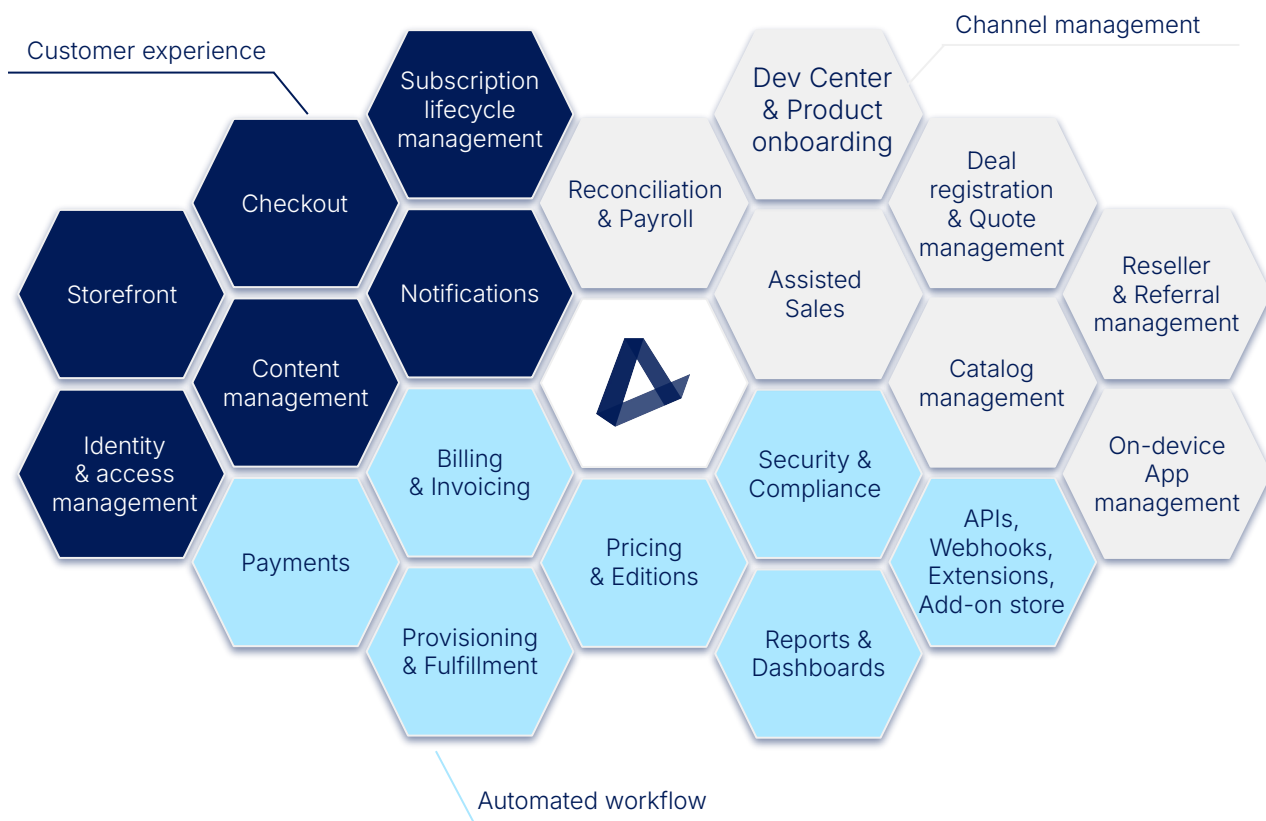# Complete capabilities for Subscription Commerce

A holistic view of what you need to sell anything as a service, through any channel, to any customer, on any device

As subscription commerce has grown in complexity over the past decade, so has the range of capabilities that companies need to be successful with a subscription go-to-market strategy. Here you will find a comprehensive list of features and functionalities that comprise a best-in-class subscription commerce experience.

AppDirect fully supports all of the capabilities mentioned below

Customer experience

Subscription lifecycle management

Checkout

Storefront

Notifications

Content management

Identity & access management

Billing & Invoicing

Payments

Provisioning & Fulfillment

Pricing & Editions

Reconciliation & Payroll

Dev Center & Product onboarding

Assisted Sales

Security & Compliance

Reports & Dashboards

Channel management

Deal registration & Quote management

Catalog management

Reseller & Referral management

On-device App management

APIs, Webhooks, Extensions, Add-on store

Automated workflow

THE DIFFERENT ROLES
A marketplace roles overview

01 END-USER

An End User is an individual seeking to discover, purchase, and manage your solutions alongside your partners' solutions.

02 END-CUSTOMER

An End Customer is a business seeking to discover, purchase, and manage solutions on behalf of their employees or end users.

03 MARKETPLACE ADMINISTRATOR

A Marketplace Administrator is an employee of your company who leads the day to day operations of indirect sales including self-service sales on a digital marketplace, channel sales through a network of resellers, and sales of partner products.

04 RESELLER ADMINISTRATOR

A Reseller Administrator is an individual who leads the team of resellers within their company.

05 RESELLER

A Reseller is an individual seeking to earn commission on the sale of your products and services as well as those of your partners

06 PARTNER

A Partner is an individual seeking to add their products to your catalog and sell to your customer base.

07 CUSTOMER SUPPORT REPRESENTATIVE

A Customer Support Representative is seeking to assist the end customer or end user with managing their purchases.

08 SALE REPRESENTATIVE

A Sales Representative is seeking to earn additional commission by making purchases of value added solutions and subscriptions on behalf of your end customer or end user.

CUSTOMER EXPERIENCE CAPABILITIES
Deliver a superior customer experience

01 STOREFRONT

Ability for an End Customer to:

- Filter, sort, search, and compare products
- Submit reviews and questions

Ability for a Marketplace Administrator to:

- Set and edit merchandising: Featured, Popular,
- Recommended, On Sale, Bundles, Free Trials
- Invite, add, or remove end users and customer companies
- Upload multiple end users via a CSV file upload
- Assign, unassign, change application access for end users with automated notifications

Additional AppDirect Capabilities:

- APIs to build your own storefront
- WYSIWYG Layout Editor
- Developer Toolkit
- Theme Manager
- Custom branding (white labeled)
- Segmentation: Curate products, pricing, and merchandising by customer segment
- Automatic localization: Support for 17 languages and 21 currencies

CUSTOMER EXPERIENCE CAPABILITIES

Deliver a superior customer experience

02 CHECKOUT

Shopping Cart

Order Summary

Order Administration

Support for different payment methods

Ability for an End Customer to:

- Add bundles to Shopping Cart
- Apply discounts
- Edit the number of users or units
- Access and edit billing details

Additional AppDirect Capabilities

- Themes and Checkout SDK
- Custom attributes
- Guest User Purchases
- Checkout dynamically updates to reflect changes to the catalog

03 CONTENT MANAGEMENT

Ability for a Marketplace Administrator to:

- Set role-based access permissions
- Publish and edit sections such as Featured Products and Media, FAQs, Reviews & Questions
- Create, edit, preview before publishing and delete product profiles

Ability for a Partner to:

- Publish and manage their own product profiles with built-in approval workflows

CUSTOMER EXPERIENCE CAPABILITIES

Deliver a superior customer experience

04 SUBSCRIPTION LIFECYCLE MANAGEMENT

Ability for an End Customer and Sales Representative to:

- Make purchases
- Upgrade or downgrade subscriptions
- Change the price and units
- View, filter, and sort through past orders, invoices, and payments
- Opt in or automatically set renewals and terminations
- Agree to or set contract terms and conditions

Ability for a Marketplace Administrator to:

- Access and manage usage records
- Configure billing settings
- Change the price and units
- Set restrictions such as increases or decreases on units
- Place one order that contains multiple subscriptions for the same customer
- Process orders cancellations (depends on agreement)
- Assign and edit roles and permissions

Additional AppDirect Capabilities:

- Dashboards and Reports for:
  - Invoices
  - Payment
  - Subscriptions
  - Orders
  - Usage
  - Gross Billings
  - Reconciliation
  - Customer accounts
  - Partner accounts
- End of contract renewal

CUSTOMER EXPERIENCE CAPABILITIES
Deliver a superior customer experience

05
IDENTITY & ACCESS MANAGEMENT

Support for multi-factor authentication via TOTP, SMS, and security keys (U2F)

Ability for an End User to:

- Single sign-on to the services they have purchased through the marketplace
- Import apps that were not purchased via the marketplace
- Log into the marketplace with their Active Directory

Ability for a Sales Representative to:

- Assign applications and provision end user access

Ability for a Reseller to:

- Login to the platform via their existing identity management system

Additional AppDirect Capabilities:

- Ability to assign, unassign, change application access for end users with automated notifications
- Ability for a third party developer to single sign on into the partner portal
- Support for federated identity to SaaS apps based on SAML, or OpenID Connect
- Easily integrate with an external identity system like Active Directory

CUSTOMER EXPERIENCE CAPABILITIES
Deliver a superior customer experience

06 NOTIFICATIONS

Ability for a Marketplace Administrator to set up custom notifications for:

- Subscriptions events
- Product events
- Lead events
- Company and user events
- Invoice events
- Payment events
- Order events
- Reseller events
- Quote and opportunity events

Ability for an End User to receive an email notification when:

- Assigned or unassigned application access
- The status of their shipment changes
- Receives a Quote & invoice

Ability for a Sales Representative to receive an email notification when:

- A lead has been created, edited, or deleted
- A client accepts a quote
- A client rejects a quote

Ability for a Partner to receive an email notification when:

- A lead is created, edited, or deleted
- A user has submitted a question about their product
- A subscription status has changed (expired trial, suspended subscription, etc.)
- A marketplace has requested to add their product to its catalog
- A marketplace has added their product
- Their product has been submitted for publication and that request has been accepted or denied

Find all notifications available here.

CUSTOMER EXPERIENCE CAPABILITIES

Deliver a superior customer experience

06 NOTIFICATIONS

Ability for a Reseller to receive an email notification when:

- A Reseller Administrator grants a new wholesale price
- A sales opportunity has been approved by a Reseller Administrator
- A sign up is approved or denied
- A reseller profile has been unpublished by a Reseller Administrator
- A request to publish a reseller profile has been approved, denied, or cancelled by a Reseller Administrator
- A Reseller Administrator or end user has rejected their quote
- A lead has been created, edited, or deleted

Ability for a Reseller Administrator to receive an email notification when:

- A sales opportunity is created or denied
- Sales lead has been created
- Quote has been sent from a reseller for wholesale price review or edited
- A reseller signs up
- A marketplace has added their product
- A reseller company has requested to publish their profile
- A lead has been created, edited, or deleted

CHANNEL MANAGEMENT CAPABILITIES

Streamline channel management

01
RECONCILIATION & PAYOUTS

Ability for a Marketplace Administrator to:

- View and share detailed payment records, invoices, revenue share breakdowns

Ability for a Reseller Administrator to:

- Determine the revenue share buckets for a product
- Track all receivables collected by resellers and payables owed to resellers
- Invoice resellers
- Transfer funds to and from Resellers

Ability for a Partner to:

- View their own payout and reconciliation activity
  - Total payments
  - Developer share
  - AppDirect share
  - Partner share

CHANNEL MANAGEMENT CAPABILITIES
Streamline channel management

02 PRODUCT ONBOARDING

Developer Center capabilities:

- Customizable Signup and Login Pages
- Customize your Partner Onboarding Application
- Tools to Review & Manage Applications
- Invite & Onboard New Partners
- Customizable Product Types

Product onboarding capabilities:

- Self service onboarding
- Automated payouts
- Multi-media management
- Pricing & Editions management
- Subscription lifecycle integration
- Contract management
- SSO integration
- Lead setup and management
- Customer management

Ability for a Partner to:

- Preview and submit or withdraw a product publish request
- Create, edit, or delete a new product and profile page in real time
- Test the provisioning and subscription management flows
- Embed additional resources in a product profile (video, PDFs, etc.)
- Manage, edit, delete, and disqualify leads

Additional AppDirect Capabilities:

- Notifications
- Reports & Dashboards
- Supported product types: cloud, SaaS, downloadable, ondevice, physical good, add-on, referral
- Network catalog of 300+ IaaS, SaaS, and PaaS solutions ready to be resold. An agreement between you and the vendor is needed if you want to resell one of catalog solution.

CHANNEL MANAGEMENT CAPABILITIES
Streamline channel management

03
ASSISTED SALES

Assisted sales capabilities:

- Lead tracking & management
- Opportunity management
- Pricing management
- Order management
- Subscription lifecycle management

Ability for a Sales or Customer Support Representative to:

- Update end user profiles on behalf of an end customer
- Make purchases on behalf of an end customer
- Update or cancel orders on behalf of an end customer
- Edit billing details on behalf of an end customer

Ability for a Sales Representative to:

- Make purchases and update orders on behalf of the customer
- Create and share a quote with customers (if right approvals - more detail [here](#))
- Refund transactions
- Customize product pricing and contract terms
- Deactivate and modify user accounts
- View and edit customer billing and payment information
- View usage of apps and subscription details
- View all user transactions

CHANNEL MANAGEMENT CAPABILITIES
Streamline channel management

03
ASSISTED SALES

Ability for a Sales Representative, Partners, Reseller, and Marketplace Administrator to:

- Create, manage, assign, edit, disqualify, and convert leads and opportunities
- View leads and activity log or download leads to a .CSV file
- Link leads to opportunities or purchases
- Receive notification when a lead is created, edited or deleted
- Automate lead assignment
- Sync data with internal systems like Salesforce

Additional AppDirect Capabilities:

- Reports, dashboards, and data analytics on leads, companies, users, and orders
- Customized lead attributes and form fields
- Notifications for when a lead is created and when a client accepts or declines a quote

CHANNEL MANAGEMENT CAPABILITIES
Streamline channel management

04
RESELLER & REFERRAL MANAGEMENT

Reseller & referral management capabilities:

- Reseller registration and account management
- Create, edit and delete reseller profiles
- Catalog management
- Pricing management
- Identity and access management
- Content management
- Channel management
- Lead tracking & management
- Opportunity management
- Order management
- Subscription lifecycle management
- Reconciliation, reseller payouts, receivables

Additional AppDirect Capabilities:

- Data analytics, reports, and dashboards
- Notification center

CHANNEL MANAGEMENT CAPABILITIES
Streamline channel management

04
DEAL REGISTRATION AND QUOTE MANAGEMENT

Deal registration and quote management capabilities:

- Automate custom pricing request and approval workflows
- Monitor activities through audit logs

Ability for Resellers to:

- Create and manage quotes for qualified opportunities with a built-in approval process
- Create, edit, and send quotes to their customers through the platform, assume an identity, and complete the purchase on their behalf through various payment options
- Create deals, convert opportunities, and complete purchases

CHANNEL MANAGEMENT CAPABILITIES
Streamline channel management

04
CATALOG MANAGEMENT

05
ON-DEVICE APP MANAGEMENT

Catalog management capabilities:

- Product publishing
- Real time product information and media management
- Version and release management
- Contract management
- Pricing management
- Product curation by customer segment
- Group products by category
- Merchandising
- Create and configure bundles
- Discounts and promotions
- Cross marketplace controls
- Product information management
- Role based authorization rules

On-device app management capabilities:

- Device enrollment through CSV uploads or API sync
- Add, view, and remove devices
- Assign devices to platforms and users
- Device management interface
- Over-the-air provisioning
- Push distributions
- Push promotions
- On-device storefront
- Version control

AUTOMATED WORKFLOW CAPABILITIES

Automate manual workflow

01 BILLING & INVOICING

Billing:

- Account, billing, and payment administration
- Automated tax calculations
- One time, recurring, and usage-based billing
- Metered usage mediation and rating
- Multi-currency support - one currency per marketplace only
- Set discounts and promotions, markups and markdowns, and bundles
- Support credits on cancellations
- Suspend and reactivate subscriptions

Invoicing:

- Automatically generate invoices for subscriptions
- Ability to create an ad hoc invoice
- Customizable invoice templates
- PDF, web page, and printed invoice types

Additional AppDirect Capabilities:

- Reseller-branded customer invoices
- Invoice Builder
- JSON format editor
- Digital invoices with imbedded payment links
- Customizable notifications for subscription events, invoice events, payment events, order events, and more
- Custom billing APIs

AUTOMATED WORKFLOW CAPABILITIES
Automate manual workflow

02
PAYMENTS

Payments capabilities:

- Automated payment administration
- Payment gateway integration
- Custom payment method integration
- Accept multiple methods of payment

Ability for an End Customer to:

- Pay for all subscriptions in a single payment

Ability for a Marketplace Administrator to:

- Set billing parameters such as payment methods, payment terms, automatic upgrades, and grace periods
- Enable the ability to pay for a subscription via credit card, debit card, bank account, or external payment
- Enable the ability to generate a charge not related to a subscription (ad-hoc charges)
- Choose which payment gateway to use to process transactions
- Configure the marketplace's daily or 30-day spend limit for self-service purchases or for specific companies
- Define grace periods
- Record and provide a payment refund
- View the revenue share associated to each party across transactions
- Automatically suspend subscriptions if payment fails

Additional AppDirect Capabilities:

- Support for out-of-the-box payment gateway integration
- Dashboard of payments

AUTOMATED WORKFLOW CAPABILITIES
Automate manual workflow

03
PROVISIONING & FULFILLMENT

Provisioning:

- Single-sign on into products
- Activate subscriptions
- APIs to create subscriptions on the partner's records
- Assigning seats or licenses to user(s)
- Start and stop billing
- Cancel or add licenses
- Upgrade or downgrade subscriptions

Fulfillment:

- Inventory management
- Support for hardware as a service and physical goods
- Dropshipping

Ability for an End User to:

- Add and update their shipping address
- See accurate shipping cost
- Track and receive notifications on the delivery status

Ability for a Marketplace Administrator to:

- Integrate with a shipping provider

Additional AppDirect Capabilities:

- Sell and deliver devices with preinstalled software
- Sell and deliver hardware as a service with pay-as-you-go billing
- Bundle software with hardware
- Sell and provision digital services on devices

AUTOMATED WORKFLOW CAPABILITIES
Automate manual workflow

04
PRICING & EDITIONS

Support for:

- One-time or recurring or free
- Pricing models including per unit, fat fee, tiered, and volume
- Contract terms
- Usage-based billing
- Bundle first and third party products
- Free trials that automatically convert to paid
- 'One-Click Free Trial' editions
- Discounts and promotions

Ability for a Marketplace Administrator to:

- Edit product editions and pricing
- Set a wholesale price for resellers and marketplace sale price

Ability for a Partner to:

- Create, edit, or delete editions or add-ons in real time

Ability for a Sales Representative to:

- Apply discount code or markup or mark down the price
- Set a reseller specific price or wholesale price

Ability for a Reseller to:

- Apply discount code or markup or mark down the price
- Request a custom wholesale price

AUTOMATED WORKFLOW CAPABILITIES

Automate manual workflow

05
REPORTS & DASHBOARDS

06
SECURITY & COMPLIANCE

Reports & dashboards capabilities:

- Dashboards: invoices, payments, revenue, subscriber count, trial performance
- Customer Reports: companies, customer cancelled entitlements, purchases, users
- Prospect Reports: lead tracking
- Billing Reports: gross billings, usage, subscriptions, transactions, orders, invoices, payments, quotes, taxes
- Reconciliation Reports: reconciliation, payouts, revenue shares
- Admin Reports: integration events, app usage logs, admin logs, web analytics report

Security & compliance capabilities:

- Two factor authentication
- Password recovery and resets
- Anti-virus software
- Firewall at each internet connection
- Internal and external network vulnerability scans
- Intrusion detection and intrusion prevention systems
- ISO 27001 compliance
- SOC 2 Type 2 compliance
- SOC 1 Type 2 compliance
- PCI-DSS Level 1 compliance
- GDPR Regulation compliance
- Audit log of transactions
- HTTPs using TLS1.2
- Verisign 256-Bit SSL certificates
- SAS 70 Type II, PCI, ISO, and HIPAA compliant data centers
- N+1 or greater redundancy for all components of essential systems

AUTOMATED WORKFLOW CAPABILITIES

Automate manual workflow

05
CUSTOMIZATION CAPABILITIES

AppDirect APIs enables developers to customize experiences and integrate with proprietary or partner systems.

Webhooks offer a real-time mechanism for our customers to stay informed about critical events occurring within the AppDirect platform, such as user creation or removal. This functionality provides a seamless headless experiences on the AppDirect platform.

Extensions are an excellent way to enhance your platform by adding new features, customizing pages, or even overriding existing pages to tailor them to your specific needs.

Add-On Store is home to a curated community of technology partners that helps us deliver experiences that create the most value for you and your customers.

About AppDirect

About us

AppDirect is a San Francisco-based B2B subscription commerce platform company that brings together technology providers, advisors, and businesses to simplify how they buy, sell and manage technology. More than 1,000 providers, 10,000 advisors and 5 million subscribers rely on the AppDirect ecosystem of subscription marketplaces to power their innovation, growth, and success.

For more information about AppDirect, please visit www.appdirect.com.

To learn more about which capabilities are best suited for your specific needs, please contact Sales: Sales@AppDirect.com