



A Portfolio Risk Management Success Story

How Bugcrowd Uses Creditsafe to Automate Credit Risk Decisions and Accelerate Global Growth

Bugcrowd is a global leader in crowdsourced cybersecurity, helping organizations identify and resolve vulnerabilities through managed bug bounty, penetration testing, and vulnerability disclosure programs. By connecting businesses with a global network of trusted security researchers, Bugcrowd enables organizations to proactively strengthen their cybersecurity posture.

Bugcrowd enjoyed rapid success, based on excellent customer service and results that spoke for themselves. But as Bugcrowd continued to scale internationally, the company needed a faster, more efficient way to evaluate

customer credit risk and support rapid deal flow across global sales teams. By integrating Creditsafe directly into Salesforce, Bugcrowd streamlined credit decisioning, reduced manual processes, and enabled both finance and sales teams to move faster with greater confidence.

The company's finance and operations teams were already using Creditsafe's web portal to review customer creditworthiness, but growing customer volumes highlighted the need for a more automated and scalable approach.

Products Used: Business Credit Reports, Creditsafe Connect API, Media Monitoring, Director Reports

Challenge

As Bugcrowd experienced rapid growth, the volume of new customer accounts entering Salesforce increased significantly. Every new account required a credit review before progressing through the sales process, creating a growing administrative burden for finance teams.

Previously, the process relied heavily on manual intervention. Once a prospective customer reached a certain stage in Salesforce, the sales team would request a credit review from finance. Finance personnel would then access the Creditsafe web portal, manually pull reports, review the information, and communicate approval decisions back to sales. The process worked, but it was slow and difficult to scale, especially as Bugcrowd's team and customer base grew internationally.

"We required credit checks for every new account created in Salesforce," explains Aayush Rijal, Revenue Accounting Manager at Bugcrowd. "Previously, we manually intervened and wouldn't let deals progress until a credit check was completed."

Bugcrowd operates globally, so the previous process also created operational challenges across time zones. Teams in regions such as APAC often required urgent approvals outside of standard business hours, forcing finance resources to remain available around the clock to prevent delays.

"We maintain a 24-hour finance SLA, so our deal flow has to move very quickly," says Aayush. "At month-end especially, we always had to keep resources available to manage credit approvals to make sure nothing slipped through."

The manual workflow also created frustration on the sales side of things. Sales team members could invest significant time pursuing potential opportunities that were knocked down by credit and finance teams later on. Since the sales team didn't have easy access to advanced credit data, they also relied heavily on finance team colleagues to run reports and check the creditworthiness of potential deals frequently.

Without Creditsafe's data and automation solutions, Bugcrowd faced problems with:

-  Manual credit checks slowing deal progression
-  Administrative overhead for finance and sales teams
-  Delays caused by global time zone differences
-  Difficulty scaling credit review processes alongside business growth
-  Increased operational strain during month-end and high-volume periods

Solution

To streamline its credit review process, Bugcrowd worked closely with the Creditsafe team to implement a Salesforce integration powered by the Creditsafe Connect API.

By automating credit checks directly within Salesforce, Bugcrowd eliminated much of the manual back-and-forth previously required between sales and finance teams.

"When a new account gets created, the integration talks directly to Creditsafe and pulls the credit report immediately," explains Aayush.

The integration automatically retrieves credit information as soon as a prospective customer account is entered into Salesforce. Based on Bugcrowd's internally defined risk logic, accounts can then be automatically approved, flagged for additional review, or escalated for manual intervention. This automation enables sales representatives to move opportunities through the pipeline without waiting for manual finance approvals. If an account is eligible to progress, sales teams can immediately continue advancing the deal.

"We simplified our logic," says Aayush. "Sales loves it, because they no longer have to reach out to finance for every single credit check they need. If the system allows them to move on to the next stage, they know they're good to go."

The automation also significantly reduced administrative work for finance teams. Previously, reports were manually downloaded, tracked in spreadsheets, and reviewed one-by-one. With Creditsafe integrated directly into Salesforce, those repetitive processes were largely eliminated.

"We used to have to run the report, download it, and track everything in Excel," says Aayush. "The integration eradicated all that administrative work for us."

In addition to improving efficiency, the earlier visibility into customer risk helped Bugcrowd make faster and more informed decisions about deal structures and customer terms.

"We vet customers earlier in the process now," Aayush explains. "If their credentials aren't strong enough, we can immediately determine what terms make sense rather than discovering problems later, after investing significant time in the opportunity."

To find out how Creditsafe can help your business, get in touch at www.creditsafe.com

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Results

With Creditsafe fully integrated into Salesforce, Bugcrowd transformed how its teams evaluate customer credit risk and manage deal flow.

The automation significantly reduced manual work for both finance and sales teams while improving speed, consistency, and scalability across the organization. According to Aayush, the integration saves the business approximately five to eight hours of work every week.

“At least a full day of work every week has been saved.”

Sales teams now spend less time managing administrative requests and more time giving their customers what they need: a faster, smoother onboarding process.

“Now the sales team can focus on finding deals and doing what they do best,” Aayush explains. “They can leave the administrative work to the automated process.”

With fewer manual reviews required, the finance team can become more flexible and proactive. The time they were previously spending on credit checks can evolve to more strategic priorities. “The additional resource we had dedicated to credit checks can now help with other operational work as well,” says Aayush. The streamlined process has also improved internal confidence in credit decisioning.

“Most of the time, if it’s auto-approved, we trust the process and let the deals move through,” Aayush explains. “Only a small percentage requires additional manual diligence.”

The automation has been especially valuable for supporting Bugcrowd’s global operations, helping teams move faster across multiple time zones without requiring around-the-clock finance intervention.

“We’ve seen much smoother deal flow overall,” says Aayush. “Teams are calmer, operations are working as intended, and the process scales much better now.”

Creditsafe has helped Bugcrowd:

- Automate customer credit checks directly within Salesforce
- Save approximately 5–8 hours of manual work each week
- Eliminate repetitive administrative processes
- Speed up deal progression through earlier credit reviews
- Improve efficiency for both sales and finance teams
- Support faster global operations across multiple time zones
- Scale credit risk management alongside rapid business growth

Why Bugcrowd Chose Creditsafe

Responsive, relationship-driven support. Bugcrowd valued the accessibility and responsiveness of the Creditsafe team throughout both implementation and ongoing support. “One of the reasons we stayed with Creditsafe was the service,” says Aayush. “Dan was always helpful, always available, and worked closely with us throughout the integration process.”

In contrast, Bugcrowd found competing providers difficult to engage with during the evaluation process. Creditsafe stood out for its responsiveness compared to other providers we evaluated.

Seamless automation capabilities. The ability to integrate Creditsafe directly into Salesforce was a key differentiator for Bugcrowd. “We wanted the system to do the work for us so we didn’t waste downtime

managing credit checks manually,” says Aayush. The Creditsafe Connect API allows Bugcrowd to automate risk decisioning while maintaining flexibility for manual review when they need it.

Scalable global credit intelligence. As a global business, Bugcrowd needed access to reliable credit information across multiple markets. Creditsafe provided the visibility needed to support confident decision-making and faster global deal execution.

“Creditsafe has been an enormous help for us,” Aayush says. “The automation, the integration, and the speed improvements have made a major impact on our operations.”