

Recurring Billing Overview

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Qualpay Recurring Billing can be configured to match your business' 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 referred to as "on-plan" subscriptions. Subscriptions that do not use a plan are referred to as "off-plan" subscriptions. Recurring Billing integrates seamlessly with [Account Updater](#) to keep cardholder data fresh, and a variety of 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. If you make any changes, such as amount, to a plan, all new subscribers will be affected by the change. 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 all of your customers \$9.99 per month then decide to raise your fee to \$10.99 for new subscribers, you can update the plan without having to update each customer's subscription. If you would like to change the amount of the plan for all customers, new and existing, you can [create a new plan](#) with the new amount and subscribe all of your customers to it.

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

Customers

Qualpay Customer Vault allows you to store customer data securely along with a customer's preferred payment information. To create a subscription, you will first [create a customer](#) and then either assign it to a plan to create an "on-plan" subscription or create an "off-plan" subscription.

Subscriptions

Subscriptions allow you to charge your customers automatically on a scheduled frequency. Use "on-plan" subscriptions if your business sells mostly the same item at the same amount. In an "on-plan" scenario you will create plans, then when you

add customers, you will create subscriptions by subscribing your customers to plans. Use “off-plan” subscriptions if you have unique billing situations for each of your customers. In the “off-plan” scenario, you will not create plans. Start by creating your customers, and then [create a unique subscription](#) for each customer. You can opt for a customer to receive a transaction receipt and a [daily summary of subscription activity](#) once our recurring billing engine processes the transaction. Configure your [communication preferences](#). Alternatively, use [webhooks](#) to subscribe to and receive notifications of Subscription events. Notifications include when a subscription is suspended, a payment success, a payment failure, and when a subscription is complete. To get started, [configure a webhook](#) and go to **Administration**, select *Webhook Configuration* and click on *New Webhook*.

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