



Recurring Billing Guide

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Overview

The gateway supports three separate types of recurring billing options.

1. Traditional

- The merchant will setup 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

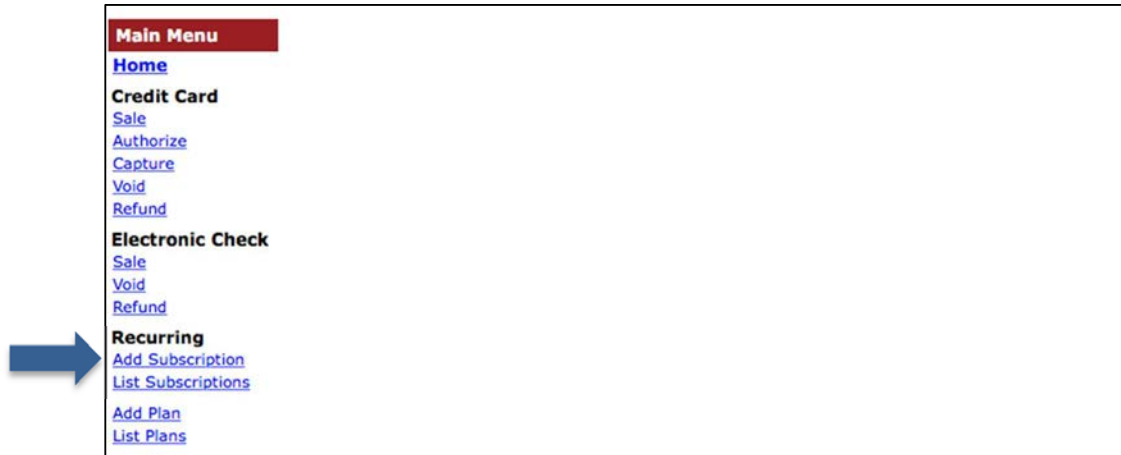
- The merchant creates a plan and then can associate an unlimited number of cardholders with the plan.
- The plan approach provides simplicity when the time comes to update the plan.
- When the merchant changes the dollar amount to be charged or the timing of the charges all associated cardholders are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

3. Modifiable Recurring Billing

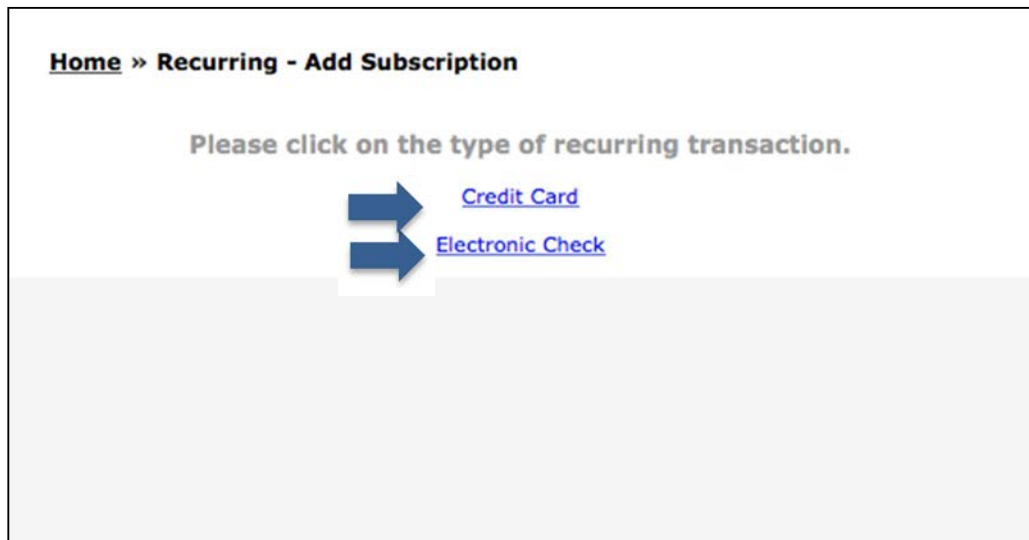
- Using the Batch Upload feature, the merchant can create an excel spreadsheet, .CSV or .TXT file to be uploaded as often as needed.
- This feature provides the merchant with the simplicity of recurring billing and the ability to change any related billing information including the dollar amount.
- If the merchant elects to create an excel worksheet, the template can be saved within the gateway and used for subsequent processing and settlement.
- The Batch Upload process can process 50,000 transactions within approximately 90 minutes.

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

Step 1: Click [add subscription](#) from the [main menu](#) under [recurring](#)



Step 2: Select credit card or electronic check as the type of recurring transaction to continue





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 (mmyy)

Currency ▾

Order Information

Order ID

Order Description

Customer Information

First Name

Last Name

Company

Country ▾


Address

City

State/Province ▾

Zip/Postal Code



Email Address



Electronic Check Example

Home » Recurring - Add Subscription

Enter the customer information for a recurring transaction.

Electronic Check Information


<input checked="" type="checkbox"/> Name on Account	<input type="text" value="John Smith"/>	
<input checked="" type="checkbox"/> Routing / ABA Number	<input type="text" value="123123123"/>	What Is This?
<input checked="" type="checkbox"/> Account Number	<input type="text" value="123123123"/>	What Is This?
<input checked="" type="checkbox"/> Account Holder Type	<input type="text" value="Personal"/>	
<input checked="" type="checkbox"/> Account Type	<input type="text" value="Checking"/>	
<input checked="" type="checkbox"/> Currency	<input type="text" value="USD"/>	

Order Information

<input checked="" type="checkbox"/> Order ID	<input type="text" value="987654321"/>	
<input checked="" type="checkbox"/> Order Description	<input type="text" value="Apparel Co."/>	

Customer Information

<input checked="" type="checkbox"/> First Name	<input type="text" value="John"/>	
<input checked="" type="checkbox"/> Last Name	<input type="text" value="Smith"/>	
Company	<input type="text" value="Apparel Co."/>	
<input checked="" type="checkbox"/> Country	<input type="text" value="United States"/>	
Address	<input type="text" value="123 Main St."/>	
<input checked="" type="checkbox"/> City	<input type="text" value="Chicago"/>	
<input checked="" type="checkbox"/> State/Province	<input type="text" value="Illinois"/>	
Zip/Postal Code	<input type="text" value="60185"/>	
<input checked="" type="checkbox"/> Email Address	<input type="text" value="smith@apparelco.com"/>	



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 fields as set by the Affiliate.


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 Aug 30 2016

or [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 12 Month Plan

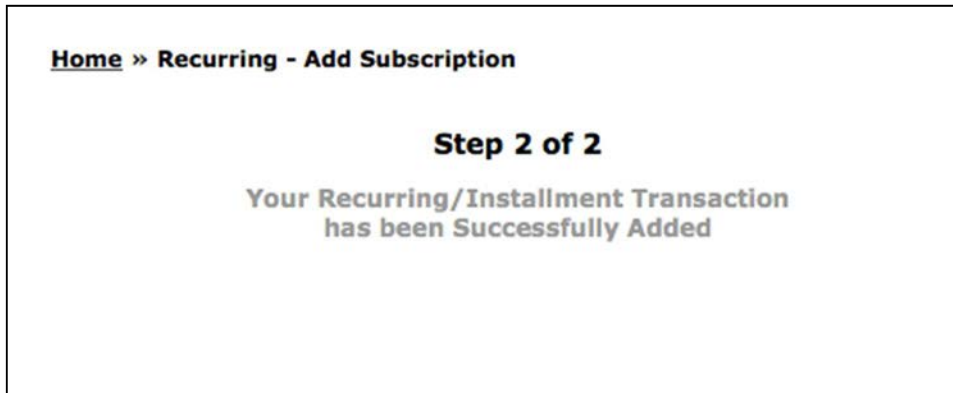
Billing Cycle Every 5th day of the month

 Start Charging the Customer on Sep 5 2016

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 from the main menu under recurring



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

Amount Range - (xx.xx)

Date Entered -

Include Completed Schedules

Only Show Expiring Credit Cards

 **Submit**

Credit Card Expires Within 30 Days
Credit Card Expired

1 - 2 of 2 Subscriptions

Customer	Order ID/SKU	Details	Entry Time	Payments
John Smith smith@apparelco.com	987654321 123	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

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

Amount Range - (xx.xx)

Date Entered -

Include Completed Schedules

Only Show Expiring Credit Cards

Credit Card Expires Within 30 Days
Credit Card Expired

1 - 2 of 2 Subscriptions


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



1 - 2 of 2 Subscriptions

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

Step 3: Edit customer information. 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 blue **delete** button at the top of the menu. Click **save** to complete.

Home » Recurring - List Customers » Edit Customer



[Create Subscription](#)  

Recurring Information



Subscription Id: 3258689815




Billing Cycle: Active, Starts 09/05/2016, Every 5th day of the month

Associated With: *lboutique*

Recurring SKU: 123

Payments: 12

Plan Name: 12 Month Plan  [Edit Plan](#) 


Next Charge Date: Sep  5  2016 


Electronic Check Information


Name on Account: John Smith

Routing / ABA Number: 123123123 [What Is This?](#)

Account Number: 1xxxx3123 [What Is This?](#)

Account Holder Type: Personal 

Account Type: Checking 

Currency: USD 

Order Information

Order ID: 987654321


Order Description: Apparel Co.

Customer Information

First Name: John


Last Name: Smith

Company: Apparel Co.

Country: United States 


Address: 123 Main St.

City: Chicago

State/Province: Illinois 

Zip/Postal Code: 60185

Email Address: smith@apparelco.com

 Save

Billing History

No Billing History

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

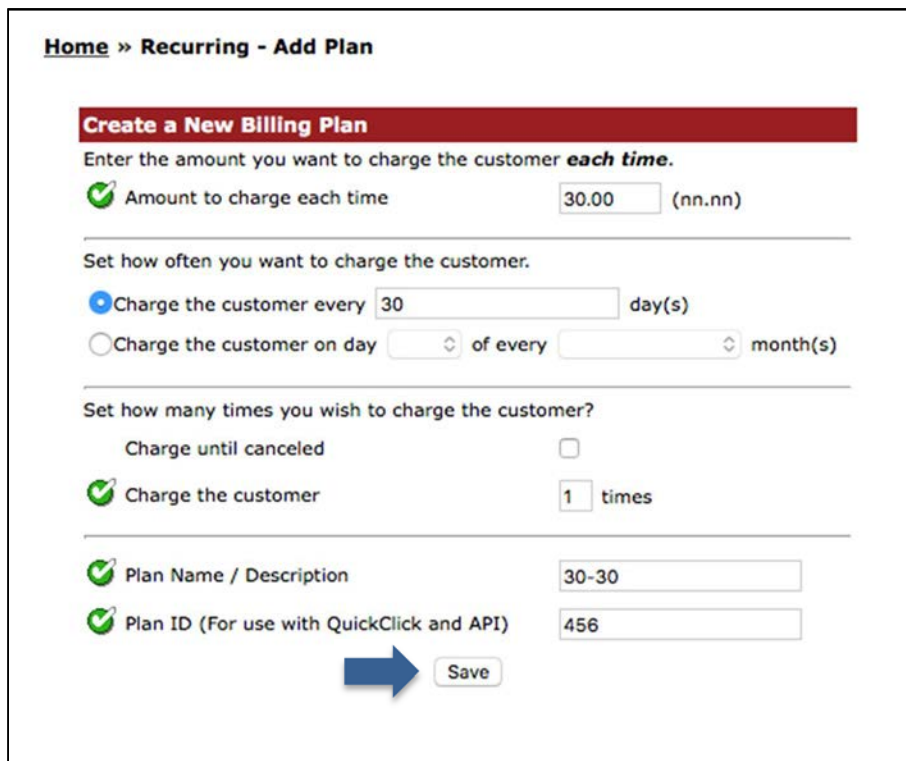
Step 1: Click [add plan](#) from the [main menu](#) under [recurring](#)



Main Menu

- [Home](#)
- Credit Card**
 - [Sale](#)
 - [Authorize](#)
 - [Capture](#)
 - [Void](#)
 - [Refund](#)
- Electronic Check**
 - [Sale](#)
 - [Void](#)
 - [Refund](#)
- Recurring**
 - [Add Subscription](#)
 - [List Subscriptions](#)
 - [Add Plan](#)
 - [List Plans](#)

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 (nn.nn)

Set how often you want to charge the customer.

Charge the customer every day(s)

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)



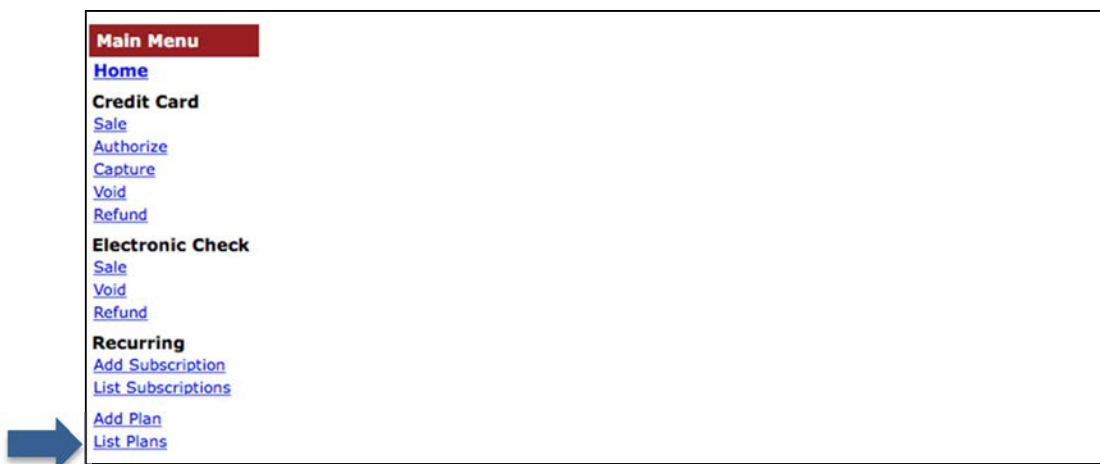
[Successfully saved](#)

Home » Recurring - Add Plan

Your Plan has been Successfully Saved.

How to edit billing

Step 1: Click [list plans](#) from the [main menu](#) under [recurring](#)



Main Menu

- [Home](#)
- Credit Card**
 - [Sale](#)
 - [Authorize](#)
 - [Capture](#)
 - [Void](#)
 - [Refund](#)
- Electronic Check**
 - [Sale](#)
 - [Void](#)
 - [Refund](#)
- Recurring**
 - [Add Subscription](#)
 - [List Subscriptions](#)
 - [Add Plan](#)
 - [List Plans](#)

Step 2: Click [plan name](#) to modify information


Home » Recurring - List Plans

To modify plan information, click on a plan name below.

Recurring Plans			
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 **blue delete** button at the top of the menu. Click **save** to complete.

Home » Recurring - Edit Plan

 **DELETE** | **BACK**

***This plan is used by 1 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 (nn.nn)

Set how often you want to charge the customer.

Charge the customer every day(s)

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

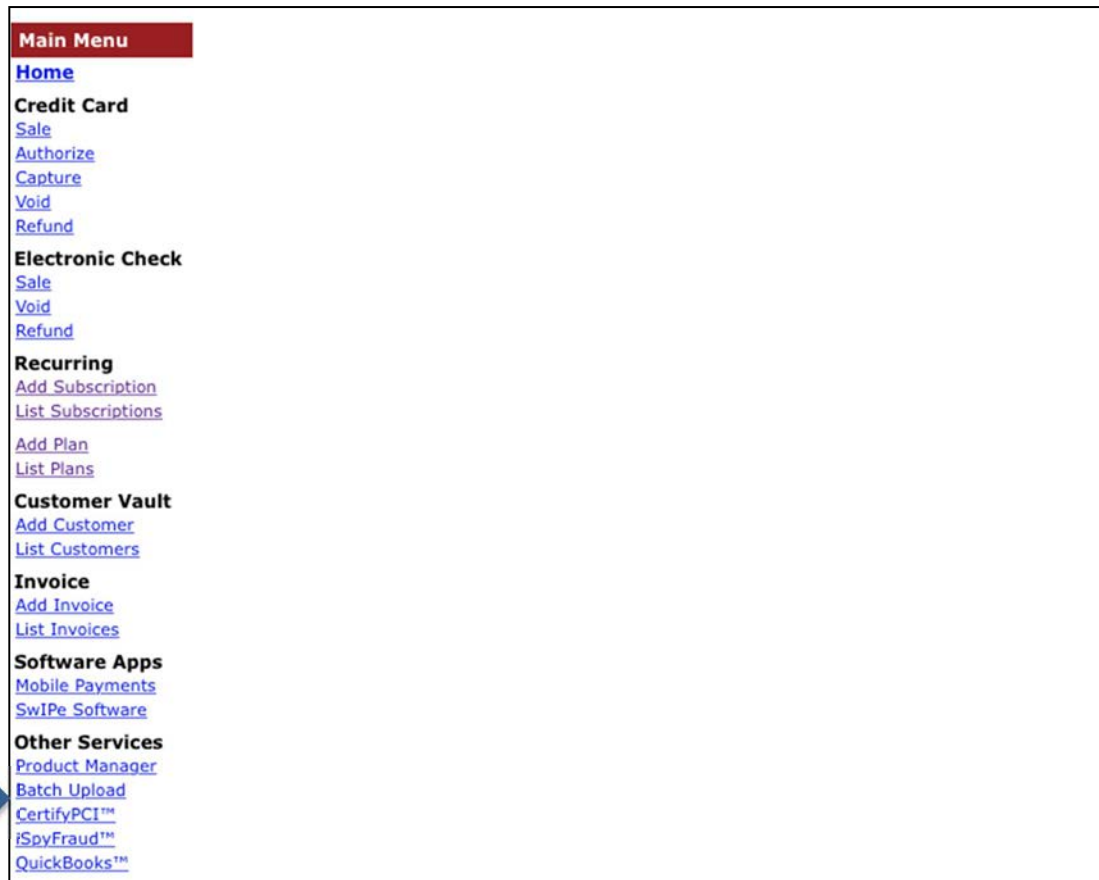
Plan Name / Description 12 Month Plan

Plan ID (For use with QuickClick and API)

 **Save**

How to create recurring billing with batch upload

Step 1: Click **add plan** from the **main menu** under **recurring**






Step 2: Click **choose file** to choose the file you wish to upload. Merchants can import a .CSV, .XLS or .TXT file for manually processing large amounts of transactions. Click **upload batch** to start processing.


Options: Two options are available for **file format**.

1. Auto Detect File Format: batch program will auto detect file formats. For example \$XX.XX as dollars. 14-16 digits as a credit card, etc.
2. Use Selected Format: Merchants can add a new batch format by clicking “configure formats”. Batch templates can be saved for future use

Home » Batch Upload

 [View Batch History](#)  [Configure Formats](#)  [Upload Batch](#)

You may upload a .CSV (Comma Separated Value), an .XLS or .XLSX (Microsoft Excel), or a .TXT (Text) file.

 * File: no file selected

Auto Detect File Format
 Use Selected Format

Format: [View Format](#)

After the submitted batch upload has completed, the results will be emailed to you.

