Upodi
Product Guide

Our humble goal

Deliver the **best connected** subscription management platform in Europe.

Subscription economy. Empowered!

- ➔ Product features
- ➔ Onboarding
- ➔ Roadmap
- ➔ Your success

Building a subscription and recurrent revenue business is one of the best choice you can provide for your company. Predictable revenue and parameterized growth strategy are a few results of this business.

We have build 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

| Subscription	Price & Packaging	Invoicing	Billing	Revenues	Analysis
• Handling • Renewal • Cross and up sales	• Pricing • Bundling • Permissions	• Invoicing • TAX • Charge	• Payment gateways • Charge claim • Reclaim • Dunning	• Schedule • Adjustment • Frequency • ERP integration	• Reporting • Dashboards • Segmentation • Insights

Platform

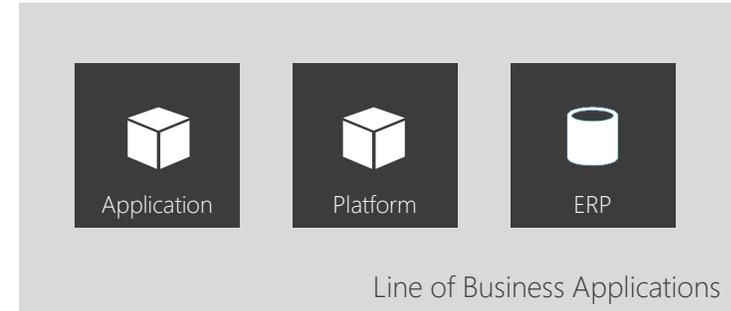Extendable   PCI compatible   Integration   Reliable   Secure   GDPR (EU 2018)

Credit cards (VISA, Master, Dankort etc.), Mobilepay, LS, iDEAL, PBS, OIOXML, manual invoice, SEPA, bank transfer
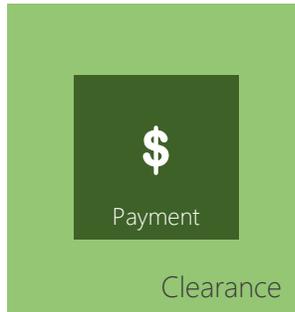
Unified Cloud Commerce Platform
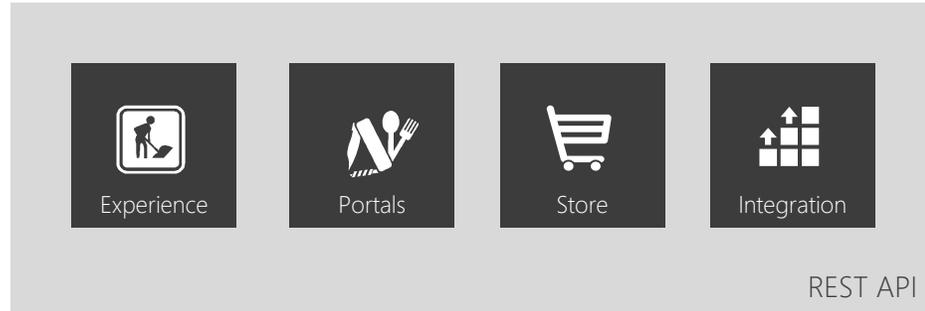
Experience	**Portals**	**Store**	**Integration**		**Application**	**Platform**	**ERP**

REST API

Line of Business Applications

Payment

Clearance
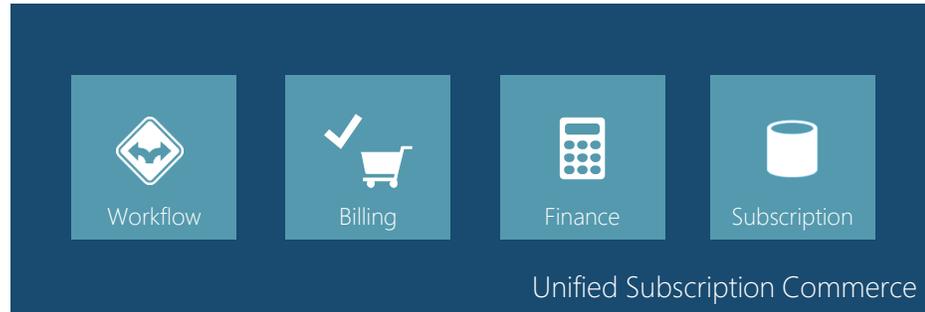
Workflow	**Billing**	**Finance**	**Subscription**

Unified Subscription Commerce
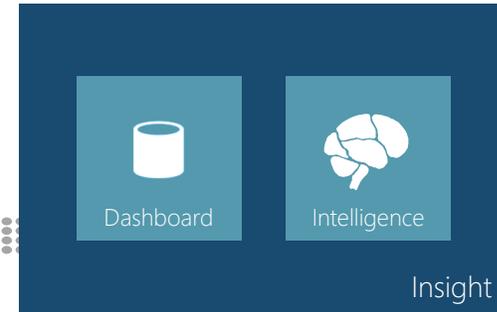
Dashboard	**Intelligence**

Insight

Automation

ipodi
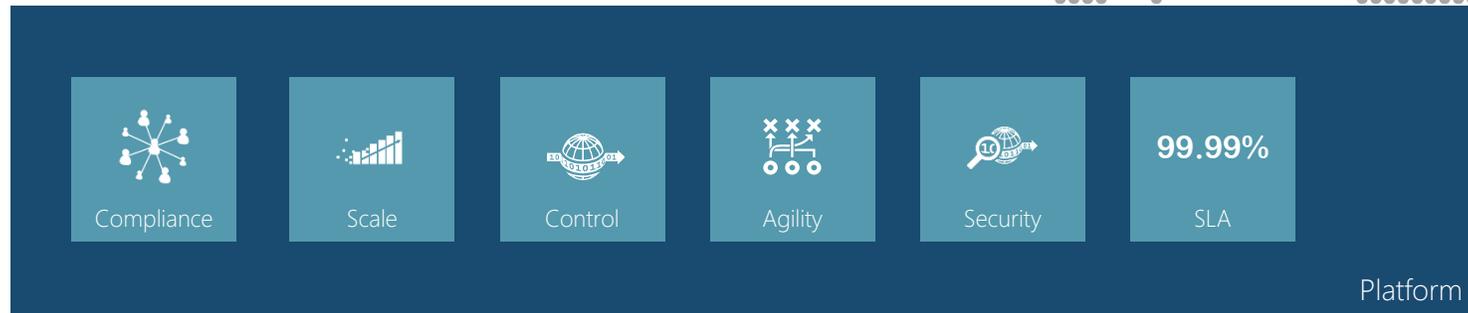
Compliance	**Scale**	**Control**	**Agility**	**Security**	**99.99%** SLA

Platform

Telemetry

Usage

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.

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

Aberdeen: Empowered Customers Demand a Seamless Experience

Upodi integrates with existing ERP

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.

e-conomic   dinero.

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.

upodi

Power BI for Upodi

Analytics

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

DeveloperFriendly

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

GitHub

Build vs. Buy

01
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.

02
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.

03
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.

04
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.

05
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

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

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 Succes Team

Dedicated to your success

- Experts in Upodi.
- Coordinates business values with...
- ...technology evolution.
- Proactive support.
- Unlocks the roadmap.
- Reports your success.

Your security

Compliance & data protection

- Industry certified data compliance and physical security

Upodi support	**HIPAA** Business Associate Agreement	**ISO 27001**	**PCI DSS 1.2**
EU model clauses, EU SAFE Harbor, UK IL2	**SSAE16** (SAS70 SOC1 report)	**EU Data processing agreement**	**Government requirements** (EU GDPR 2018)

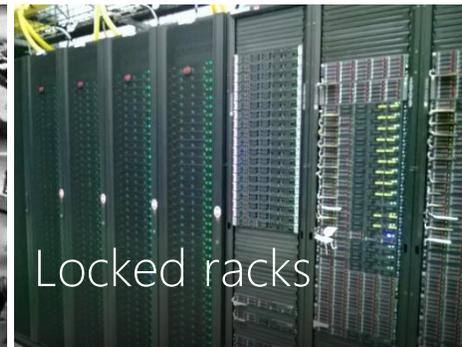Microsoft Azure platform adds security and extends compliance

Multi-factor authentication

Perimeter security

Extensive monitoring

Locked racks