Subscription Reports

Overview

Subscriptions Reports are used to search recurring subscriptions. There are many different ways to search recurring subscriptions from your Gateway Account. Learn more on how to search recurring subscriptions according to specific search criteria.

How to Search Subscriptions

The Search Subscriptions form is used to find specific Recurring customers. There are multiple ways to search for Recurring Subscriptions. The fields will help narrow your search results. After searching, the Recurring Subscriptions matching those criteria are displayed. Merchants can retrieve additional information for Recurring Subscriptions by clicking on the blue hyperlink in the 'Customer' column.

They can be searched by the following criteria:

- Subscription ID - the Payment Gateway will automatically generate a unique ID when you create a subscription. Merchants can then search by the Subscription ID.
- Order ID - the order ID is optionally added by the merchant when a subscription is created. Merchants can then search subscriptions by this order ID.
- First Name - if the customer's first name is entered when a subscription is created, merchants can then search by using the first name.
- Last Name - if the customer's last name is entered when a subscription is created, merchants can then search by using the last name.
- Account Number - the account number is the customer's bank account number or credit card number. You have the option to type in the full card number/bank account or just the last four digits.
- Company -the company name is optionally passed by the merchant when a subscription is created. Merchants can then search by this company name.
- Plans - if you created any Plans, you can use the dropdown menu to choose from the list and any customer who is in the plan will appear in your search list.
- Min. Amount/Max. Amount - allows you to enter a specific amount range to target subscriptions of a specific amount or amount range.
- Start Date/End Date - use these dates to search between a specified date range. All the subscriptions added within this date range will be displayed, or click on the calendar dropdown to see other options (today, this week, this month, this quarter, this year, etc.)
- Include Completed Schedules - if you check this box, then any completed subscriptions will appear on your search list.
- Include Deleted Schedules - if you check this box, then any deleted subscriptions will appear on your search list.

- Only Show Expiring Credit Cards - if you check this box then any credit cards that are expired will appear on your search list. If the credit card is expiring soon or the credit card has expired then a yellow or pink flag will appear on the subscription detail.
- Labeled Merchant Defined Fields - if the Merchants have any labeled Merchant Defined Fields, they will show up here and can be used to filter.

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Pausing Subscriptions

Pausing subscriptions will make it so that the subscriptions do not charge again until the merchant resumes them. Pausing subscriptions will take effect immediately and will stop billing until the merchant resumes them. Merchants have the option to pause all subscriptions or pause a single subscription.

Pause/Resume ALL Subscriptions - to pause all subscriptions, click on the red "Pause All Subs" button and then later click on the blue "Resume All Subs" button when the merchant is ready to start running their subscriptions on their regular schedules again. Clicking on the “Pause All Subs” button will pause all subscriptions that the user has access to. If the user has 2,000 subscriptions and they click on "Pause All Subs", this will pause all 2,000 subscriptions.

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Pause/Resume a Single Subscription - once you find the subscription that needs to be paused, click on the Customer Name to pull up the details. In the details page, you will find a checkbox that reads "Subscription is paused". By checking this box and saving, it will pause that single subscription. By unchecking this box and saving, it will resume that single subscription.
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After pausing subscriptions, merchants will see which subscriptions are paused from the List Subscriptions page with a "Paused" red text under the “Details” column:

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Downloaded Reports

You have the option to download the Recurring Customer List by clicking on the "Download Subscriptions" button. The two formats available are Microsoft Excel (.xls), and Comma Separated Value(.csv).

The report will include the fields below if they are filled in for the customer:

- recurring_sku
- subscription_id
- orderid
- orderdescription
- billing_cycle
- start_date
- recurring_plan_name

- created payments
- completed_payments
- attempted_payments
- remaining_payments
- count_failed
- next_charge_date
- account_name
- routing
- account
- payment_type
- account_expiration
- account_holder_type
- account_type
- sec_code
- currency
- amount
- ponumber
- shipping tax
- tax_exempt
- reference_id
- status*
- first_name
- last_name
- company
- country
- address1
- address2
- city
- state
- zipcode
- phone
- fax
- email
- website
- processor
- username
- All Merchant Defined Fields

*paused subscriptions will be listed as status active in downloaded reports

Recurring Customer List

Once you have typed in the information to search for your subscription, the following columns will be displayed:

- Customer - the customer's name will show in this section and the email address below if one was provided.
- Order ID/Plan ID - if an Order ID is provided then it will display in this section and the Plan ID or the Recurring SKU if it is a custom plan.
- Details - a masked credit number or bank account number will display in this column as well as the "paused' status if the subscription is paused.
- Entry Time - will display the date and time the subscription was created.
- Payments - will display how many payments were successful and how many attempts were made. It will also include one of the three options:
  1. the number of payments that still need to be collected if the merchant was set to be charged a certain amount of times
  2. if the subscription payments were Completed
  3. if the subscription will continue Until canceled

Once you pull up the subscription you were searching for → click on the Customer's Name link, this will take you to the customers details page. If a name was not provided then it will display as "(Not Specified)".

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*Recurring customers will be listed in the order of Entry Date.

Recurring Customer Details Management

Once you pull up the customers details page, you will be able to view and manage their Recurring Information, Credit Card and/or Electronic Check Information, Level III Information (if applicable), Customer Information, Merchant Defined Fields (if applicable), Processor, Billing History, and Automatic Card Updater History (if applicable).

Recurring Information

The recurring information is going to include the details of the payment schedule:

- Subscription Id - the unique number tied to the subscription.
- Associated With -the username tied to the user who created the subscription (via Virtual Terminal, API, or Batch Upload) will display here.
- Billing Cycle - the subscription status(active,stopped,inactive), when the billing cycle starts, and when it is set to run
  - Active = Not completed or Paused
  - Stopped = Completed
  - Inactive = Deleted
- Recurring SKU - a number generated by the gateway for internal use.
- Payments - total number of payments that need to be collected.
- Plan Name - the name of the plan tied to the subscription. If no plan is assigned to it then it will say "(CUSTOM PLAN)". If you edit the plan name, make sure to click Save at the bottom of the page.

- Next Charge Date - the first or next date you want to run the payment. If you edit the next charge date, make sure to click Save at the bottom of the page.
- Subscription is paused - this box is used to pause a subscription, it will stop billing for the subscription until you resume and uncheck the box. If you check or uncheck this option, make sure to click Save at the bottom of the page.

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Credit Card / Electronic Check Information

The Credit Card Information will contain the credit card payment details. The option to "Skip this card when using Automatic Card Updater" is available which will not submit the card to be automatically updated if the box is checked. If you edit the Credit Card Information, make sure to click Save at the bottom of the page.

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The Electronic Check Information will contain check payment details (name on account, Routing/ABA Number, Account Number, Account Holder Type, Account Type, Entry Method (SEC Code), and Check Number). If you edit the Electronic Check Information, make sure to click Save at the bottom of the page.

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Level III Information

The Level III Information will contain Level III details that was entered by the merchant. This section will only be apply to merchants who have Level III Advantage Value Added Service enabled. If you edit the Level III Information, make sure to click Save at the bottom of the page.

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Customer Information

The Customer Information will contain any customer details like the name and address. If you edit the Customer Information, make sure to click Save at the bottom of the page.

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Merchant Defined Fields

Merchant Defined Fields will only appear if the Merchant configured any. If you edit the Merchant Defined Fields, make sure to click Save at the bottom of the page.

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Processor

The Processor you chose for the subscription will display here. If you did not choose one then it will be blank. You can also change the processor at any point before the next charge date. If you edit the Processor, make sure to click Save at the bottom of the page.

The "Send Receipt Email" box is also available if the merchant wants an automatic receipt to be sent to the customer for approved recurring transactions. The emailed receipt will go to the email address that is provided in the Customer Information section.

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Billing History

The Billing History will display the status of each payment, the associated transaction ID, Date/Time, and Amount. If you click on the Transaction ID, it will take you to the Transaction Details page. Here are the statutes available:

- Pending Settlement - the transaction was successful but has not been settled yet.
- Complete - the payment was successful and has been settled.
- Failed - the transaction was not successful

* A failed transaction will not count as a collected payment for subscriptions that are set up to collect X amount of payments from the customer. For example, if the subscription is set to charge the customer 3 times, it will continue the normal billing cycle until it collects 3 'Successful' payments. The gateway will not re-attempt any failed payments.

*If the transaction contained Level III Data and Failed then it will display as 'Level III Data'.

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The billing history will also display any errors that occur along with it's Ref ID. In this example, the merchant received 'Error: Amount exceeds the maximum ticket allowed' which means that the amount for that transaction was over what their maximum ticket allowed* is set to.

*Please see Account Limitations for more info.

Billing History

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Update Subscription Warning/Pop-up

If a Partner changed, disabled, or deleted a processor, in the Partner Portal, that was associated to a subscription and did not update the subscription to a new processor, the next time the merchant opens that subscription details page, an "Update Subscription" warning/pop-up will appear that requires action. It will notify the merchant that the processor has been deactivated and that they need to select a new processor, or select 'Use Default', in order for the subscription to run successfully.

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Frequently Asked Questions

Does the merchant receive a subscription report? Merchants can enable the email notification to Receive Recurring Reports.

Is it possible to run a recurring subscription report that will show the next ‘run’ date? Yes, the 'Next Charge Date' will be included in the downloaded Excel file.

Can I subscribe to Recurring Webhooks? Yes, you can get webhooks for adding, updating, or canceling/deleting subscriptions and for adding, updating or deleting plans. Learn more here.

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