



GETTING ON THE FAST TRACK

To Subscription Revenue
The Essential Guide



A Smarter Approach to Subscription Commerce

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 flexible, enterprise-grade subscription management platform that cuts through the complexity of subscription billing, 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 with any other solution on the market, providing a competitive advantage.

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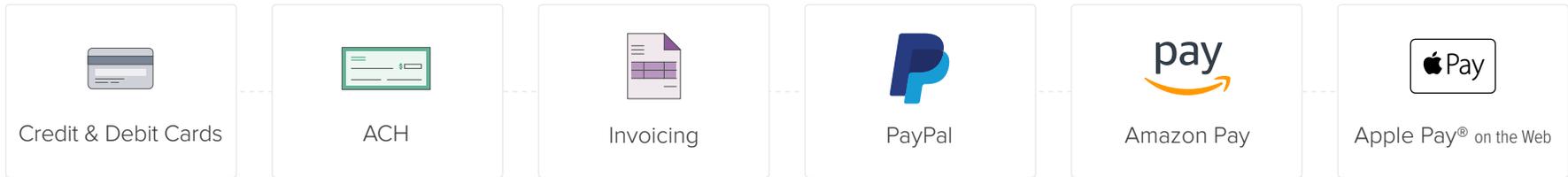


Chapter 1

Subscription Businesses Get Up and Running Quickly

Recurly offers a variety of paths for connecting the Recurly subscription management platform to our customers' websites and infrastructure. From simple pre-designed templates to a fully customizable API, there are integration options for every subscription business.

Recurly supports a variety of payment methods:

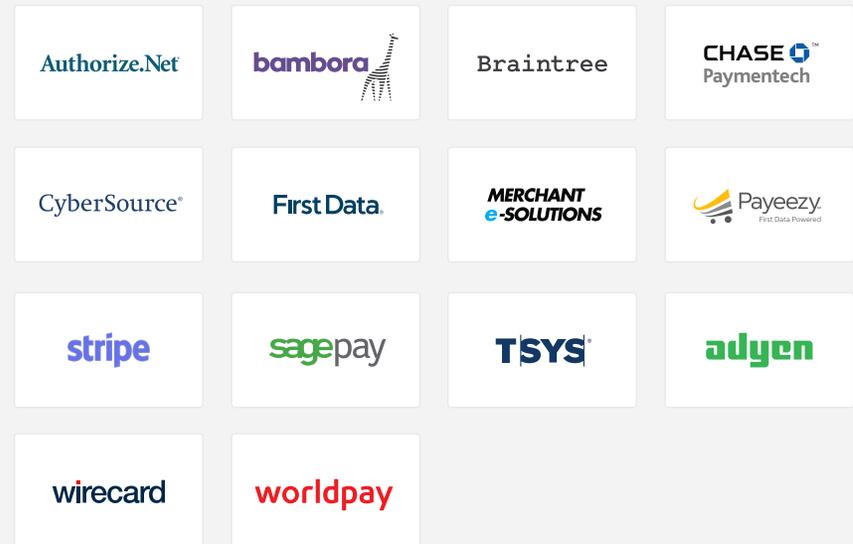


Payment Gateway and Rail Agnostic

Even for the largest integrations, Recurly’s speed and ease of implementation help our customers 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 includes integrations with Salesforce, NetSuite, QuickBooks Online, and Xero, optimizing your investment with Recurly. By integrating Recurly with leading accounting solutions, we've streamlined processes for financial management and reporting and have enabled our customers 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.



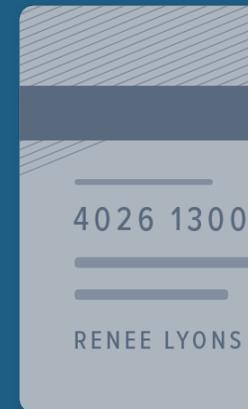


Easy Integration Options

Use hosted payment pages to start accepting payments immediately. Or use Recurly.js to build custom branded pages for seamless subscriber experiences. Multiple webhooks automate actions in other systems, such as email messaging, reporting and analytics, or referral tracking 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, .NET, and any developer with client library experience will find integrating with Recurly a straightforward process.

A screenshot of a web browser showing a payment form. The browser's address bar is visible at the top. The form is titled 'PAYMENT INFORMATION' and contains a card icon with a camera overlay. Below the icon, there are input fields for 'NAME ON CARD' (containing 'RENEE LYONS'), 'CREDIT CARD NUMBER' (containing '**** 6171'), and 'EXP DATE' (containing '06 / 20'). A 'Pay Now' button is located at the bottom of the form.

Hosted Fields

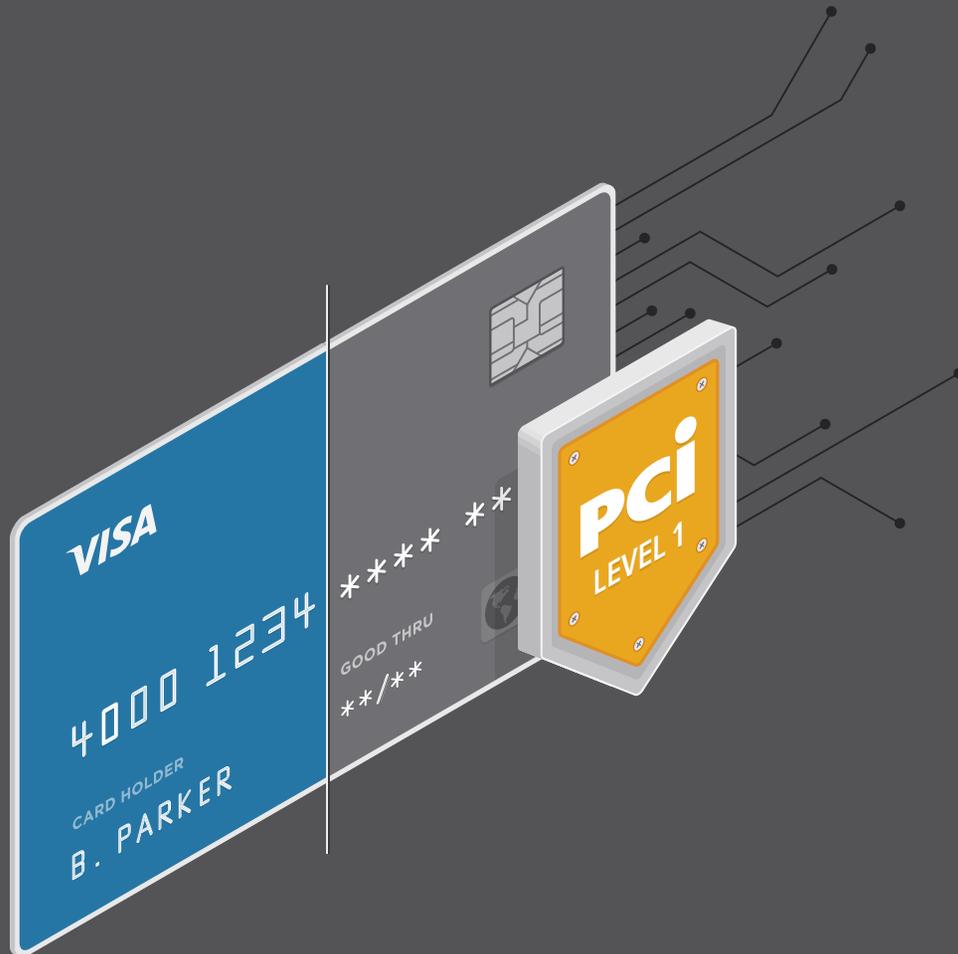
Customize your checkout process and accept payments securely with Recurly's hosted fields.



Chapter 2

Infrastructure and Security

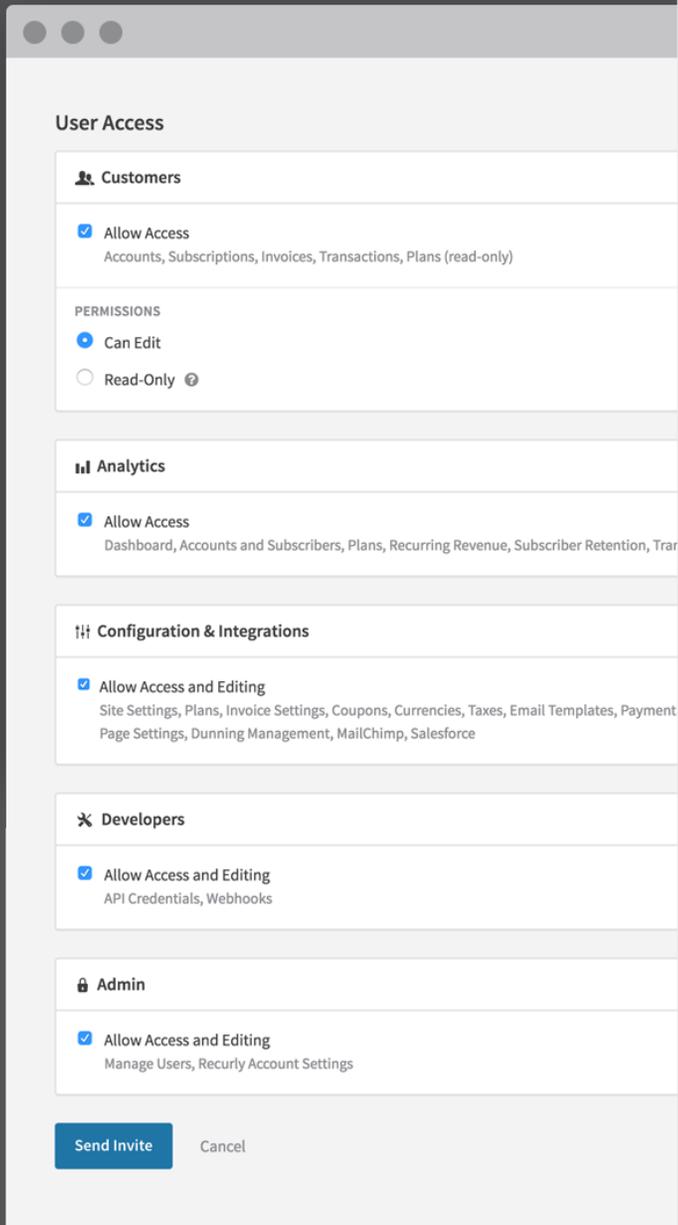
Ensuring a highly secure and available environment is of the utmost importance. Recurly meets or exceeds all industry-standard payment security guidelines and requirements. We offer streamlined and secure tools for accepting mobile payments, so our merchants never miss out on revenue. And we manage the 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. Recurl operates a secure environment that not only meets but exceeds industry-standard payment security practices and mandates. We are PCI Level 1 and SSAE18 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 customers' needs related to large quantities of transactions, high volumes of subscribers, and differing levels of business complexity, including those merchants in "high-velocity" businesses.



User Roles

Security and compliance are also supported by providing Recurly Administrators with the ability to set-up and manage user roles and permissions. Because we understand that not every user in your organization needs full access to the Recurly app, we support five distinct user permission groups with varying levels of access.

The five permission groups are named to reflect the area of the Recurly application to which the user has been given access: *Customers*, *Reports*, *Configuration & Integrations*, *Developers*, and *Admin*. Read-Only access to the *Customers* section of the application is also provided.

Two-factor Authentication

Two-factor authentication provides an additional layer of security in accessing Recurly. In addition to a password, users must supply a verification code which is sent to their cell phone or email. This ensures that only intended users can access their account.

Single Sign-On

Recurly supports Single Sign-On (through Okta) which provides an additional layer of security, further safeguarding your subscribers' data in Recurly. Single Sign-On also simplifies your employees' login experience by eliminating the need to remember multiple passwords for different systems.



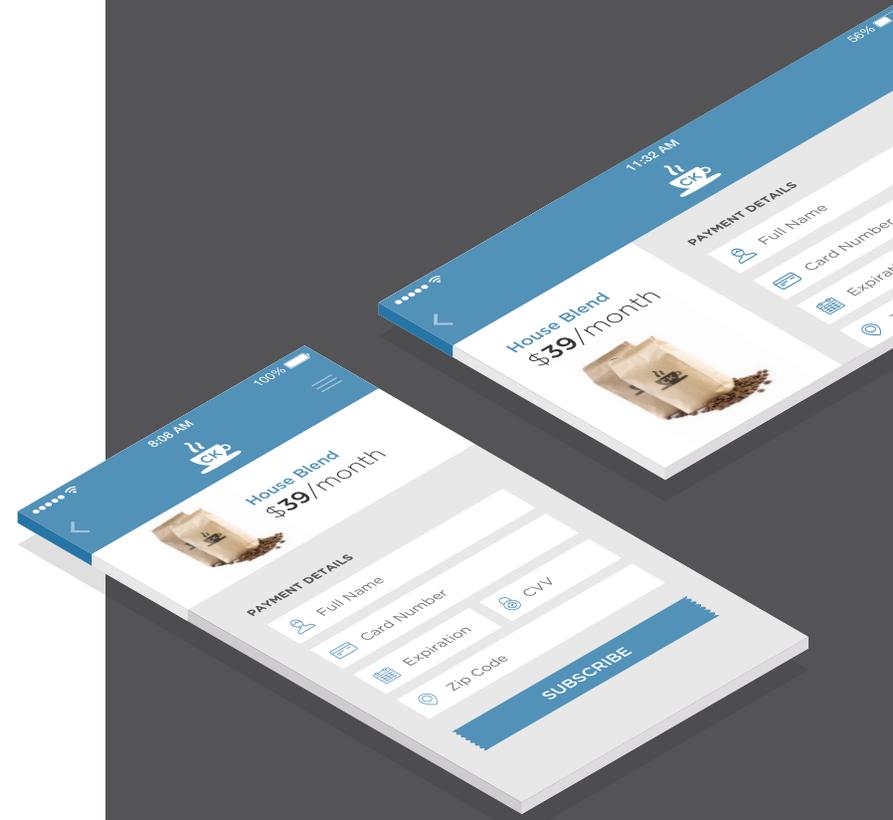
Streamline Mobile Integration

Recurly provides 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.

Recurly's streamlined mobile checkout experience allows shoppers to scan their credit card information with their mobile device's camera or import saved card information from iCloud Keychain, Google Wallet, and LastPass. We've also optimized iFrame fields for checkout forms on desktop and mobile devices, so you can deliver a seamless and secure payment experience that helps increase sales conversions.

Secure Data Migration

Recurly allows our customers 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. We work closely with each new Recurly customer 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 **SSAE18 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 subscribers, or issuing refunds and credits is straightforward. Our subscriber management dashboard streamlines subscription plan management.

Create as Many Plans as Needed

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

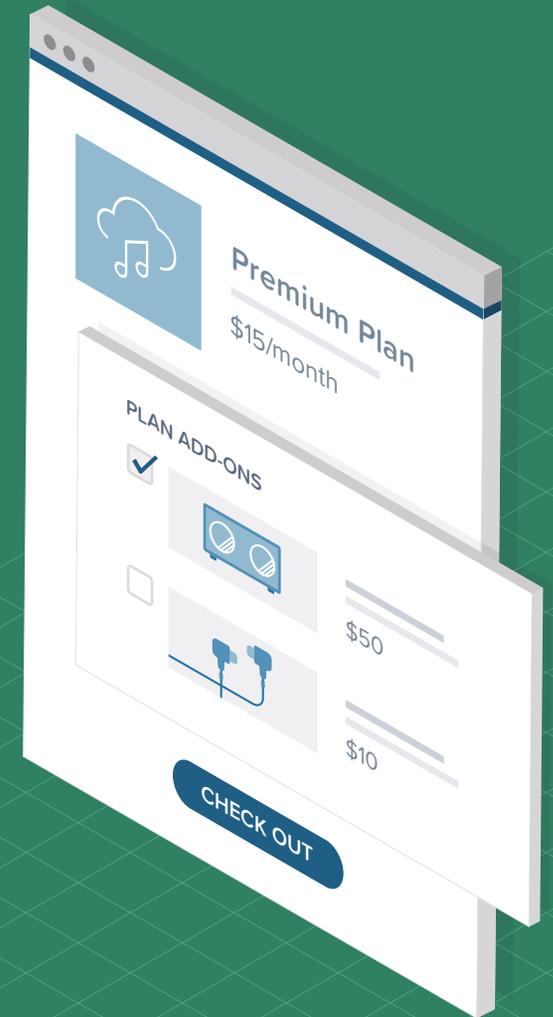
Hybrid Checkout

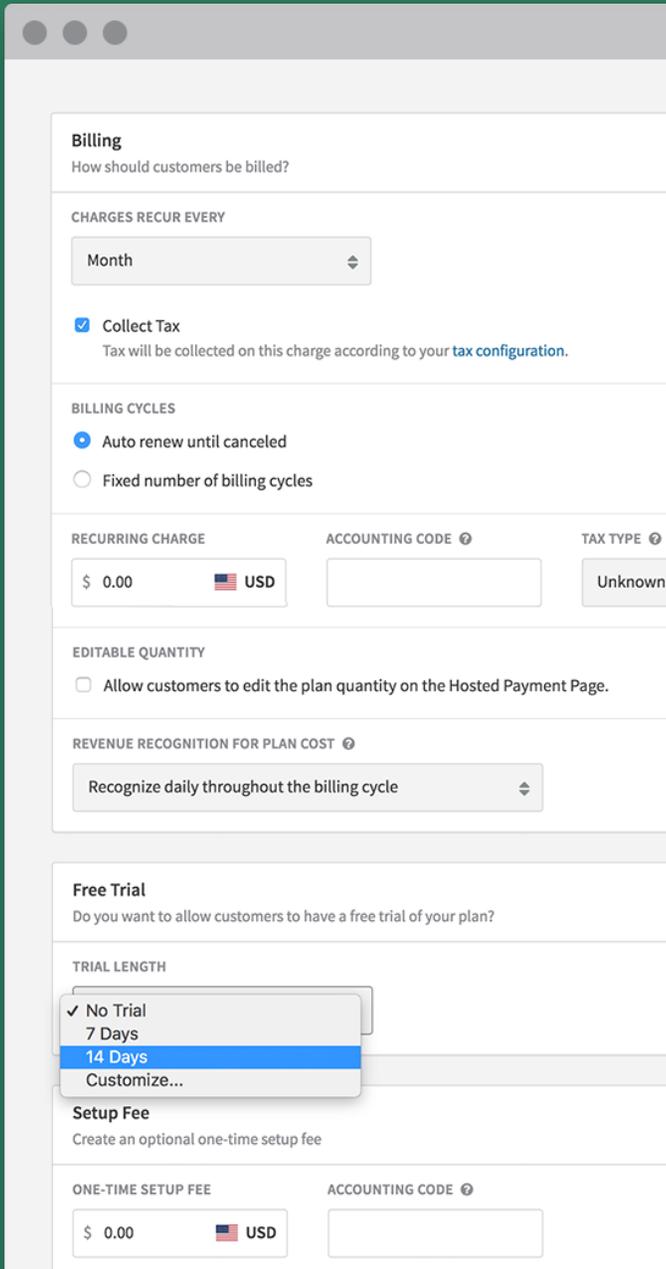
Recurly's Hybrid Billing Model lets our customers easily sell both subscriptions and one-time products. This flexibility reflects today's changing consumption patterns, letting businesses that sell one-time products introduce a recurring revenue stream while subscription businesses can offer complimentary one-time products. Either way, Recurly combines fixed recurring and one-time charges into a single invoice, minimizing friction and cart abandonment with a simple and fast checkout experience.

Streamlined Renewal Processing With Calendar Billing

With our calendar billing feature, subscribers with more than one subscription can renew those subscriptions together via a single transaction and a single invoice. This streamlines the process for both the business and the subscriber and minimizes the transaction costs incurred by the merchant.

The calendar billing feature also allows for physical goods companies to generate aggregated invoices when a single account has multiple renewals. Subscription businesses with digital services can automatically align renewals and prorate charges for plans with different bill dates in one combined renewal invoice.





Billing
How should customers be billed?

CHARGES RECUR EVERY
Month

Collect Tax
Tax will be collected on this charge according to your [tax configuration](#).

BILLING CYCLES
 Auto renew until canceled
 Fixed number of billing cycles

RECURRING CHARGE **ACCOUNTING CODE** ⓘ **TAX TYPE** ⓘ
\$ 0.00  USD [] Unknown

EDITABLE QUANTITY
 Allow customers to edit the plan quantity on the Hosted Payment Page.

REVENUE RECOGNITION FOR PLAN COST ⓘ
Recognize daily throughout the billing cycle

Free Trial
Do you want to allow customers to have a free trial of your plan?

TRIAL LENGTH
 No Trial
 7 Days
 14 Days
 Customize...

Setup Fee
Create an optional one-time setup fee

ONE-TIME SETUP FEE **ACCOUNTING CODE** ⓘ
\$ 0.00  USD []

Handle Upgrades and Downgrades With Ease

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

Bill Subscribers Based on Usage

In addition to simple fixed-price recurring billing and one-time charges, Recurly offers usage-based billing, letting businesses bill their subscribers in arrears for only as much of their product or service that the subscriber actually uses. This option lets subscription businesses that are primarily transactional bill their customers in a manner more appropriate to that model, supporting higher customer satisfaction.

Easily Configure Trial Periods and Setup Fees

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

Offer 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.

Gift Subscriptions

Recurly is the only subscription management platform on the market today that offers a complete, automated gift program which includes both gift plans and gift cards, letting your subscribers share their love for your product or service with friends and family. This is also an economical way to grow your subscriber base as many recipients will choose to become paying subscribers when the gift period ends.

If a business sells physical goods, their subscribers can ship the goods they purchased together to different addresses. For example, a customer can ship a Box of the Month to their friend's address and ship a one-time item to their own address. And Recurly will ensure that the tax is calculated properly for each item, based on the recipient's address.

With gift plans, the giver can purchase the subscription as recurring or nonrecurring. Gift cards are purchased in pre-set amounts determined by the subscription business. The gift card option includes automated emails to remind recipients to redeem their gift and to encourage them to become paying subscribers when the gift period ends.

Gift subscriptions combined with coupons provide a rich and robust promotional toolkit to help attract and retain subscribers, building into your marketing the "social proof" that businesses want and prospects value.



Easily Create Coupons and Discounts

Discounted price promotions and “special offers” provide the flexibility to attract new subscribers 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.



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.



Limit Total Redemptions

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



Multiple Coupons Per Account

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



Bulk Unique Coupons

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



Restore & Edit Coupons

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



Fight Fraud

Fraud is an ever-present and evolving threat in e-commerce. To fight this threat, Recurly has partnered with the leading fraud prevention solution, enabling our customers to protect themselves from fraudsters and card-not-present fraud, minimize chargebacks, and fight account takeover and account creation fraud.

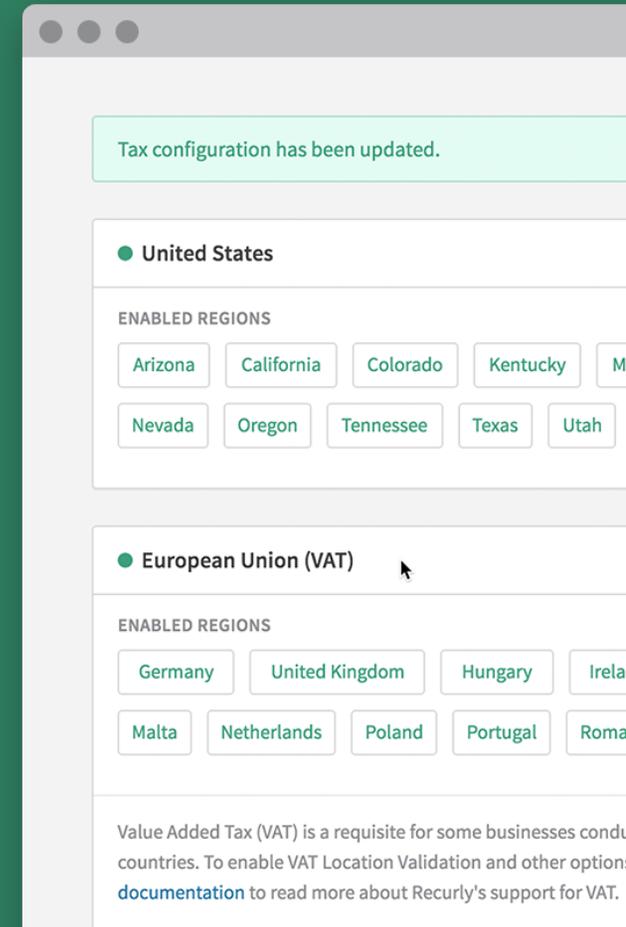
Basic and Advanced Tax Support

Easily collect taxes on your Recurly invoices and rest assured that your tax charges are calculated from the most current tax rates, rules, and jurisdictional information. Using Avalara AvaTax, Recurly will automatically collect tax on the appropriate customer invoices. Free for all Recurly customers, our basic tax support includes tax calculations for the United States, Canada, Australia, New Zealand, South Africa, and Israel, as well as all of Europe (including European Union VAT).

For advanced tax needs, Recurly has integrations with both Avalara and Vertex. With these integrations, Recurly customers can fully customize product taxation based on jurisdiction, industry, and type of goods or service being sold). Integrating with Vertex also provides tax support for a broad international coverage area.

Choose How to Collect Payments

Managing invoices and payments is straightforward using our intuitive account management dashboard which centralizes 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

Subscription businesses benefit greatly 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.

Ensure Billing Continuity With Gateway Failover

Recurly's **Gateway Failover** capability provides business continuity when your gateway has an issue. This technology automatically detects a payment gateway outage and then routes transactions to your backup or 'failover' gateway so you can keep processing subscription signups and one-time transactions. Gateway Failover is a key element of how Recurly helps you optimize payments.



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.

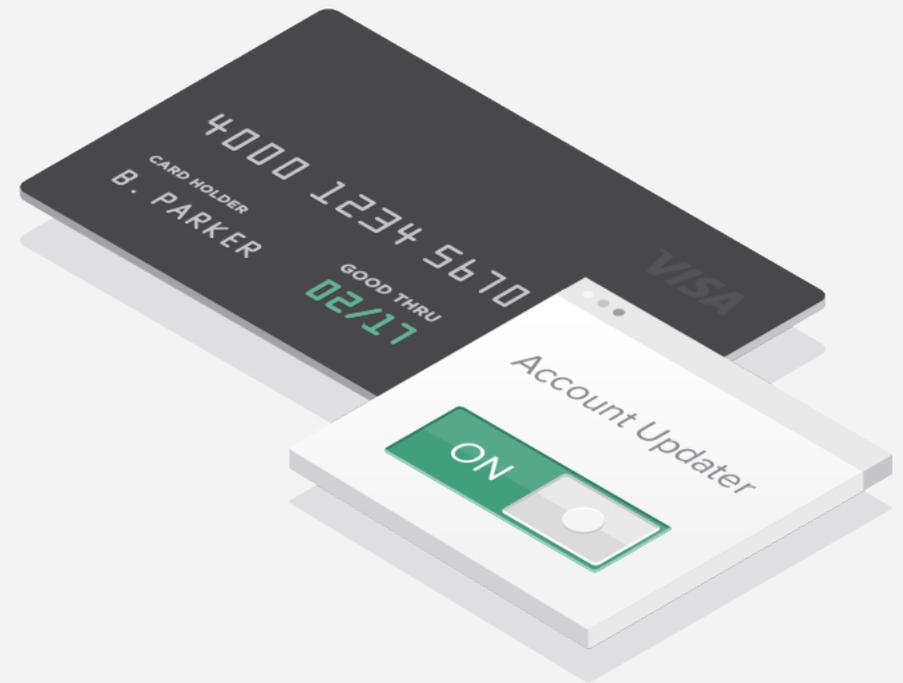
Improve Your Bottom Line

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 subscription management system from scratch or wish to retire a rigid and unwieldy home-grown system, Recurly is designed to improve your bottom line.

Automatically Update Billing Information

Recurly's account updater service regularly compares your subscribers' 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 subscribers' billing information is always accurate.



Expert Tip: Reduce Credit Card Declines

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

Reduce Churn. Increase Revenue 12%.

With Recurly's Revenue Optimization Engine, decline management strategies can boost revenue by 12%.



Recover Lost Revenue Through Decline Management and Revenue Optimization

Every subscription business encounters credit card declines. They increase churn, reduce revenue, and can negatively impact subscriber relationships.

The Recurly Revenue Optimization Engine utilizes machine learning to create a tailored process to repair failed credit and debit card transactions. This exclusive technology improves transaction success rates and recovers revenue that would otherwise be lost—up to 12% on average each month when combined with other decline management techniques.

This technology, combined with our Account Updater and Automated Dunning process, lets our customers focus on growing their subscriber base while Recurly focuses on maximizing their revenue.

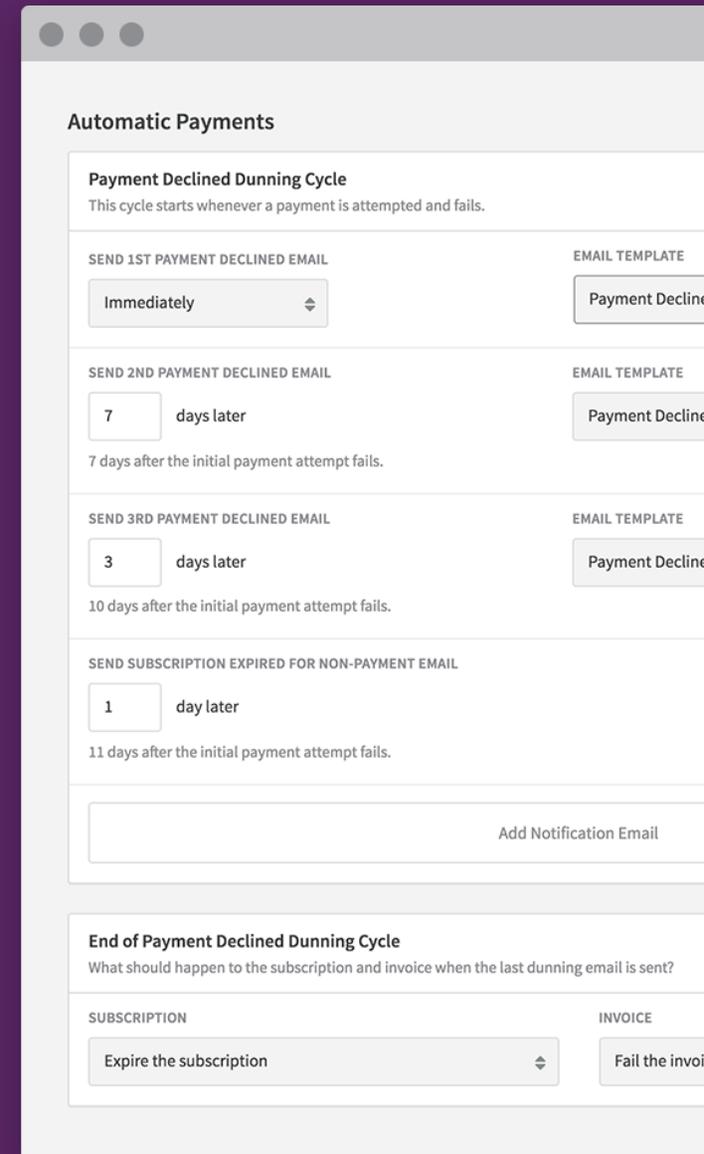


Dunning Management

Recurly separates the dunning and retry processes which increases the amount of revenue we recover for our customers. We've separated the two processes because we know that different industries experience very different rates of churn. This also allows us to optimize each process which more effectively increases transaction success rates and reduces churn.

Instead of retrying credit cards at the same time as subscriber emails are sent, we use sophisticated logic based on our past experience to determine when payment retries are most likely to result in success. This improves our transaction success rate and gives our customers control over when their subscribers are contacted about payment issues.

To more effectively recover revenue, Recurly allows for different email messages for each step in the dunning cycle. For example, each email can include escalating language to communicate a sense of urgency to subscribers about updating payment information to prevent their subscription from expiring.





Robust Analytics

Recurly Analytics provides a clear overview of the state of your business. Subscriber, plan, and revenue data, along with KPIs and trend analysis, surface the insights you need to monitor and take action to improve your business every day for a true competitive advantage.

Revenue Recognition

Recurly offers an automated revenue recognition solution within our platform to aid companies in recognizing revenue on a daily, monthly, or other basis. Our process generates automated revenue recognition schedules and a deferred revenue waterfall report. By automating and simplifying the process, we help ensure greater reporting accuracy which improves compliance, saves time, and reduces errors.



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 flexible approach to subscription commerce 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 subscription management for thousands of businesses worldwide.



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