

# Recurring Billing Guide



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## 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.

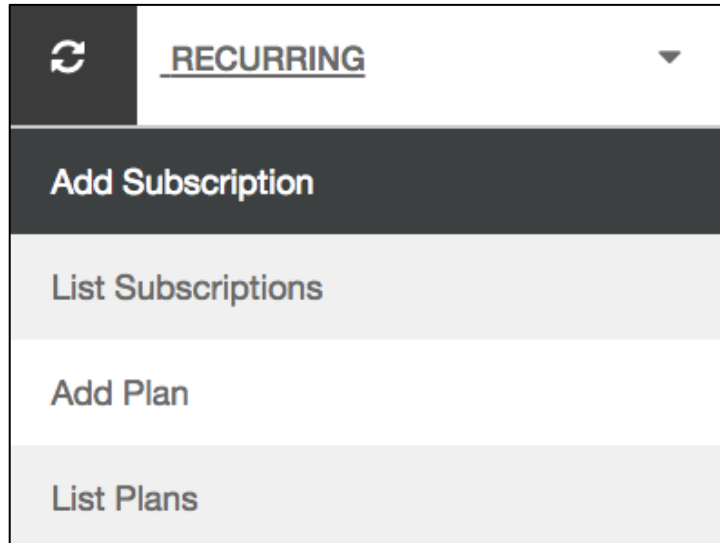
### 2. Expanded/Plan Recurring Billing

- 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.



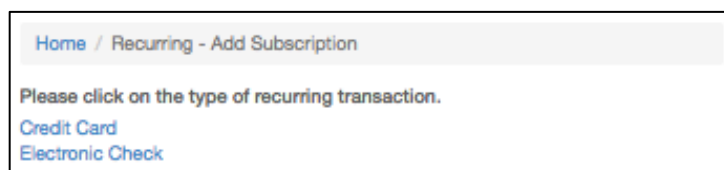
## How to edit established recurring billing for a single cardholder or a checking account

**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. 


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**Credit Card Information**

<b>Credit Card Number</b> 	<b>Expiration Date</b> 	<b>Currency</b> 
<input type="text" value="4111111111111111"/>	<input type="text" value="0119"/>	<input type="text" value="USD"/>

---




**Order Information**



**Order ID** 




**Order Description** 


---

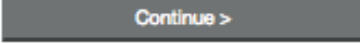
**Customer Information**

<b>First Name</b> 	<b>Last Name</b> 	<b>Company</b> 
<input type="text" value="John"/>	<input type="text" value="Smith"/>	<input type="text" value="Apparel Co."/>

<b>Country</b> 	<b>Address</b> 
<input type="text" value="United States"/>	<input type="text" value="123 Main Street"/>

<b>City</b> 	<b>State</b> 	<b>Zip Code</b> 
<input type="text" value="Chicago"/>	<input type="text" value="Illinois"/>	<input type="text" value="60185"/>


**Email Address** 








## 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** Every 5th day of the month

**Start Charging the Customer on**

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

**Save**

The subscription was successfully added.

Home / Recurring - Add Subscription

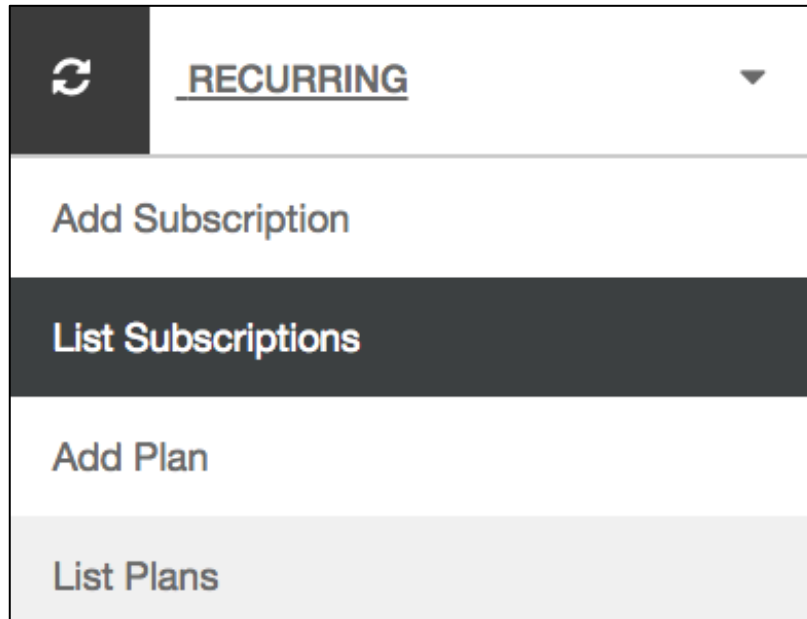
**Step 2 of 2**

**Your Recurring/Installment Transaction has been 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
<input type="text"/>	<input type="text"/>
Account Number	Company
<input type="text"/>	<input type="text"/>
Amount Range (Min)	Amount Range (Max)
\$ <input type="text" value="00.00"/>	\$ <input type="text" value="00.00"/>
Start Date	End Date
<input type="text" value="01/01/2002"/>	<input type="text" value="02/02/2018"/>
<input type="checkbox"/> Include Completed Schedules	<input type="checkbox"/> 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 <input type="button" value="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 <input type="button" value="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

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**Search Recurring Transactions**

Order ID  Last Name

Account Number  Company

Amount Range (Min)  \$ 00.00 - Amount Range (Max)  \$ 00.00

Start Date  01/01/2002  End Date  01/22/2018

☐ Include Completed Schedules ☐ Only Show Expiring Credit Cards

---

**Recurring Customer List**

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

**1 - 3 of 3 Subscriptions**

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



**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**

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

**Electronic Check Information**

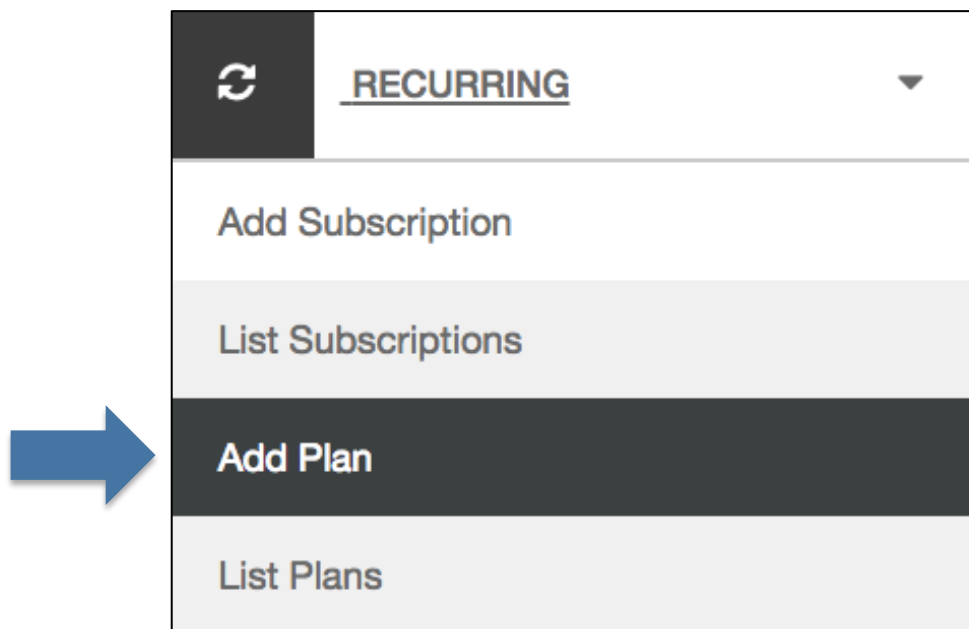
<b>Name on Account</b> ✓ John Smith	<b>Routing / ABA Number</b> ⓘ ✓ 123123123
<b>Account Number</b> ⓘ ✓ 1xxxx3123	
<b>Acct Holder Type</b> ✓ Personal	<b>Account Type</b> ✓ Checking
<b>Currency</b> ✓ USD	





## 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 30 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 ☒ 1 times

Plan Name / Description ☒ 30-30

Plan ID (For use with QuickClick and API) ☒ 456

Save



Successfully saved

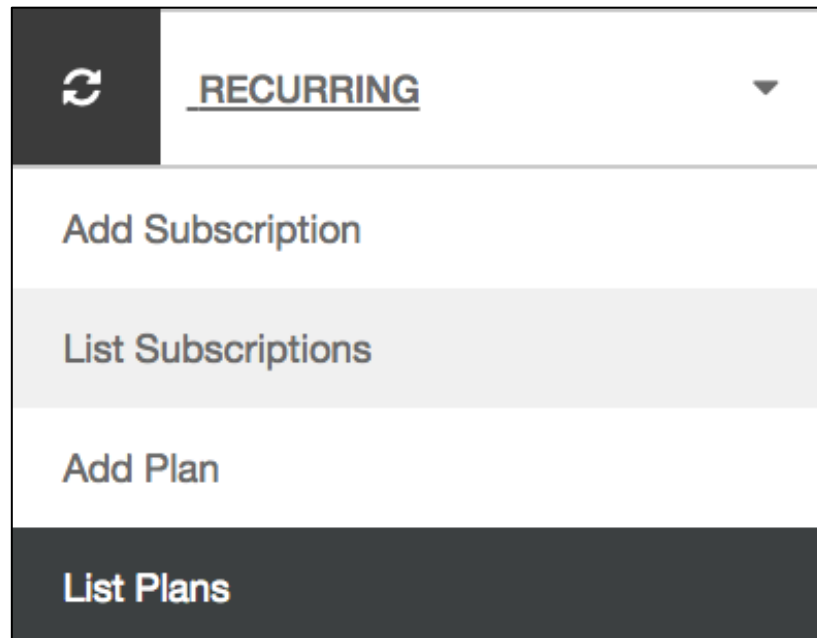
Home / Recurring - Add Plan

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.


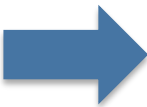
The screenshot shows a web page titled "Home / Recurring - List Plans". Below the title is a message: "To modify plan information, click on a plan name below." The page is titled "Recurring Plans" and contains a table with the following data:

Plan	Plan ID	Billing Cycle	Amount
<a href="#">12 Month Plan</a>	123	Every 5th day of the month	50.00
<a href="#">30-30</a>	456	Runs every 30 day(s)	30.00

A large blue arrow points to the "12 Month Plan" link in the table.



**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) ☒ 123

**Save**