

# The 6 Must-Haves from a Subscription Billing Software -And Why You Need Them

With a bonus feature checklist!

Now it's time to pull some triggers on software to get you started.

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Firstly, kudos! You've done the hard work — developed a business idea you're passionate about, created your product, you've got your website up and running and even have a marketing plan put together. Now it's time to pull some triggers on software to get you started, and you need to do it quickly, since you need to be live somewhere around...yesterday.

Since most entrepreneurs walking around aren't business experts AND billing experts, we created this quick read to help you weed through all the subscription billing offerings. Here are our six absolute must-haves, followed by a checklist of product features to make sure are included in your final choice.

## Must-Haves:

### 1. Multiple Payment Gateways

There are tons of reasons why choosing a subscription billing software that allows multiple payment gateways is important, but it boils down to this: stuff happens, and having multiple gateways can minimize your risk and help you earn more. The old saying goes, “Two is one, one is none.” Those numbers don’t translate to what we’d recommend, but the sentiment does.

### 2. Payment Methods & Currencies

Do you need to be able to accept ACH or bitcoin as well as payment cards? Or USD as well as the South African rand? Make sure your payment gateway and your subscription billing software support all of the methods and currencies you need, or might need in the future.

### 3. Reporting & Data

The idea that data is hugely important in making intelligent business decisions isn’t unique to billing, but it’s just as important here as other areas of your work. Make sure the software you choose offers great pre-set reports as well as the ability to customize to your liking and integrate your marketing lead source data.

## Must-Haves:

### 4. Card Data Portability

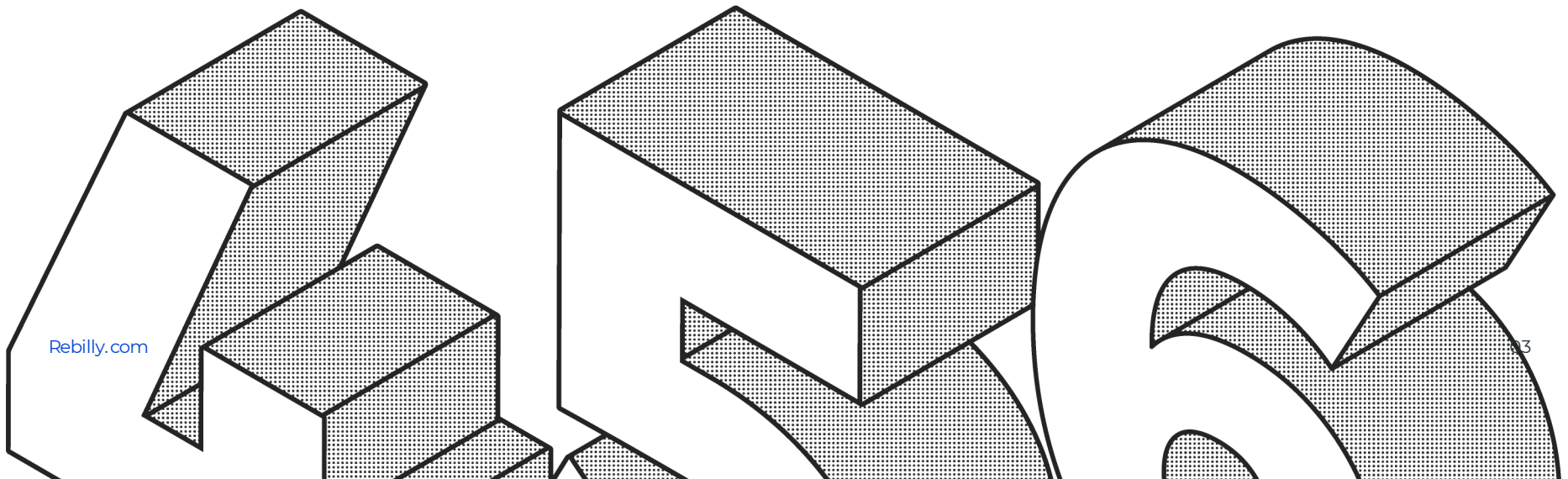
Ever had an ad rejected, or worse...an entire ad account shut down? Well, heads up: that can happen with payment gateway accounts, too, and it can really hurt your business. That's why we recommend integrating more than one payment gateway and choosing a subscription billing software that vaults your payment card data securely and then lets you move that data from one gateway to another, so there's no downtime for your business just in case something unexpected happens.

### 5. Security

You don't have to be a billing expert to know that it's really important to treat payment card data with extreme caution and security. We'd recommend choosing a software that's PCI DSS Compliant and avoid handling the sensitive data yourself, so that there's less for you to worry about.

### 6. Flexibility

Every business is unique, so the specific features you'll need will vary. A good way to make sure you're covered is by choosing a software that allows you to customize how it's used—this may be through their API, through webhooks, or with rules you create inside the software.

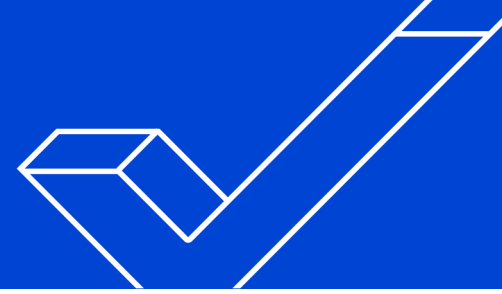


# Bonus Feature Checklist



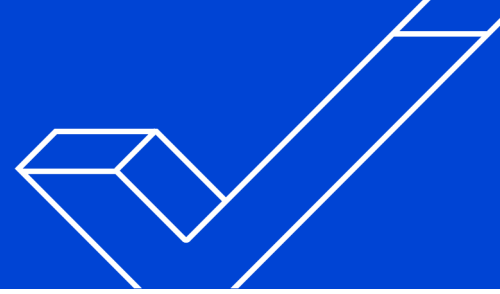
- Automated Rebills** - Kinda the number one, most important thing.
- Flexible Plan Configuration** - Make sure you can set up the specific type of subscription plan(s) you'd like to sell.
- Multiple Payment Gateways** - Again, you shouldn't be limited to one payment gateway.
- Unlimited Plans** - This goes for the number of plans you can create, too.
- Unlimited Websites** - Maybe your organization runs four websites, maybe it runs 100. Make sure you're not limited.
- Coupons & Discounts** - Having a coupons/discount feature can help you learn what your customer responds to best, or reward them for loyalty.
- Checkout Pages** - Make sure to check out the checkout pages feature if you're not planning on hosting your own pages so you can make sure you like the layout and aesthetics options.
- One-time Sales** - Lots of subscription businesses still have one-time sales to make, so it's important that your billing software supports both kinds of sales.
- Upsells & Downsells** - Upsells and downsells are a great way to test pricing. Even if you aren't planning on doing this right away, make sure the feature is there for you in the future.
- Invoices** - You may find it works better for you to invoice your clients, so having this function is important.
- Payment Methods & Currencies** - make sure the payment gateways and the subscription billing software you choose both support the methods and currencies you need to accept.

# Bonus Feature Checklist



- Shipping** - If one of your upsells is a t-shirt, or if any part of your product is physical, make sure the software you choose has shipping capabilities.
- Webhooks & Integrations** - Great for automating simple tasks, like sending yourself an email each time a new subscription is created.
- Email Automation** - A big part of subscription businesses is great customer service, and the ability to automate important emails mean that you never forget to send a confirmation email to your customer.
- Customizable Retry Schedules** - Lots of softwares offer pre-set retry schedules, but to maximize your return, make sure you can customize those schedules based on your own customer data.
- Blacklists & Greylists** - Combat fraud by adding bad transaction parameters (IP and email addresses, credit cards, device fingerprints, etc.) to temporary “greylists” or permanent blacklists.
- Transaction Risk-scoring** - Automation is the name of the game, so it’d be extra-great if the software you choose has a way for you to input warning signs for a risky transaction and block those to avoid the fraudulent transaction.
- Automated Dispute Management** - Dealing with disputes isn’t fun. If you can automate this process, you’ll spend less time not having fun.
- 2-Factor Authentication** - A way to enable extra security during your checkout process, if you choose.
- Stock & Custom Reports** - Take a look at the software’s reports and make sure that you see the data you think is important, as well as a way to customize reports as you learn more and want to dive deeper into your data.

## Bonus Feature Checklist



- Clean API** - If you'll be using the software's API in any capacity, it's a good idea to take a look and make sure it's clean and well-organized.
- Card Data Portability** - Remember, choosing a subscription billing software that securely vaults payment card data means you'll have more flexibility and less downtime if you ever lose a merchant account.
- Security** - Choose a software that's PCI DSS Compliant to reduce the scope of your security responsibility and worries.
- Flexibility through Rules** - A rule is a programmatic event that triggers when a criteria is met. It's a very flexible way to make almost anything you need to happen, happen. Finding a software with a Rules Engine would be the cherry on top of your payments sundae.

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