Account and Billing Info

Recurly

Recurly's Import Team facilitates the secure transfer of billing data from your legacy platform, and mitigates PCI compliance risks associated with the storage of card data. Recurly provides business guidance and technical expertise to manage the process from start to finish.

The Recurly Way

We take a hands-on approach to both the business and technical aspects of the import process. We provide a detailed timeline for delivery and guide you through the data preparation process while our Solutions Engineering team executes the technical migration of data.

A Recurly *Account and Billing Info Import* typically takes less than a month, depending on the source and format of your data. We'll agree on a target timeline at the beginning of your project.

Preparation
We meet with you to review the import process and materials, and prepare your team for import.

Prework
Before your team requests an export of your PCI data from your current provider, your Recurly site must be configured and live to new customers. Your team will also complete a mapping document before data migration begins.

Import
Our team performs the data import on our PCI compliant servers to your desired production subdomain.

Key Benefits

- PCI Compliant process
- Smooth transition that is transparent to your customers
- Management of the technical aspects of the process

Key Deliverables

- An import project kickoff call with a Recurly project manager
- Access to and guidance from the project manager related to the import
- A result set file containing any accounts that could not be imported and their associated errors
- One secondary import, if needed, to bring in any accounts requiring clean-up

Data Format Requirements

The following are minimum requirements to bring billing data into Recurly:

- UTF-8 encoding
- CSV file format containing the following data (credit cards)
    - Card ID reference
    - Card number
    - Expiry month
    - Expiry year
    - First and last name

- CSV file format containing the following data (ACH)
  - Bank account type (checking/savings)
  - First and last name
  - Account number
  - Routing number
- Billing Agreement ID tokens (PayPal)*
- If taxes are enabled, 2-Letter ISO alpha-2 Country Code
  - U.S. and Canada must also include Postal Code (full address recommended)
- PGP encryption

Third party solutions, such as ecommerce platforms, may capture and store Billing Agreement IDs (BAIDs) that cannot be repurposed in Recurly. In those cases, subscribers who want to pay via PayPal will have to generate new BAIDs with you.

Why Recurly Professional Services?

Recurly's Professional Services team supports our customers and partners in the effective implementation and application of Recurly solutions to drive your company's success.

Our Professional Services consultants:

- Collaborate with you to develop the right solution for your needs
- Leverage their deep understanding of the technical capabilities of the Recurly platform
- Plan and execute complex and custom implementations
- Provide expertise with payment and technology integrations

PCI Compliant Supported Sources

Common PCI compliant import sources for billing data include, but are not limited to:

- ✓ Stripe
- ✓ CyberSource
- ✓ Braintree
- ✓ PayPal
- ✓ Authorize.net
- ✓ Zuora
- ✓ InfusionSoft
- ✓ Vindicia
- ✓ Adyen

Terms & Conditions

This services engagement is governed by Recurly's standard Professional Services Terms and Conditions.

Want to Learn More?

For more information about our services, please contact sales@recurly.com.

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