



Thank you for considering BluSynergy. We hope this checklist will help you find the right billing and payment solution for your business!

**2 – IMPORTANT**

**1 – NICE TO HAVE**

**0 – NOT IMPORTANT**

FEATURES	2	1	0	IMPORTANCE
Account level 360* visibility				View all invoices and payments for each Salesforce Account with real-time balances
Invoicing				Sales people can generate invoices right inside Salesforce. Convert opportunities or just create an invoice.
Accept Payments				Take credit cards or ACH payments, and optionally store the credit card for future automated payments
Automated Invoices (Subscriptions)				Generate recurring invoices (monthly / quarterly / annual / etc)
Customer Self Service Portals				Mobile and web self-service portals seamlessly embedded within your website allowing customers direct access to their accounts.
Multiple Billing Plans				Implement new pricing models in a few mouse-clicks without IT involvement – prorating, bundling, free trials, metered billing and more!
Automated Customer Communications				From welcome messages for new customers to overdue invoice reminders to updating expiring credit cards, you'd want the system to automate customer communications, but lets you control branding.
"Subscribe Now" Shopping Cart				Embed sign-up buttons and links on your own website to capture new subscriptions
Revenue Dashboards				Specialized reporting for invoices, payments, and subscriptions let's you monitor KPIs such as revenue, aging, customer churn, etc. in Salesforce
Commissions				Automate recurring commissions, royalties and similar payables (e.g. "10% year 1, 5% year 2")
Key Integrations				If you already have important software in place to manage other parts of your business, like SAP, QuickBooks, Avalara Sales Tax, or in-house applications, make sure easy integration is possible.
Data Security / PCI				If keeping your customers' information secure, private, and PCI/DSS compliant is important to how you run your business, you'll want to work with a provider that feels the same way.
Custom Billing Solutions				The ability to extend and customize the software for your needs.
All-In-One Solution				Simplify your entire billing and cashflow process down to one tool instead of a series of tools, an all-in-one software solution is right for you.