Our humble goal
Deliver the **best connected** subscription management platform in Europe.
Building a subscription and recurrent revenue business is one of the best choices you can provide for your company. Predictable revenue and parameterized growth strategy are a few results of this business.

We have built this product to support your decision and steps to move to the subscription economy.
Product features
Status: Upodi unify tools
To empower the perfect subscription experience

<table>
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<th>Subscription</th>
<th>Price &amp; Packaging</th>
<th>Invoicing</th>
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<th>Revenues</th>
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</table>

**Platform**

- Extendable
- PCI compatible
- Integration
- Reliable
- Secure
- GDPR (EU 2018)

Credit cards (VISA, Master, Dankort etc.), Mobilepay, LS, iDEAL, PBS, OIOXML, manual invoice, SEPA, bank transfer
Unified Cloud Commerce Platform

- Experience
- Portals
- Store
- Integration
- Application
- Platform
- ERP
- Workflow
- Billing
- Finance
- Subscription
- Dashboard
- Intelligence
- Compliance
- Scale
- Control
- Agility
- Security
- SLA
- 99.99%
- Usage
- Automation
- Telemetry
- Insight
- Platform
- Portals Experience
- Store Line of Business Applications
- Finance REST API
- Integration
- Billing
- Payment
- Subscription
Subscription

Automate

Upodi handles automatic renewal, health check and subscription lifetime, enabling key insights to cross- and up sales opportunities – making sure time is spend on the right customers.

360 view

Understand the subscription history, changes and customer insights in a clean and friendly UI.

Empowered

Take action on time to prevent charge failures and subscription cancellations.
Price & packaging

Unified products
Enterprise grade product designer, enabling unified solution building, with various charge- and billing models.

Multi-currency
Capture internationalization and offer services in more than 147 currencies.

Matching customer expectations
Scale subscription pricing from one-off to advanced tiered & volume pricing models.

Aberdeen: Empowered Customers Demand a Seamless Experience

60% of companies grow out of their custom build billing platform
Invoicing

Simplify collections

Invoices are generated using simplified currency and taxation parameters. Advanced taxation can be added with TaxJar™.

Complexity simplified

Charges are often complex and cumbersome. Upodi ensure the charge is the right time and size, and automated to billing.

Align with ERP

Today Upodi supports integration with existing ERP solutions. An extendable API enables more integrations ensuring your alignment with local ERP system to keep revenue in tact.
Billing

Charge processing
Once invoices and charges are created, Upodi automates the payment following with direct credit providers, or issue manual invoicing through your existing line-of-business systems..

Payment automation
We integrate with multiple payment providers; Stripe, Braintree, Worldpay, Adyen, MobilePay etc. This enables your business to scale internationally and run billing against VISA, Amex, Mastercard at ease.

Dunning
Credit card do have periods of insufficient balance. By combining strong dunning management with your billing cycle, you get revenue on time.
Analytics

- Upodi is connected to the world's best BI platform.
- We provide customizable reports based on industry standard SaaS metrics.
- Gain revenue and customer insights.
- Customize to fit your business needs.
Developer Friendly

Documented
Upodi is fully documented using standardized JSON/REST API’s. We ♥ developers.

Standardized frameworks
JavaScript SDK or NuGet for C#. We have it.

- https://github.com/upodi
- https://docs.upodi.com
There are 7 essential components to successful subscription management
Changeable plan features, effective e-mail integration, knowledge to handle VAT and multi currency, support for multiple payment providers, integration to ERP and output for reporting and finance to handle day to day operations.

A running subscription management operations is critical
Assigned resources will often be displaced based on need and focus of the organization. Subscription management is revenue cashflow and critical. You cannot displace the focus, choose a vendor whom are you back-up.

The 80/20 rule. It takes 80% the time to build, vs. 20% the time to integrate
Once subscription is live, developers are not the day to day operations; product managers and finance are. You need a click-to-configure platform vs. a custom code which require sudden focus.

Payment providers (PSPs) like Stripe, Adyen and Braintree provide the perception
In reality you will need to map all subscription processes into the technical platform of the payment provider. Upodi support multiple payment gateways – you still gain the value of your PSP partnership(s) using our platform.

Subscription operations are just like ERP; it will become commodity fast
There is no differentiation in building your own subscription solution. Most companies does not build their own finance management applications like ERP or CRM.

http://blog.upodi.com/blog/build-or-buy/
Onboarding
# Upodi fits your existing IT tools

And help optimize our automated experience

<table>
<thead>
<tr>
<th>Business need</th>
<th>Description</th>
<th>Integration / Custom Development</th>
<th>Existing solutions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selfservice</strong></td>
<td>Today, customers demand to be in control. Self service is a key resource to handle increased customer demand and link customers to subscription management.</td>
<td>Intensive</td>
<td>• Sitecore</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Umbracho</td>
</tr>
<tr>
<td><strong>Support &amp; helpdesk</strong></td>
<td>Upodi support various support and helpdesk service management via extendable APIs.</td>
<td>Moderate</td>
<td>• Zendesk</td>
</tr>
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<td></td>
<td></td>
<td></td>
<td>• Helpscout</td>
</tr>
<tr>
<td><strong>Financial &amp; ERP systems</strong></td>
<td>Upodi does not substitute ERP but add-to. Billings and invoicing need to be processed, why Upodi links naturally to your ERP.</td>
<td>Moderate</td>
<td>• Dynamics 365 for Financials</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Dinero, Economic</td>
</tr>
<tr>
<td><strong>Customer relations &amp; management</strong></td>
<td>Keeping track of customer changes and behaviour is how the modern business work. You cannot exist without a central point of customer evidence.</td>
<td>Moderate</td>
<td>• Dynamics 365 for Sales</td>
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<td></td>
<td></td>
<td></td>
<td>• Hubspot</td>
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<td></td>
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<td></td>
<td>• Salesforce.com</td>
</tr>
<tr>
<td><strong>Communications &amp; chat</strong></td>
<td>Multi-channel and modern communication across online and offline. Enable service agents to handle subscription related questions.</td>
<td>Light</td>
<td>• Zendeks</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Intercom</td>
</tr>
<tr>
<td><strong>Subscription management</strong></td>
<td>The Upodi platform.</td>
<td>None</td>
<td></td>
</tr>
<tr>
<td><strong>Supply and provisioning</strong></td>
<td>Every service is delivered differently. Upodi is the hub between your ERP, CRM and provisioning.</td>
<td>Intensive</td>
<td>• Azure</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Amazon EWS</td>
</tr>
<tr>
<td><strong>Payment transactions</strong></td>
<td>Supporting PayPal, Stripe, CyberSource, Braintree and other payment gateways.</td>
<td>None</td>
<td></td>
</tr>
</tbody>
</table>
Follow the best practice

Customer Success Plan:

- Align common objectives.
- Based on a proven model
- Reduces the confusion
- Completes the overview
- Removes the risk
- Keep your timelines
Customer Success Team

Dedicated to your success

- Experts in Upodi.
- Coordinates business values with...
- ...technology evolution.
- Proactive support.
- Unlocks the roadmap.
- Reports your success.
## Compliance & data protection

- Industry certified data compliance and physical security

### Upodi support

<table>
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<th>Compliance Standard</th>
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<tr>
<td>HIPAA Business Associate Agreement</td>
</tr>
<tr>
<td>SSAE16 (SAS70 SOC1 report)</td>
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<tr>
<td>EU Data processing agreement</td>
</tr>
<tr>
<td>Government requirements (EU GDPR 2018)</td>
</tr>
</tbody>
</table>

Microsoft Azure platform adds security and extends compliance:

- Multi-factor authentication
- Perimeter security
- Extensive monitoring
- Locked racks