Salesforce Payments & Billing

Frequently Asked Questions

Q: Why is native payment processing important in Salesforce?

A: Native payment processing allows organizations to collect and manage payments directly within Salesforce. This eliminates disconnected systems, reduces manual reconciliation, and improves revenue visibility across sales, finance, and operations. Paytram is designed to work directly within Salesforce workflows.

Q: Can Salesforce handle payments securely without storing card data?

A: Yes. Secure Salesforce payment solutions use tokenization and hosted payment forms so sensitive card or bank data is never stored in Salesforce. This approach supports the highest level of PCI compliance while still enabling seamless payment experiences.

Q: What is PCI compliance and why does it matter for Salesforce users?

A: PCI compliance is a set of security requirements for any business that accepts, processes, stores, or transmits credit card information, ensuring a secure environment to protect cardholder data from theft and fraud through technical and operational measures. Being out of compliance can result in fines and cancellation of merchant service accounts.

Q: How can payments be automated using Salesforce Flow?

A: Salesforce Flow enables teams to automate billing, payment collection, receipts, reminders, and reconciliation as part of existing business processes. Flow-ready payment platforms, such as Paytram, allow admins to configure these automations declaratively without custom code.

Q: Can Salesforce support recurring billing and subscriptions?

A: When paired with the Paytram native payment solution, Salesforce can support recurring billing, subscription models, scheduled charges, and split payments. Paytram enables flexible billing schedules that stay aligned with Salesforce data and workflows.

Q: What is a virtual terminal in Salesforce?

A: A virtual terminal allows users to securely charge or save payment methods directly from Salesforce. This is commonly used by sales, finance, or support teams to process payments on behalf of customers while remaining PCI compliant. Paytram includes a native virtual terminal capability.

Q: How do payment links work in Salesforce?

A: Payment links allow organizations to send customers a secure payment request via email or other channels. Once the payment is completed, Salesforce records can be automatically updated. Platforms like Paytram support customizable payment links with automated reconciliation.

Q: Does Salesforce support ACH and eCheck payments?

A: Yes. In addition to credit cards, Salesforce payment platforms can support ACH and eCheck payments. This is especially useful for B2B, high-volume, or lower-fee payment scenarios. Paytram supports both credit card and ACH payment methods.

Q: Does Salesforce integrate with Stripe and other payment gateways?

A: Salesforce can integrate with major payment gateways such as Stripe, Authorize.net, USAePay, and others through native payment platforms. Paytram supports multiple gateways, providing flexibility without locking organizations into a single processor.

Q: What types of businesses benefit most from Salesforce-native payments?

A: Organizations with recurring revenue models, complex workflows, or a need for real-time revenue visibility benefit most from Salesforce-native payments. This includes B2B SaaS, professional services, healthcare, education, and financial services. Paytram is designed to support these use cases directly within Salesforce.

Learn more about Paytram on the Salesforce AppExchange:
https://appexchange.salesforce.com/appxListingDetail?listingId=6c11a859-da51-404f-b8d4-1b3598417754