



RECURRING BILLING

Recurring Billing

The gateway supports three separate recurring billing options.

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.

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.

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.



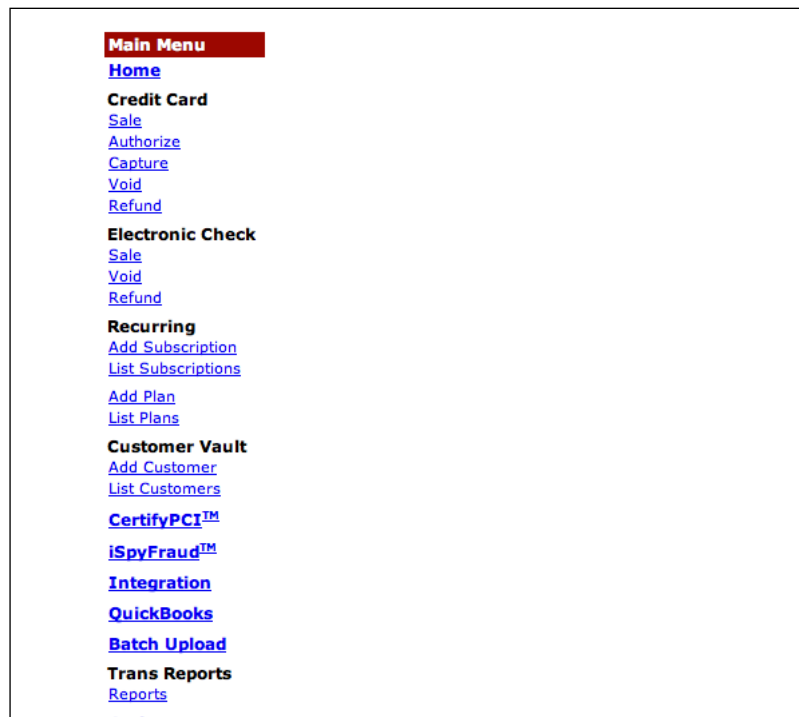
RECURRING BILLING

How to Edit Established Recurring Billing for a Single Cardholder or a Checking Account?

Required fields and adding/deleting fields.

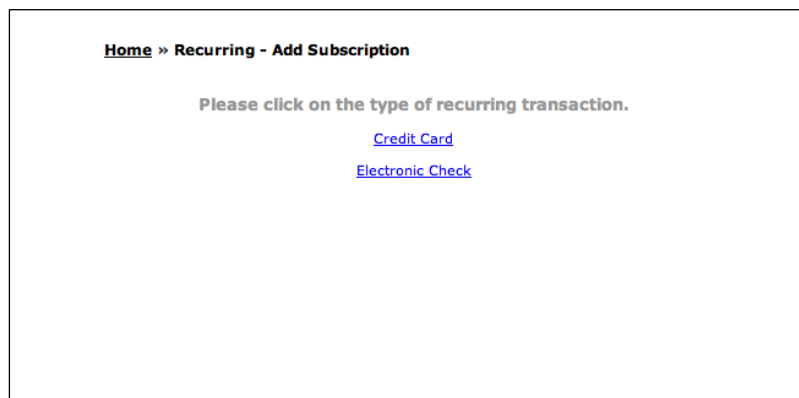
Step 1.

- 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.



RECURRING BILLING

How to Edit Established Recurring Billing for a Single Cardholder or a Checking Account?

Required fields and adding/deleting fields.

Step 3.

- Enter customer information for Credit Card. Click **CONTINUE** to proceed.

Home » Recurring - Add Subscription

Enter the customer information for a recurring transaction.

Credit Card Information

Credit Card Number

Expiration Date (mmyy)

Currency

Add to Customer Vault [What Is This?](#)

Customer Vault ID [What Is This?](#)

Order Information

Order ID

Order Description

Customer Information

First Name

Last Name

Company

Country

Address

City

State/Province

Zip/Postal Code

Email Address



RECURRING BILLING



How to Edit Established Recurring Billing for a Single Cardholder or a Checking Account?

Required fields and adding/deleting fields.

Step 3.

- Enter customer information for Electronic Check. Click **CONTINUE** to proceed.

Home » Recurring - Add Subscription

Enter the customer information for a recurring transaction.  

Electronic Check Information

Name on Account

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

Account Number [What Is This?](#)

Account Holder Type

Account Type

Currency

Order Information

Order ID

Order Description

Customer Information

First Name

Last Name

Company

Country

Address

City

State/Province

Zip/Postal Code

Email Address

RECURRING BILLING

How to Edit Established Recurring Billing for a Single Cardholder or a Checking Account?

Required fields and adding/deleting fields.

Step 4.

- Select an existing plan from the **PLAN NAME** list or create a new billing plan by clicking on the **BLUE CLICK** [HERE LINK](#). *Fields with red asterisks 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

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

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

Successfully Added

- Subscription was successfully added. Note that steps 4 and 5 are the same menus for credit cards and electronic checks.

[Home](#) » **Recurring - Add Subscription**

Step 2 of 2

Your Recurring/Installment Transaction has been Successfully Added



RECURRING BILLING

How to Edit Established Recurring Billing?

Required fields and adding/deleting fields.

Step 1.

- Click LIST SUBSCRIPTIONS 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](#)
- Customer Vault**
 - [Add Customer](#)

Option

- Merchant can also search recurring transactions to find a subscription by entering information you need. Click **SUBMIT** for search results.

Home » Recurring - List Customers

Search Recurring Transactions

Order ID:

Last Name:

Credit Card 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

Recurring Customer List

Customer	Order ID/SKU	Details	Entry Time	Payments
John Smith johnsmith@apparelco.com	98761234	Check 1...3123	6/10/2011 4:20:58 PM	0 @ \$100.00 0 attempted 12 Left
John Smith johnsmith@apparelco.com	227014	Credit Card 4...1111	6/7/2011 12:44:17 PM	0 @ \$100.00 0 attempted

RECURRING BILLING

How to Edit Established Recurring Billing?

Required fields and adding/deleting fields.

Step 2.

– Click BLUE

CUSTOMER NAME to edit. Click DOWNLOAD TRANSACTIONS to save information from Recurring Customer List. Information includes Subscription information as well as individual client information.

Home » Recurring - List Customers

Search Recurring Transactions

Order ID

Last Name

Credit Card 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 johnsmith@apparelco.com	98761234	Check 1...3123	6/10/2011 4:20:58 PM	0 @ \$100.00 0 attempted 12 Left
John Smith johnsmith@apparelco.com	227014	Credit Card 4...1111	6/7/2011 12:44:17 PM	0 @ \$100.00 0 attempted 12 Left

1 - 2 of 2 Subscriptions

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

RECURRING BILLING

How to Edit Established Recurring Billing?

Required fields and adding/deleting fields.



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. Merchant 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

[DELETE](#)

[Create Subscription](#)  

Recurring Information

Billing Cycle Active, Started 06/08/2011, Every 5th day of the month

Associated With *jdconstruction*

Recurring SKU

Payments 12

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

Next Charge Date Jul 05 2011

Credit Card Information

Credit Card Number 411111*****1111

Expiration Date 0612 (mmyy)

Currency USD

Order Information

Order ID 227014

Order Description Online Order

Customer Information

First Name John

Last Name Smith

Company Apparel Co.

Country United States

Address 123 Main Street

City Chicago

State/Province Illinois

Zip/Postal Code 60185

Email Address johnsmith@apparelco.

Billing History

No Billing History

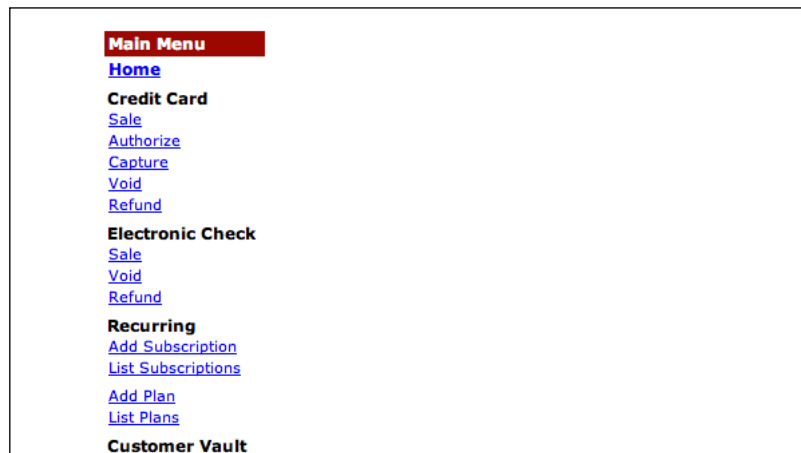
RECURRING BILLING

How to Create Billing Plans for an Unlimited Number of Cardholders or Checking?

Required fields and adding/deleting fields.

Step 1.

- Click **ADD PLAN**
from the MAIN MENU
under RECURRING.

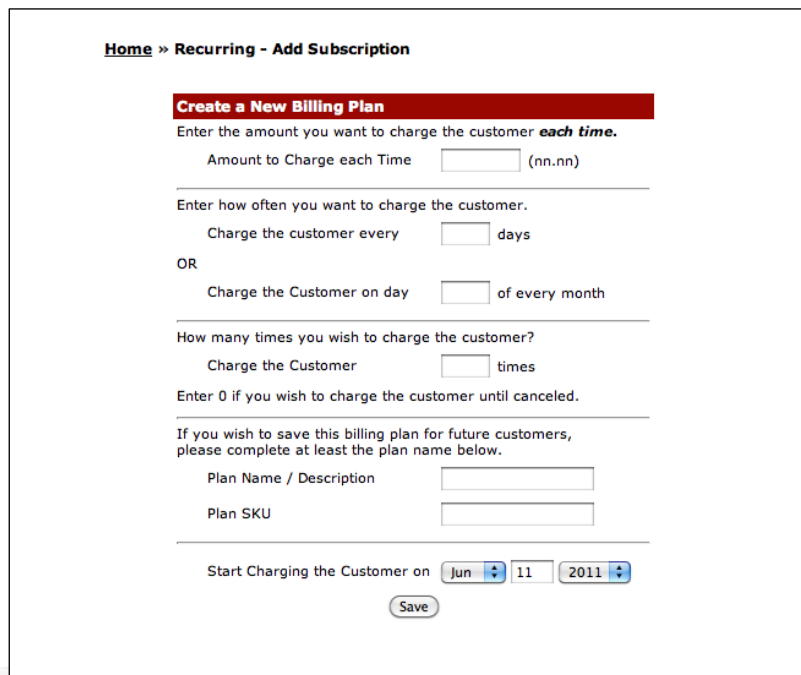


The screenshot shows a navigation menu with the following items:

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

Step 2.

- Enter information
to create a new
billing plan.



The screenshot shows the 'Create a New Billing Plan' form with the following fields and options:

- Home » Recurring - Add Subscription**
- Create a New Billing Plan**
- Enter the amount you want to charge the customer **each time**.
Amount to Charge each Time (nn.nn)
- Enter how often you want to charge the customer.
Charge the customer every days
- OR
Charge the Customer on day of every month
- How many times you wish to charge the customer?
Charge the Customer times
- Enter 0 if you wish to charge the customer until canceled.
- If you wish to save this billing plan for future customers,
please complete at least the plan name below.
Plan Name / Description
- Plan SKU
- Start Charging the Customer on
-

RECURRING BILLING

How to Create Billing Plans for an Unlimited Number of Cardholders or Checking?

Required fields and adding/deleting fields.

Step 3.

– 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)

Enter how often you want to charge the customer.

Charge the customer every days

OR

Charge the Customer on day of every month

How many times you wish to charge the customer?

Charge the Customer times

Enter 0 if you wish to charge the customer until canceled.

Plan Name / Description

Plan SKU

Successfully Saved

[Home](#) » [Recurring - Add Plan](#)

Your Plan has been Successfully Saved.

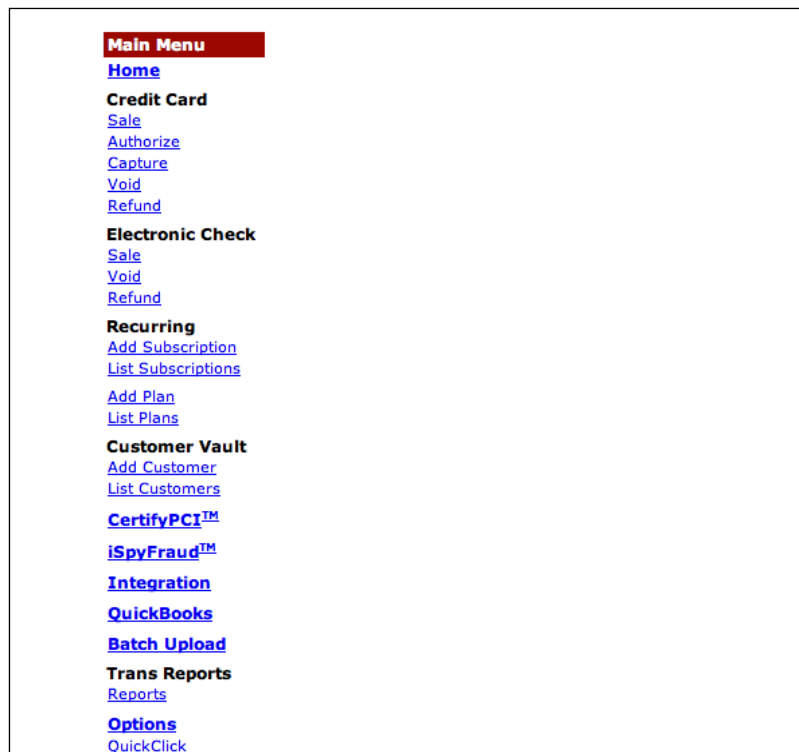
RECURRING BILLING

How to Edit Billing?

Required fields and adding/deleting fields.

Step 1.

- Click LIST PLANS from the MAIN MENU under RECURRING.

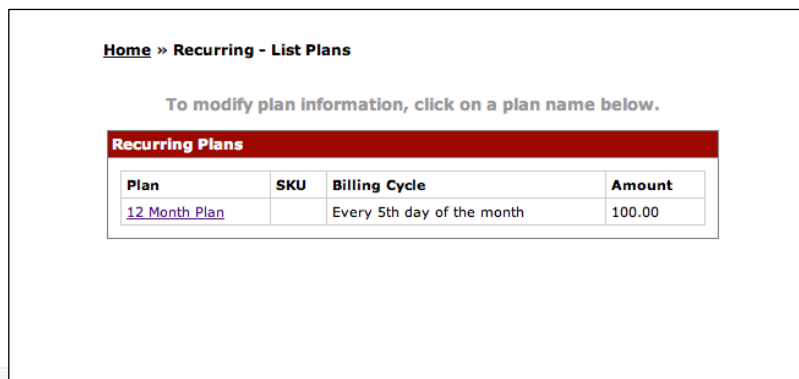


Main Menu

- [Home](#)
- Credit Card**
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 - [Add Plan](#)
 - [List Plans](#)
- Customer Vault**
 - [Add Customer](#)
 - [List Customers](#)
- [CertifyPCI™](#)
- [iSpyFraud™](#)
- Integration**
 - [QuickBooks](#)
 - [Batch Upload](#)
- Trans Reports**
 - [Reports](#)
- Options**
 - [QuickClick](#)

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	SKU	Billing Cycle	Amount
12 Month Plan		Every 5th day of the month	100.00

RECURRING BILLING

How to Edit Billing?

Required fields and adding/deleting fields.

Step 3.

– Edit any information to the existing billing plan. WARNING: All customers 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 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 (nn.nn)

Enter how often you want to charge the customer.

Charge the customer every days

OR

Charge the Customer on day of every month

How many times you wish to charge the customer?

Charge the Customer times

Enter 0 if you wish to charge the customer until canceled.

Plan Name / Description

Plan SKU



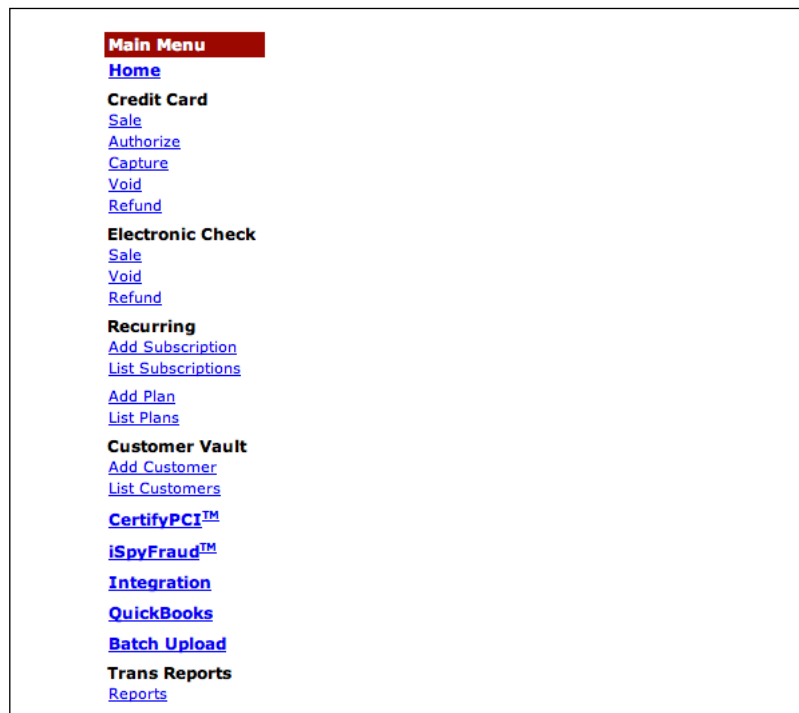
RECURRING BILLING

How to Create Recurring Billing with Batch Upload?

Required fields and adding/deleting fields.

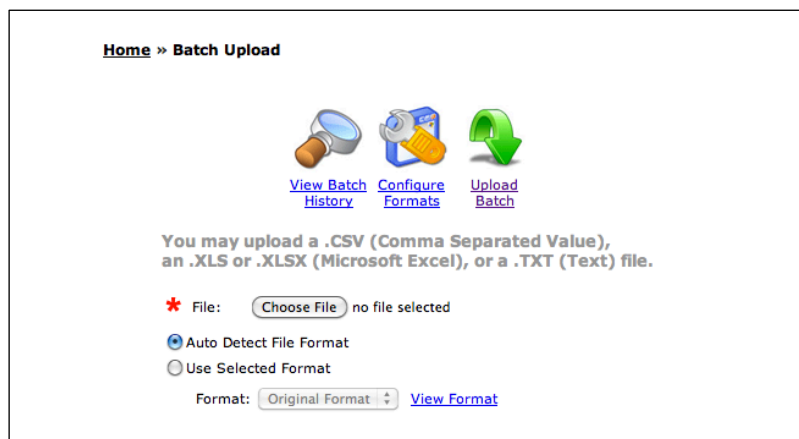
Step 1.

- Click **BATCH UPLOAD** from the MAIN MENU.



Step 2.

- Click **CHOOSE FILE** to choose the file you wish to upload. Merchant can import a .CSV, .XLS or .TXT file for manually processing large amounts of transactions.





RECURRING BILLING

How to Create Recurring Billing with Batch Upload?

Required fields and adding/deleting fields.

Step 3.

- Click **UPLOAD BATCH** to start uploading.

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 submitting a batch upload, the results will be emailed to you once it has completed.

Options

- Two options 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: Merchant 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 submitting a batch upload, the results will be emailed to you once it has completed.