

Enhance customer retention & spend by leveraging real-time billing and event data

Leverage CLV analysis to analyze customer behavior, identify key spending patterns, boost revenue, mitigate churn triggers, adapt to shifting demand, and minimize costs.

What data sources do you need?

Billing

i.e. Where one tracks payment invoices from customers.

Your organization likely uses at least 1 billing platform. Choose 1 to get started:

- Recurly
- Stripe
- Zuora
- Paypal
- Braintree
- Recharge
- Workday Financial Management

Events/Web Analytics

i.e. where you're tracking customer engagement and interactions with your site/app

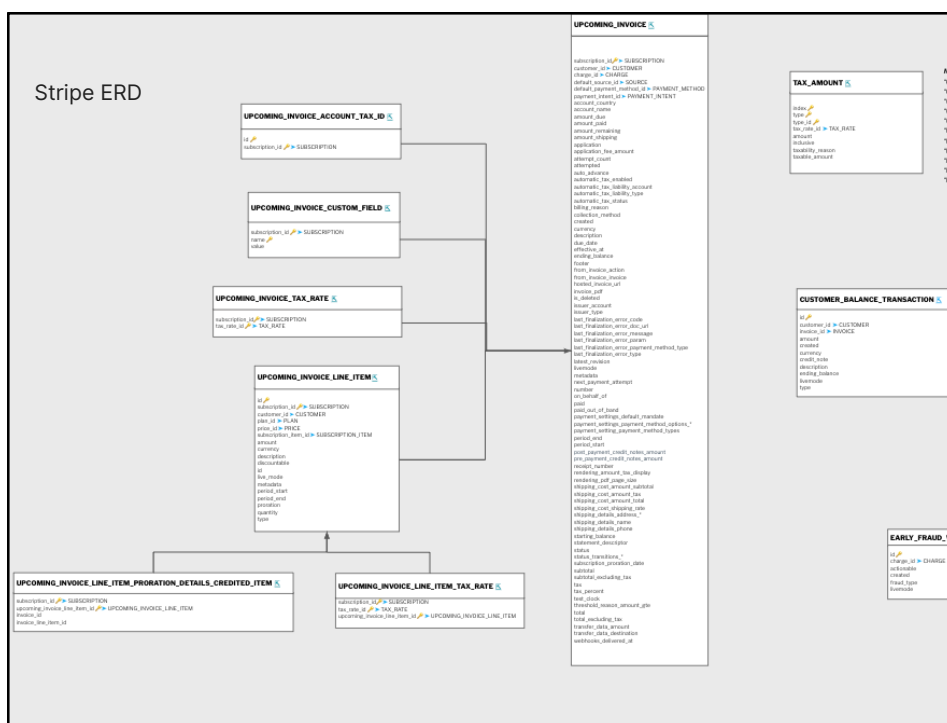
Your organization likely uses atleast 1 events/web analytics platform. Choose 1 to get started:

- Google Analytics
- Adobe Analytics
- Mixpanel
- Segment
- Pendo
- Heap
- Shopify

Find more connectors →

How do you get started?

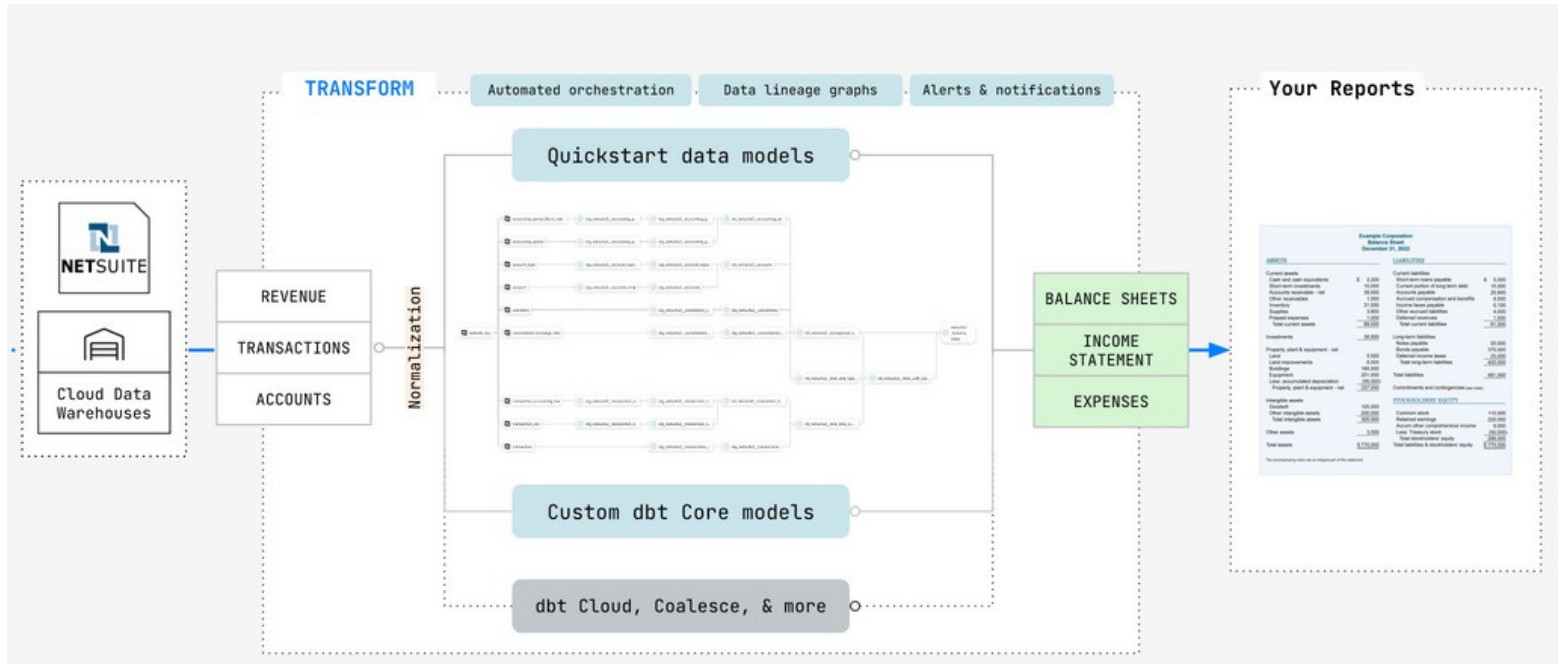
1. Ensure the sources you plan to connect have appropriate access to all the accounts. Use an Admin account for each source where possible.
2. For connectors with an option to select "**historical timeframe**", choose a more recent timeframe in order to speed up the historical sync and get to insights quicker.
3. For **Billing connectors**: Review the schemas within the respective ERDs to understand which tables contain the specific billing or payments data.
4. For **Event/Web Analytics connectors**, depending on the type of event connector, you have the option to use a pre-built report template to obtain the necessary fundamental data. Alternatively, you can create a Custom Report or utilize the ERDs to identify the tables that hold the specific metrics you are seeking, such as campaigns, events, page views, and more.



Start a free 14-day trial at fivetran.com/signup

Visit our [Documentation](#) to find schemas, reports, and ERDs for each individual connector.

6. Initiate Historical Sync.
7. Validate and standardize data across each new source in the destination.
8. Use our free **Fivetran Data Models** to help with standardization of the data. Fivetran offers data models for Zuora, Recharge, Quickbooks, Stripe, Recurly, Netsuite and many more.



[Find more data models →](#)

9. Use the data to measure monthly recurring revenue (MRR), Customer acquisition cost (CAC) and more.

What's next? Check out popular finance analytics projects

Accelerate Financial Reconciliation

Create Accurate Financial Statements

Improve Revenue Analysis

Check out popular finance analytics connectors

Oracle Fusion Cloud
Apps

Netsuite 2.0

Start a free 14-day trial at fivetran.com/signup