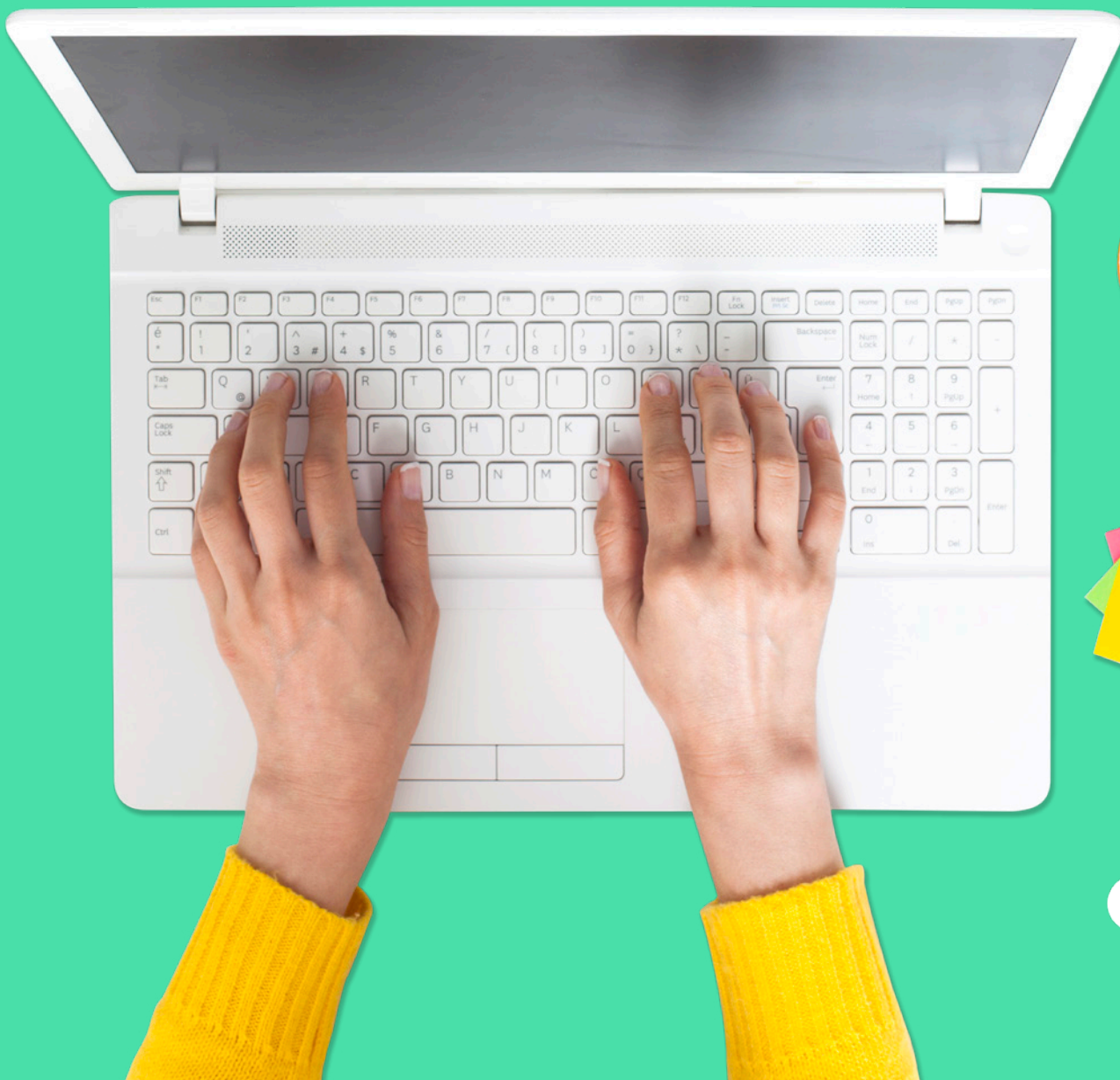


# Checklist:

## 10 Ways to Improve Collections With Salesforce.



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# COLLECTIONS CHECKLIST

## 10 Ways to Improve Payment Collections Using Salesforce

At first, the odd failed payment was easy for your team to manage. But as you scaled and grew, it became clear the process that worked yesterday is holding you back today. Your customers expect easier payment experiences, and your team wants to spend their time on more strategic tasks.

Our checklist will help you automate and improve your collections process.

### 1. Automate your entire payments process

Automating early-stage [collections activities](#) like emails and failed payment retries lets your team focus on collections that require high-touch outreach.

### 2. Create an effective dunning process

Create a series of [automated email notifications](#) to keep customers updated on their payment and account status.

### 3. Combine silos into one system

Streamline your collections process by integrating your payment and CRM systems, and give your team 360-degree visibility into critical customer payment data.

### 4. Optimize the types of payments you accept

Modern digital payment options like [ACH/direct debit](#) reduce paper checks and processing times, making it easier to automate your system.

### 5. Enable customers to update billing details online

Your customers don't want to call you, and they don't want to be limited to business hours! Offer customers self-service features like [online account management](#) and improve their payments experience.

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**6. Use automated emails to notify customers of failed payments**

Make configurable, [automated emails](#) from Salesforce a key part of your collections process. Email templates make it easy to customize and standardize your messaging, and clickable links offer a convenient way to pay immediately, directly in the email.

**7. Automatically retry failed payments**

Implement a process that will automatically [retry subscription payments](#) and notify customers of failed payments. Smart retry logic lets you identify the schedules that work best for your customer base and needs.

**8. Use a flexible system to manage recurring billing**

Make sure the [process and systems](#) you choose will scale effectively with your organization. Manually charging customers each month doesn't work well beyond a dozen or so customers.

**9. Continually refine your collections process**

Track how your process is performing using [actionable analytics](#). Adjust and reconfigure processes to achieve the best results for you and your customer experience.

**10. Think beyond failed payments**

Payments are not one-size-fits-all, and matching the [right process](#) to every payment scenario helps you leverage automation tools to manage overdue invoices, failed renewals, deposits, and more.

Chargent Automated Collection puts powerful technology to work to help you optimize your collections process and collect more revenue, faster. How can checking this list deliver immediate ROI for your organization? [Talk to our sales team](#) to learn more.



**Want help completing  
this essential checklist?**

**WE'RE ALWAYS HERE TO HELP!**

[Sales@AppFrontier.com](mailto:Sales@AppFrontier.com)

