Checklist:

10 Ways to Make Salesforce Payments Safe, Easy & Profitable.

Chargent

☐ 1. USE TOKENIZATION

By using **tokens in Salesforce**, your customer's sensitive data will be safe at the gateway. You will prevent sensitive data from getting exposed to attackers.

Chargent sends account numbers to your payment gateway, never storing them in Salesforce. The token in Chargent will be ready for future payments.

☐ 2. USE BANK TRANSFERS

Using bank drafts reduces your transaction fees to a fraction of card fees.

At Chargent we love **bank drafts**! We support them through many gateways, in many countries!

☐ 3. ENABLE CUSTOMERS TO SELF SERVE

Customers want to enter their own card data. You will reduce the person hours required to track down payments and enter payment data.

Pro Tip: You will also improve your **PCI compliance**!

The Chargent **Payment Request** feature enables you to send payment links to customers. Customers only need to click and enter their details.

☐ 4. OPTIMIZE FOR LEVEL II

Passing Level II card data reduces your processing costs and improves reporting data.

At Chargent we have made Level II data easy to send to the gateway.

☐ 5. OPTIMIZE FOR LARGE TICKET TRANSACTIONS

Visa, Mastercard and American Express all have much lower "large ticket" interchange fees.

The Chargent team can guide you to lower large transaction fees. Ask us today!

☐ 6. NO-TOUCH RECURRING PAYMENTS

Stop retyping card numbers for each bill! Use a set-it and forget-it **recurring payment** system.

The Chargent app makes sure you get paid. Automatically.

☐ 7. SAVE YOUR PAYMENT METHODS FOR LATER

Being able to store payment methods securely for future use is critical. Both for your revenue and for the experience of your customers.

Chargent allows you to **securely store** any credit card or bank account, for future use.

☐ 8. PUT PAYMENT BUTTONS WHERE YOUR USERS ARE

Make payments as simple as possible. Meet users where they are. Payment-enable their existing workflows.

Chargent Anywhere enables your users to take payment on any page in Salesforce!

☐ 9. STOP USING PAPER MONEY AND CHECKS

Physical forms of currency can be a nuisance – checks don't clear in real time and paper money can be miscounted.

At Chargent, we make **digital payments** simple. We do this so you no longer need to use cash or checks.

☐ 10. ENABLE CUSTOMER PAYMENT PORTALS

Your customers want to manage payment information on their own!

Chargent's Take Payments component for **Salesforce Communities** puts the power in the hands of the users. It is easy to enable. Provides customers with self-service access to payment information.

Want help completing this essential checklist?

WE'RE ALWAYS HERE TO HELP!

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Chargent
by AppFrontier