



GETTING ON THE FAST TRACK

To Subscription Revenue
The Essential Guide for IT



Powering Subscription Success

The subscription model fuels success for a wide variety of businesses, providing predictable revenue, encouraging customer loyalty, and powering growth. The key to managing a successful subscription business is a trusted, flexible and secure subscription billing solution that provides both technical and operational expertise—and that doesn't require massive integration effort and expense.

Recurly is the agile enterprise-grade subscription billing management platform that cuts through the complexity of subscription management, providing rapid time-to-value and the nimbleness to power continued growth. Unlike bloated, “code-heavy” solutions, Recurly focuses on delivering elegant user flows, best-in-class credit card decline handling, and a simple, flexible API. As a result, merchants can deploy new plans and promotions more quickly than any other solution on the market, providing a competitive advantage.

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Chapter 1

Merchants Get Up and Running Quickly

Recurly offers a variety of paths for connecting the Recurly Subscription Billing Platform to merchant websites and infrastructure. From simple pre-designed templates to a fully customizable API and support for multiple gateways, there are integration options for every merchant.

Payment Gateway and Rail Agnostic

Even for the largest integrations, Recurly's speed and ease of implementation help clients to reach operational status in weeks, not months—without requiring professional services engagements to complete.

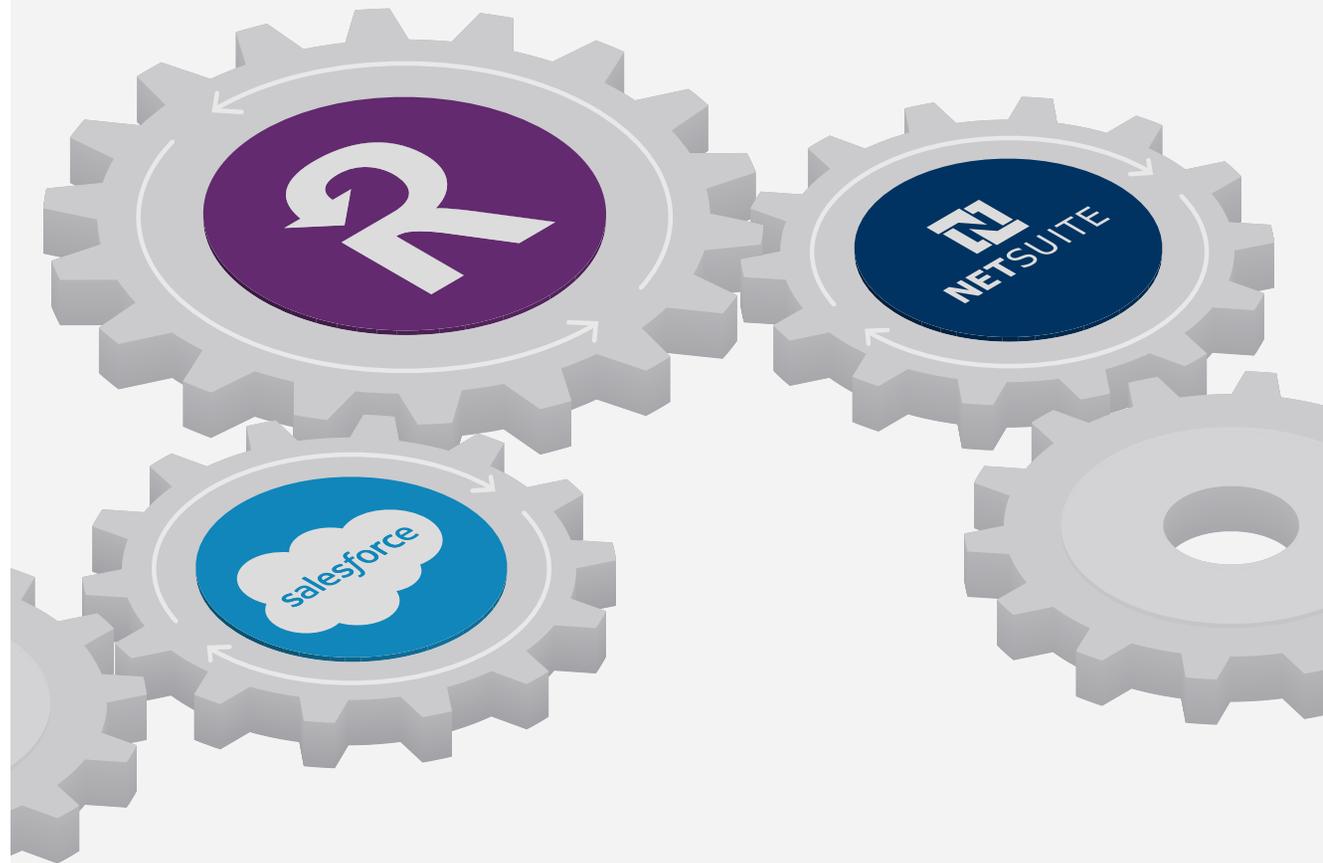
Because Recurly integrations are lightweight, companies can profit from rapid set-up. With support for more than a dozen payment gateways, connecting accounts and integrating with Recurly is straightforward, minimizing complexity.

Recurly supports a number of gateways to support a variety of business needs.



Partner Integrations

Our partner ecosystem provides integrations with Salesforce and NetSuite, optimizing your investment with Recurly. Streamline financial management and accounting by integrating Recurly with NetSuite to recognize revenue in a GAAP-compliant manner. Improve account management and sales decision-making with Recurly's Salesforce integration which links Recurly account data directly to your Salesforce implementation.





Easy Integration Options

Use hosted payment pages to start accepting payments immediately. Or use Recurly.js to build custom branded pages for seamless customer experiences. Webhooks automate actions in other systems, such as email messaging systems, in response to triggers based on actions in Recurly. Easily integrate existing systems and infrastructure with Recurly's open API and out-of-the-box client libraries.

Expert Tip: Visit the Recurly Developer Hub

Our developer site provides complete documentation for planning how to integrate and deploy Recurly. Our API, Recurly.js, is secure and open. We support PHP, Ruby, Python, and .NET. Any developer with client library experience will find integrating with Recurly a straightforward process.



Hosted Fields

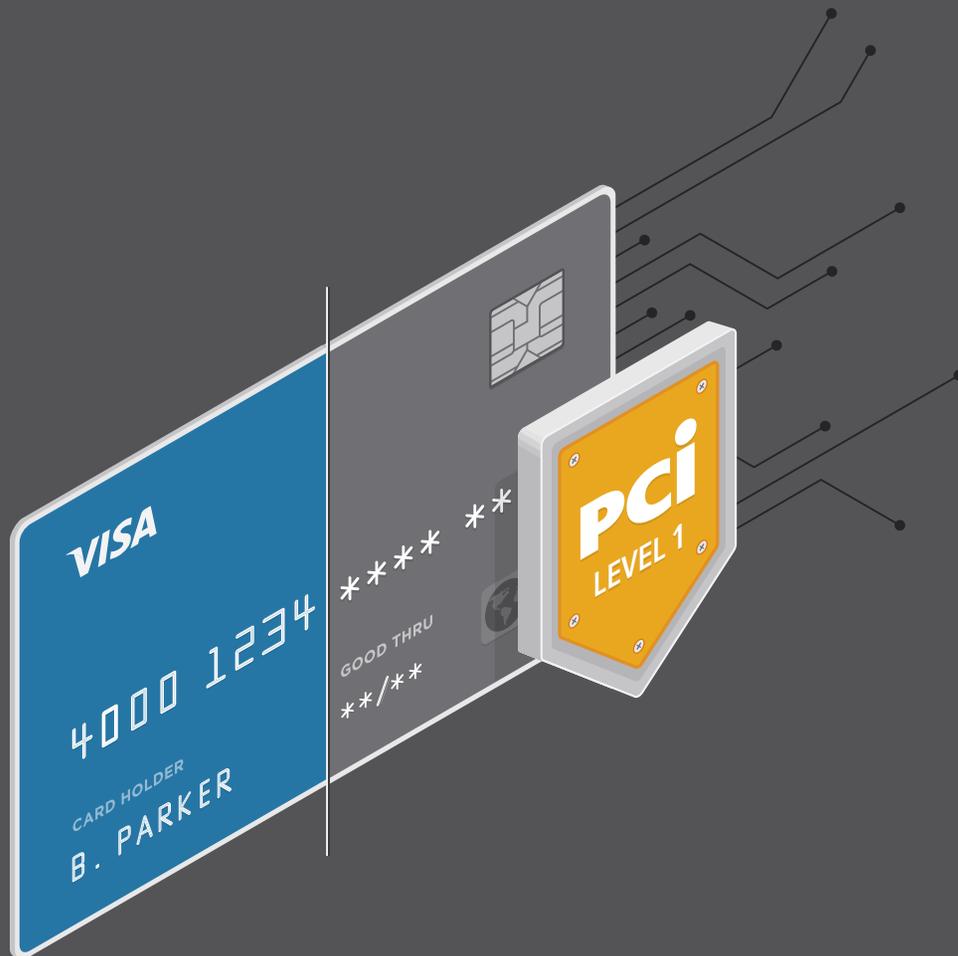
Customize your checkout process and accept payments securely with Recurly's hosted fields.



Chapter 2

Infrastructure and Security

Ensuring a highly secure and available environment is of utmost importance. Recurly meets or exceeds all industry-standard payment security guidelines and requirements. We offer streamlined and secure tools for accepting mobile payments, so our merchants never miss out on revenue. And we manage the risk of migrating and storing credit card data, easing the burden on merchants in this critical area.



Ensuring Data Security and System Availability

Maintaining the security of our customers' data is of critical importance. Recurly operates a secure environment that not only meets but exceeds industry-standard payment security practices and mandates. We are PCI Level 1 and SSAE16 SOC 1 Type 2 compliant as a merchant service provider and maintain a highly available, N+1 redundancy throughout our entire infrastructure stack.

The redundancies we have built into our infrastructure offer a stable and scalable environment which meets our merchants' needs related to large quantities of transactions, high volumes of customers, and differing levels of business complexity, including those merchants in "high-velocity" businesses.



Streamline Mobile Integration

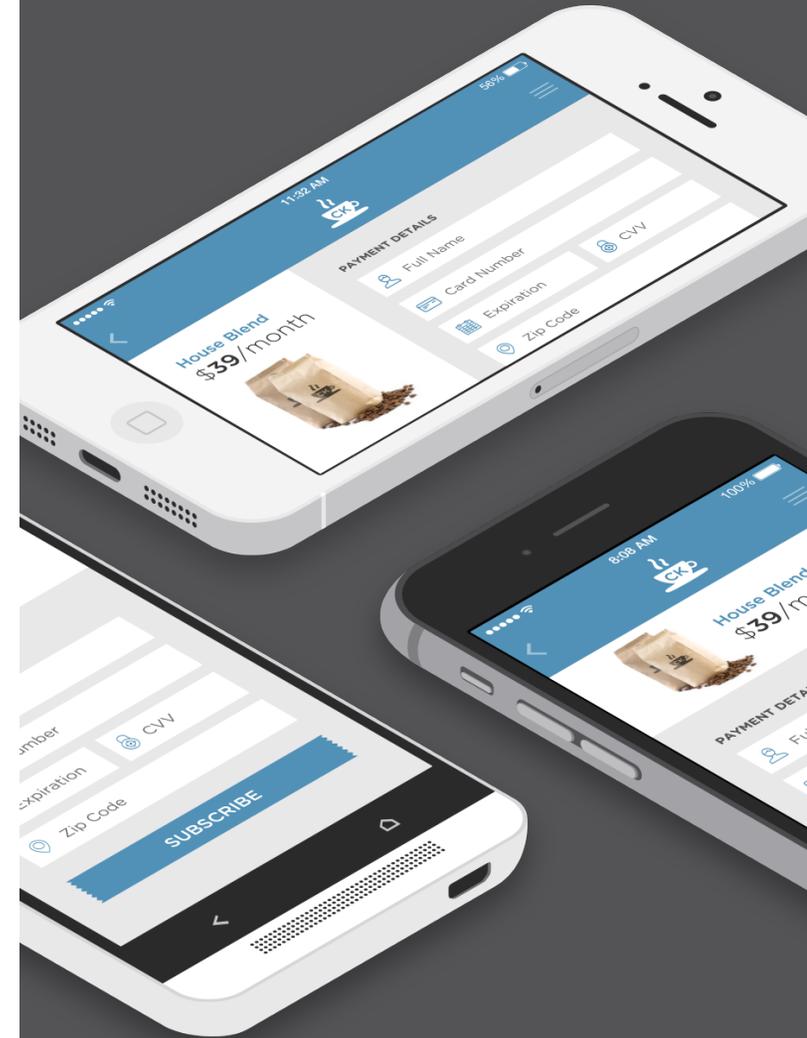
Recurly provides developers and merchants with fast, elegant and secure tools for accepting mobile payments. Whether you're looking for a native mobile solution or are extending your mobile web presence, Recurly has a solution.

Secure Data Migration

Recurly allows merchants to import existing subscribers' payment information into our secure environment. Our experience in credit card portability streamlines this complex process into a well-managed, organized transition. Recurly works closely with merchants throughout the process to ensure data integrity and compliance, and we manage the risks of storing credit card data.

Expert Tip: Check Credentials

We are **PCI Level 1** and **SSAE16 SOC 1 Type 2** compliant as a merchant service provider and maintain a highly available, N+1 redundancy throughout our entire infrastructure stack.

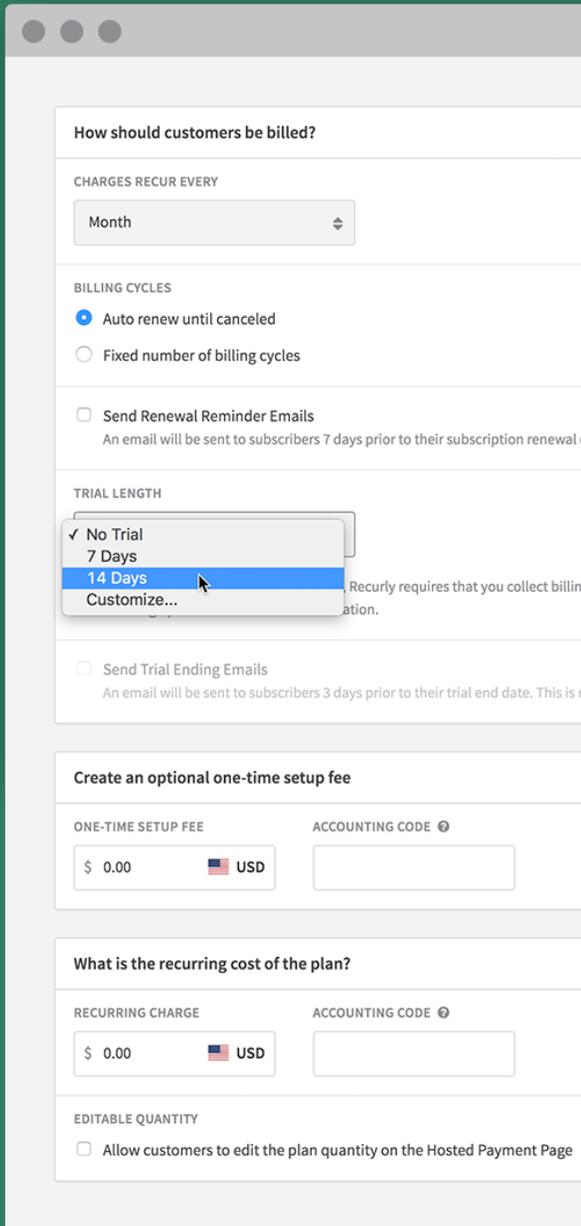




Chapter 3

Recurly Cuts Through the Complexity of Subscription and Recurring Billing

Recurly's goal is to take the complexity out of subscription management by providing a solution that is agile, flexible, and powerful. We automate complicated calculations so that adding new plans, upgrading and downgrading customers, or issuing refunds and credits is straightforward. Our customer management dashboard streamlines subscription plan management.



The screenshot displays a web interface for configuring a subscription plan. It is divided into several sections:

- How should customers be billed?**
 - CHARGES RECUR EVERY:** A dropdown menu set to "Month".
 - BILLING CYCLES:** Radio buttons for "Auto renew until canceled" (selected), "Fixed number of billing cycles", and "Send Renewal Reminder Emails" (with a sub-note: "An email will be sent to subscribers 7 days prior to their subscription renewal date").
 - TRIAL LENGTH:** A dropdown menu with options: "No Trial", "7 Days", "14 Days" (highlighted), and "Customize...". A note states: "Recurly requires that you collect billing information."
 - "Send Trial Ending Emails" (with a sub-note: "An email will be sent to subscribers 3 days prior to their trial end date. This is required for all trials.")
- Create an optional one-time setup fee**
 - ONE-TIME SETUP FEE:** Input field showing "\$ 0.00" and a currency selector for "USD".
 - ACCOUNTING CODE:** An empty input field.
- What is the recurring cost of the plan?**
 - RECURRING CHARGE:** Input field showing "\$ 0.00" and a currency selector for "USD".
 - ACCOUNTING CODE:** An empty input field.
 - EDITABLE QUANTITY:** A checkbox for "Allow customers to edit the plan quantity on the Hosted Payment Page" which is currently unchecked.

Create as Many Plans as Needed

As part of a Recurly account, merchants may create an unlimited number of subscription plans. Merchants may choose to offer a variety of different billing cycles and/or pricing tiers to provide adequate choice for customers.

Handle Upgrades and Downgrades With Ease

As customers upgrade or downgrade their plans or change billing cycles, Recurly takes care of automated customer communications, pro-rating payments and accurately billing each customer according to plan. Customers can also add or remove add-ons after subscribing, and Recurly will handle all the related events such as customer email confirmations, pro-rating mid-period payments, and posting account updates.

Easily Configure Trial Periods and Setup Fees

Offering a free trial is a great way to allow customers to sample products before they commit to a paid subscription plan. Recurly simplifies configuring Free Trials, including setup fees on a per-plan basis.

Multiple Subscriptions Per Account

With Recurly, each subscription plan can have its own pricing, billing intervals, and termination date, as well as related add-ons, coupons, and promotion codes. This advanced feature is presented in a simple, easily understood dashboard.



Basic and Advanced Tax Support

Calculate and collect sales tax for any charge managed within Recurly, and rest assured that your tax charges are calculated from the most current tax rates, rules, and jurisdictional information.

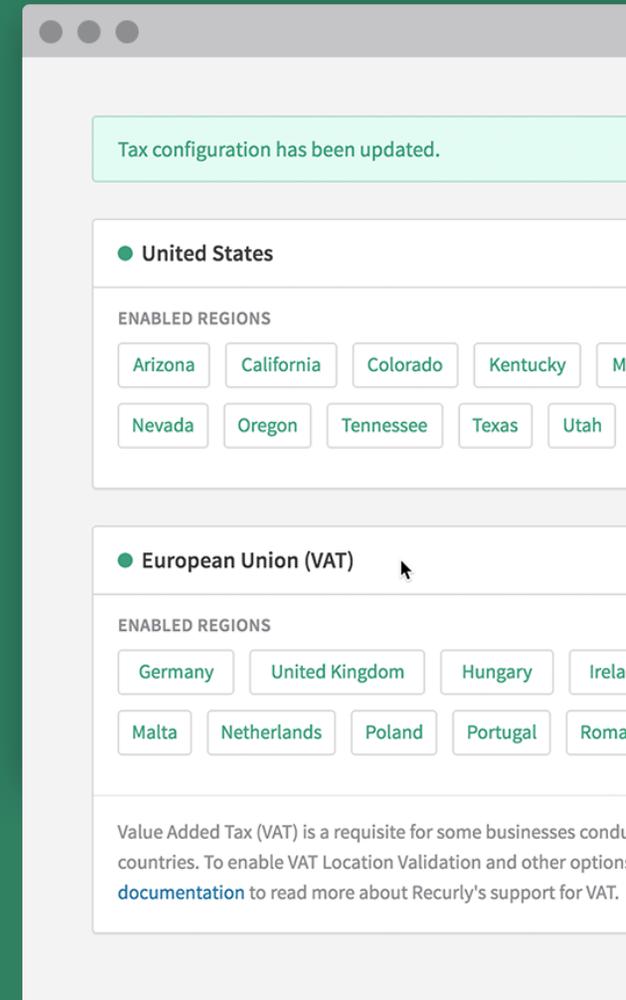
Free for all Recurly customers, our basic tax support includes tax calculations for the United States, Canada, Australia, and New Zealand, as well as self-defined rates for European VAT.

Choose How to Collect Payments

Managing invoices and payments is straightforward using our intuitive account management dashboard to centralize billing information. Choose between payment collection options, including invoices, which can be one-time or ongoing. Specify how to handle collections— automatic (billing on file) or manual—and customize dunning rules.

Route Payments to the Best Gateway

Merchants greatly benefit from Recurly's ability to route payments to the appropriate gateway based on easily configurable rules. Avoid paying unnecessary fees by routing payments to the optimal payment gateway based on a variety of transaction types. In the event of failed communications, your team can manually reset Recurly to route payments to another gateway. Route them back to the preferred gateway once communications are restored.



Easily Create Coupons and Discounts

Discounted price promotions and “special offers” provide merchants with the flexibility to attract new customers while engaging existing ones. Recurly makes it easy to define and manage numerous promotional offers in a simple console, streamlining the synchronization of billing and marketing campaigns.



Percentage & Total Dollar Discounts

Easily apply percentage discounts, or take fixed dollar amounts off the price of a subscription.



Limit Total Redemptions

Limit your offers to a fixed number available, and automatically monitor the count until the promotional code is no longer valid.



Bulk Unique Coupons

Create thousands of unique codes to track the effectiveness of your campaigns.



One-Time, Fixed Period, or Evergreen Offers

Apply promotions to a fixed number of billing periods, or apply the discount throughout the duration of a subscription.



Multiple Coupons Per Account

Allow customers to redeem more than one active coupon on their account at a time.



Restore & Edit Coupons

Edit existing coupons and restore expired coupons to make them redeemable again.



Chapter 4

Powerful Results

At Recurly, we consider ourselves partners in your success, providing flexible, nimble tools that generate powerful results. When you work with us, you partner with experts in subscription billing and management, with a dedicated support team that is supplemented by a rich documentation site and in-app support.



Improve Your Bottom Line

Recurly's deep expertise in the payments industry can help you prevent lost revenue, gain business insights, and spend less time managing your billing. Whether you want to avoid building a billing system from scratch or wish to retire a rigid and unwieldy home-grown system, Recurly is designed to improve your bottom line.

Recover Lost Revenue

Credit card declines can adversely impact subscription businesses. Recurly's proprietary decline logic automatically corrects over 60 common error types. Our ability to correct and successfully retry these cards prevents lost revenue and increases customer retention rates.

Rich Reporting Data

Recurly offers clear visibility into the health of your business with a variety of reports relevant to subscription-based business models.



Reduce Churn. Increase Revenue.

With Recurly, customers recover an average of 7% of credit card revenue each month from repaired transactions previously lost due to credit card declines.

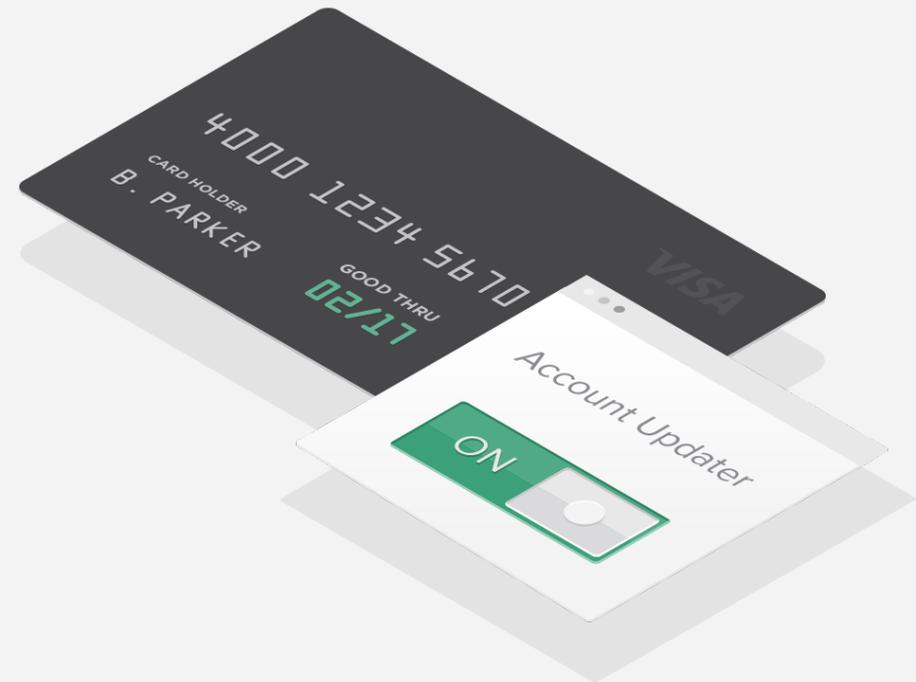
Automatically Update Billing Information

Recurly's account updater service regularly compares your customers' credit card information with Visa® and MasterCard® and, if changes are detected, automatically updates it so that every transaction is submitted with the most current information.

Available for all payment gateways Recurly supports, merchants can rest assured that your customers' billing information is always accurate.

Dunning Management

Recurly distinguishes between Hard Declines and Soft Declines and automatically knows how to take appropriate action to recoup lost revenue and automate the communication process required to have your customers update their credit card billing detail.



Expert Tip: Reduce Credit Card Declines

Recurly's Account Updater service helps to reduce churn and recover revenue lost from avoidable credit card declines.

Maximize Long-Term Value

Recurly believes that the intersection of customer events and billing events reveals powerful customer intelligence which enables businesses to make critical decisions quickly. The subscription model focuses a powerful lens on economic loyalty as organizations build revenue and customer relationships for the long term.

Unlike bloated, 'code heavy' solutions, Recurly focuses on delivering aesthetically elegant user flows, best-in-class credit card decline handling, and a simple, flexible API in a secure, stable, and scalable environment.

Our agile approach to the subscription model allows merchants to deploy quickly, innovate, and grow their revenue, maximizing long-term value.

For additional information on Recurly and our enterprise subscription billing solutions, visit [Recurly.com](https://recurly.com) or call us at 1.844.732.8759.



Recurly

Recurly provides enterprise-class recurring billing management for thousands of subscription-based businesses worldwide.



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