

Subscription economy billing solution

Entirely designed and developed on the **Force.com Lightning platform**, Sofacto allows you to manage efficiently, easily and quickly, all invoicing processes, from editing quotes to monitoring payments.



"Sofacto is a perfect tool, as it's customizable. We have gained incredible time in setting up invoices and credit notes."

Emilien Eychenne,
Co-founder & Chief Revenue Officer,
ADIKTEEV

Sales Licence

25€

per user
per month

Intended for commercial operations, the SALES license is the ideal complement to the Sales Cloud. It allows your salespeople to surpass themselves and achieve their goals by benefiting from a 360 ° view of the account history and the customer profile.

Finance Licence

45€

per user
per month

Reliable and powerful, the FINANCE license enhances the efficiency and productivity of your sales administration (SAL) and accounting teams. Its functional richness, easy set-up and high degree of customization allow easy adoption of the solution for all its users.

For more information on the features and options visit our website.

30 days **FREE** trial

www.sofacto.com



salesforce appexchange

Sofacto feature list

Sales

Finance

Activity management

Follow-up quotes (offers issued / to be issued)	•	•
Follow-up revenue (invoices issued / to be issued)	•	•
Recovery Tracking (Payments Received / Receivable)	•	•
Viewing Reports and Dashboards	•	•
Creating Reports and Custom Dashboards	•	•

Sales cycle management

Creating quotes/offers from an Opportunity or from scratch	•	•
Synchronization of Quotes (Offers) with Opportunities	•	•
Quotation generation (Offers) in PDF	•	•
Product Management and Offer pricing Catalog		•
One-click billing from an Opportunity and / or Offer		•

Billing cycle management

One-click recurring billing (subscription) generation from an Opportunity and / or Offer		•
Detailed invoice generation from an Opportunity and / or Offer		•
Generating Billing Milestones from an Opportunity and / or Offer		•
Management of indexes of revaluation of the price of a subscription	€	€
Credit Note management (total or partial) and their imputations		•
Invoice tracking via a multi-criteria search engine		•
Issuing and / or automatic sending by e-mail of PDF invoices	€	€
Automatic issuing of reminder emails for unpaid invoices	€	€
Management of the life cycle of the subscription (renewal, interruption ...)	€	€

Collection management

Entering payments		•
Generation of payment schedules		•
Tracking reminders, sending pre-formatted e-mail reminders		•

Relationship with Accounting

Export Sales Entries to Accounting	€	€
Monthly revenue breakdown (deferred revenue)	€	€

Collaboration

Instant messaging via Chatter	•	•
Consultation and sharing of notes and files	•	•
Creating and assigning tasks	•	•

Administration System

Management of data visibility and access rights		•
Creating custom fields and customizing page layouts on Sofacto objects		•
Creating Public list Views, reports, and dashboards		•
Management of one or more companies and bank details for each company		€
Managing multiple currencies		•
Management of the multilingual interface (FR and EN, other languages possible)		•
Customizing the numbering sequence of invoices and credit notes		•
Management of communication models (direct mail, e-mails)		•
Manage offer and invoice / credit note template		•
<i>Business Process Automation (sending e-mail and / or notifications, updating fields, creating tasks, issuing and / or sending invoices and reminders, managing the subscription lifecycle, ...)</i> *	€	€
* Requires a Sales Cloud License Enterprise Edition		
Data import (accounts, contacts, invoices, payments, etc.)		•

• : available as standard, according to the rights granted by the System Administrator

€ : requires a paid option that can be activated at the org level (regardless of the number of users)