

Recurly + Salesforce: The Subscriber Relationship Hub

Recurly for Salesforce builds subscriber bases and loyalty through a secure, 360-degree customer view

Enterprises rely on Salesforce as a centralized hub for building and managing customer relationships. Enabling a 360-degree view of subscribers within Salesforce ultimately helps build subscriber loyalty and lifetime value (LTV).

Subscription-based businesses that use Salesforce to manage customer relationships and that depend on Recurly to manage their recurring revenue streams can now have a central and actionable view of subscriber and customer data within Salesforce.



Foster positive customer experiences

Immediate access to subscriber data enables customer service professionals to provide targeted, differentiated customer service to every subscriber.



Harness the combined power of Recurly and Salesforce

Up-to-date, end-to-end customer data allows merchants to better support and manage their customers' subscription experience.



Gain powerful insights through comprehensive reporting

Instant visibility into critical sales and billing data enables subscription businesses to more effectively manage their recurring revenue streams.



Empower sales and maximize customer LTV

Sales reps can use insights gained from a 360-degree customer view to better upsell and nurture customers.



Know that data is secure and accessible

Get full access to subscriber data while maintaining the highest levels of security and PCI compliance.

Increase Productivity and Efficiency

Many subscriber-centric companies use Salesforce to manage critical business and customer relationships. Recurly's sophisticated integration allows sales and customer support teams to view the most current billing information, create new subscriptions, and edit customer details within Salesforce. These changes are then automatically synchronized with the Recurly subscription management platform.

Centralized access to both subscription and customer data not only improves productivity by enabling customer-facing personnel to make changes to a customer record in one system, it also provides an informed basis for making sure-footed decisions on how to best serve each customer. Sales and support team members can work confidently with the knowledge that updates will be reflected in both systems and that credit card and customer data is handled in a secure manner, fully compliant with PCI standards.

Drive Subscription and Customer Analytics

Customer service and sales team members can access and update critical customer and subscription data that is synchronized automatically between Recurly and Salesforce. Subscriber data can also be included in Salesforce reports to drive subscription and customer analytics.

In addition to increased efficiencies, Recurly for Salesforce minimizes the risk and operational burden of having team members logging into multiple systems.



Recurly data that is synchronized with Salesforce:

- ▶ Accounts
- ▶ Billing information
- ▶ Credit card information (PCI compliant)
- ▶ Subscriptions
- ▶ Invoices
- ▶ Transactions



CONTACT SALES



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

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