upodi

Technical overview

Michael Christensen
CTO, Upodi

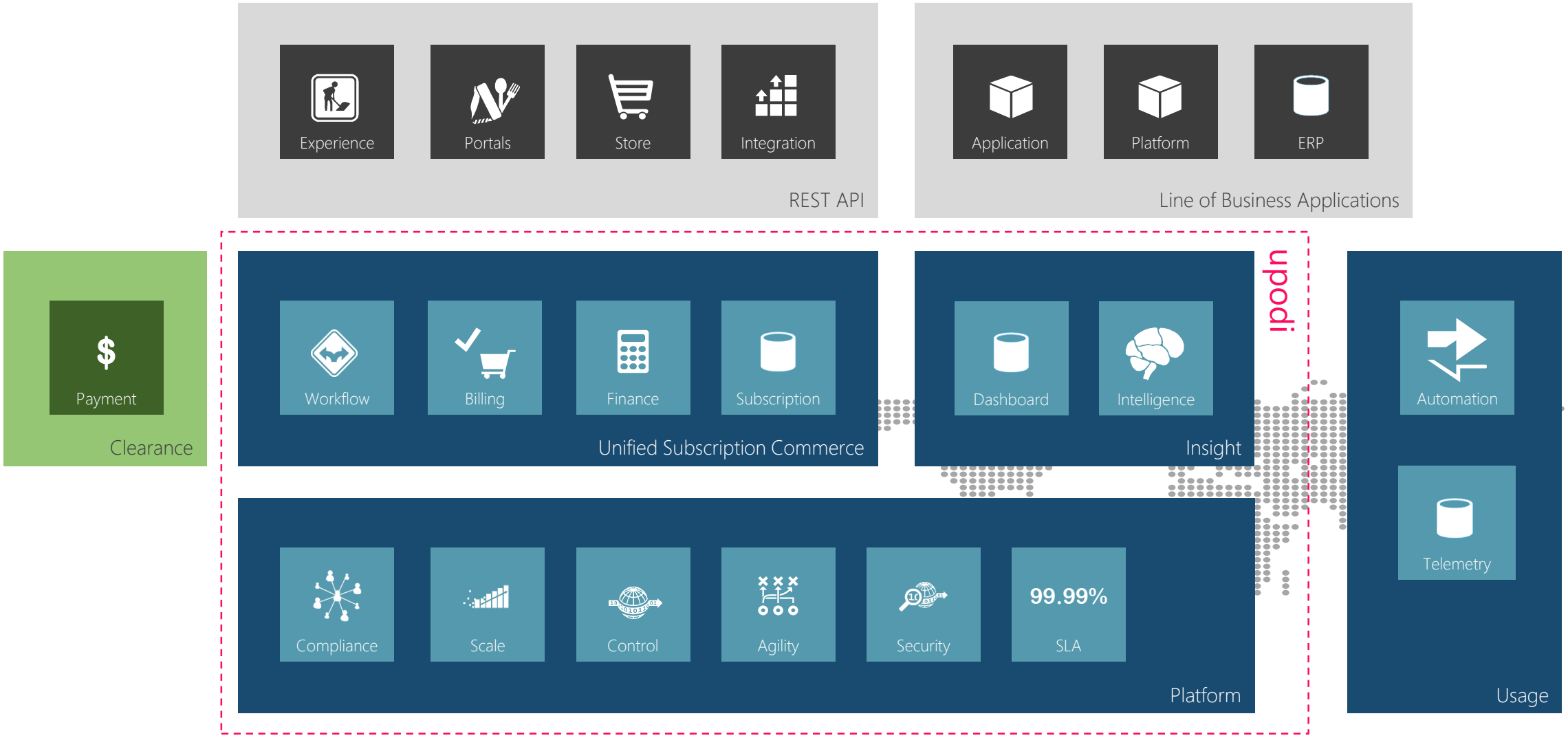
Where do we fit?

Upodi fits your existing IT tools

And help optimize our automated experience

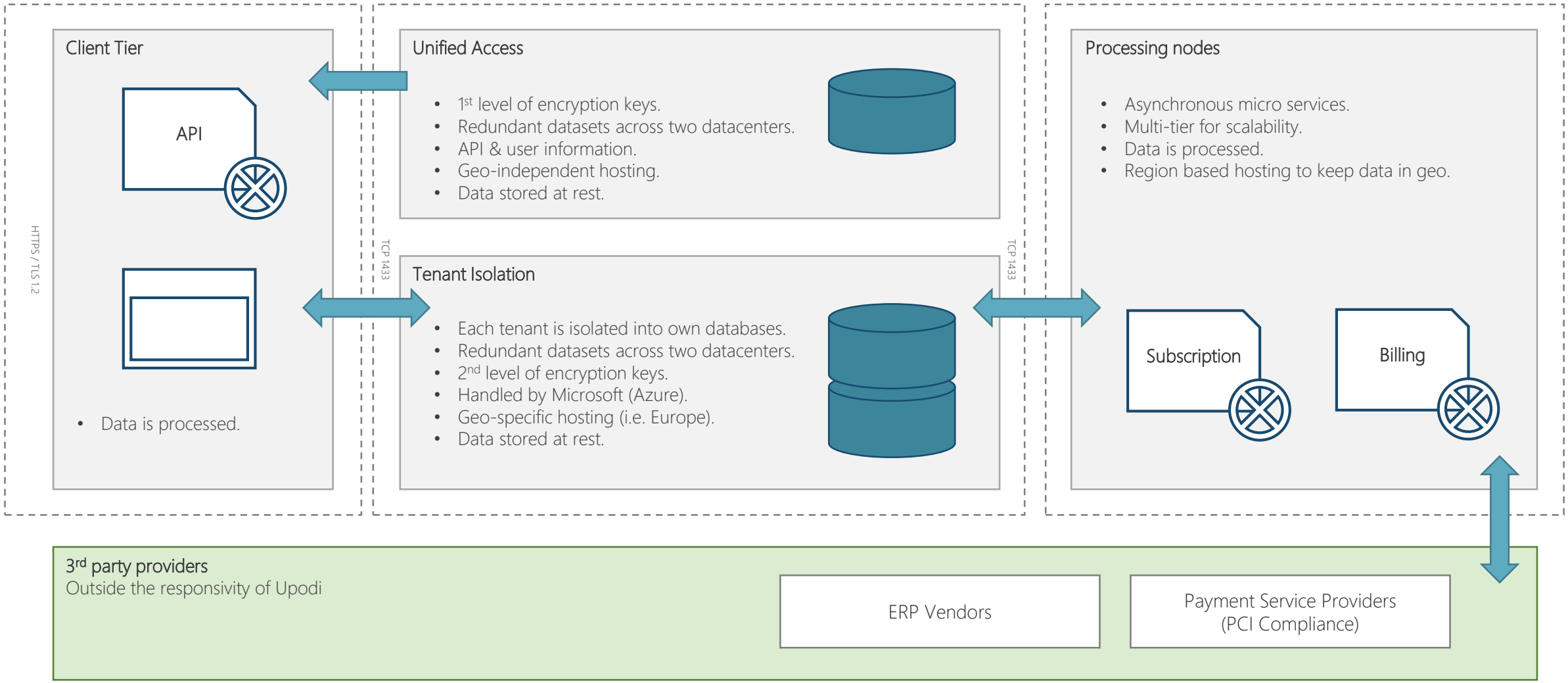
Business need	Description	Integration / Custom Development	Existing solutions
Selfservice	Today, customers demand to be in control. Self service is a key resource to handle increased customer demand and link customers to subscription management..	Intensive	• Sitecore • Umbracho
Support & helpdesk	Upodi 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	• Zendesk • 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 AWS
Payment transactions	Supporting PayPal, Stripe, CyberSource, Braintree and other payment gateways.	None	

Unified Cloud Commerce Platform



Platform Architecture

Logical Breakdown of Platform



MBI. This information is business confidential and only subject to be shared with the intended audience. If you have received this in copy from Upodi, we please ask not to distribute this information to 3rd parties without the written consent of Upodi.

Analytics

Correct data – every time

We have a range of options when dealing with getting data out of the platform. We have direct integration with PowerBi, Tableau, Excel to name just a few.

Data in your data warehouse

You have the possibility to connect Upodi subscription data with your existing data warehouse. We have full support for oData to expose all the data needed – when you need it. Fastest way to get data where you need it – always updated.

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

Supported ERP systems

Supported ERP systems

List of most used ERP systems

e-conomic

dinero.

xero

VISMA

Microsoft

intuit quickbooks

billy®

Supported Gateways

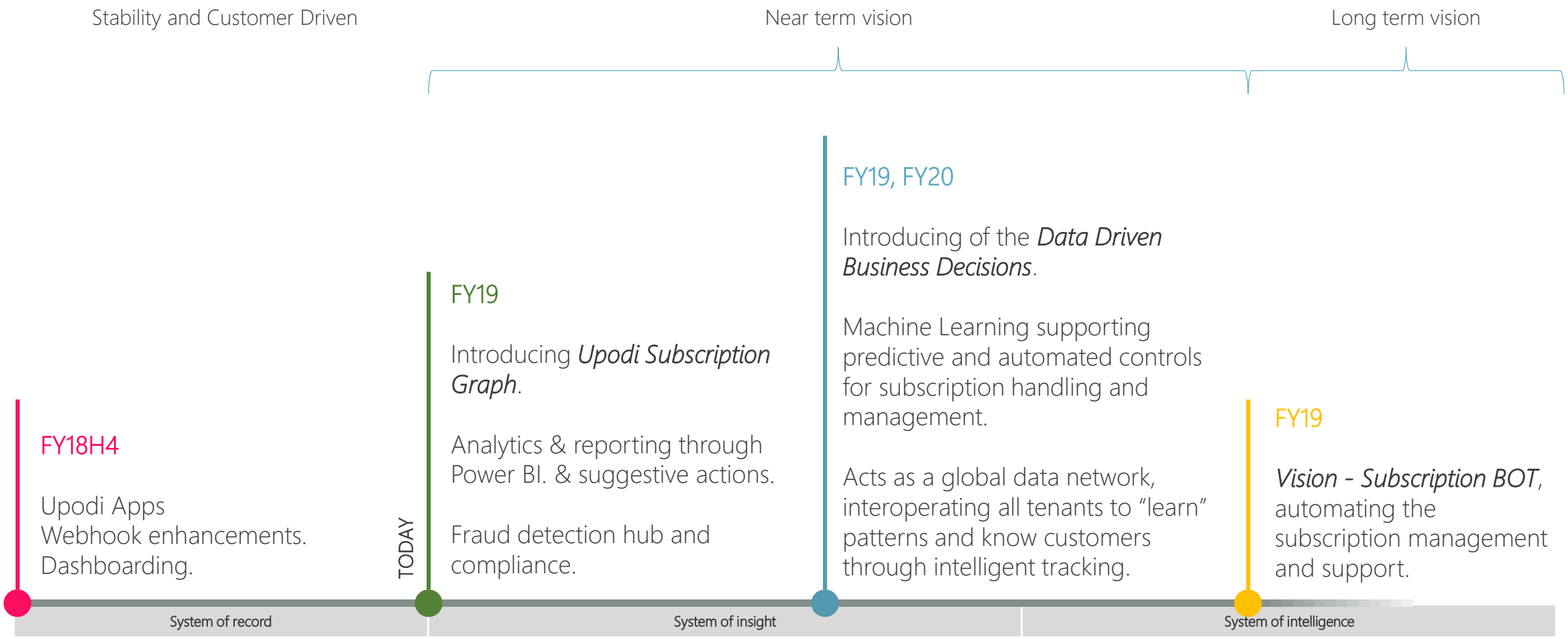
Supported Gateways

List of most used Gateways

Do we miss one? Upodi strive to integrate with the proven vendors of choice.

Roadmap

Roadmap

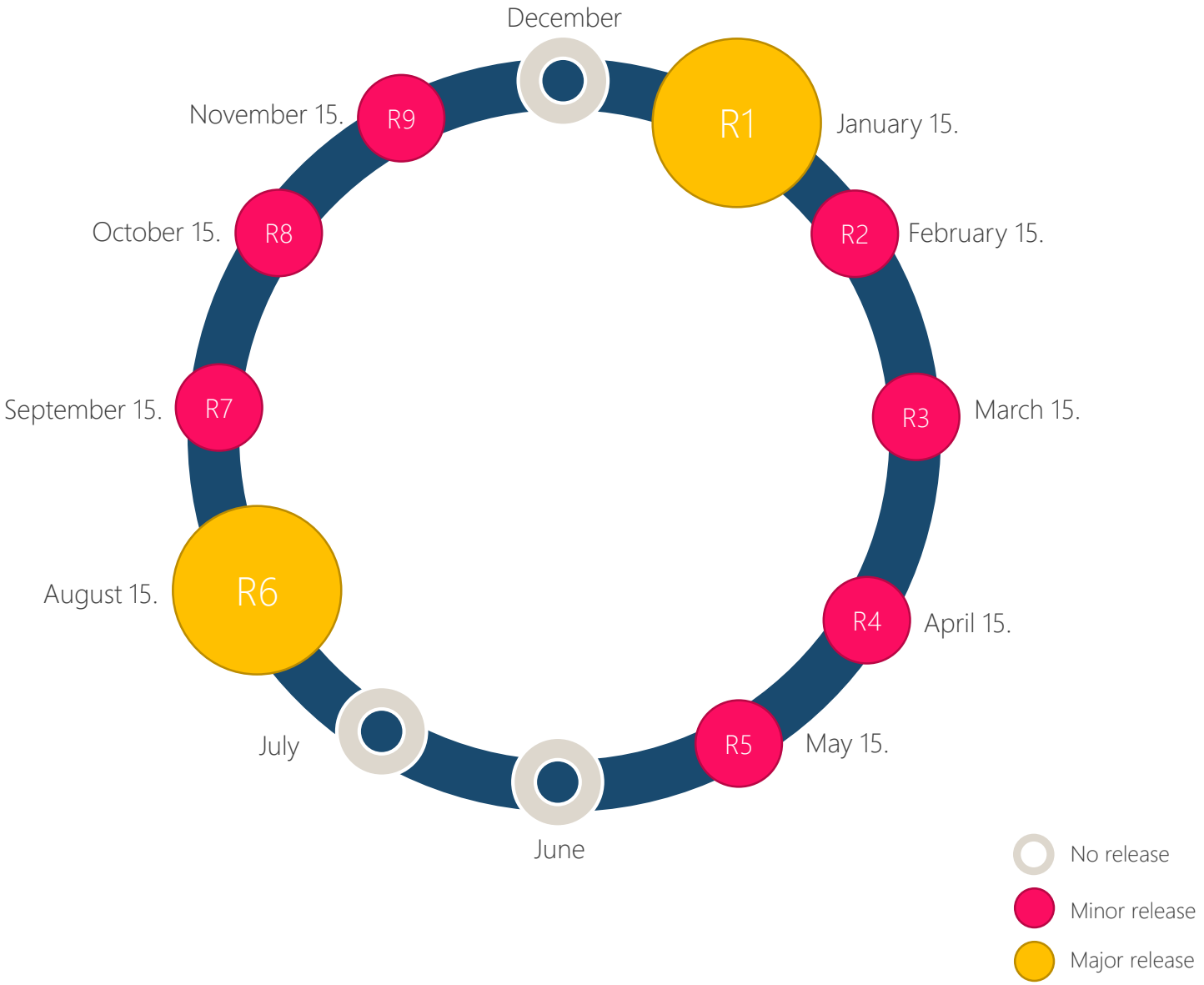

Stability and Customer Driven
Near term vision
Long term vision
FY18H4
Upodi Apps
Webhook enhancements.
Dashboarding.
TODAY
FY19
Introducing *Upodi Subscription Graph*.
Analytics & reporting through Power BI. & suggestive actions.
Fraud detection hub and compliance.
FY19, FY20
Introducing of the *Data Driven Business Decisions*.
Machine Learning supporting predictive and automated controls for subscription handling and management.
Acts as a global data network, interoperating all tenants to "learn" patterns and know customers through intelligent tracking.
FY19
Vision - Subscription BOT, automating the subscription management and support.
System of record
System of insight
System of intelligence

Release plan

Release planning

- Two (2) **major releases** with feature enhancements and changes. These includes the big rocks of our roadmap, requested by customers.
- Six (7) **minor releases** changes and minor enhancements and hotfixes.

- See https://docs.upodi.com/docs/releases



Security of Upodi

Security

Offices & physical perimeter

Upodi office locations are physical locked. Access is tracked by security cards and logged for audit.

People security

Annual audit of criminal records, initial screening of all new employees to secure compliance and trust.

Data security

Infrastructure including client desktop use anti-virus systems, conduct scans and are applied with security policies of automatically locking desktops, enforcing strict password policies and securing the use and access to data.

Upodi is build using the standard framework of security by Microsoft & Windows Azure.

Logical Security Separation

Web- & API tier

Isolated into security zone, allowing only HTTPS (TCP 443) from internet to the zone. Perimeter scan conducted on a regular basis, client scan is permitted on notification.

Processing tier

Isolated tier using web jobs. There is no external access to this tier. Tier is configured to allow communication with data tier and external 3rd parties via HTTPS (TCP 443).

Data Tier

Isolated and separated by distinct firewall policies allowing data access from web- and processing tier.

Upodi can extract data from this tier for support capabilities via jump stations.

Penetration Testing Policy

Enabling customers to provide own evidence of penetration tests.

Empowers customers with the ability to:

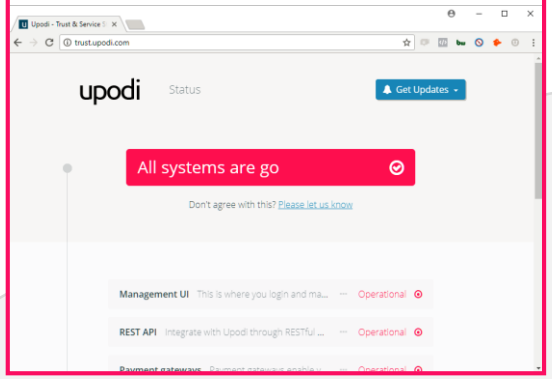
- Trust and Verify.
- Perform their own penetration tests of Upodi.
- Perform penetration tests of their own customizations and personalized portals.

Failsafe uptime

Real-time Health information

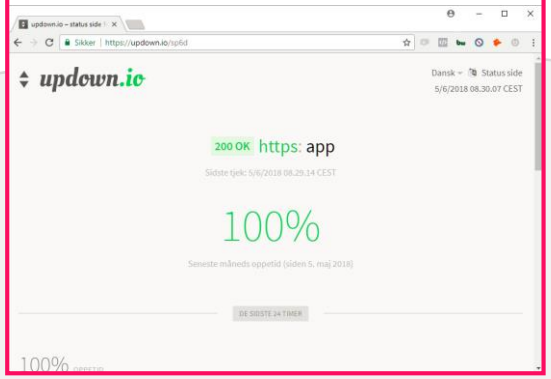
Alerting & announcement of maintenance

(https://trust.upodi.com)



API & WebApp uptime & response

(https://updown.io/xskt & https://updown.io/sp6d)



3rd party monitoring and management

Upodi will monitor and notify clients when 3rd party issues arise with payment providers and integrational partners.

Separation of logic

- Each component of Upodi is run as a separate logic.
- Each component is a micro service.
- Integrating Upodi drives less responsibility to the integration party. Allowing fault scenarios to run optimal.

Scenario examples:

- If our API is down, customers will not be able to update changes via the API, however billing and subscription engine will not be affected. Updates can be done via the web app.
- If our billing is down, customers will be able to update changes via web app and API, and billing will resume once back up. Subscription engine processing is not affected.
- If our web app is down, customers will not be able to update changes via web but API. Billing and subscription engine is not affected.
- If our subscription engine is down, neither billing or api or web app is affected.
- If Windows Azure is down, our engines and services will resume from the time the incident occurs, in case redundancy under Microsoft controls fails to handle load balance.

How we handle credit card data & PCI

Security of card data

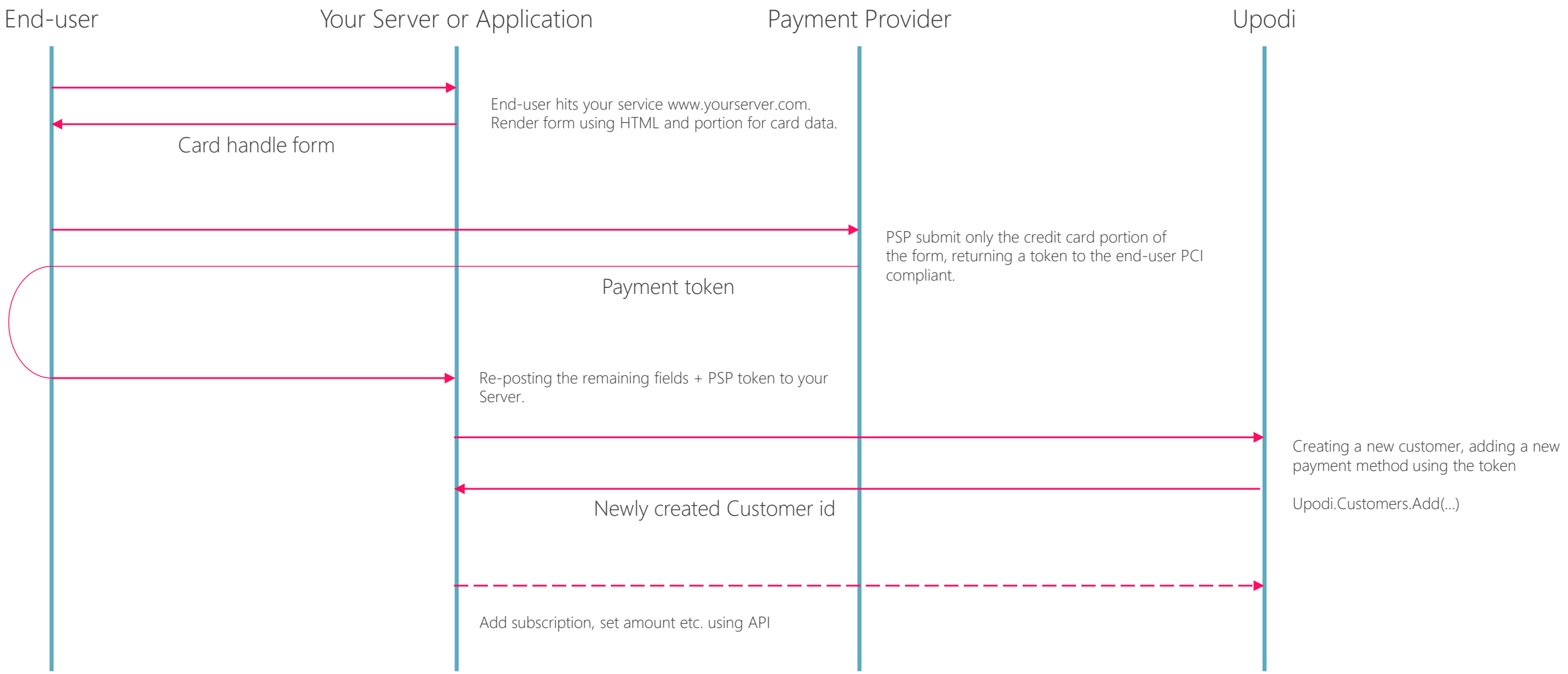
How Upodi comply with PCI DSS

By December 2018, Upodi have depreciated support for handling raw credit card data. We only support token based card processing in production.

- Strict PCI level 1 compliance is handled by the PSP.
- Upodi will comply with the SAQ A-EP PCI compliance.
- As a customer you will have to fulfil either SAQ A, A-ERP, D or QSA PCI level 1 for processing card forms in your application or website.
- As a customer, you will likely have comply with SAQ A or A-EP.

Worth to know for your implementation	
Used by iframe or popup windows. Do not touch, process or store cardholder data, and do not serve any card collection forms (e.g. you use an iFrame or popup.)	SAQ A
Used by token based form collection. Do not touch, process or store cardholder data, but do serve card collection forms (e.g. you use embedded card forms)	SAQ A-EP
Used when storing data. Do touch, process or store cardholder data	SAQ D
Used when storing data. Do touch, process or store cardholder data with over 6 million online transactions per year.	QSA, PCI Level 1

Payment provider (PSP) flow



Compliance

Compliance & data protection

- Industry certified data compliance and physical security

Upodi is build on Azure

HIPAA
Business Associate Agreement

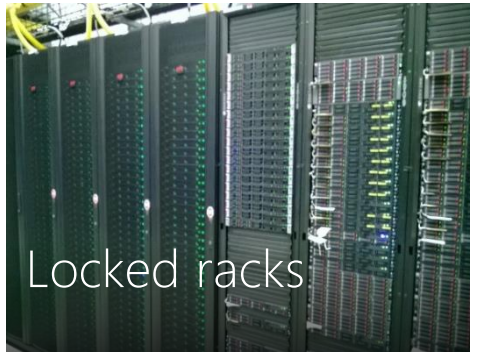
ISO 27001

PCI DSS 3.2

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