

Customer Success

aMind Delivers Quote-to-Cash with End Customer Self- service on Salesforce

Drives rapid rollout of new subscription-based product line.



Background

Industry: Technology
Headquarters: Kirkland, Washington
Founded: 2006
Salesforce CPQ and Billing
Billing Methods: Mix of fixed, subscription, consumption,
entitlement-based

Salesforce CPQ and Billing Software

aMind delivers an end-to-end quote-to-cash solution.



Channels
Inside Sales
Customer Self-service



Countries
United States



Integration
Avalara
(taxation)
Cybersource
(credit card payment processing)

CPQ and Billing Challenges

BitTitan needed an update to legacy billing systems in order to support aggressive customer acquisition through the rapid rollout of subscription-based software.

The company's executive team selected Salesforce CPQ and Billing software and aMind implementation services for an end- to-end quote-to-cash solution to:

- Lay the groundwork for a full billing and payment engine for multi-channel self-service across inside sales, managed sales and distribution partners.
- Quote, sell, handle recurring billing, and recognize revenue for subscription products spanning purchase, license delivery, billing and renewals.
- Enable customer self-service to capture customer payment method information.

Inside Sales Customer Self-service

Salesforce CPQ

- New product line configured with CPQ and billing information, tax and revenue rules and treatments to drive behavior from s/b quote-cash.
- Integration of contract, asset and subscription creation/management processes into ordering flow.

Avalara Tax for Salesforce CPQ for generation of estimated tax on quote and customers facing proposal documents.

Conga Quote Generator for Salesforce CPQ for generation of customer-facing proposals with invitation and link to the self-service community.

Salesforce Partner Community create a pragmatic channel used to capture the customer's purchase intent and payment method information for recurring billing and payment runs. Supports the rapid development using OOB Lightning components and connectors.

Salesforce Billing

- Order activation and fulfillment triggered through a "notify and callback" integration pattern.
- Avalara Tax Engine automatically applies tax based on customer address.
- Revenue recognition schedules automatically created on order activation for ratable recognition over the course of the one year contract term.
- Invoices generated from a scheduled job run nightly to generate both initial and recurring customer invoices.
- Invoices paid from a scheduled job run nightly to collect using the customer's credit card payment method routed through the Cybersource payment gateway.

Conga Invoice Generator for Salesforce Billing to generate customer-facing receipts of paid invoice.

Conga Trigger for the automate generation and delivery of customer receipt upon successful payment.



These guys know CPQ better than anyone else.



– Scott Gualdoni, AVP, Enterprise Sales / Salesforce



Salesforce CPQ & Billing Modules



CPQ

- Quote
- Proposals
- Approvals
- Orders
- Contracts
- Reporting



Billing

- Orders
- Contracts
- Approvals
- Invoices
- Revenue Schedules
- Revenue Transactions
- Reporting



Partner Portal

- Review Order Terms
- Purchase Items
- Submit Credit Card Information

CPQ and Billing Results

Thanks to aMind's implementation experts, BitTitan has a complete end-to-end quote-to-cash solution on Salesforce. The company's new Salesforce implementation supports the rapid rollout of the company's expanding software product line sold on a subscription basis. Here's how BitTitan uses Salesforce across their organization.

Here is how BitTitan uses Salesforce across their organization:

Inside Sales creates quotes and presents proposals to customers, inviting them to a self-service portal to confirm their purchase intent and provide payment information.

Customers receive a proposal notification and link to purchase. The buyer accesses a portal to agree to terms and conditions, provide payment method information and confirm their purchase.

Finance reports on AR/Billing and deferred revenue and forecast, closes finance periods and extracts financial transaction data from Sage Intact to feed the general ledger.