

Recurring Billing Overview

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Qualpay Recurring Billing can be configured to match your business's recurring and scheduled payment needs. The components of Recurring Billing are plans, customers, and subscriptions. All subscriptions require a customer, but do not necessarily require a plan. Subscriptions that use a plan are called "on-plan" subscriptions. Subscriptions that do not use a plan are called "off-plan" subscriptions. Recurring Billing integrates seamlessly with [Account Updater](#) to keep cardholder data fresh, and various emails and reports will support your management needs.

Plans

If you sell a few products and bill at fixed frequencies, plans are a simple way to create and maintain your subscriptions. All new subscribers will be affected if you make any changes to a plan, such as the amount. A new plan ID will be created for the plan with the changes, and the current plan ID for the existing plan will remain the same. Existing subscribers will stay on the current plan. For example, if you charge your customers \$9.99 per month and then decide to raise your fee to \$10.99 for new subscribers, you can update the plan without updating each customer's subscription. If you would like to change the plan amount for all new and existing customers, you can [create a new plan](#) with the new amount and subscribe all of your customers to it.

You can manage your plans by [locating a plan](#) and selecting to [edit](#), [delete](#), or [archive](#).

Customers

Qualpay Customer Vault allows you to securely store customer data and a customer's preferred payment information. To create a subscription, you will first [create a customer](#) or select an existing customer. Then, you can select to use an existing plan to create an on-plan subscription or choose to create a unique off-plan subscription.

Subscriptions

Subscriptions allow you to charge your customers automatically on a scheduled frequency. Use on-plan subscriptions if your business sells the same item at the same price. In an on-plan scenario, you will create plans, and then when you add customers, you will create a new subscription by assigning your customers to plans. You can use off-plan subscriptions if you have unique billing situations for each customer. In the off-plan scenario, you will not create plans. After creating your customers, [create a unique subscription](#) for each customer. You can opt for a customer to receive a transaction receipt in the [receipt settings](#).

Configure [notification settings](#) and assign users to receive a [daily summary of subscription activity](#). Summaries are sent after our recurring billing engine processes the subscription transactions. Alternatively, you can use [webhooks](#) to subscribe to and receive notifications of Subscription events. Notifications include subscription suspensions, payment success, payment failures, and subscription completions. To [configure a webhook](#), go to **Administration**, select **Webhook Management**, and click on **New Webhook**.

You can manage your subscriptions by [locating a subscription](#) and selecting to [edit](#), [pause](#), [resume](#), or [cancel](#).
