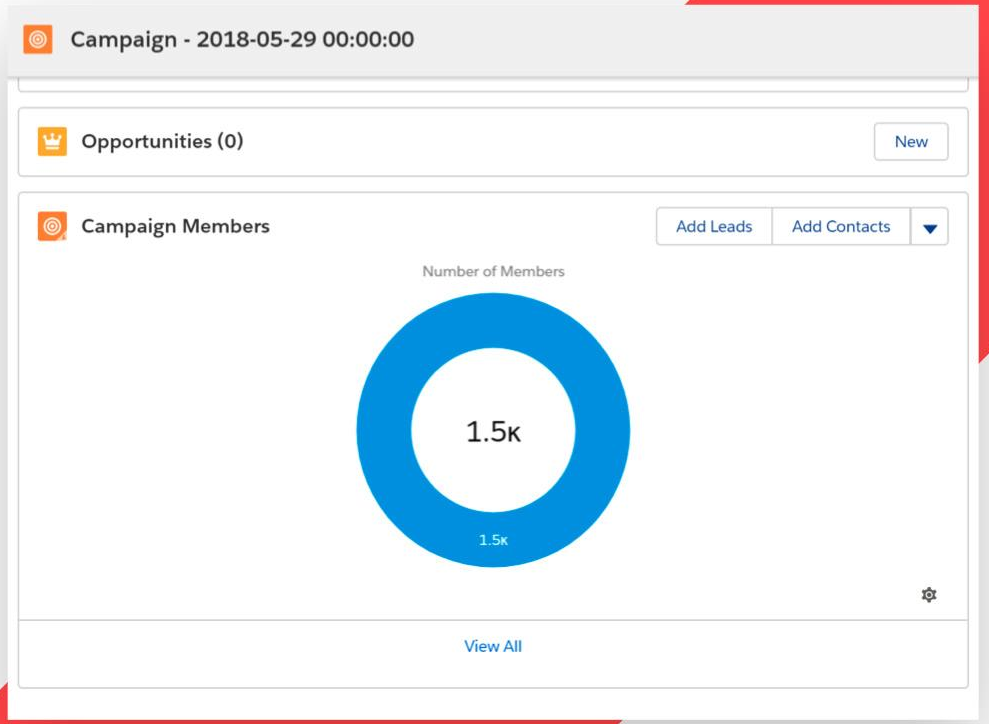
To Target Campaigns

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



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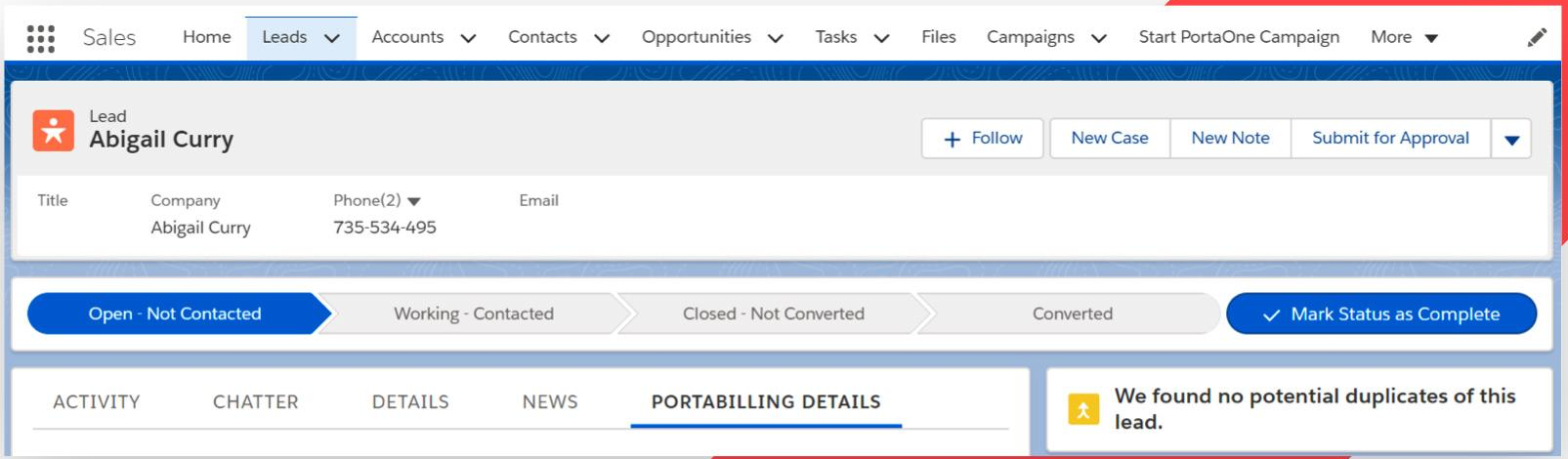
To Supplement Salesforce Data

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



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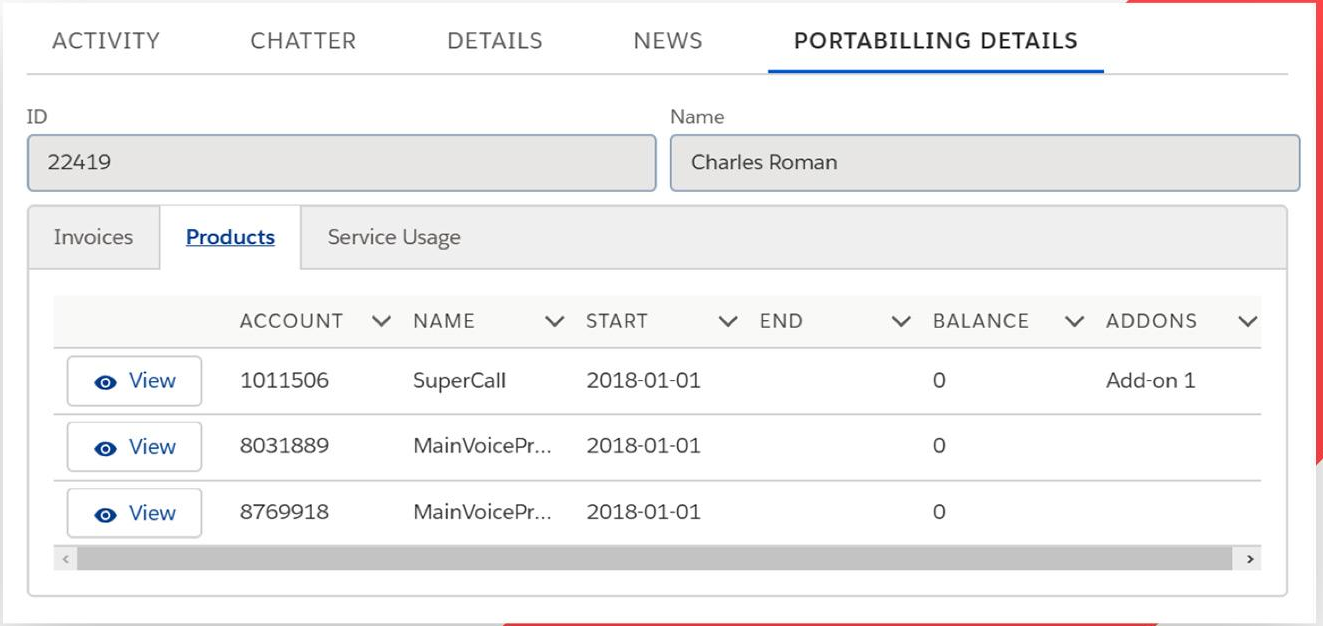
To Supplement Salesforce Data

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



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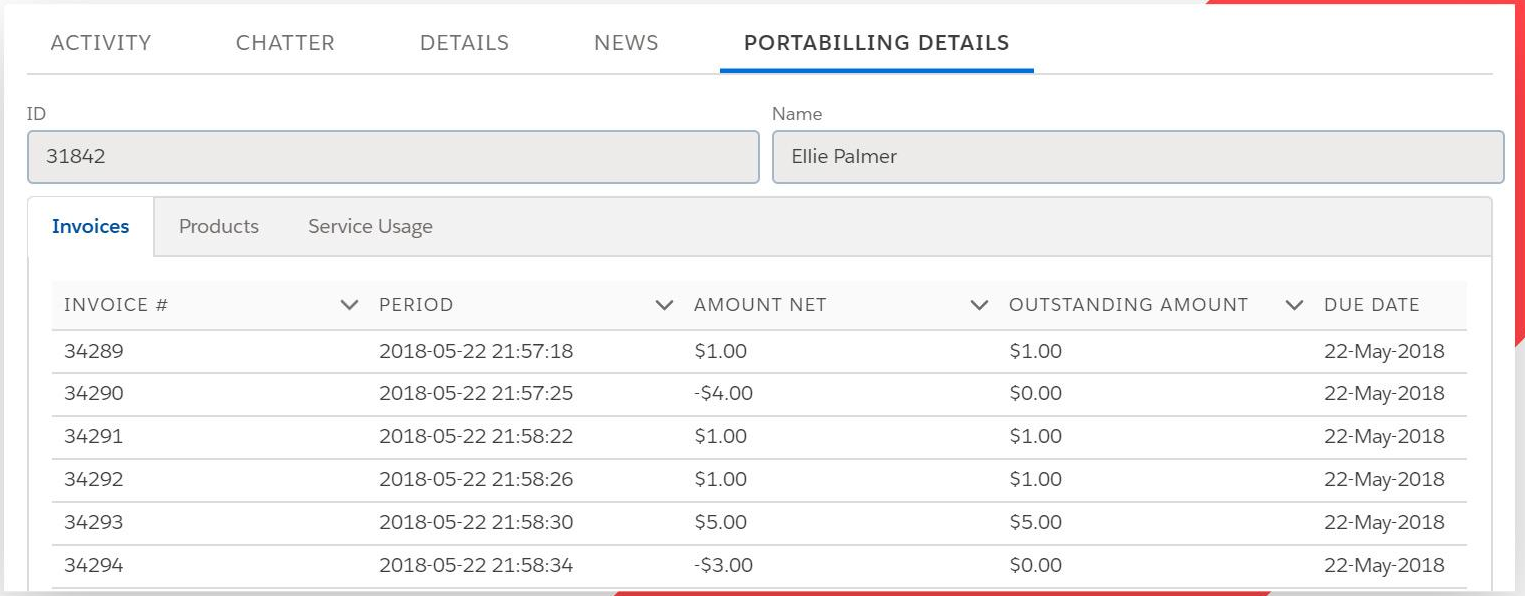
To Supplement Salesforce Data

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



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

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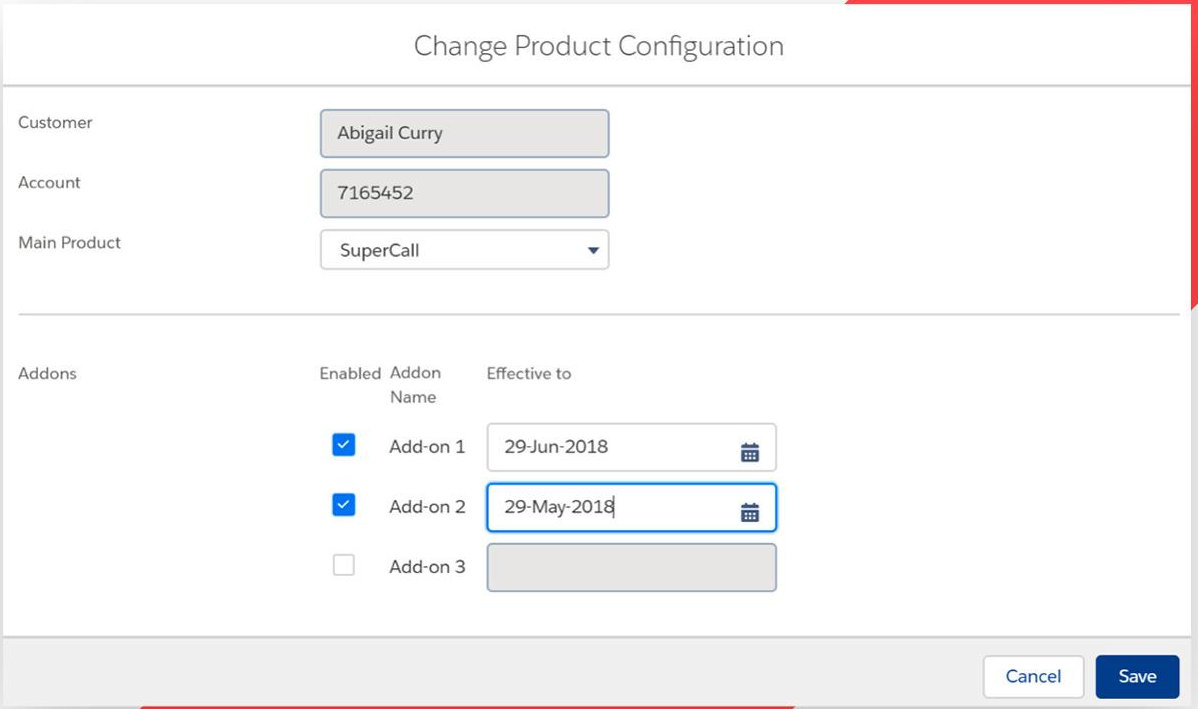
To Record Upsales in PortaBilling

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



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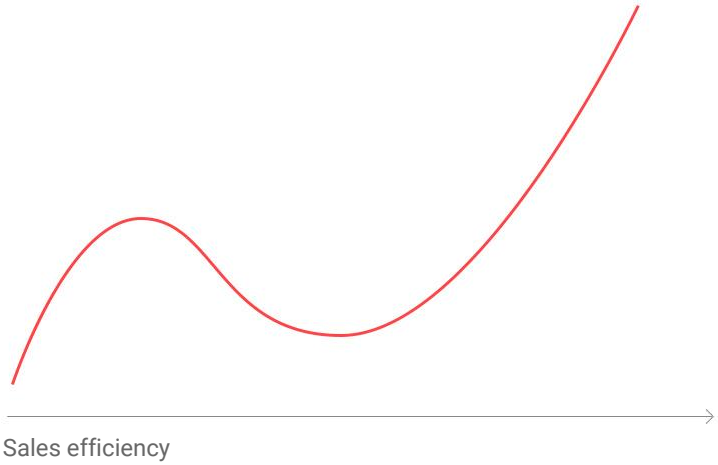
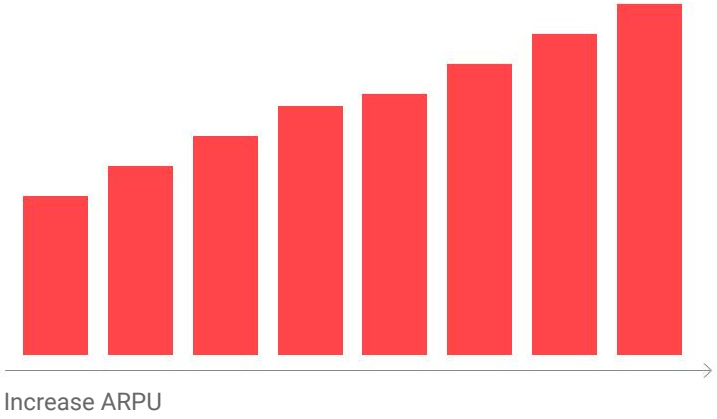
Summary

- Increases the efficiency of sales
- Increases ARPU





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Thank You!

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