

Subscription Info

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. In addition to migrating customer account and billing data, Recurly's Import Team facilitates the transfer of subscriptions into the Recurly platform. This allows you to focus your development resources on the integration while Recurly moves your most important data in a way that's transparent to your subscriber base. 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 *Subscription Info Import* typically takes 4-6 weeks, depending on your legacy system.



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 for 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
- Expert guidance on migration best practices
- 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 and/or subscriptions that could not be imported and their associated errors
- One secondary import, if needed, to bring in any accounts and/or subscriptions requiring clean-up

Subscription Import Guidelines

- Your Recurly site must be configured and live to new customers prior to the migration
- Subscription start dates are recorded as the import date
- Historical data cannot be imported and should be captured from your legacy system
- Institute a maintenance period to block mid-migration changes to accounts and subscriptions
- The cutoff date for billing in your legacy system must be 10 business days after the data import

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 - Expiry month - First and last name
 - Card number - Expiry year
- CSV file format containing the following data (ACH)
 - Bank account type (checking/savings) - Account number
 - First and last name - 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](#)

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](#).

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

Want to Learn More?

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



CONTACT SALES



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

Recurly.com
+1.844.732.8759 sales@recurly.com

