



Recurring Billing Guide

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Overview

The gateway supports three separate types of recurring billing options.

1. Traditional

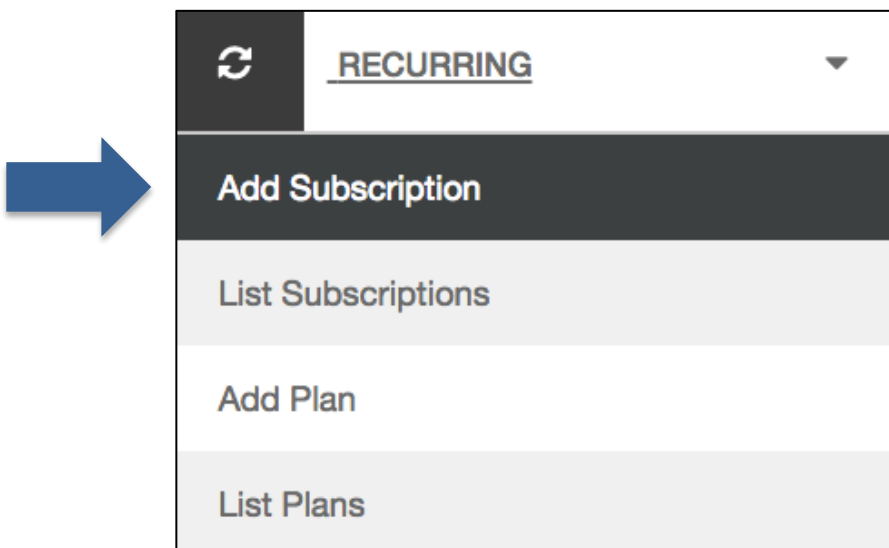
- The merchant will set up and bill a single cardholder, via credit card or ACH e-Check, a specific dollar amount on a specific day for an indefinite or specified period of time.

2. Expanded/Plan Recurring Billing

- The merchant creates a plan and then can associate an unlimited number of cardholders with the plan.
- The plan approach provides simplicity when the time comes to update the plan.
- When the merchant changes the dollar amount to be charged or the timing of the charges all associated cardholders are affected immediately.

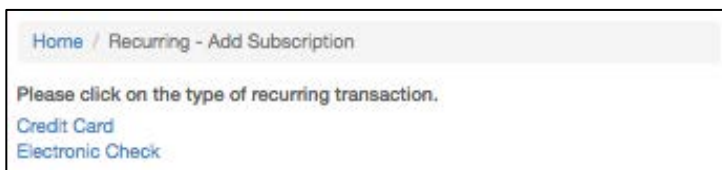
How to edit established recurring billing for a single cardholder or a checking account

Step 1: Click **Add Subscription** under **Recurring** from the **Main Menu**.



Step 2: Select **Credit Card** or **Electronic Check** as the type of recurring transaction to continue.


Note: this option will only occur if you have both payment methods available.






Step 3: Enter customer information for **Credit Card** or **Electronic Check**. Click **Continue** to proceed.


Credit Card Example

Home / Recurring - Add Subscription


Enter the customer information for a recurring transaction. 

Credit Card Information


Credit Card Number  Expiration Date  Currency 

4111111111111111 0119 USD 

Order Information




Order ID 

12344321



Order Description 


Shirt Order




Customer Information


First Name  Last Name  Company 


John Smith Apparel Co.

Country  Address 

United States  123 Main Street

City  State  Zip Code 

Chicago Illinois  60185

Email Address 


johnsmith@apparelco.c

Continue >








Electronic Check Example



Home / Recurring - Add Subscription


Enter the customer information for a recurring transaction. 

Electronic Check Information


Name on Account  **Routing / ABA Number**  


Account Number  

Acct Holder Type  **Account Type** 




Currency 



Order Information




Order ID 


Order Description 

Customer Information

First Name  **Last Name**  **Company** 

Country  **Address** 

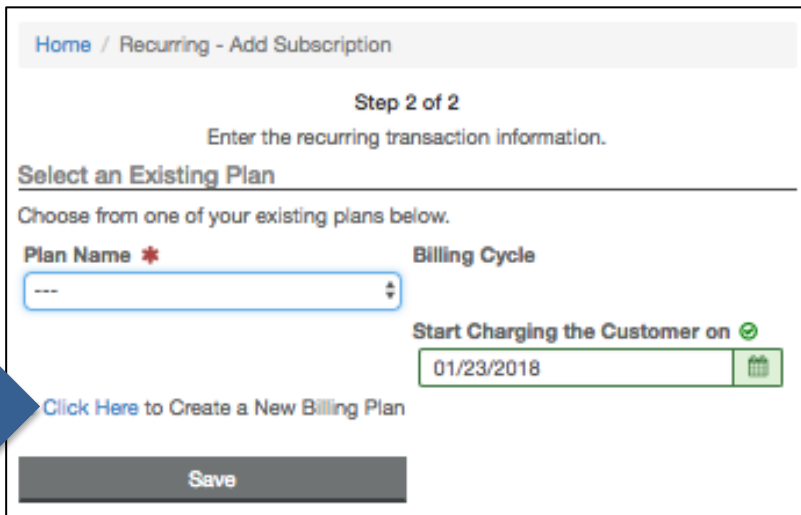
City  **State**  **Zip Code** 

Email Address 



Step 4: Select an existing plan from the **Plan Name** drop down list or create a new billing plan by clicking on the **Click Here** link. These steps are the same for credit cards and electronic checks.

Note: fields with red asterisk are required.



Home / Recurring - Add Subscription

Step 2 of 2

Enter the recurring transaction information.

Select an Existing Plan

Choose from one of your existing plans below.

Plan Name *

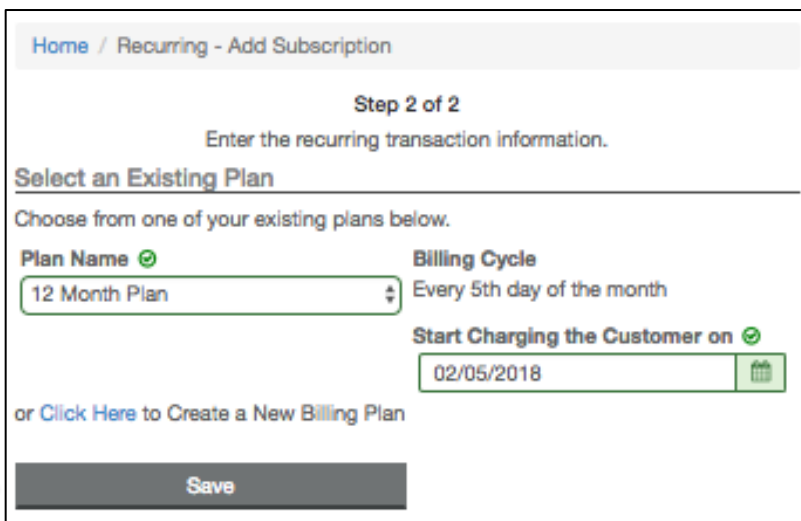
Billing Cycle

Start Charging the Customer on

[Click Here to Create a New Billing Plan](#)

Save

Step 5: Click **Save** to complete.



Home / Recurring - Add Subscription

Step 2 of 2

Enter the recurring transaction information.

Select an Existing Plan

Choose from one of your existing plans below.

Plan Name

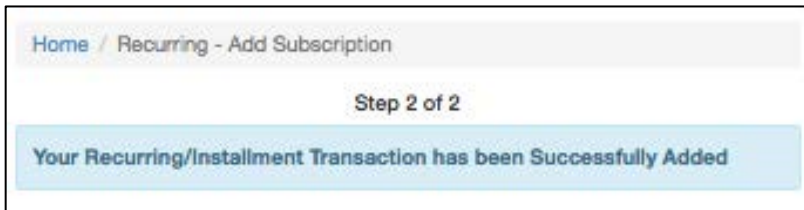
Billing Cycle

Start Charging the Customer on

or [Click Here to Create a New Billing Plan](#)

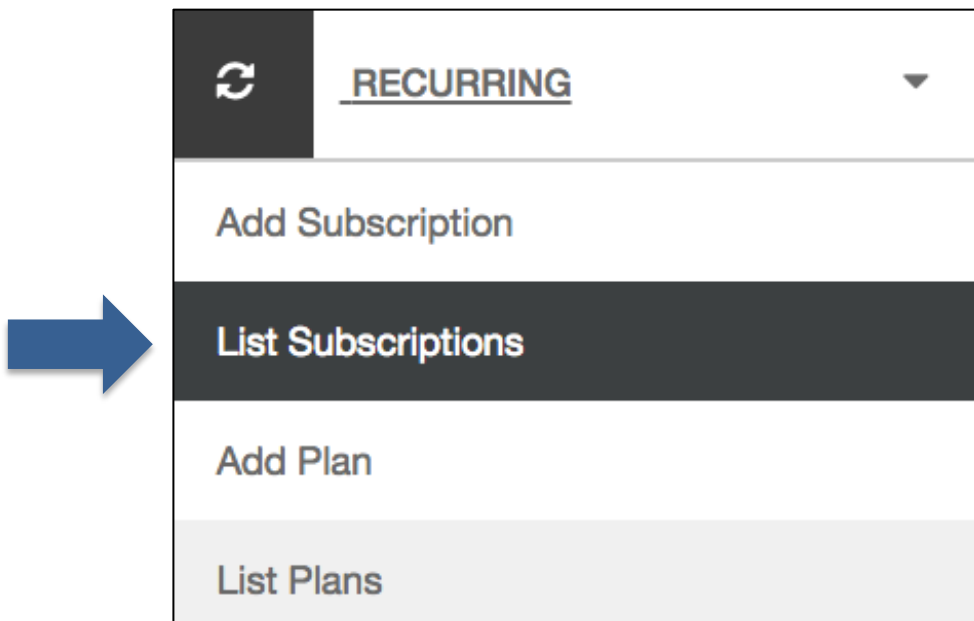
Save

[The subscription was successfully added.](#)



How to edit established recurring billing

Step 1: Click [List Subscriptions](#) under [Recurring](#) from the [Main Menu](#).



Option: Merchants can also search recurring transactions to find a subscription by entering information they need. Simply fill in the fields and click **Submit** for search results.

Home / Recurring - List Customers

Search Recurring Transactions

Order ID Last Name

Account Number Company

Amount Range (Min) - Amount Range (Max)

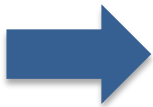
Start Date End Date

Include Completed Schedules Only Show Expiring Credit Cards

Credit Card Expires Within 30 Days Credit Card Expired

Recurring Customer List

Customer	Order ID/SKU	Details	Entry Time	Payments
John Smith jsmith@apparelco.com	987654321 123	Credit Card 4...1111	1/31/2018 5:55:08 PM	1 @ \$10.00 2 attempted Until Canceled
John Smith jsmith@apparelco.com	987654321 123	Credit Card 5...1111	1/31/2018 5:53:13 PM	1 @ \$10.00 2 attempted Until Canceled



Step 2: Click the **blue customer name** to edit. Click **Download Transactions** to save information from the recurring customer list. Information includes subscription details as well as individual client information.

Home / Recurring - List Customers

Search Recurring Transactions

Order ID **Last Name**
Account Number **Company**
Amount Range (Min) \$ - **Amount Range (Max)** \$
Start Date **End Date**
 Include Completed Schedules Only Show Expiring Credit Cards

Submit

Credit Card Expires Within 30 Days **Credit Card Expired**

Recurring Customer List

Customer	Order ID/SKU	Details	Entry Time	Payments
John Smith johnsmith@apparelco.com	987654321 123	Check 1...3123	1/22/2018 10:15:11 AM	0 @ \$50.00 0 attempted 12 Left
John Smith smith@apparelco.com	987654321 456312930	Check 1...3123	8/29/2016 12:39:04 PM	0 @ \$50.00 0 attempted 12 Left
John Smith johnsmith@apparelco.com	12344321 123	Credit Card 4...1111	8/29/2016 12:01:34 PM	0 @ \$50.00 0 attempted 12 Left


1 - 3 of 3 Subscriptions


Microsoft Excel (.xls)
 Comma Separated Value (.csv)

Download Subscriptions





Step 3: Merchant has the option to edit the customer's billing plan from this menu. Click **Edit Plan** to change settings. **Warning: all customers associated with the plan will be affected by your changes.** Merchants can also delete the customer's subscription by clicking the **Delete** button at the top of the menu.


Home / Recurring - List Customers / Edit Customer

DELETE 












[Create Subscription](#) 

Recurring Information

Subscription Id 3957901338	Associated With <i>lboutique</i>
Billing Cycle Active, Starts 02/05/2018, Every 5th day of the month	
Recurring SKU 123	Payments 12
Plan Name  (CUSTOM PLAN)  Edit Plan	Next Charge Date  02/05/2018 

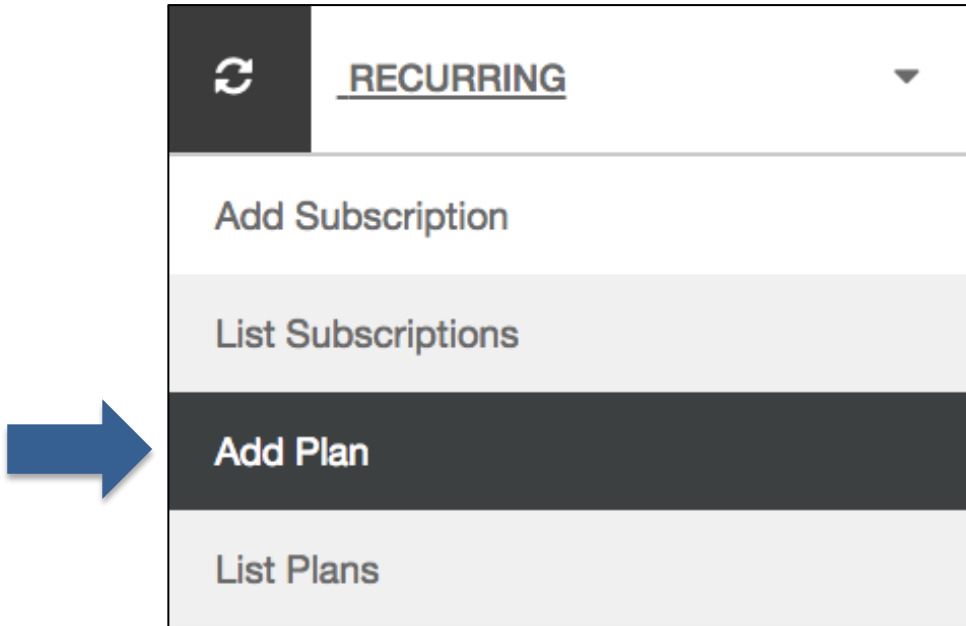


Electronic Check Information

Name on Account  John Smith	Routing / ABA Number   123123123
Account Number   1xxx3123	
Acct Holder Type  Personal 	Account Type  Checking 
Currency  USD 	

How to create billing plans for an unlimited number of cardholders or checking

Step 1: Click **Add Plan** under **Recurring** from the **Main Menu**.



Step 2: Enter information to create a new billing plan. Click **Save** to complete.

Home / Recurring - Add Plan

Create a New Billing Plan

Enter the amount you want to charge the customer *each time*.

Amount to charge each time \$ 30.00

Set how often you want to charge the customer

Charge the customer every days

Charge the customer on day of every month(s)


Set how many times you wish to charge the customer?

Charge until canceled

Charge the customer times

Plan Name / Description

Plan ID (For use with QuickClick and API)



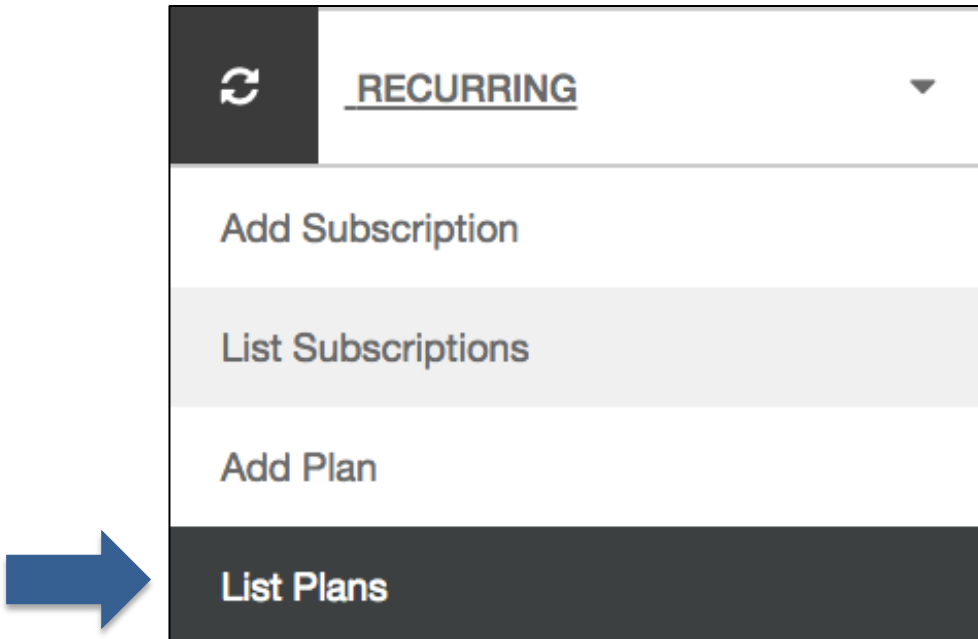
Successfully saved

Home / Recurring - Add Plan

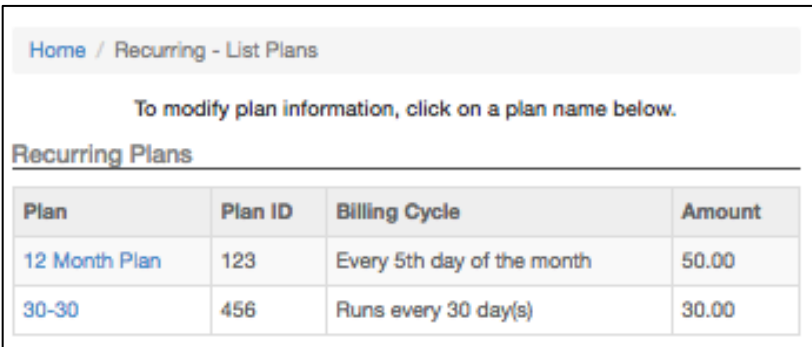
Your Plan has been Successfully Saved.

How to edit a plan

Step 1: Click **List Plans** under **Recurring** from the **Main Menu**.



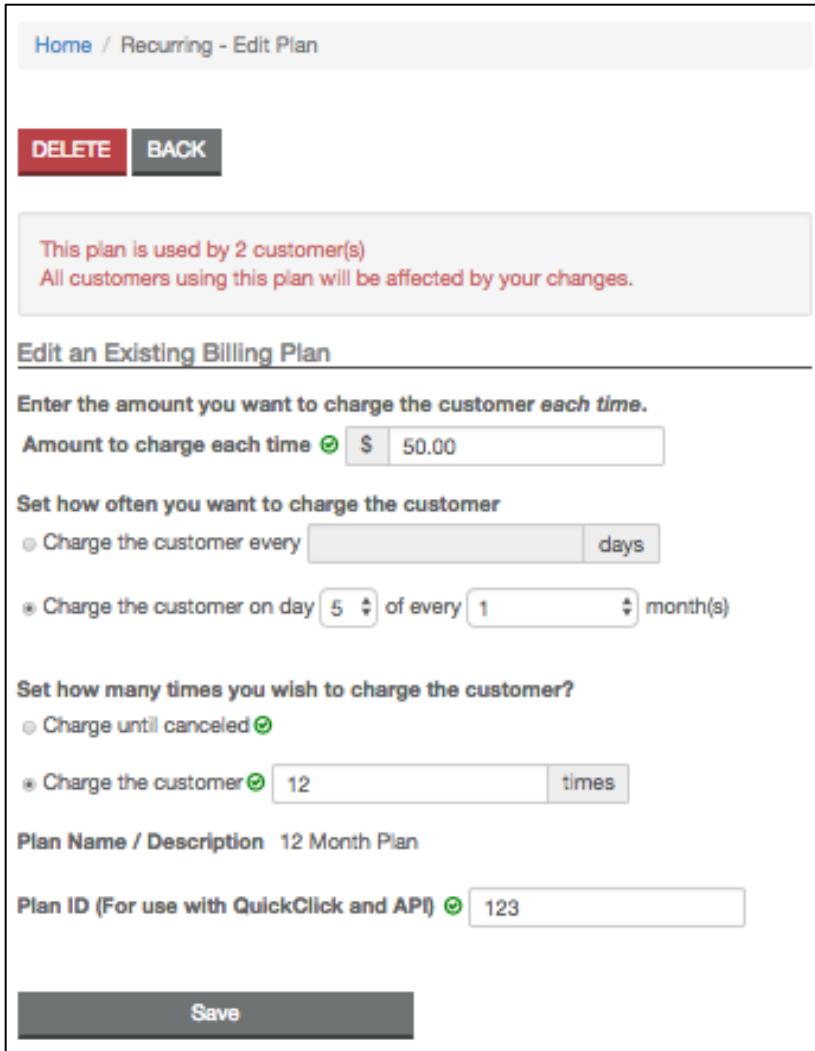
Step 2: Click the **blue plan name** to modify information.



A screenshot of a software interface showing a page titled 'Home / Recurring - List Plans'. Below the title, there is a message: 'To modify plan information, click on a plan name below.' Below this message is a table titled 'Recurring Plans' with four columns: Plan, Plan ID, Billing Cycle, and Amount. A blue arrow points to the '12 Month Plan' in the first row of the table.

Plan	Plan ID	Billing Cycle	Amount
12 Month Plan	123	Every 5th day of the month	50.00
30-30	456	Runs every 30 day(s)	30.00

Step 3: Edit any information to the existing billing plan. *Warning: all customer associated with the plan will be affected by your changes.* Existing plans can also be deleted by clicking the **Delete** button at the top of the menu.



Home / Recurring - Edit Plan

DELETE **BACK**

This plan is used by 2 customer(s)
All customers using this plan will be affected by your changes.

Edit an Existing Billing Plan

Enter the amount you want to charge the customer *each time*.

Amount to charge each time \$ 50.00

Set how often you want to charge the customer

Charge the customer every days

Charge the customer on day of every month(s)

Set how many times you wish to charge the customer?

Charge until canceled

Charge the customer times

Plan Name / Description 12 Month Plan

Plan ID (For use with QuickClick and API)

Save