Recurring Billing

Recurring Billing allows you to automatically bill a customer's valid credit card on file weekly, monthly, or yearly for a product/service(s).

You must have integrated card processing set up, and a valid customer credit card associated with the owner record to use the recurring billing feature.

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Here are two examples of how you can use recurring billing:

Monthly Unlimited Daycare Packages:

Add or use an existing Monthly Daycare Package product/service. (Set quantity field equal to the maximum number of daycare days in a month, set the package expiration field to 1 month).

Add a recurring event to an owner record for that monthly daycare product. Set it up to bill monthly on the first day of the month.

When successfully processed, the recurring billing transaction will add the package to the owner account so it can be selected and used for daycare. The package will expire at the end of the month, the customer will be billed on the first of the month for the new package, and the new package will be added to their account via the recurring transaction.

This will work for daycare packages, boarding packages and "other" packages.

Annual Membership Program:

Add or use an existing Annual Membership product/service with the price of your annual membership.

Add a recurring event to an owner record for that annual membership product. Set it up to bill annually on any day of the year.

Since PetExec does not have automated functionality built to support an annual membership program, you will have to set up the program parameters manually based on what the program offers your owners.

Here are some suggestions:

Create an owner advisory to indicate the customer is part of your annual membership program (i.e. Platinum Member, Gold Member etc).

If your program includes unique pricing, you can set that up via owner custom pricing or owner discount.

In this example the recurring billing feature will automate the billing for the annual membership, but does not automate any 'features' of that membership program.

Adding recurring billing to your employee type

In order to see the recurring menu options, you will need to enable them for your employee type. Click for details on how to enable new features released as part of a PetExec software update for my PetExec system.

Setting up recurring billing events by owner

Owners must have a valid credit card on file in order to add recurring events. Begin in the owner menu→recurring billing.

1. Select the product/service which you want to bill monthly. Type in key word to filter your product/service list. You can enter multiple products/services. Click "add item" to add the product/service to the recurring event.
2. Change the status to active. Only events with an active status will be processed.
3. Enter the start date for the recurring billing. The start dates provides the flexibility to set up future recurring events.   Enter the end date for the recurring billing event, the end date is not required, you can leave the end date blank.
4. Select the frequency for the recurring billing event. This how often you will bill the card on file for the service(s) indicated.
   a. If weekly is selected, you will then select the day of the week.
   b. If monthly is selected you will then select the day of the month (or last day of the month)
   c. If yearly is selected, you will then select a calendar date.
5. Valid credit cards will be listed, select the card you wish to use.
6. Click Save Recurring Billing to save changes.
7. Click return to Recurring Event List to see a list of all events for an owner.

In this example we have set up a Monthly Daycare package to bill on the 15th of the month.

Managing recurring billing events by owner

To view/manage recurring billing events by owner, from the owner menu, click "recurring billing". This will display all the events for an owner.

1. You will see a summary for each billing event added, the last processed date and the next scheduled processing date.
2. Click to see orders from previously processed recurring events.
3. You also have the option to edit the event, manually process an event, or delete a recurring event. Use "Process Now" to reprocess a failed transaction.

In this example, Susie Jones is scheduled to be automatically billed monthly on the 15th for a monthly daycare package, and yearly on Jan 1st for a membership fee. Since we set up the recurring billing on 1/8/18, we missed the 1/1/2018 processing date. This is an example where we could click "process now" to process the 1/1/2018 annual membership fee. PetExec will then bill automatically on 1/1/2019.

Recurring Billing for Susie Jones   ⓘ

Recurring billing allows owners to be automatically charged for a service or product on a recurring schedule. Petexec will process the orders based on the specified date range, product(s) and/or service(s), and frequency provided. This functionality requires integrated credit card processing and a valid credit card on file.

☰ Jones, Susie

Show Deleted Events ☐

(1)

Status: **ACTIVE**	Frequency: **Monthly on the 15th day of the month**			Last Processed: **Never Processed**	
Selected Card: **Card ending in 1111, exp: 04/2019**				Next Process Date: **01/15/18**	
Effective From: 01/08/18 through (No End Date)					
Service	**Price**	**Quantity**		**Subtotal**	Related Orders **(2)**
Monthly Daycare Package	375.00	1		375.00	
Subtotal				375.00	Edit
Total Tax				0.00	Process Now **(3)**
Total Charges				375.00	Delete
Log History - Click for Detail					

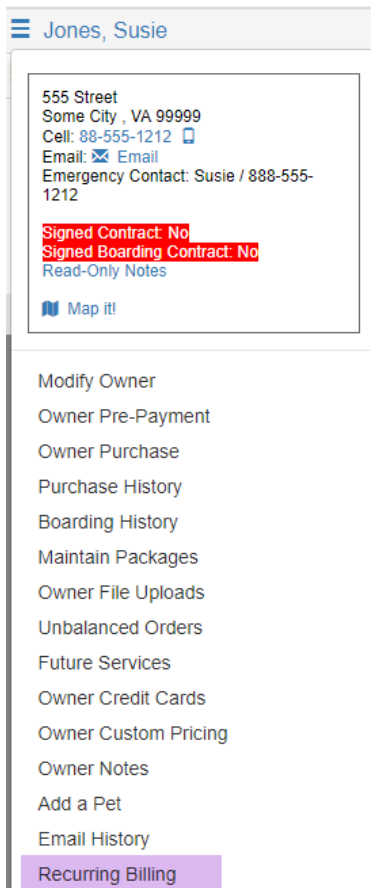| Status: **ACTIVE**	Frequency: **Yearly on Jan 01**			Last Processed: **Never Processed**	
Selected Card: **Card ending in 1111, exp: 04/2019**				Next Process Date: **01/01/19**	
Effective From: 01/01/18 through (No End Date)					
Service	**Price**	**Quantity**		**Subtotal**	Related Orders
Annual Membership Fee	100.00	1		100.00	
Subtotal				100.00	Edit
Total Tax				0.00	Process Now
Total Charges				100.00	Delete
Log History - Click for Detail					

Add New Event   Return to Modify Owner

Managing all recurring billing events in your PetExec system:

PetExec provides the data for you to review your recurring transactions with the following menu options. There is no automated process in PetExec to reprocess failed transactions. We suggest using the reporting available in the system to audit your recurring events and identify any failed transactions and reprocess those transactions manually.

There are several ways to view/manage your recurring billing events:

To see specific events by owner or transaction: Owner menu➔Recurring Billing.

To manage events for all owners use the PetExec Menu➔Recurring Billing:

Scheduled Services ▾
Company Calendar ▾
Time Clock ▾
Recurring Billing ▾
    Maintain Recurring Events
    Recurring Billing Transactions
    Recurring Events
Feature Requests
PetExec Documentation

PetExec Menu Options:

Maintain Recurring events: Search by owner, or leave criteria blank and click search to see all recurring events for all owners. Click to view specific events by owner. To view deleted events for an owner, click view events, and then check the box to Show Deleted Events for a specific owner.

Maintain Recurring Events ⓘ

Search for Owner

Search Criteria		Search

Search Results

Owner	# Active Events	# Inactive Events	# Deleted Events	
☰ Jones, Susie	2	0	0	View Events
☰ Naro, Paul	1	0	0	View Events

Recurring Billing Transactions: View all recurring transactions or orders. Orders are generated when a recurring event is successfully processed. Failed transactions will not generate a PetExec order, but you will see the failed attempts listed here.

Recurring billing transactions will fail if the card selected does not pass the authorization criteria for the transaction (i.e. card is expired, over limit, blocked lost/stolen etc). This report will allow you to view failed transactions and manually reprocess those transactions. PetExec will not attempt any additional processing for transactions listed as "failed". When a transaction fails, the recurring event will automatically marked "inactive".

Recurring Billing Transactions ⓘ

Search Criteria

Start Date (mm/dd/yy)	End Date (mm/dd/yy)
01/01/18	02/28/18

Frequency

All ▾

Status

All ▾

Search

(Search)   [Download Spreadsheet]

From 01/01/18 - 02/28/18

Search:

Recurring ID	Order ID	Date	Name	Card Type	Exp. Date	Last 4	Frequency	Status	Amount	Services	Additional Info
1	18734196	01/01/18 03:25 AM	Naro, Paul	Mastercard	08/2021	0004	Monthly	Success	100.00	10 Day Daycare Package	
1	18734198	01/01/18 03:45 AM	Naro, Paul	Mastercard	08/2021	0004	Monthly	Success	100.00	10 Day Daycare Package	

To reprocess a failed transaction:

1. Update the card information on file to resolve the failure reason. (Owner menu→Owner Credit Cards)
2. Access the recurring event for the customer. (Owner menu→Recurring Billing) and change status from "inactive" to "active".
3. Click process now on the appropriate recurring event. This will generate an order and charge the credit card selected in the event.

Recurring Events: allows you to see all active events for all owners. Click on the column headings to sort by the data in those columns. For example, sort by service to see all of the products that are included in your recurring events, sort by next processing date to see your next scheduled events, sort by frequency to see all your year events.

You can also easily access all owner events and edit events from this page.

Recurring Events ⓘ

Search Results

There were 3 active recurring events found.

Search:

Owner Name	Frequency	Every	Start Date	End Date	Last Process Date	Next Process Date	Services		
Naro, Paul	Monthly	1st day of the month	01/01/18	None	01/01/18	02/01/18	10 Day Daycare Package	All Owner Events	Edit this Event
Jones, Susie	Yearly	Jan 01	01/01/18	None		01/01/19	Annual Membership Fee	All Owner Events	Edit this Event
Jones, Susie	Monthly	15th day of the month	01/08/18	None		01/15/18	Monthly Daycare Package	All Owner Events	Edit this Event

Click here to download the spreadsheet.

Additional Information:

Orders via recurring billing:

You will see orders in the Modify Orders menu option for transactions that occur through the recurring billing function as well as in the owners recurring billing events page. The payment history section of the orders identifies that the order was created through the recurring billing function:

Payment History

Change the dates, additional Info or amount applied as needed and press the "Update History" button to change the record. Selecting the "delete" checkbox will delete the record from the system and recalculate the totals.

Note: Once deleted, the record can not be recovered. You can always add a new history record above to fix it. Dates need to be in a readable format like mm/dd/yyyy hh:mm AM .

There has to be at least ONE history record. If there are none, they were all deleted. Please select at least a "No Payment" with a charge of $0.00.

Changing the type to "Credit" **DOES NOT** charge external processors like First Data!

Order Date	Employee	Additional Info	Type	Amount Applied	Delete
01/09/18 02:44 PM	PetExec Administration	Recurring Billing - monthly Card Type: visa Card Number: XXXX-XXXX-XXXX-1111	Credit	375.00	☐

Update History

Email Notification:

Your owners will receive an email receipt when a recurring billing event is successfully processed. It will follow the template set up for Order Receipt in Modify Email Content.

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