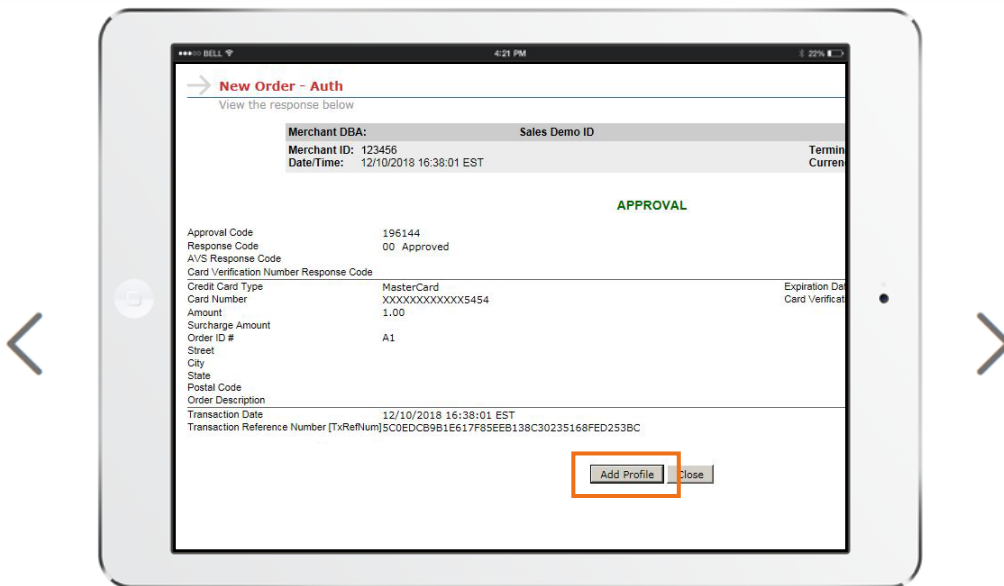


Steps

- 1 | Click the **Add Profile** button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button



Step 1

Click the Add Profile button

Click the **Add Profile** button at the bottom of the authorization screen after completing a successful transaction. If this feature is not available to you, contact client support at **1-866-645-1314**.

Steps

- 1 | Click the Add Profile button
- 2 | **Create Profile ID**
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button

The screenshot shows a tablet displaying the 'Admin - Profile Management' form. The form is titled 'Admin - Profile Management' and includes the following fields and options:

- Merchant DBA:** Test Gateway
- Merchant ID:** 123456
- Date/Time:** 11/30/2018 16:08:02 EST
- Terminal ID:** 001
- Currency Code:** USD
- PROFILE CONFIGURATION** (selected tab)
- Profile ID:** (text input field, highlighted with an orange box)
- Use Next Available Profile ID:** (checkbox, checked, highlighted with an orange box)
- Customer Name:** Mr. TEST
- Street:** 123 test St.
- City:** (text input field)
- State:** (dropdown menu)
- Country Code:** (dropdown menu)
- Postal Code:** 12345
- E-mail Address:** (text input field)
- Order Description:** (text input field)
- Payment Method:** Credit Card (dropdown menu)
- Card Number:** 5454545454545454
- Expiration Date:** 01 | 2019 (dropdown menus)
- Amount ##00.00:** 2.00
- Use Profile ID as Order Number:** (checkbox, unchecked)
- Use Profile ID as Order Description:** (checkbox, unchecked)
- Add Managed Billing - Recurring:** (checkbox, unchecked)

Step 2

Create Profile ID

To create the Profile ID, enter a custom value (e.g. customer name, customer ID, etc.) or check the **Use Next Available Profile ID** option to have one automatically created.

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | **Enter the amount for recurring billing**
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button

The screenshot shows the 'PROFILE CONFIGURATION' screen on a tablet. The screen is divided into several sections. The top section contains profile information: Profile ID (138549933), Profile Status (Active-MB), Customer Name (Mr. TEST), Street (123 test St.), City, State, Country Code, Postal Code (12345), E-mail Address, and Order Description. The middle section contains payment information: Payment Method (Credit Card), Card Number (5454545454545454), Expiration Date (01/2019), and Amount (2.00). The bottom section contains billing options: Add Managed Billing - Recurring (checked), Override defaults, and frequency options (Weekly, Monthly, Yearly). The 'Amount' field is highlighted with an orange box.

Step 3

Enter the amount for recurring billing

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | **Select the box labeled Add Managed Billing – Recurring**
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button

The screenshot shows the 'PROFILE CONFIGURATION' screen on a tablet. The screen displays various fields for profile configuration, including Profile ID (138549933), Profile Status (Active-MB), Customer Name (Mr. TEST), Street (123 test St.), City, State, Country Code, Postal Code (12345), E-mail Address, Order Description, Payment Method (Credit Card), Card Number (5454545454545454), Expiration Date (01/2019), and Amount (2.00). The 'Add Managed Billing - Recurring' checkbox is highlighted with an orange box. Below this checkbox, there are radio buttons for 'Weekly', 'Monthly', and 'Yearly', and a section for scheduling options: 'Day 01 of every 01 month(s)' and 'The first Day of every month(s)'. The 'Add Managed Billing - Recurring' checkbox is checked.

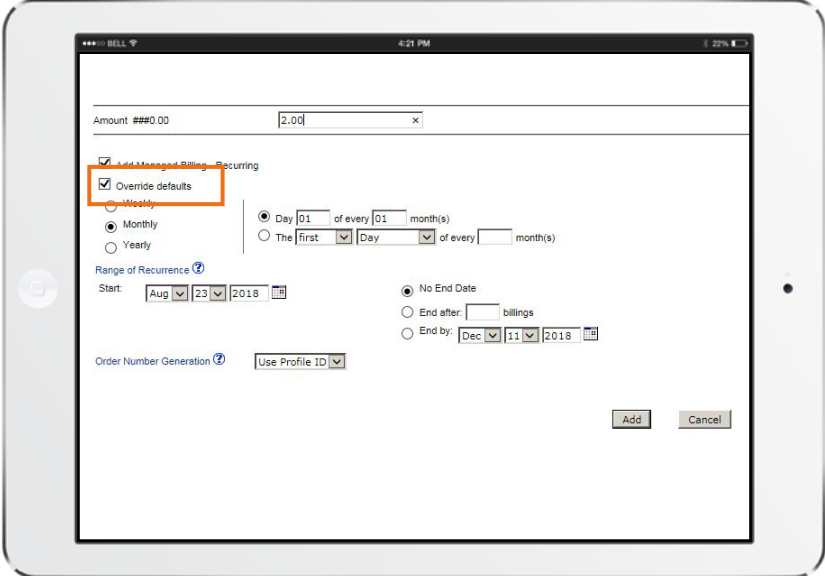
Step 4

Select the box labeled Add Managed Billing – Recurring

Managed billing is for automatic payments.

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | **Payment scheduling options will be displayed**
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button



The screenshot shows a mobile application interface for setting up a recurring billing profile. At the top, the amount is set to 2.00. Below this, the 'Add Managed Billing – Recurring' option is selected. The 'Override defaults' checkbox is checked and highlighted with an orange box. Underneath, there are radio buttons for 'Monthly', 'Weekly', and 'Yearly'. The 'Monthly' option is selected, and the frequency is set to 'Day 01 of every 01 month(s)'. There are also options for 'The first' and 'Day' of every month. The 'Range of Recurrence' section shows a start date of 'Aug 23 2018' and an end date of 'Dec 11 2018'. There are also options for 'No End Date', 'End after' a certain number of billings, and 'End by' a specific date. The 'Order Number Generation' section has a dropdown menu set to 'Use Profile ID'. At the bottom right, there are 'Add' and 'Cancel' buttons.

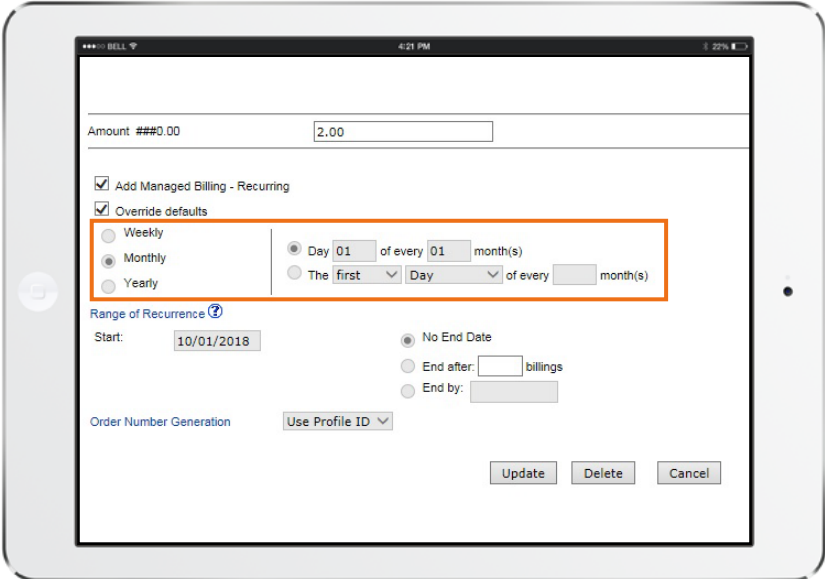
Step 5

Payment scheduling options will be displayed

Options will be displayed to schedule payments. Check the **Override Defaults** box to be able to select payment options.

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | **Choose frequency of payments**
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button



Amount ###0.00 2.00

Add Managed Billing - Recurring

Override defaults

Weekly

Monthly

Yearly

Day 01 of every 01 month(s)

The first Day of every month(s)

Range of Recurrence ⓘ

Start: 10/01/2018

No End Date

End after: billings

End by:

Order Number Generation Use Profile ID

Update Delete Cancel

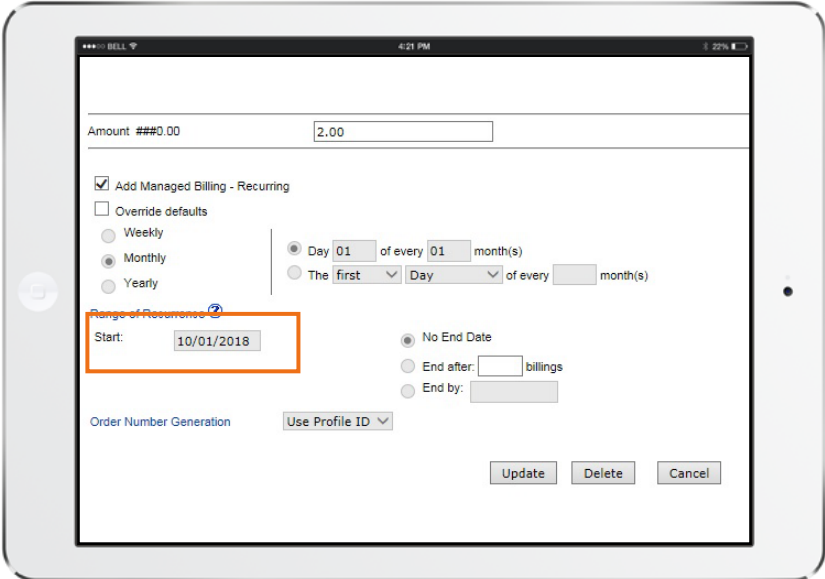
Step 6

Choose frequency of payments

Choose weekly, monthly or yearly.

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | **Enter the start date**
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | Click the Update button



The screenshot shows a mobile application interface for setting up a recurring billing profile. The amount is set to 2.00. The 'Add Managed Billing - Recurring' option is checked. The frequency is set to 'Monthly', and the schedule is 'Day 01 of every 01 month(s)'. The 'Start' date is 10/01/2018, which is highlighted with an orange box. The 'End Date' is set to 'No End Date'. The 'Order Number Generation' method is set to 'Use Profile ID'. There are 'Update', 'Delete', and 'Cancel' buttons at the bottom right.

Step 7

Enter the start date

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | **Choose the end date**
- 9 | Choose the Order Number Generation Method
- 10 | Click the Update button

Amount ###0.00 2.00

Add Managed Billing - Recurring

Override defaults

Weekly

Monthly

Yearly

Day 01 of every 01 month(s)

The first Day of every month(s)

Range of Recurrence ⓘ

Start: 10/01/2018

No End Date

End after: [] billings

End by: []

Order Number Generation Use Profile ID

Update Delete Cancel

Step 8

Choose the end date

Choose **No End Date**, **End after** a number of payments or **End by** a selected date.

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | **Choose the Order Number Generation method**
- 10 | Click the Update button

Amount ###0.00 2.00

Add Managed Billing - Recurring

Override defaults

Weekly

Monthly

Yearly

Day 01 of every 01 month(s)

The first Day of every month(s)

Range of Recurrence ⓘ

Start: 10/01/2018

No End Date

End after: billings

End by:

Order Number Generation Use Profile ID

Update Delete Cancel

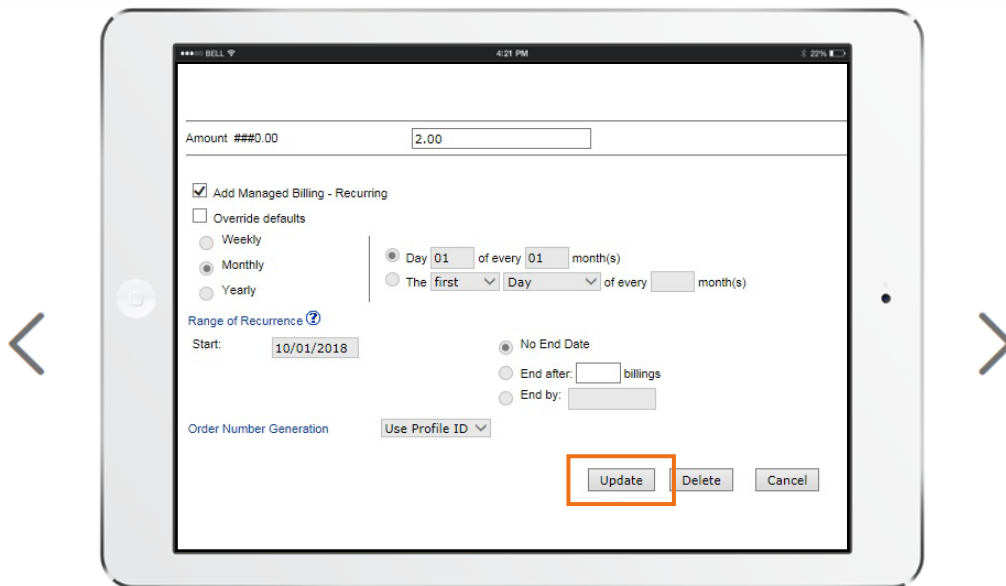
Step 9

Choose the Order Number Generation method

For **Order Number Generation**, use the dropdown menu to choose **Profile ID** or select **Dynamic** to assign the next order number in the current batch.

Steps

- 1 | Click the Add Profile button
- 2 | Create Profile ID
- 3 | Enter the amount for recurring billing
- 4 | Select the box labeled Add Managed Billing – Recurring
- 5 | Payment scheduling options will be displayed
- 6 | Choose frequency of payments
- 7 | Enter the start date
- 8 | Choose the end date
- 9 | Choose the Order Number Generation method
- 10 | **Click the Update button**



Step 10

Click the Update button

This will save your changes.