

ELEVATING FINANCIAL PRECISION WITH INNOVATION

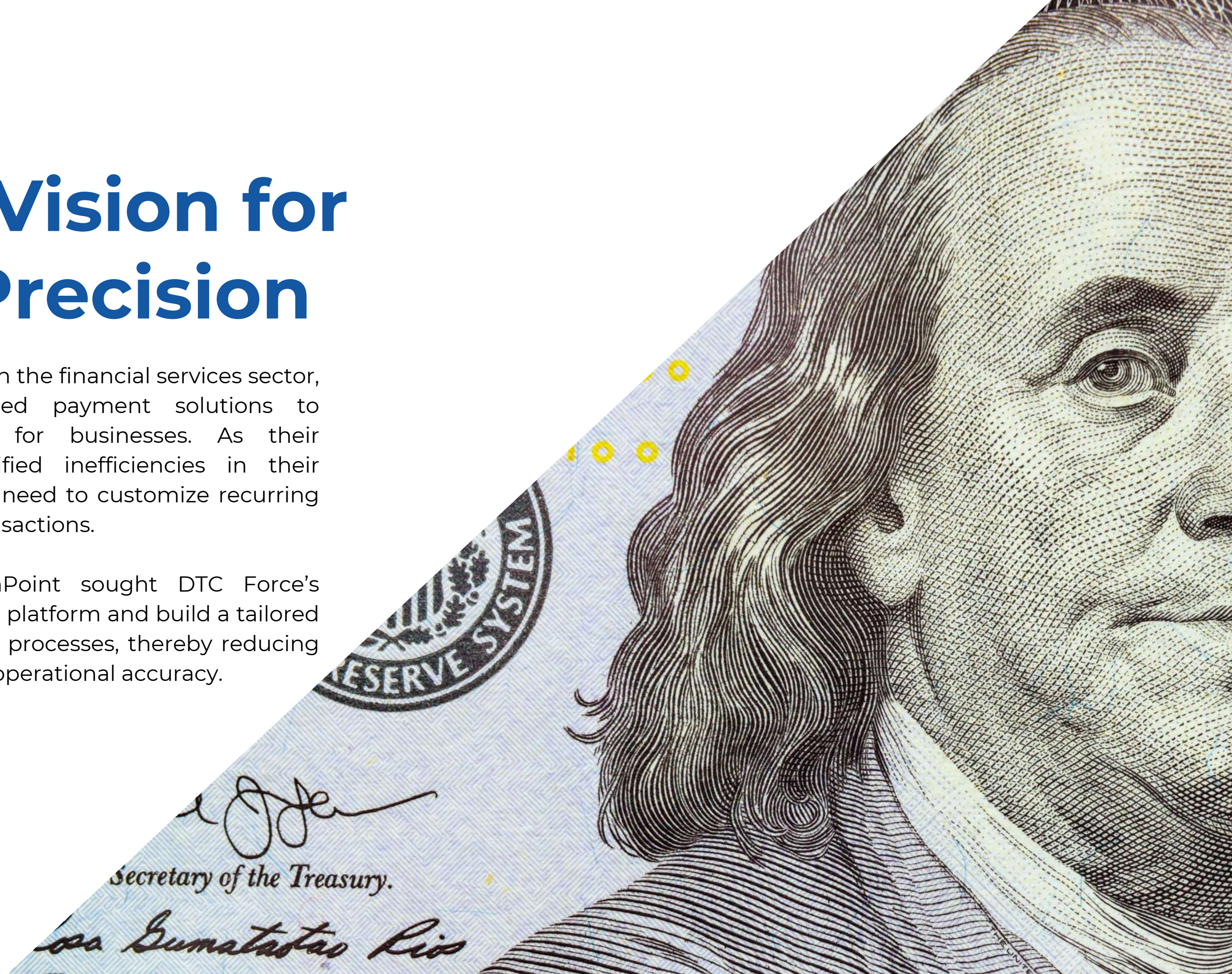
Automated Solutions for OnPoint's
Financial Precision



OnPoint's Vision for Financial Precision

OnPoint is a well-established player in the financial services sector, specializing in providing advanced payment solutions to streamline financial transactions for businesses. As their operations expanded, they identified inefficiencies in their invoicing processes, particularly the need to customize recurring invoices and manage zero-dollar transactions.

To address these challenges, OnPoint sought DTC Force's expertise to enhance their Salesforce platform and build a tailored solution that would automate these processes, thereby reducing manual intervention and improving operational accuracy.





Phase 1

Laying the Foundation for Efficient Invoicing

In the initial phase of the project, OnPoint's primary objective was to enhance their invoicing process by integrating a recurring product sync and enabling zero-dollar invoice generation. The challenge they faced was that their existing system could not automatically differentiate products and services to be added to recurring invoices.

DTC Force began by creating a system within Salesforce that allowed OnPoint to automatically include or exclude products marked for invoicing, providing the flexibility to manage products across billing cycles. This phase laid the groundwork for automating what had been a labor-intensive process, ensuring that only relevant products would appear on recurring invoices, based on client-specific criteria.

Phase 2

Transforming Zero-Dollar Invoices into a Streamlined Process

OnPoint also required the ability to generate zero-dollar invoices—a challenge that had previously required significant manual input.

DTC Force implemented custom code to redirect transactions to a Payment Center page, allowing the seamless generation of zero-dollar invoices without interrupting the transaction flow. By automating this process, users were able to send invoices that reflected promotions, discounts, or test transactions, while the system kept records in sync. This transformation allowed OnPoint to improve their service offering by handling a wider variety of billing scenarios, all while maintaining compliance with their internal accounting practices.

Optimizing Through Customization: Enhancing User Experience

As the project progressed, DTC Force continued to enhance OnPoint's Salesforce environment by creating custom workflows that aligned with their specific business requirements. This included enabling a recurring sync for products and developing an intuitive interface for users to manage their invoicing more efficiently.

By ensuring that each enhancement was tightly integrated with Salesforce's Payment Center, OnPoint's teams could manage their operations with increased precision, reducing the margin for error and freeing up resources that had previously been dedicated to manual invoice tracking and adjustments.





A Future of Streamlined Transactions

The collaboration between OnPoint and DTC Force culminated in a comprehensive solution that transformed their invoicing processes. By automating recurring invoice generation and enabling zero-dollar invoicing, OnPoint significantly reduced the time spent on manual entry and error correction. This not only improved their operational efficiency but also enhanced the overall customer experience by providing faster, more accurate billing.

The project underscored the importance of customizing solutions to fit specific business needs, and OnPoint now operates with a level of financial precision that positions them well for future growth in the fast-evolving financial services industry.

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