

Simplifying Payment Collections for a Professional Services firm in Healthcare with ChargeOn

Discover how our client improved their senior placement operations by utilizing ChargeOn to automate payment links and manage subscription billing with backup gateway options.

Products: ChargeOn, Salesforce CRM, Experience Cloud, Stripe

Industry: Professional Services related to Healthcare

Region: Ohio, US



Business Overview



The client is an Ohio-based senior placement and care coordination service firm founded in 2021. The organization serves seniors and families across the nearby local areas.

The organization assists elderly individuals in transitioning safely from home to various care facilities, including assisted living, memory care, and skilled nursing. They also offer medicaid programs, VA benefits, healthcare coordination, downsizing, legal documentation, and transportation. The client mainly receives referrals from hospitals and healthcare providers. They collaborate with case managers and social workers to create appropriate discharge plans. Their services are free to clients and families, as they earn revenue through referral fees paid by care facilities upon successful placement.

A photograph of three healthcare professionals in a modern hospital hallway. On the left, a woman with short blonde hair, wearing a light grey blazer, is shaking hands with a woman on the right. The woman on the right has long reddish-brown hair and is wearing a light blue medical scrub top with a stethoscope. In the background, a man with a beard, wearing a white lab coat over a blue shirt and tie, also has a stethoscope and is smiling. The hallway has large windows and modern lighting.

Reason for Collaboration

Our client transitioned from their legacy CRM to Salesforce, recognizing the need for enhanced integration, customization, and automation capabilities. This transition required implementing a comprehensive payment solution to address multiple operational gaps:

- Payment automation for direct Stripe charges linked to Customer IDs
- Subscription billing for ongoing care coordination and facility management fees
- Automated payment link generation with a "Request Payment" button within Opportunity records
- Quote-to-payment integration to streamline the proposal-to-invoice workflow

The client demanded a solution that could handle their complex referral fee structures, facility-based billing, and multi-party payment scenarios while maintaining compliance and operational efficiency.

Challenges



Fragmented Payment Collection Without Customer ID Linking

The client's team manually recorded payments from various channels in separate spreadsheets disconnected from their legacy CRM, leading to hundreds of untracked payments each month.



Manual Subscription Billing and Missed Recurring Cycles

Ongoing care coordination services demanded recurring billing, but the client's legacy CRM lacked subscription automation. The client's team had to send reminders to the clients who missed their payments manually.





No Fallback Payment Options When Primary Gateway Fails

Due to the client's reliance on a single payment gateway, Stripe, they faced halted payments whenever the gateway encountered issues. Due to declining transactions, staff had to manually ask clients to retry or switch payment methods. The client's team spent significant time troubleshooting declined payments and handling retries manually.



Quote Management is Completely Disconnected from Payments

The client's team sent emails with 'call to proceed' instructions due to no automated workflows for payment collection. The clients approved and made payments via phone or through generic links. The payments were tracked manually in different systems, leading to confusion and email clutter.

Solutions

We integrated ChargeOn with Stripe in Salesforce to enable subscription billing, support payment links, and facilitate a multi-gateway fallback mechanism. This enabled Salesforce automation, quote management, and streamlined everything from payment collection and client billing to quote tracking and customer engagement, removing manual administration.



ChargeOn
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stripe



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Payment Automation and Customer ID Synchronization

We integrated ChargeOn in Salesforce CRM and with Stripe to enable direct charges, automated payment link generation through the “Request Payment” button, and automatic sync of Customer IDs from Salesforce Accounts and Opportunities. The payment details and transaction logs are stored natively within Salesforce, ensuring all payment events are linked to the right client record.

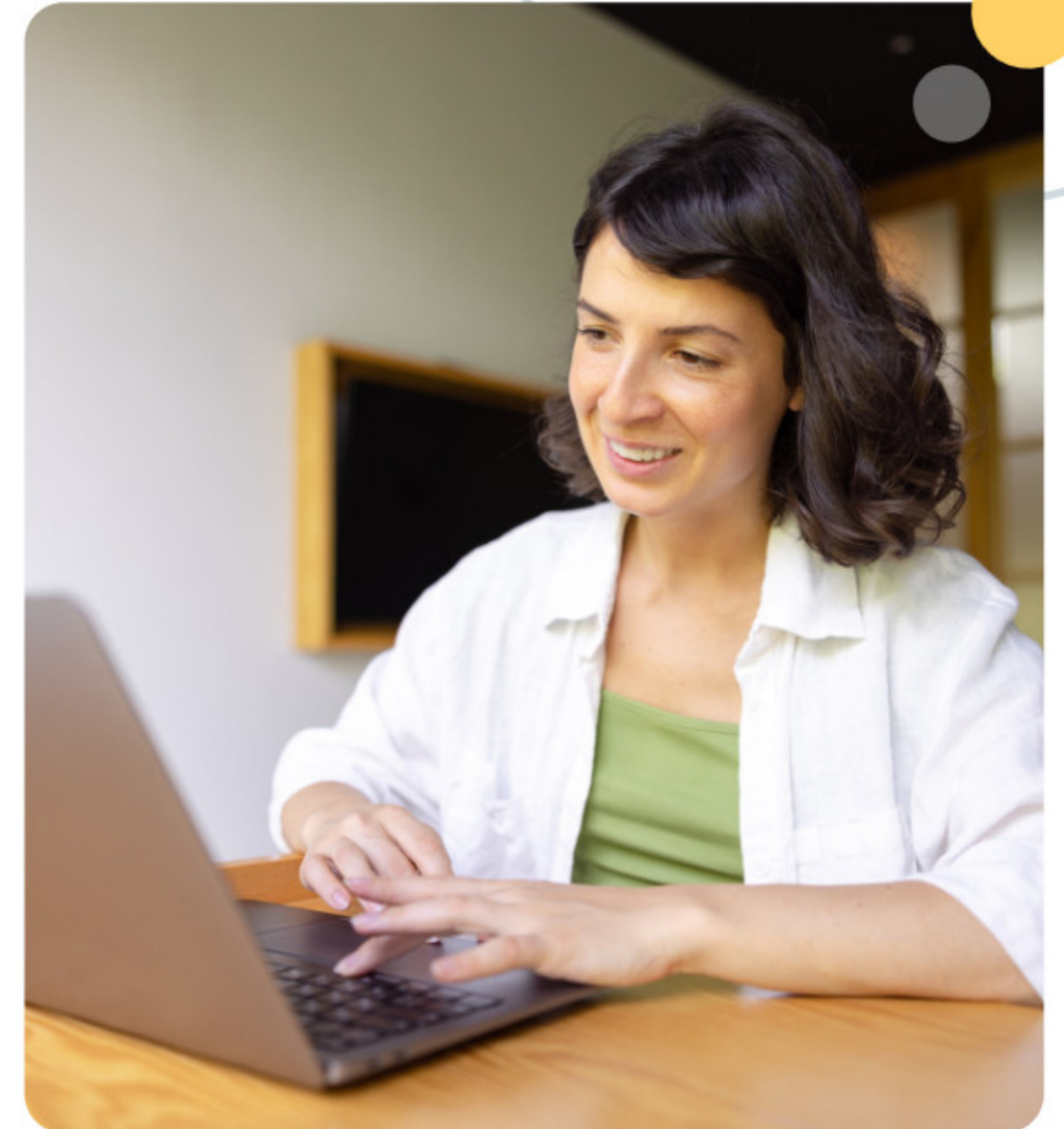


2 **Subscription Billing Automation**

Using ChargeOn's subscription billing feature, we enabled recurring billing for facility management and care coordination fees. These are automatically invoiced, collected, and tracked in the system. With this, the client was able to send auto-reminders and one-click payment links, reducing manual cycles and service interruptions.

3 **Backup Payment Gateway Setup**

ChargeOn enabled multi-gateway orchestration to automatically route failed payments from Stripe to a backup gateway, minimizing declines and abandoned payments. The client's team was notified only when manual intervention was truly required. It improved the payer experience and reduced lost revenue.



Benefits

Here are the transformative benefits that our client achieved



70%

Reduction in manual
payment entry effort.



35%

Increase in successful
payment collections.



30%

decrease in payment
failures



40%

fewer billing errors
through automation.



60%

less manual effort on
subscription renewals.



90%

accuracy in payment
reporting.

Ready to eliminate missed payments, improve quote conversions, and deliver a seamless modern billing experience to your clients?

Connect with our experts today to schedule a ChargeOn for Salesforce demo!

Connect With Experts Today!

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Being a leading Salesforce Partner, Cyntexa's global capabilities and the team of CRM experts are assisting businesses of all sizes and types to streamline their manual processes in definite clicks.

We have a team of 400+ Salesforce experts, certified and accredited as Salesforce AppExchange Partner, Salesforce Implementation Partner, and Salesforce Consulting Partner.

With expertise in CRM implementation, integration, and business process automation, we stand out as a prominent industry leader, delivering solutions that generate substantial value to meet your diverse business requirements.

