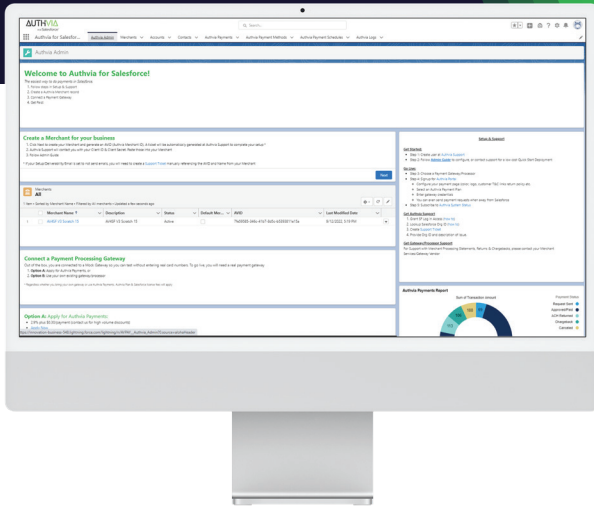# AUTHVIA

AUTHVIA FOR SALESFORCE™
EVERYTHING YOU NEED TO REQUEST AND RECEIVE PAYMENTS WITH AUTHVIA FOR SALESFORCE™

Authvia with TXT2PAY® create a convenient, safe, and easy way to collect payments from your customers. And with a Salesforce integration, the entire payment process is even better. From requesting a payment to marking it paid, the Salesforce for Authvia solution will help your team save time, improve the customer payment experience, and create a better back-office reconciliation process from beginning to end.

SET UP THE AUTHVIA FOR SALESFORCE™ IN MINUTES

No coding required—the Authvia for SalesforceTM setup is fast and easy. Simply install the **Authvia app** from the Salesforce AppExchange or request a Quick Start Deployment.

FACILITATE 5 PAYMENT EXPERIENCES WITH AUTHVIA FOR SALESFORCE™

↘ Send payment requests via SMS and email
↘ Add payment links to statements and invoices
↘ Embed payment widgets into websites for card capture or payments
↘ Request payments from the Authvia PortalTM—no Salesforce user license, card readers, or terminals required
↘ Set up automated, recurring customer payments

A CLOSER LOOK AT THE FEATURES OF THE AUTHVIA FOR SALESFORCE™:

VISIBILITY INTO PAYMENT LIFECYCLE

Get complete visibility into the entire payment lifecycle. From requests sent, paid, declined, refunds, returns, chargebacks, write offs and partial write offs, and even paid offline (when a customer pays via another method), you see every payment status, date, amount, and the payment mode used.

AUTHVIA FOR SALESFORCE™ BUILT FOR YOUR BUSINESS

MULTIPLE PAYMENT REQUEST MODES

Send payment requests in the channel that works best for your business or customer. Request payments via text or email, use Auto Pay to quickly charge an existing payment method, embed a payment widget into your online checkout, or embed links to hosted payment pages in PDF invoices or emails.

INTEGRATE PAYMENTS TO ANY OBJECT

Authvia for Salesforce™ works with Accounts, Contacts, and Person Accounts to define **who** is paying. Connect to any standard or custom object(s) to define **what** the payment is for and how it should be categorized (Opportunities, Cases, Orders, etc.).

COMPLETE CUSTOMER VIEW

Get a detailed, complete view of each customer. Access past payments, pending requests, or future payment dates.

BACKOFFICE PAYMENT UPDATES

Whether your customer made a payment offline (e.g. via check or over the phone), you need to cancel a payment, issue a refund, or complete a return, you can easily manage each of those tasks with Authvia for Salesforce™.

SCHEDULED RECURRING PAYMENTS

Whether you need a payment schedule in the future or a series of recurring payments, you can customize the schedule you need for your customer. Configure schedules by each customer: automatic card or ACH, recurring TXT2PAY, or recurring email invoices.

Select your payment frequency (weekly, monthly, bi-weekly, annual, and more) payment amount, a different amount for the first payment (for prorations or setup fees), start date, automatic due date calculation, and end date or end after a number of payments.

And, unique to Authvia, your business can set up a semi-automatic payment request schedule. Instead of automatically taking a payment on a specific date, your business can send a payment reminder or request on a specific date. This allows your business to add a convenience fee when the customer selects a specific payment option (e.g. when the customer wants to use a credit card).

AUTHVIA FOR SALESFORCE™ IS BUILT TO MAKE YOUR PAYMENT PROCESS FASTER, SAFER, AND MORE CONVENIENT. IT ALSO INCLUDES:

↘ Out-of the-box integrations to other popular Salesforce products (AccountingSeed, AVSight, FormAssembly, Salesforce Billing, Nonprofit Success Pack, Vonage for Service Cloud, Cloud Lending Solutions, and more)

↘ Modern platform event based architecture

↘ Credit card or ACH payments

↘ Customers may store multiple payment methods in the Authvia Wallet

↘ Support for hundreds of gateways

↘ Configurable flow templates

↘ Automatic payment triggers

↘ Fully automatic payment schedules and requests

FOR MORE INFORMATION,
VISIT THE AUTHVIA FOR SALESFORCE™ APP PAGE ON THE SALESFORCE APPEXCHANGE.

AUTHVIA