

Citation

A customised and fully integrated Direct Debit Management Solution between Salesforce and Financial Force

Delivering a customised payment solution to Citation, an HR and Health & Safety consultancy, SmarterPay provided a full [Direct Debit Management System \(DDMS\)](#) in Salesforce, driven by a seamless integration with Financial Force.

First established in 1995, Citation offer personalised HR and Health & Safety advice to small and medium-sized businesses. Helping over 50,000 clients in the last 25 years, Citation's highly qualified consultants offer a 24/7 advice line and thousands of resources, including free guides, updated articles, training modules and templates.

Citation first came across SmarterPay whilst doing some market research to find

a suitable replacement for their previous vendor. They were looking for a Salesforce compatible solution that would give them complete control of their Direct Debit lifecycle. Crucially, it needed to be quick, efficient and fully automated, which was when SmarterPay's fully integrated DDMS caught their eye, as Tony Gardner, Group Credit Manager at Citation recalled:

"At the time we were looking for a new provider because our original system was very manual and we wanted to automate our processes. The SmarterPay DDMS through Salesforce really appealed to us as it would allow customised invoice automation with our existing accounts package, Financial Force, which met our requirements perfectly."

27+
years of
experience

50,000
customers
helped in the
last 27 years

300,000
pieces of advice
offered annually

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Tony Gardner, Citation





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The DDMS solution for Salesforce

SmarterPay created an entirely bespoke solution that features a DDMS with dynamic integration with Citation’s accounts package, Financial Force, through two-way automated updates. Allowing full Direct Debit collection and processing to be automated, the solution auto-updates the Direct Debit collections on each run. This allows flexible collections whilst also marking failed Direct Debits as ‘unpaid’ cash entries on Citation’s customer accounts, completely automating the credit control process.

The solution was deployed over a three-month period, from the initial requirement gathering and design phase and build, through to the implementation, testing period and final ‘go-live’ stage. Throughout the duration of the project, weekly progress meetings were held to review progress and incorporate feedback from Citation with regards to any modification requests.

Commenting on the deployment of the solution, Tony said; “Myself and my team were fully involved at all stages of the process, from initially viewing how the Smarterpay process worked, to how it would work in conjunction with Financial Force. The implementation was excellent at all stages and SmarterPay were superb in their communication and response to issues raised during the planning and testing stages.”

With the additional inclusion of extended support and submission monitoring after the ‘go-live’ date, Tony elaborated further and expressed how impressed he and his team were; “The whole process from start to finish was managed excellently by SmarterPay. Those high standards have also been maintained post ‘go-live’ and the few issues we have had subsequently, have also been managed quickly and efficiently.”

6 months
from solution
selection to
roll-out and
‘go-live’

100%
Dynamic
integration
with accounts
package

100%
Direct Debit
automation

“The implementation was excellent at all stages and SmarterPay were superb in their communication and response to issues raised during the planning and testing stages.”

Tony Gardner, Citation



"I would recommend SmarterPay without hesitation, it is an excellent automated process backed by a great team who deal with any issues in a quick and efficient manner."

Tony Gardner, Citation

Full payment process automation

Speaking about the benefits of the SmarterPay fully integrated DDMS between Salesforce and Financial Force, Tony explained;

"The major benefit of the solution for us was the automation of our payment processes which accorded with our expectations. It has enabled us to manage our Direct Debit process a lot more efficiently with far less manual intervention which in turn, has allowed us

to focus our resources elsewhere. Over time, we expect to see even more time saving as the solution embeds as less and less manual intervention is required, further streamlining our payment and business processes in general.

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Customer Profile

Citation offer unrivalled Health & Safety, HR and Employment Law expertise to businesses up and down the country. With anything from contracts of employment, handbooks and holiday management, to risk assessments, policies and site audits, Citation offer peace of mind to business when they need it most.

www.citation.co.uk

About the SmarterPay DDMS

SmarterPay's [Direct Debit Management Solution](#) gives you full control of the Direct Debit lifecycle. From sign-up to mandate creation, right through to managing payment schedules, ongoing collections, represents, account updates and cancellations.

Key features include:

- ✓ Direct Debit set-up
- ✓ Mandates and branded notifications
- ✓ Modulus checking at point of set-up
- ✓ Full integration
- ✓ New instructions
- ✓ Payment Schedules (including Data Validation)
- ✓ Automated Submissions
- ✓ Auto-account updates
- ✓ Automated represents
- ✓ Cancellations

For more information about SmarterPay DDMS or any other products and services, please get in touch on:

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 **SmarterPay**

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