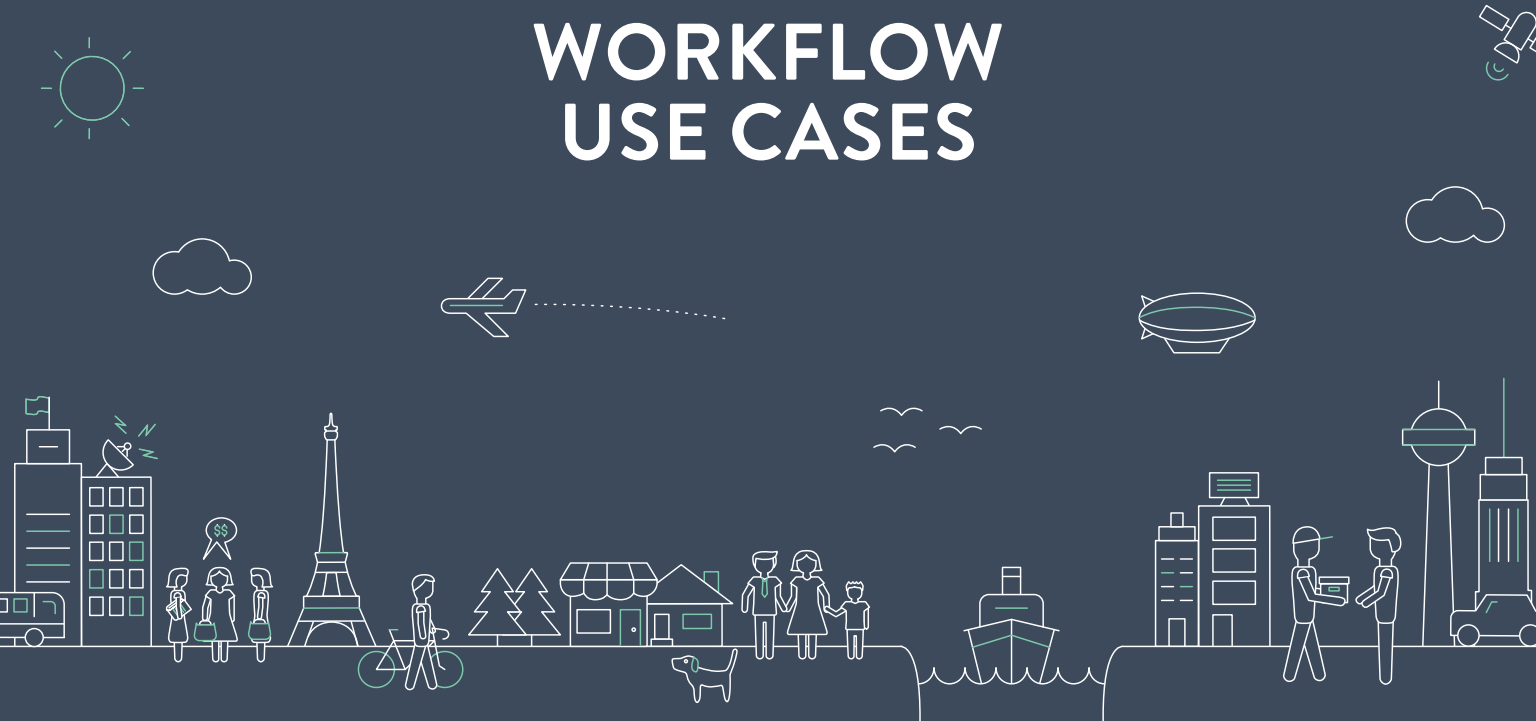


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## WORKFLOW USE CASES



# ORCHESTRATE YOUR SUBSCRIPTION BUSINESS WITH THE POWER OF WORKFLOW

This booklet contains use cases available  
in the pre-built Workflow library and  
real-world workflows that Zuora customers  
use to run their business today



# ORDER-TO-REVENUE WORKFLOWS



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## ORDER-TO-REVENUE WORKFLOW

### APPLY LATE FEE TO OVERDUE INVOICES

Find customers that are late, apply a late fee to their invoice, and notify them about their late fee



AVAILABLE NOW IN THE PRE-BUILT WORKFLOW LIBRARY

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# ORDER-TO-REVENUE WORKFLOW

## CHARGEBACKS

Find overdue invoices, cancel associated subscriptions, and write off invoices



## ORDER-TO-REVENUE WORKFLOW

### PRINT INVOICES FROM BILL RUN

Gather and print invoices that have been billed



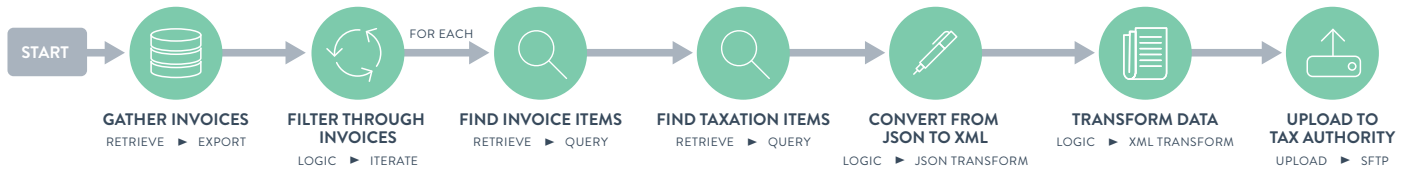
AVAILABLE NOW IN THE PRE-BUILT WORKFLOW LIBRARY

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# ORDER-TO-REVENUE WORKFLOW

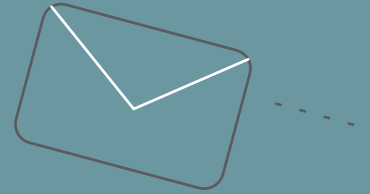
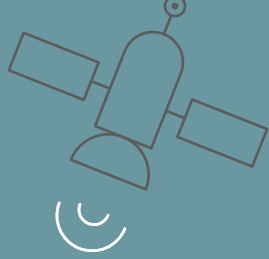
## INVOICE DELIVERY TO GOVERNMENT TAX AUTHORITY

Gather invoices tied to country, retrieve and format data as XML document, and upload to tax authority









# COMMUNICATION WORKFLOWS

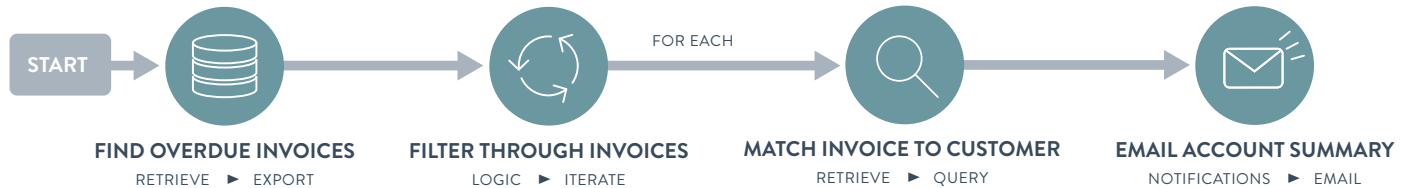


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## COMMUNICATION WORKFLOW

### EMAIL ACCOUNT SUMMARY TO CUSTOMERS WITH OVERDUE INVOICES

Find invoices past due, match them to corresponding customers, and email account summary



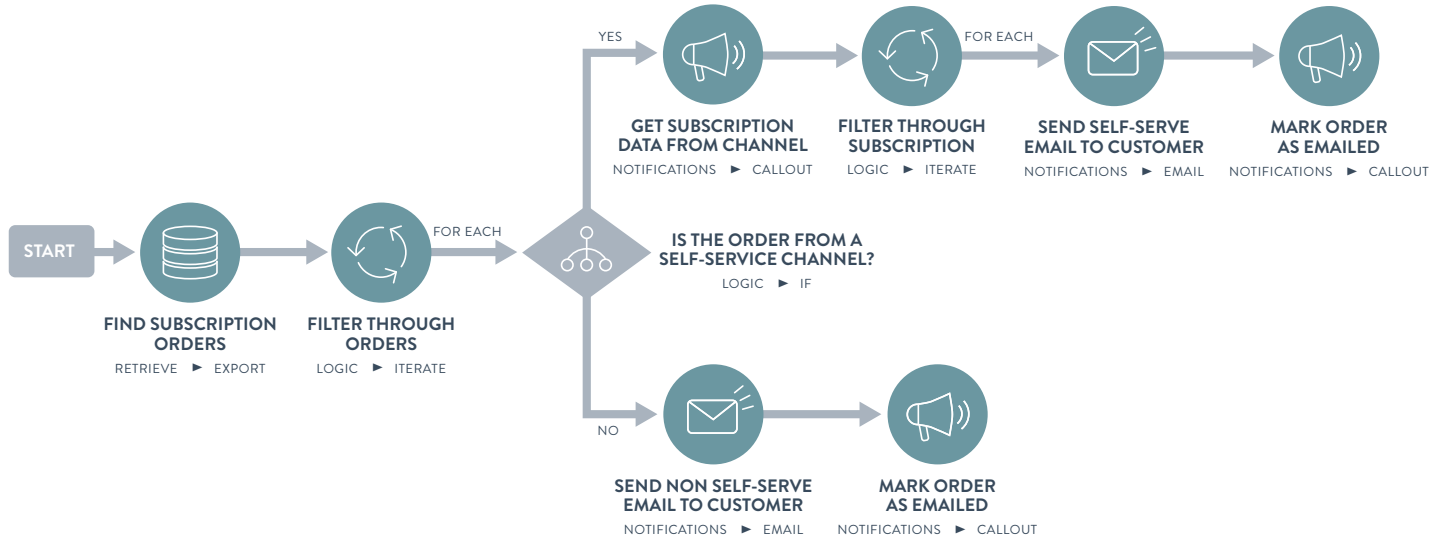
AVAILABLE NOW IN THE PRE-BUILT WORKFLOW LIBRARY

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# COMMUNICATION WORKFLOW

## EMAIL ORDER CONFIRMATION BASED ON CHANNEL

Find subscription orders, identify where they came from, and send confirmation email that corresponds to the channel



## COMMUNICATION WORKFLOW

# SUSPEND SUBSCRIPTION AND NOTIFY CUSTOMER VIA SMS

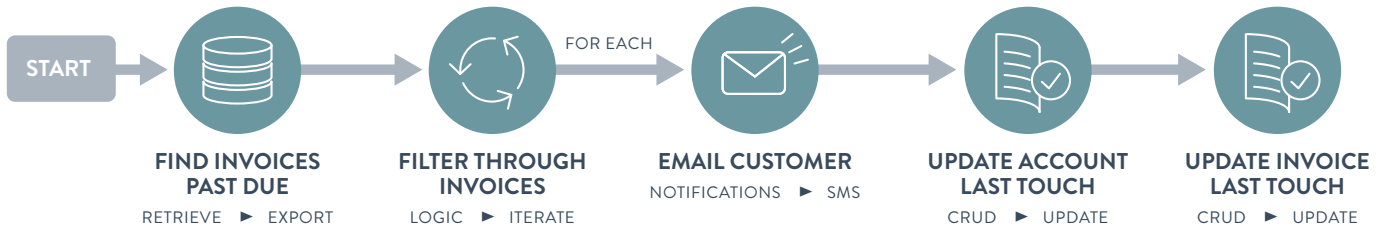
Find subscriptions with a balance, suspend them, and send customers a text



# COMMUNICATION WORKFLOW

## SEND EMAIL WHEN CREDIT CARD FAILS

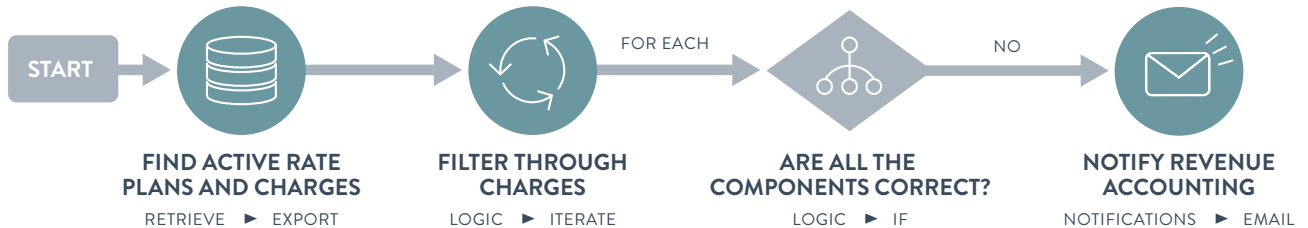
Find invoices with credit card failure, filter through them, email customer, and update information

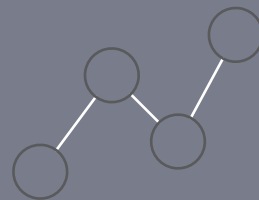


## COMMUNICATION WORKFLOW

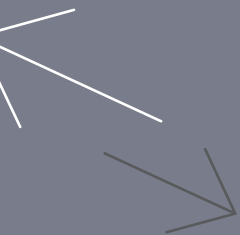
### VALIDATION CHECK EMAIL FOR REVENUE ACCOUNTING TEAM

Find active charges in product catalog, filter and validate charges, and notify revenue accounting for updates needed





# DATA INTEGRATION WORKFLOWS

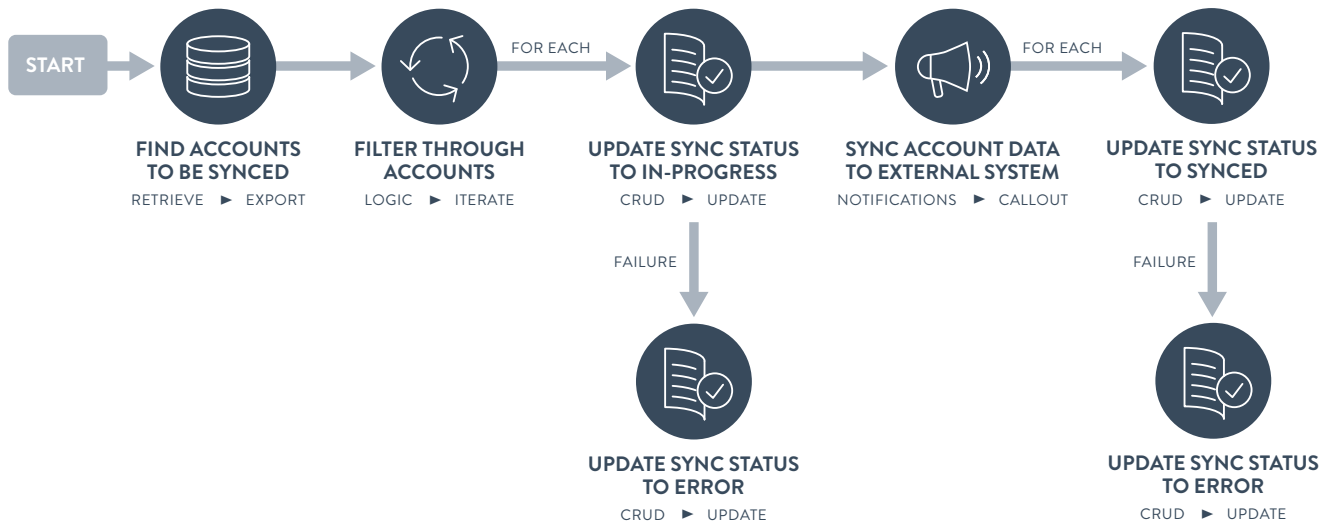


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# DATA INTEGRATION WORKFLOW

## DEFAULT PAYMENT METHOD UPDATER

Find accounts, test to see if payment method is valid, and update external system

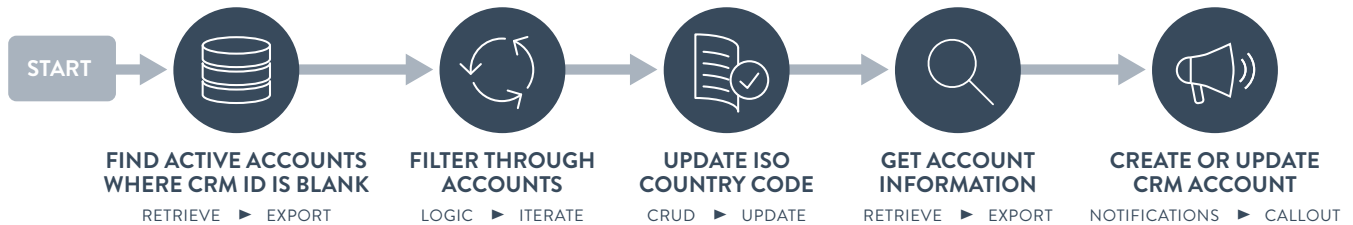




# DATA INTEGRATION WORKFLOW

## CREATE OR UPDATE ACCOUNT IN CRM

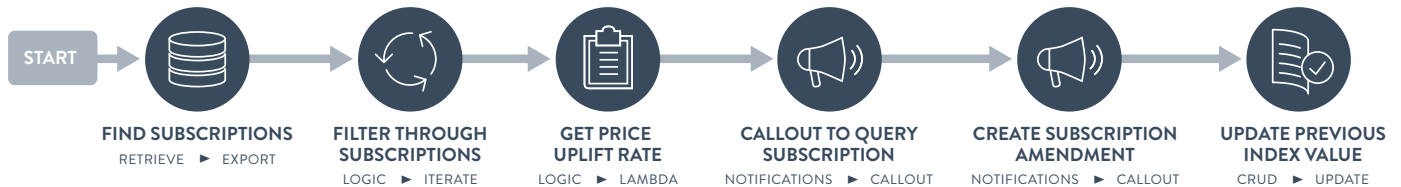
Find active accounts, filter through and update ISO country codes, and create or update CRM account



# DATA INTEGRATION WORKFLOW

## PRICE UPLIFT BASED ON LABOR RATES

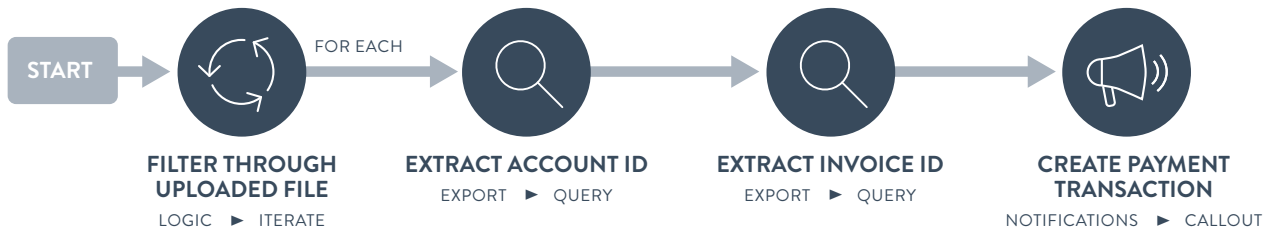
Find subscriptions, get price uplift based on external source, and update subscription



# DATA INTEGRATION WORKFLOW

## CREATE BANK PAYMENTS

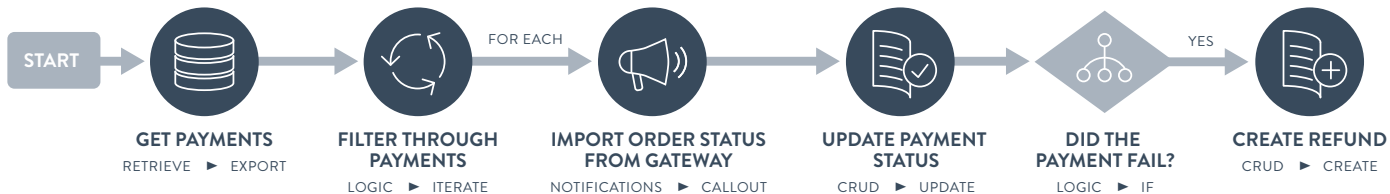
Upload payment file, extract account & invoice ID, and create payment



# DATA INTEGRATION WORKFLOW

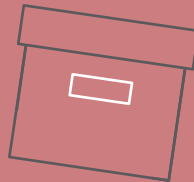
## PAYMENT GATEWAY RECONCILIATION

Find payments, import order status from gateway, and create refund if payment failed in gateway





# PROVISIONING WORKFLOWS

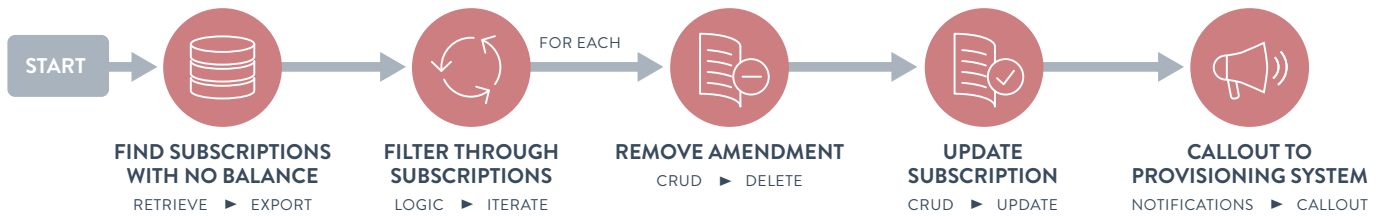


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## PROVISIONING WORKFLOW

### REACTIVATE SUBSCRIPTIONS THAT HAVE NO BALANCE

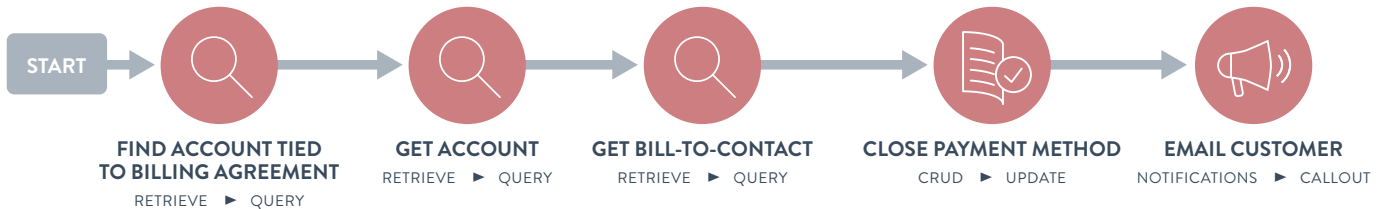
Find subscriptions that have no balance, remove amendment, update subscription, and reactivate via callout to a provisioning system



# PROVISIONING WORKFLOW

## AUTOMATED FRAUD RESPONSE

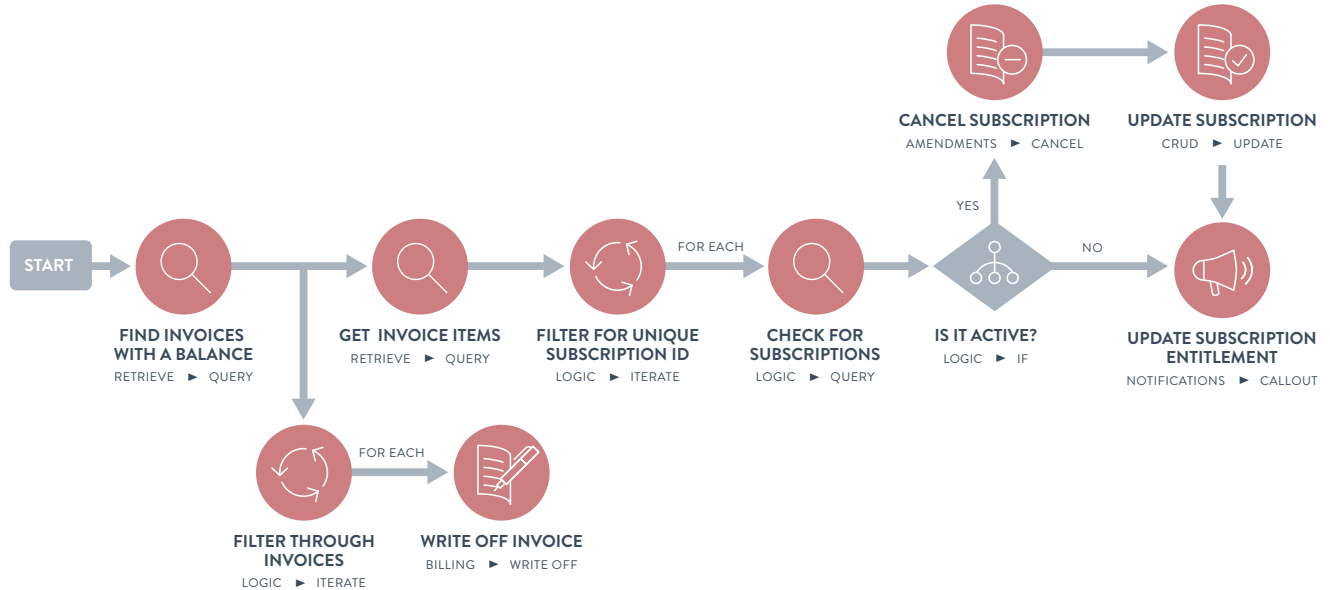
Find fraudulent accounts, close their payment methods, and notify the customer



# PROVISIONING WORKFLOW

## CANCEL OVERDUE SUBSCRIPTIONS

Find invoices with a balance, write them off, and cancel subscriptions

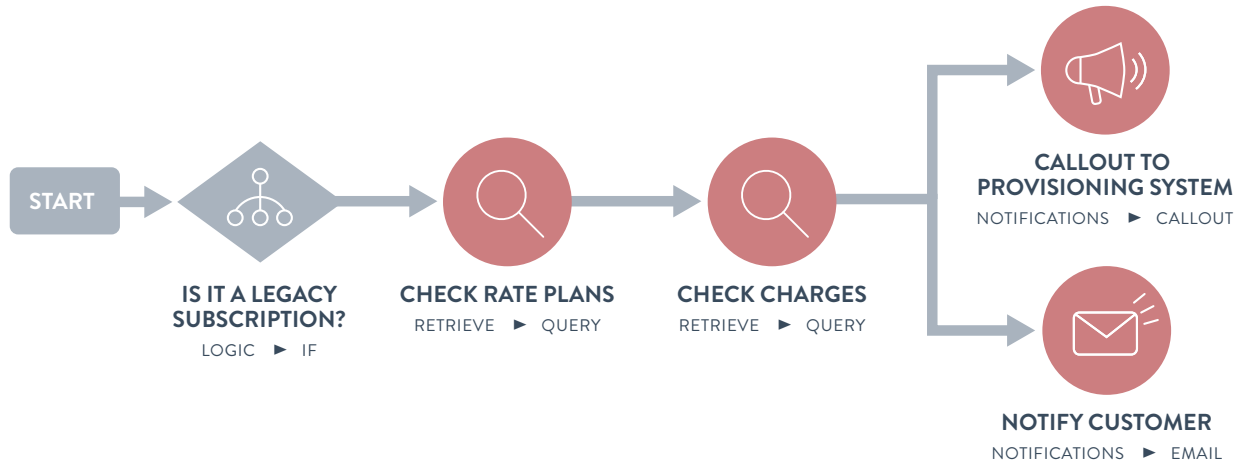




## PROVISIONING WORKFLOW

### ACTIVATE NEW FEATURES FOR CUSTOMERS

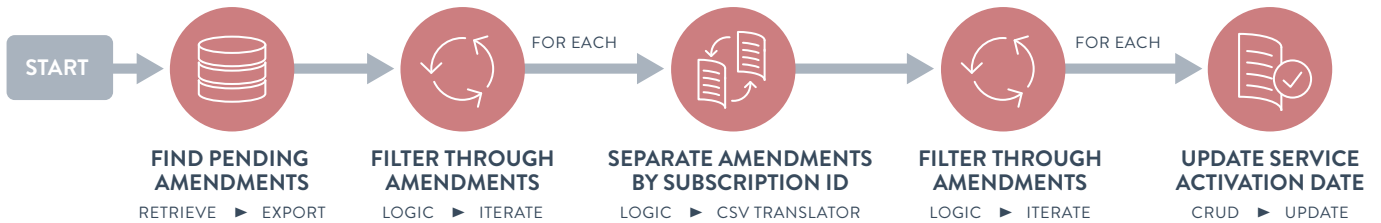
Verify subscription is new, check rate plans & charges,  
and activate new features via callout to provisioning system



# PROVISIONING WORKFLOW

## ACTIVATE FUTURE DATED AMENDMENTS

Find pending amendments, filter through them, and update service activation dates



## WANT TO SEE MORE OF OUR PLATFORM?

Developers and partners are  
invited to our early access  
program at [labs.zuora.com](https://labs.zuora.com)

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