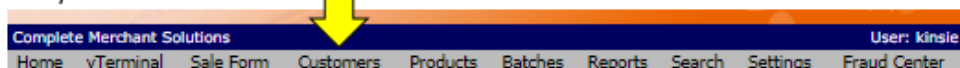


How to Create a Payment Plan In the Complete Gateway

1. Go to your Customer's tab



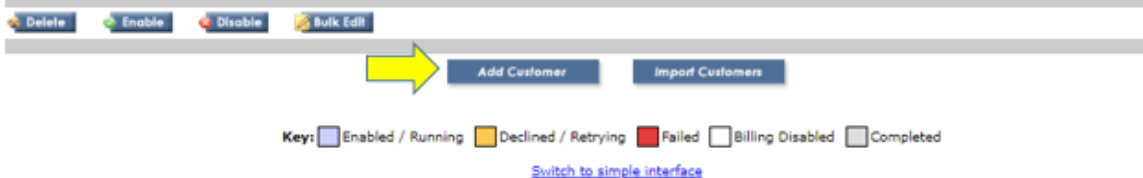
Merchant Console Complete Merchant Solutions

Welcome to the Complete Gateway

02/10/2014

CMS is excited to be rolling out Complete Gateway. Complete Gateway allow our merchant's to explore new options for their credit card processing. Complete Gateway has a vast amount of additional features such as, adjusting for tips, recurring billing and tokenization just to name a few. Feel free to explore and find the possibilities that Complete Gateway can provide to your company. As always, if you have any questions, or would like additional information, feel free to give us a call at 1-877-267-4324.

2. Select "Add Customer" at the bottom of the list of customers(if you haven't added any customers, it will be toward the middle of your screen).



3. Fill in the customer's pertinent information. All of the information is not required, but the more information to identify the customer, the better, in case of customers with similar names.

A screenshot of the 'Customers' form. The form has a dark blue header with the text 'Customers'. Below the header are buttons for 'Save & Close' and 'Cancel'. The form is divided into several tabs: 'General', 'Recurring Billing', 'Notes', 'Virtual Terminal', 'Billing Preview', and 'Billing History'. The 'General' tab is selected. The form contains several input fields for customer information: 'Cust #', 'Company', 'First Name', 'Last Name', 'Address', 'Address2', 'City', 'State', 'Zip', 'Country', 'Phone', 'Fax', 'Web Site', and 'Email'. There is also a 'Custom Fields' section with a 'Clerk ID' field and an 'Edit Custom Fields' button. On the right side of the form, there is a 'Payment Methods' section with an 'Add' button. A large yellow arrow points to the 'Payment Methods' section.

4. Add a Payment Method by clicking the “Add” button under “Payment Methods”. This will open up a popup screen to add a card to this customer. You can’t save the CVV code to a recurring billing customer as it is not PCI Compliant. Click save after adding the card information.

The screenshot shows the 'Customers' form with the 'General' tab selected. The 'Payment Methods' section is visible, and a yellow arrow points to the 'Add' button. An 'Edit Payment Method' dialog box is open, showing fields for 'Pay By' (Credit Card), 'Payment Name', 'Card Num', and 'Expiration'. The dialog has 'Save' and 'Cancel' buttons. The main form has 'Save & Close' and 'Cancel' buttons at the top and bottom.

5. Click the “Recurring Billing” tab on the customer information box.

The screenshot shows the 'Customers' form with the 'Recurring Billing' tab selected. The 'Schedule Enabled' checkbox is checked, and the 'Schedule' is set to 'Monthly'. The 'Start' and 'Next' dates are '07/09/2020'. The 'Num Left' is set to '*'. The 'Tax' field is empty. The 'Each Pmt Amt' field is empty. The 'Order ID' field is empty. The 'Category' is set to 'Recurring' and the 'User' is set to '(Auto)'. The 'Description' field is empty. The 'Send Customer Receipt' checkbox is unchecked. The form has 'Save & Close' and 'Cancel' buttons at the top and bottom.

6. To schedule a recurring payment, select what day of the month, or how many times a month you'd like your customer to be billed. **IMPORTANT: the start date is not the first payment of the recurring billing, but when you have first saved them as a recurring billing customer. Their first payment is technically the on the "Next" date when you first add them into the system.**

Num Left: This field is for how many payments left you'd like to charge your customer; i.e, if you enter a 7 into this field, the system will charge them 7 more payments and then stop the recurring payment. If there is an asterisk(*), it will continue the recurring payment indefinitely until you cancel their payments.

Tax: this field does not add tax to the final amount of their payment; it will show on their receipt how much of their payment was tax

Each Pmt Amt: This field is where you will enter how much you wish to charge your customer for each payment.

Category: Leave as Recurring

User: this field will show in the report who set this recurring payment up.

Click Save & Close to add them into your list of customers.

The screenshot shows a web form for setting up a recurring payment. On the left, there are four labeled input fields: 'Each Pmt Amt:' with a text box, 'Order ID:' with a text box, 'Category:' with a dropdown menu showing 'Recurring', and 'User:' with a dropdown menu showing '(Auto)'. To the right of these fields is a large, empty rectangular area. At the bottom of the form, there are two buttons: 'Save & Close' and 'Cancel'. A yellow arrow points from the left towards the 'Save & Close' button.

7. The Virtual Terminal tab: this tab is where you can run a transaction specifically for this saved customer with their saved payment method if they happen to miss a payment or would like to make an additional payment.