

ESTUATE

Estuate Credentials & Zuora Managed Services Offerings



ESTUATE

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ESTUATE'S CREDENTIALS

For 19 years, our team of technologists have been delivering Zuora billing and revenue management solutions to over 425 customers. We offer a compelling value proposition that provides:



LOW RISK

Fully managed, SLA/KPI-driven project delivery models.






HIGH ROI

6-12 months ROI via cost-effective global delivery and targeted value creation.



BUSINESS EFFICIENCY

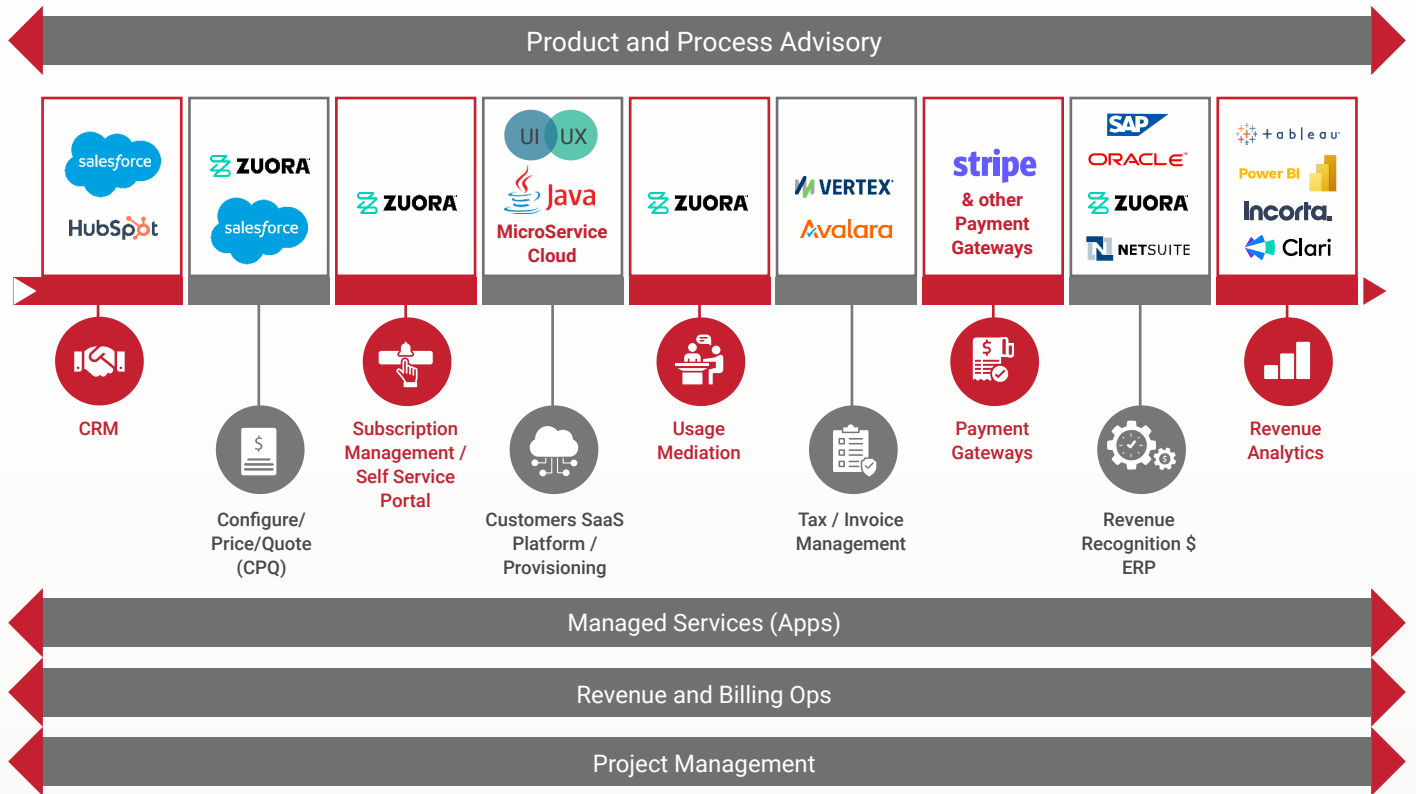
Solutions with built-in innovation and automation.

| Founded 2005 | Growing Services | Today 2024 |
|---|--|---|
| <p>Estuate was founded in Silicon Valley in 2005 by executives from Oracle who were part of the early founding and acceleration of Oracle into the heart of enterprise IT.</p> | <ul style="list-style-type: none"> <li data-bbox="620 1526 1003 1687">  Digital Apps Services CRM - Billing - ERP - Revenue <li data-bbox="620 1710 1003 1871">  Digital Core Services Cloud - Data - Analytics - Integration <li data-bbox="620 1894 1003 2008">  Digital Security Services I&AM - GRC | <ul style="list-style-type: none"> <li data-bbox="1075 1526 1377 1561">● 400+ Employee Team <li data-bbox="1075 1595 1318 1630">● 425+ Customers <li data-bbox="1075 1664 1351 1699">● Partner to 20+ ISV's <li data-bbox="1075 1733 1448 1790">● 100+ Awards and Certifications for Excellence <li data-bbox="1075 1825 1383 1951">● Expert Teams in BFSI / Healthcare / Retail-Ecommerce / Tech / Telecom / Media |

ESTUATE'S ZUORA CREDENTIALS

Lead-To-Revenue Expertise

Estuate's expertise spans the entire lead-to-revenue value chain across multiple products and services, helping customers drive better monetization of their offerings.



Proven Zuora Expertise

Estuate's expertise in Zuora lies in our extensive experience, innovative tools, and proven track record of successful implementations that drive significant revenue growth and operational efficiency.








| | | | | |
|---|--------------------------------------|-------------------------------------|---|--------------------------|
| | | | | |
| 425+ SUCCESSFUL PROJECTS | END-TO-END LEAD-TO-REVENUE EXPERTISE | 9.5/10 & ABOVE | 30+ PREBUILT ACCELERATORS | 50+ ZUORA CERTIFICATIONS |
| BILLING COLLECT WORKFLOW 240+ 20+ 165+ | ERP E-PAYMENTS TAX USAGE | CSAT | TOOLS ACCELERATORS | L1 & L2 CERTIFICATIONS |
| USA, EUROPE & APAC | ZUORA INTEGRATION EXPERTISE | LONG TERM & REFERENCEABLE CUSTOMERS | REDUCTION IN IMPLEMENTATION EFFORTS & COSTS | ACROSS BILLING & REVENUE |

PCI Compliant Credit Card Data Migration Services



- In June 2022, Estuate became the only global Zuora Partner to achieve PCI DSS certification.
- As part of this certification journey, we have invested in state-of-the-art data migration tools and a fully secured AWS infrastructure.
- Over the past two years, we have successfully executed several credit card data migration projects.

Preferred Managed Services Partner For Zuora's Top Customers

| Region | Key Customers |
|---------------|--|
| North America |      |
| Europe |  |
| APAC |   |

Zuora Managed Services Package Details

Our Zuora Managed Services offer flexible and scalable solutions tailored to your business needs. Choose from Essential, Growth, and Enterprise packages to ensure operational continuity, support stability, and provide comprehensive management control over your Zuora environment.

| Managed Service Packages | | Essential | Growth | Enterprise |
|--------------------------------------|---|------------------------|------------------------|-----------------|
| Hours/Month | | 60 hrs/mo | 100 hrs/mo | 160 hrs/mo |
| Managed Service Cost (Annual) | | \$65,000.00 | \$90,000.00 | \$150,000.00 |
| Areas | Summary of Services Offerings | | | |
| Administration (Billing) | Zuora ecosystem administration (limited to billing, payment, finance settings) | ✓ | ✓ | ✓ |
| | User access, roles & security policies management | ✓ | ✓ | ✓ |
| | System monitoring, Communication on system outage and maintenance | ✓ | ✓ | ✓ |
| | Instance refresh, post refresh activities, custom objects & deployments | * | * | ✓ |
| | User & Roles Audit report for SOX compliance | * | * | ✓ |
| Product Catalog Management (Billing) | New product launch, NPIs | Upto 5/Quarter | Upto 10/Quarter | Upto 15/Quarter |
| | Best Practices to Manage Subscription Products | ✓ | ✓ | ✓ |
| | Optimize existing products (consolidation, clean-up, de-activate) | * | ✓ | ✓ |
| | Configure products with advanced charge models & advanced consumption billing | * | * | ✓ |
| Billing Operations (Billing) | Monitor billing operations (invoicing, credits, taxation) | ✓ | ✓ | ✓ |
| | Troubleshooting system errors and take corrective actions | ✓ | ✓ | ✓ |
| Billing Operations (Billing) | Support for manual usage data uploads or data fixes for usage data | 5 times/month | ✓ | ✓ |
| | Support for creating ad-hoc invoicing, credit/debit memos | Upto 100 Records/Month | Upto 250 Records/Month | ✓ |
| | Help in monthly AR & tax reconciliation | ✓ | ✓ | ✓ |
| | Migrate or customize HTML templates | * | ✓ | ✓ |
| | Customize billing notifications | * | * | ✓ |
| | Billing Document/Templates Customization | * | * | ✓ |

✓ In-scope * Out-of-scope

| Areas | Summary of Services Offerings | Essential | Growth | Enterprise |
|---|---|------------------------|------------------------|------------------------|
| Bulk Data Updates /Data Migration (Billing) | Provide Best practices on legacy data migration | ✓ | ✓ | ✓ |
| | Manual onboarding new subscription orders and Order Actions entries in Zuora | Upto 100 Records/Month | Upto 250 Records/Month | Upto 250 Records/Month |
| | Bulk data creation - accounts, subscription orders, credit memos | * | * | ✓ |
| | Bulk data updates on supported objects and fields (data must be provided by business) | 2 times/month | 5 times/month | 10 times/month |
| | Ad-hoc price change and bulk Subscription amendments | * | * | ✓ |
| | Solution design and migrate new line of business into Zuora | * | * | * |
| Upgrades & Migration (Billing) | Upgrade to Zuora Orders/Orders Harmonization and Zuora for Salesforce managed packages. | * | * | * |
| | Review, test, educate and roll out new features as needed | * | * | ✓ |
| | Periodic review on Zuora Release changes and impacts to existing implementation | * | ✓ | ✓ |
| | Impact analysis on end of life feature/application and design/ build alternative solutions | * | ✓ | ✓ |
| Connectors/ Third-Party Integration (Billing) | Develop a framework/reporting mechanism to troubleshoot and monitor data synchronization errors between Zuora and other applications. | * | * | ✓ |
| | Zuora API consulting | * | ✓ | ✓ |
| | Build customized solutions for subscriber care portal, reseller portal or payment portal | * | * | * |
| | Design and develop Zuora workflows for pre- and post-billing operations, as well as provisioning callouts. | * | * | ✓ |
| Reports & Analytics (Billing) | Customizing out-of-the-box reports | ✓ | ✓ | ✓ |
| | Troubleshooting existing report data anomalies | ✓ | ✓ | ✓ |
| | Educate and Best Practices around Data Model and Data Sources | ✓ | ✓ | ✓ |
| | Develop custom reports, data queries | * | * | ✓ |
| | ETL Zuora data to external data warehouse and reporting in analytics | * | * | * |
| Features Requests /Incidents Reporting (Billing) | Submit and track feature requests with Zuora PM/Engineering team | ✓ | ✓ | ✓ |
| | Create support tickets for incidents, NOC and oversee RCA and permanent fixes. | ✓ | ✓ | ✓ |
| Payment Operations (Payments) | Monitor payments operations (payments, refunds) | ✓ | ✓ | ✓ |
| | Support for dunning and cash reconciliation | ✓ | ✓ | ✓ |
| | Assist in payment gateway migration | * | * | ✓ |
| | Configure payment method updater | * | ✓ | ✓ |
| | Payment Method migration with PCI compliance | * | * | * |
| | Implement Zuora Collect to automate payment & collection operations | * | * | ✓ |
| | SIT/CIT (Stored Credential profile) | * | ✓ | ✓ |
| | Advanced CPR Application | * | * | ✓ |
| | Payment Gateway reconciliation | ✓ | ✓ | ✓ |

✓ In-scope * Out-of-scope

| Areas | Summary of Services Offerings | Essential | Growth | Enterprise |
|---|--|---------------|---------------|----------------|
| Zuora for Salesforce/ HubSpot (CPQ) | Create or modify quote templates | * | ✓ | ✓ |
| | Administration activities related to managed packages | ✓ | ✓ | ✓ |
| | Support production issues with Zuora CPQ/ Hubspot and Data Sync | ✓ | ✓ | ✓ |
| | Configure pricing rules in guided selling flows and rules engines | * | ✓ | ✓ |
| | Develop custom APEX code to integrate Zuora and CRM system | * | * | * |
| | Identify the technical debt and develop alternative solutions | * | * | * |
| | Zuora Managed package upgrade and extensions | * | * | * |
| Zuora Revenue Accounting & Finance (Revenue) | Help support in month end period closing process | ✓ | ✓ | ✓ |
| | Help support in transfer data from AR Subledger to GL | ✓ | ✓ | ✓ |
| | Overall Zuora Revenue data interface/sync monitoring (Zuora Billing, external) | ✓ | ✓ | ✓ |
| | Zuora Revenue administration (user management, deployments, report definitions, refresh, application setups) | * | * | ✓ |
| | Build custom scripts for pre/post data sync and collection | * | * | * |
| | Create new/modify existing stage validation & augmentation rules | * | * | ✓ |
| | Manual transactions/events upload (data to be provided by IT/business) | 2 times/month | 5 times/month | 10 times/month |
| | Create/Modify Transaction, Bundle Config, Zuora Billing Data Mapping, Events Upload templates | * | ✓ | ✓ |
| | Assist in data issues in staging and help resolve them | ✓ | ✓ | ✓ |
| Project Management | Quarterly Business Review - QBR on achievements, areas of improvements | * | ✓ | ✓ |
| | Steering committee meetings | * | ✓ | ✓ |
| | Weekly Status Reports | ✓ | ✓ | ✓ |
| General Consulting/ Guidance (Billing, Payments, Revenue, CPQ) | Document business process and workflows | * | * | ✓ |
| | Review repeated manual business process to automate wherever it is applicable | * | * | ✓ |
| | Best practices recommendations | ✓ | ✓ | ✓ |
| | RCA for any bugs/issues. Prioritize to fix them. | ✓ | ✓ | ✓ |
| | Periodic training of technical resources and business on Zuora features & operations | * | * | ✓ |
| | Quarterly health check on Zuora ecosystem and provide report on observations | * | ✓ | ✓ |

✓ In-scope * Out-of-scope

WHY ESTUATE



DEEP LEAD-TO-REVENUE EXPERTISE

Over 12 years of experience in managing and optimizing the entire lead-to-revenue process



CERTIFIED TALENT

A ready talent pool of Zuora-certified and experienced consultants across billing, payments, and revenue



PROVEN METHODOLOGY

Proven transition-in methodology and framework



EXTENSIVE EXPERIENCE

Deep experience in providing Zuora managed services for numerous engagements



REUSABLE COMPONENTS

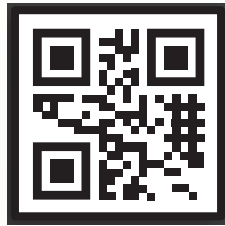
A vast repository of Zuora-related pre-built and reusable components



PCI CERTIFIED

The only Zuora partner with PCI DSS certification and tooling

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