



## FinDock for Nonprofit Cloud

Manage the entire payment journey in Salesforce.

### Payment Capture

Increase conversion by offering supporters their preferred ways to pay. Easily configure and adapt payment methods if preferences change.

### Payment Experiences

When payment data becomes Salesforce CRM data you can launch personalized payment experiences with ease.

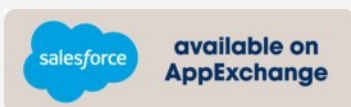


### Payment Processing

Centralize all your payment processing for one-time & recurring payments in Salesforce. Gift Aid management also included.

### Payment Operations

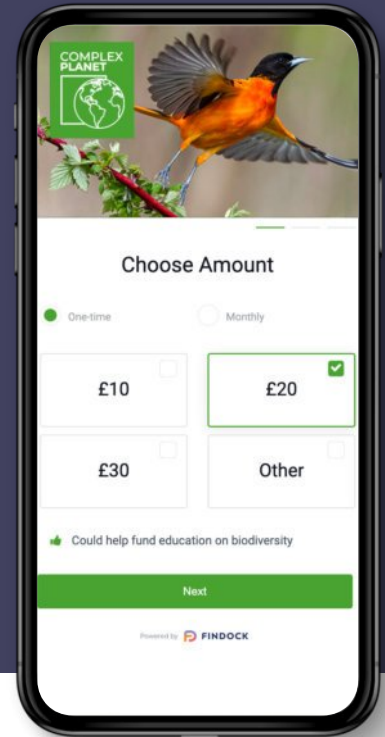
Reconcile bank data with CRM data and ensure you always have a complete 360 degree view in Salesforce.



# Payment Capture: online

Offer your supporters their preferred way to make **one-time or recurring payments**. Connect front-end payment capture to back-end processing in Salesforce.

Supported payment processors and methods



## Tools



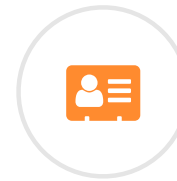
### Giving Pages

Create and launch on-brand payment pages and forms with integrated payments processing from Salesforce.



### Payments API

Connect any custom webform to payments processing and custom journeys in Salesforce.



### PayLinks

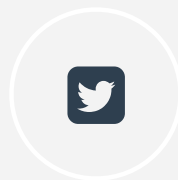
Create personalized and/or localized one-click payment URLs that can be used across multiple channels.

FinDock also integrates with **3rd party applications** to meet more front-end needs.



### Email

Maximize conversion with personalized payment links for one-click payments or to follow up on failed payments.



### Social Media

Track payments from social channels using unique links and custom payment pages.



### SMS

Capture attention by sending personalized text messages with different options to make donations/ payments.

## Channels

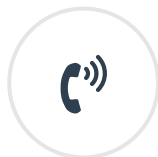
# Payment Capture: offline

Bring modern data-driven approaches to traditional fundraising/ payment channels.



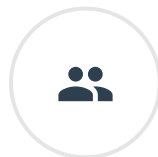
### Direct Mail

Create payment requests and/or QR codes to send with Direct Mails for one-time or recurring donations.



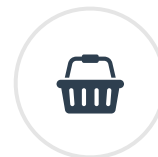
### Telephone\*

Securely capture payment details over telephone for 1-1 engagements or major appeals.



### Face-to-face\*

Capture payment details directly from supporters in Salesforce on tablets and get real-time updates in CRM.



### In-store

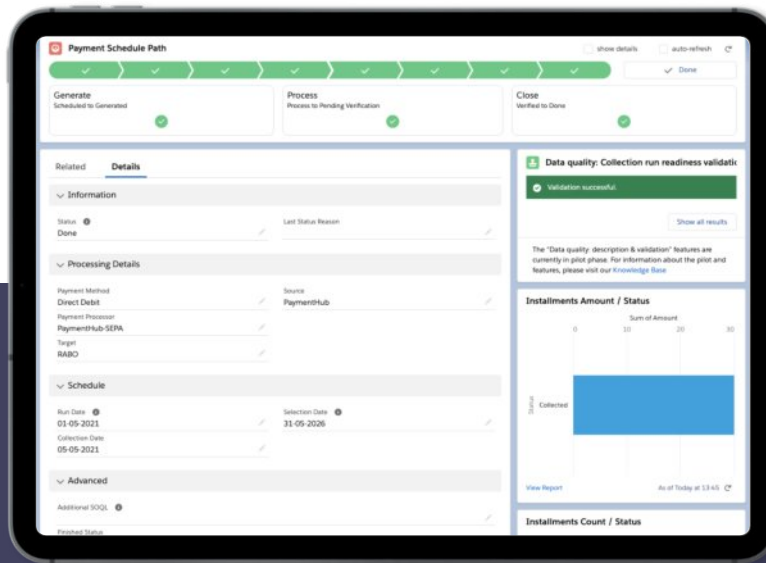
Sync up in-store payments to donation records in Salesforce

## Trusted by:



# Payment Processing

Accept and process one-time & recurring payments from any source in Salesforce. Take full control with native FinDock tools or enjoy enhanced automation with 3rd party processors.



## Self-managed: Direct Debit

Centrally collect Direct Debit in several payment schemes like SEPA, SEDA, BACS, CH-DD, LSV+. Easily manage mandates, payment schedules and reconciliation inside Salesforce.



## Self-managed: SEPA Credit Transfer

Manage the entire SEPA credit transfer process in Salesforce using FinDock's native tools, including payment schedules and reconciliation.



## Payment Request Generator

Easily create and manage one-off or bulk payment requests for one-time or recurring payments. Attribute payment references to specific campaigns using the Salesforce campaign ID.



## Gift Aid management (UK)

Enjoy automated Gift Aid processing in Salesforce. Create and submit Gift Aid claims for every eligible donation, access real-time insights into active declarations and view an audit trail in Salesforce. (Integrated with HMRC)

*Multi-currency, multi-merchant and auto-collect available for all payment types. Pre-collection data validation is enabled to ensure data is quality checked before sending to the bank.*

# Payment operations

Save time and enjoy improved team collaboration.



## **PSP reconciliation**

Reconcile payment data in real-time from your connected payment service providers (PSPs).

*Manage workflows & notifications with ease across all payments services providers.*

## **File base reconciliation**

FinDock's large volume bank file reconciliation makes it easy to match bank data and CRM data with Automated, Guided and Manual Matching.

*Centralize control and enrich Salesforce data.*

## **Workflows & automation**

Leverage payment data along with Salesforce's powerful tools to automate processes to speed up the time to process payments.

*Free up employee's time to spend on more meaningful tasks.*

# Insights & optimization

Use FinDock data to enrich your Salesforce reports and dashboards to give you a clear view of what's working and what could be improved.



## Understand payment preferences

Enjoy a complete 360 view of all your audiences with payment/transactional data added in - right in the heart of their Salesforce profile.

*Better identify opportunities for engagement and improve segmentation and targeting.*

## Track campaign performance

Get a clear view of the campaigns, methods, and channels which are helping you reach your goals.

*Now you can adapt and improve your approach, save time, and increase revenue.*

## Optimize payments stack

Understand which payment methods and processors are delivering the most return on investment using Salesforce reporting tools.

*Adapt and optimize to reduce costs and increase conversion.*

# Payment experiences

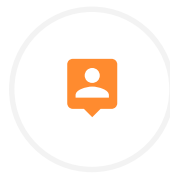
With FinDock, payment data becomes Salesforce CRM data, meaning you get a complete view of every contact in your Salesforce org. Use this data to launch personalized payment experiences using the full power of Nonprofit Cloud.



## Understand payment preferences

Measure the success of different methods and processors and access transactional history in the contact record.

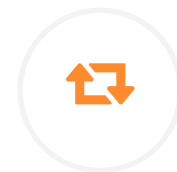
*Build a complete profile of your audiences in Salesforce.*



## Personalize the engagement

Create unique payment experiences for your audiences across multiple channels, using tailored payment options, payment links & pages.

*Increase engagement and conversation with smarter targeting.*



## Follow up to increase payment success

Use journeys and workflows to engage more creatively, send thank you emails, and automate follow-ups on failed payments.

*The engagement doesn't stop at collection. Maximize the value of each transaction.*



“We wanted to reach donors on channels that best resonate, and to create personalized engagements. FinDock and Salesforce help us do this.”

**Jeroen Beelen**  
Data and Marketing Automation Manager

[READ STORY](#)



## Supported Payment Processors and Methods

You can install and activate as many processors and methods as you need. For more details, visit our Knowledge Base at <https://docs.findock.com/payment-methods>.

	Adyen	Axerve	Buckaroo	Checkout.com	FinDock <sup>1</sup>	GoCardless	Mollie	PayPal	Redsys	SmartDebit	Stripe	SIX-Saferpay	Tikkie	Worldpay CG and BG350 <sup>2</sup>
Acceptgiro					✓									
Apple Pay											✓			
Bancontact	✓		✓	✓			✓							
Bollettino Postale					✓									
Cash					✓									
Credit Card	✓	✓	✓	✓			✓	✓	✓		✓	✓		✓
Credit Transfer   SEPA					✓									
Cryptocurrency													✓	
Direct Debit   Bacs					✓	✓				✓	✓			
Direct Debit   CH-DD					✓									
Direct Debit   LSV+					✓									
Direct Debit   SEPA			✓		✓		✓				✓			
ESR					✓									
Google Pay											✓			
iDEAL	✓		✓	✓			✓				✓			
Instant Bank Pay						✓								
OGM					✓									
PayPal			✓				✓	✓						
PostFinance E-Finance													✓	
Post Finance PostCard													✓	
Sofort	✓		✓				✓							
Tikkie													✓	
TWINT												✓		

<sup>1</sup> FinDock handles transactions, and banks process the payments. See below for details.

<sup>2</sup> FinDock supports Worldpay Corporate Gateway (CG) and Business Gateway 350 (BG350)

## Supported Bank Schemes and File Standards

FinDock natively supports the generation and reconciliation of national and regional bank schemes and file standards.

Applicable Country / Region	Direct Debit Scheme	File Standards
EU, Andorra, Iceland, Norway, Switzerland, Liechtenstein, Monaco, San Marino, Vatican City	SEPA	CAMT.053, CAMT.54 MT940 <sup>1</sup> PAIN.002, PAIN.008
Belgium		CODA
Spain		C72 N43
Italy	SEDA	PAIN.009, PAIN.010, PAIN.011
	SEPA CBI	PAIN.002, PAIN.008
Switzerland	CH-DD, LSV+	CAMT.053, CAMT.54 PAIN.002, PAIN.008
United Kingdom	Bacs	AUDDIS/ADDACS/ARUDD/DDICA Input Report Standard 18 MT940 <sup>1</sup>

<sup>1</sup> Please refer to the FinDock Knowledge Base for a list of supported BICs and how to request additional BIC support if needed.



# Next steps

Start your Nonprofit Cloud and FinDock journey today.

- 1 Create your Nonprofit Cloud vision**  
 Meet with your Salesforce Account Executive and a FinDock Solution Specialist to create a Nonprofit Cloud solution vision/ plan.
- 2 Decide on license requirements**  
 Decide on the number of Nonprofit Cloud users and your annual payment volume.
- 3 Receive proposal & quote from Salesforce**  
 Your Salesforce Account Executive will present the proposed solution and quote.
- 4 Project roll out with SI**  
 Work with an approved System Implementation partner to roll out the solution at your organization.

## Resources



Documentation



Customer Stories



Feature Videos