

# If your SaaS business runs on Salesforce, then the choice is clear.

Built on Salesforce	place	Maxio (formerly SaaSOptics)
DESIGNED FOR B2B SAAS COMPANIES USING SALESFORCE	✓	X
100% ACCESSIBLE WITHIN SALESFORCE	✓	X
ONE PLACE FOR BOOKINGS, BILLING, AND REVENUE	✓	X

Subscription Management	place	Maxio (formerly SaaSOptics)
MANAGE THE CONTRACT LIFECYCLE FROM INSIDE SALESFORCE	✓	X
EXPANSIONS CO-TERMINATE WITH THE ORIGINAL CONTRACT	✓	✓
ONE SOURCE OF TRUTH FOR CUSTOMER SUBSCRIPTION DETAILS	✓	X
AUTOMATIC RENEWAL OPPORTUNITY CREATION	✓	X
TURN INITIAL & EXPANSION OPPORTUNITIES INTO ONE RENEWAL	✓	X
SUPPORT FOR MULTI-YEAR SUBSCRIPTION AGREEMENTS	✓	X

Billing & Collections	place	Maxio (formerly SaaSOptics)
AUTOMATE BILLING AND COLLECTIONS WORKFLOWS	✓	✓
SUPPORTS COMPLEX LICENSE, USAGE, AND SERVICES BILL-	✓	X
FLEXIBLY PRORATE INVOICES FOR PARTIAL SERVICE PERIODS	✓	X
BILL BOTH NEW ORDERS AND ADD-ONS FROM THE SAME INVOICE	✓	X
SUPPORTS INVOICE ADJUSTMENTS AND BILLING EXCEPTIONS	✓	✓
VIEW CUSTOMER INVOICE PAYMENT STATUS IN SALESFORCE	✓	✓
MULTI-TIERED INVOICE APPROVALS	✓	X

Revenue Recognition	place	Maxio (formerly SaaSOptics)
AUTOMATE ASC 606 REVENUE CALCULATIONS	✓	✓
PRORATE REVENUE FOR PARTIAL MONTHS (ASC 606)	✓	X

SaaS Metrics and Reporting	place	Maxio (formerly SaaSOptics)
200+ BUILT-IN SAAS METRICS, REPORTS, AND DASHBOARDS	✓	X
ENDLESSLY CUSTOMIZABLE METRICS CALCULATIONS	✓	X
EXPENSE-RELATED METRICS WITH LIVE ACCOUNTING DATA	✓	X
INVESTOR-READY REPORTS	✓	✓
TRACK BOOKINGS VS. BILLINGS VS. ASC 606 REVENUE	✓	X

Key Capabilities	place	Maxio (formerly SaaSOptics)
ONE SOURCE OF TRUTH FOR PRODUCT AND PRICING INFORMATION	✓	X
ONE SOURCE OF TRUTH FOR ACCOUNTS AND CONTACTS	✓	X
CONTROL ACCESS BY ROLE (SALES, ACCOUNTING, ETC.)	✓	X
DIRECTLY CONNECT MULTIPLE ACCOUNTING SYSTEMS	✓	X
INTEGRATED MESSAGING BETWEEN USERS	✓	X
ACHIEVE RAPID ADOPTION BY EMPLOYEES	✓	X

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