

# SaaS Payment Solution Essentials Checklist

## Integration

- Seamless integration with your website and platform (e.g., WordPress).
- Compatibility with other business tools (e.g., CRM, accounting software).
- Dedicated integration support from the provider.

## APIs:

- Comprehensive and well-documented APIs.
- Flexibility for customization and automation.

## Security:

- PCI DSS compliance.
- Robust security measures (e.g., data encryption, tokenization).
- Advanced fraud prevention tools (e.g., AVS, CVV checks, 3D Secure).
- Tools and processes to handle and dispute chargebacks.

## Dunning Management:

- Automated email reminders for failed payments.
- Customizable retry schedules and account updater services.
- Tools to minimize involuntary churn.

### **Customer Support:**

- 24/7 billing customer support through multiple channels (e.g., phone, email, chat).
- Responsive and knowledgeable support team.
- CSM representative available through channels that are convenient for you and your team (e.g., Skype, WhatsApp, Slack, etc).
- Guided onboarding and integration.

### **Checkout Experience:**

- Customizable checkout process to optimize conversions.
- Support for various payment methods (e.g., credit cards, PayPal, wire transfer).
- Mobile-optimized payment options.
- Support for cross-sell/upsell options.

### **Subscription Management:**

- Support for different subscription models (e.g., fixed, usage-based, free trials, cross-sells, upsells).
- Flexible pricing options and billing frequencies.
- Automated recurring billing and proration.
- Tools to manage sign-ups, upgrades, downgrades, and cancellations.
- License key management: Secure generation, management, and distribution of license keys.

### **Sales Tax Management:**

- Calculation (correct calculation of B2B VAT, tax absorb, etc.)
- Automated collection of taxes/VAT/HST/GST, etc.
- Remittance of sales tax to the right authorities (based on your customer location).
- Support for various tax jurisdictions and regulations.

### **Billing:**

- Flexible invoicing features with customization options.

### **Marketing:**

- Integrated Marketing Tools: Features like coupons, discounts, and promotional campaigns.
- Analytics and Reporting: Detailed reporting on key metrics (e.g., transaction volume, revenue, churn).
- Proven track record and robust infrastructure.

Use this checklist to evaluate different payment solutions and choose the one that best fits your SaaS business needs.