



An overview of FinDock

The secret ingredient for Customer Payment Happiness on Salesforce

 **John Smith** 

Email	Customer Health	85
Phone number	Lifetime value	\$ 945
Address	Customer Status	Subscriber

Collected Payments

✓ \$20	Credit Card	Nov 12th
✓ \$30	Direct Debit	Dec 11th




Failed Payments

⚠ \$30	Direct Debit	Insufficient funds
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Scheduled Payments

🕒 \$30	Credit Card	Jan 15th
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Customer Payment Profiles

 Paypal	<input type="checkbox"/>
 Bank account	<input type="checkbox"/>
 Credit Card	<input type="checkbox"/>

Introduction to FinDock



The secret ingredient for Customer Payment Happiness

FinDock is a fully native to Salesforce payment operations and experiences platform, offering control, flexibility, and visibility over payments. Right from the heart of your CRM.



End-to-end payments

Every transaction, from initiation to reconciliation, lives within Salesforce.



Automated payment operations

Reduce manual work, eliminate reconciliation headaches, and improve cash flow.



Payment flexibility

Accept credit cards, direct debits, digital wallets, and bank payments.



Seamless payment provider integrations

Work with leading PSPs, banks, and financial tools. You choose.



Enterprise-grade security & compliance

GDPR-ready, ISO-certified, PCI Compliant and encrypted within Salesforce.

Most importantly, FinDock brings payment data into the customer profile, turning payment data into valuable insights that improve payment operations and increases Customer Payment Happiness.

A word from our founder



“No CRM strategy is complete without Payment Operations at its core. With FinDock, organizations seamlessly manage payments natively in Salesforce, turning every transaction into an opportunity for engagement and growth. This brings operational efficiency and Customer Payment Happiness together.”



-Bas Visser, Founder & CEO at FinDock

Why FinDock?

The secret ingredient for frictionless payment operations



Struggles of organizations

Disconnected payment systems

Siloed payment systems create inefficiencies and reconciliation challenges.

Limited payment options

Customers expect flexibility, but many systems lack payment flexibility.

Manual financial workflows

Finance teams spend too much time tracking, matching, and resolving errors.

Lack of customer insight

Payment data is often isolated, limiting the full Customer 360 view.

How FinDock solves these problems



Automate collections & reconciliation

Save hours of manual financial work

On average, our customers experience **2.5x faster reconciliation** (source: [FinDock Impact Report](#)). [The English Speaking Union](#) even saved the manual work of 2.5 full-time employees.



Turn payment data into strategic insights

Unlock a whole new level of customer insights

On average, our customers experience **150% better customer insights** (source: [FinDock Impact Report](#)).



Reduce payment failures

With intelligent retry strategies

Intelligent retry strategies improve revenue retention. [Save the Children](#) **reduced their direct debit fails by 60%** since using FinDock, which resulted in an additional income of €61,000 per year.



Enhance customer experience

Offer seamless, localized payment methods

With FinDock, [ABN Amro Verzekeringen](#) was able to create a truly unique, amazing customer journey.

Read more customer stories on how Salesforce + FinDock helped increase Customer Payment Happiness on our [Customer Stories](#) page.

What we do

FinDock places payments at the core of Salesforce, transforming your CRM into a powerful engine for customer interactions. With seamless integration, you access real-time payment data that drives personalization. Whether it's crafting targeted marketing campaigns or resolving payment issues quickly.

Your Salesforce Environment with FinDock



Custom

Every organization has unique payment needs. FinDock is implemented by trained Salesforce Partners to tailor solutions that align perfectly with your business processes, ensuring full control over your payment operations. Explore [FinDock's Registered Partners](#).



Industry solution

Payments power every industry, and FinDock is designed to support industry specific needs, including but not limited to Education, Energy & Utilities, Financial Services, Media, Nonprofits, and the Public Sector.

Salesforce Industry Solutions



Nonprofit Cloud



Financial Service Cloud



Education Cloud



Public Sector Solutions

Partner Industry Solutions



Wunderbricks
Real Estate



Singlify
Microfinance



Emma
Membership

FinDock provides a robust and flexible payment layer that enables organizations to accept, process, and reconcile one-time and recurring payments within Salesforce.



Payment Operations



One-time payments

+



Recurring payments

Payment Experiences



Online payments

+



Agent payments

+



Bank payments

+



Outbound payments

FinDock is built natively on Salesforce, harnessing the power of being fully connected with core CRM capabilities. FinDock works seamlessly with any Salesforce Cloud including Sales, Service, Marketing, Commerce, and Experience Clouds, as well as all Industry Clouds.



Sales



Service



Industries



Marketing



Commerce



Experience



Analytics

Powering Payment Operations from within Salesforce

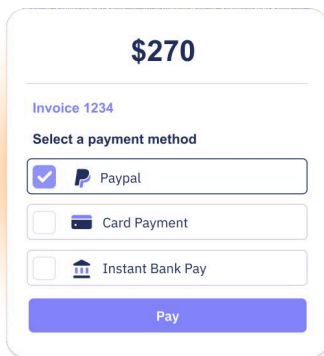
Handle the entire payment journey within Salesforce. From one-time transactions to recurring payments, FinDock empowers your organization to accept, process, and reconcile payments seamlessly.

One-time payments

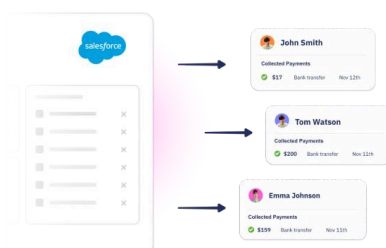
With FinDock, you can seamlessly process single transactions within Salesforce.

Recurring payments

With FinDock, you can automate the entire lifecycle of recurring payments from initiation to collection.



Payment Schedule Stats		
	# of installments	Amount Total
	3001	\$ 3.003.524,5
	# of installments	Amount Total
✓ Completed	1000	\$499.500
✗ Failed	1002	\$505.500
⌚ Pending	999	\$2.497.525



Accept Payments

- Across a variety of channels (online, over the phone and via mail)
- With built-in mandate management for Direct Debit
- Supporting the PSP and localized methods
- Simplifying operations for your organization

Process Payments

- With one source for all your payment operations
- Collection is directly triggered from Salesforce
- Built for high-volume; from a few hundred to a few million
- Enabling you to scale without compromising efficiency

Reconcile payments

- Ensure payments are accurately matched to Salesforce records
- Gain full visibility on payment statuses
- Manage and respond to failed or complete transactions
- Enabling a seamless customer journey

Seamless Payment Experiences

FinDock equips your organization to meet customers where they are, delivering seamless payment experiences across a variety of channels and workflows:

Online Payments

Enable seamless payment experiences through FinDock's hosted payment pages, Experience Cloud self-service portals, payment links, and QR codes—all powered by FinDock's Payment API to ensure flexibility and scalability for your digital transactions.

Bank Payments

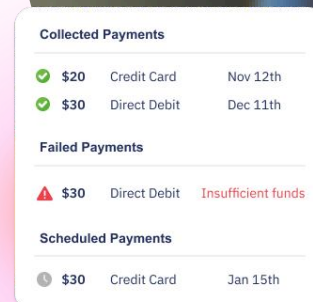
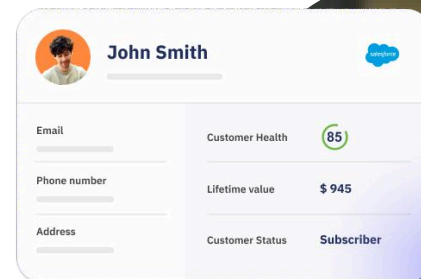
Bring bank payments seamlessly into Salesforce with FinDock's Bank Feed and Guided Matching features. Automate the import, processing, and reconciliation of payments, ensuring accuracy, efficiency, and full visibility into your financial operations.

Outbound Payments

Simplify disbursements with SEPA Credit Transfer, including refunds and grant payouts, ensuring transparency and control.

Agent Payments

Empower your customer service teams to process payments securely over the phone or via mail directly within Salesforce using FinDock's Virtual MOTO Terminal.



"With Salesforce and FinDock we're **saving 70-80 hours a month** on a team of 14 employees."

A horizontal solution that works with any Salesforce Cloud and Industry

FinDock is built to power payment operations across industries, embedding Customer Payment Happiness directly from the heart of your Salesforce CRM. Whether you're processing donations, managing subscriptions, handling direct debits, or streamlining invoicing, FinDock is the secret ingredient that makes payments work seamlessly within Salesforce.



Nonprofits & Fundraising

Boost donor retention, encourage recurring giving, and simplify financial reconciliation to maximize impact.



Subscription Businesses

Automate renewals, reduce churn, and enhance recurring payment reliability for predictable revenue.



Financial Services

Reduce failed policy payments, streamline premium collections, and improve customer satisfaction.



Education

Streamline tuition payments, automate fee collection, and enhance the student experience with flexible payment options.



Membership

Simplify membership renewals and increase engagement through seamless payment processes.



Energy & Utilities

Enable efficient utility bill payments, automate collections, and deliver a smooth customer experience for recurring payments.



Real Estate & Housing

Streamline rent collections, homeowner association fees, and property transactions.



Public Sector

Ensure seamless public sector payments, automate collections, and enhance citizen services with flexible and secure payment solutions.



"We're regularly surprised by what we can do with FinDock and Salesforce."

How FinDock works: FAQ

How does FinDock's data model connect with Salesforce?

FinDock is **100% Salesforce-native**, meaning all payment data lives within the Salesforce database. This ensures real-time reporting, workflow automation, and full API accessibility.

How does FinDock connect to payment providers?

We offer **pre-built integrations** with 30+ PSPs and direct bank connections via APIs, enabling seamless transaction processing without data duplication. [View all the supported Payment Service Providers and Payment Methods in our factsheet.](#)

Is my data safe with FinDock?

Absolutely! FinDock is **GDPR-compliant, ISO 27001-certified, PCI compliant**, and ensures full data encryption within Salesforce's security framework. [Read more here.](#)

How does FinDock's pricing model work?

Our pricing is based on:

- **Base subscription** (a per Salesforce org license, covering core functionalities)
- **Number of transactions** (fixed price per transaction, scaling with your volume)
- **Optional add-on features** (covering additional functionalities)

Reach out to sales@findock.com for a quote to meet your specific needs.



*"Before FinDock, we had someone spending almost two days a week doing manual reconciliations. Now, we've been able to automate that process and free up resources across the organization. We **save about £20k per year** in staffing because of FinDock."*



So are you ready for

Customer Payment Happiness?



Next Steps: start your FinDock journey



Explore our free resources

Watch [FinDock Shorts](#) or join the [FinDock Academy](#).



Book a free discovery call

or contact Sales to learn how we can transform your payments.



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Managing 100M+ transactions per year • 3B in revenue • 350+customers • 4.97 rating on AppExchange