

Payment Connect —

Collect, send and manage payments directly within Salesforce.

Payment Connect brings Salesforce payment processing directly into your CRM. Sales, finance, and support teams collect and send payments using cards, ACH, eCheck, or branded payment links. Every transaction is recorded against the related parent record in real time.

22% Fewer Failures

Capture more successful payments

93% Faster Reconciliation

Cut manual finance workload

PCI Compliant

Supports tokenized payments

Instant Reconciliation

Keep payments synced with accounting systems

Why Businesses choose Payment Connect —

- **100+ payment gateways supported.** Connect Stripe, Fiserv, Actum, Authorize.Net, PayPal, and more. Route by cost, region, or preference, and switch providers anytime.
- **Automate recurring payments.** Automatically charge stored payment methods on weekly, monthly, or annual schedules.
- **Card data never enters your org.** Tokenized, PCI-compliant payments with AES-256 encryption, with zero plain text storage in Salesforce.
- **Automatic reconciliation.** Every transaction links to its record with gateway, status, date, amount, and customer details.



What it does —

Collect & Send Payments

- **Salesforce payment processing** for cards, ACH, eCheck, and phone payments from one unified console on any record.
- **Create branded payment links** that can be sent by email or SMS to any device.
- **Send** payments to vendors, partners, and resellers directly from any Salesforce record.
- **Void** pending transactions in one click and issue **full or partial refunds** without a portal login.

Track, Automate & Reconcile

- **Trigger and process** payments from any standard or custom Salesforce object using Flow or apex.
- **Run recurring payments** schedules weekly, monthly, or annually, with automatic retries or deferral for failed transactions.
- **Real time status tracking** with gateway, amount, date, and customer details on every record.
- **Sync payments**, invoices, and customers to QuickBooks through QuickBooks Connect for automatic reconciliation

4.93/5 customer satisfaction • 1,500+ projects delivered • 400+ customers

Collect payments. Send funds. All in Salesforce.

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