



## Protocol for entering Recurring Credit Card Payment – iCheck

1. Open the iCheckGateway portal.
2. Select Customers
3. Choose 'Add Customer'

**iCheckGateway.com**  
Online Terminal Console  
Accessed By: bryansmith  
Time: 10/20/2017 1:46:27 PM  
IP Address: 96.29.16.61  
Site ID: JAHR

View Today | New Transaction | Verify | **Customers** | Invoices | Recurring | POS | Upload | Billing | Search | Reports | Return Codes | Users | Support | Password | Logout

### Customer Account Management

Customer Search:  Search Site ID: JAHR

Customer Number	First Name	Last Name	Company	Zip		
3e093c859d1412	James	Thornhill			Select	Delete
EC582C3E271E4A4	Maria	Vival			Select	Delete
9AE720A2D68544A	Test	Test			Select	Delete
7b898c9019e04cf	Mindy	Towles			Select	Delete

Quick Processing Stats  
Date: October 2017  
Check Processing:  
Transaction Count: 1  
Dollar Volume: \$200.00  
Card Processing:  
Transaction Count: 18  
Sale Volume: \$2,916.00

View Today | New Transaction | Verify | Customers | Invoices | Recurring | POS | Upload | Billing | Search | Reports | Return Codes | Users | Support | Password | Logout

4. Fill out all of the relevant information and Save Changes

**iCheckGateway.com**  
Online Terminal Console  
Accessed By: bryansmith  
Time: 10/20/2017 1:49:44 PM  
IP Address: 96.29.16.61  
Site ID: JAHR

View Today | New Transaction | Verify | Customers | Invoices | Recurring | POS | Upload | Billing | Search | Reports | Return Codes | Users | Support | Password | Logout

### Add New Customer

Back to Customers

Site ID: JAHR

Customer Number: 6329260CB04E47A

First Name: B

Last Name: Smith

Company: ABC Company

Address 1: 123 Main St

Address 2:

City: Lexington

State/Province: KY

Zip: 40503

Phone:

Email Address:

Notes:

Save Changes

View Today | New Transaction | Verify | Customers | Invoices | Recurring | POS | Upload | Billing | Search | Reports | Return Codes | Users | Support | Password | Logout



## 5. Enter all of the appropriate Detail for the Customer

**View Customer Details** [Customer List](#) | [Edit](#) | [Setup Recurring](#) | [Add Customer](#)

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Site ID:	JJHR
Customer Number:	6329260CB04E47A
First Name:	B
Last Name:	Smith
Company:	ABC Company
Address 1:	123 Main St
Address 2:	
City:	Lexington
State:	KY
Zip:	40503
Phone:	
Email Address:	
Notes:	

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Credit Card Number:	<input type="text"/>
Expiration Date:	<input type="text"/> (MMYY)
CVC Code:	<input type="text"/>

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Routing Number:	<input type="text"/>
Account Number:	<input type="text"/>
Account Type:	Personal Checking ▾
Entry Class Code:	Select ▾

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Site ID:	JJHR ▾
Transaction Date:	10/20/2017 <input type="text"/>
Transaction Type:	Debit (Sale From Customer) ▾
New Transaction Amount:	<input type="text"/>
Sales Tax:	0.00 <input type="text"/>
Custom 1:	<input type="text"/>
Custom 2:	6329260CB04E47A
Custom 3:	<input type="text"/>
Memo:	<input type="text"/>

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OR

## 6. Then Choose Setup Recurring



Online terminal

Accessed By:  
Time: 10/5/2017 1  
IP Address: 7  
Sit

[View Today](#) | [New Transaction](#) | [Verify](#) | [Customers](#) | [Invoices](#) | [Recurring](#) | [POS](#) | [Upload](#) | [Billing](#) | [Search](#) | [Reports](#) | [Return Codes](#) | [Users](#) | [Support](#) | [Password](#) | [Logout](#)

**View Customer Details**

[Customer List](#) | [Edit](#) | [Setup Recurring](#) | [Add](#)



7. Fill out the Recurring Transaction information, choose continue

**New Recurring Transaction**

Site ID:	JAHR ▾
Start Date: *	10/05/2017 <input type="text"/>
Schedule: *	Monthly ▾
Term: *	Continuous Payments ▾
Amount: *	<input type="text"/>
First Name:	<input type="text"/>
Last Name: *	<input type="text"/>
Company Name:	<input type="text"/>
Email Address:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
Street Address 1:	<input type="text"/>
Street Address 2:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Postal Code:	<input type="text"/>
Custom 1:	<input type="text"/>
Custom 2:	<input type="text"/>
Custom 3:	<input type="text"/>
Transaction Type:	Debit (Sale) ▾

8. Complete the Credit Card information, select Process Card

**View Customer Details**

Customer List | Edit | Setup Re

Site ID:	JAHR
Customer Number:	9AE720A2D68544A
First Name:	Test
Last Name:	Test
Company:	
Address 1:	
Address 2:	
City:	
State:	
Zip:	
Phone:	
Email Address:	
Notes:	

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Credit Card Number:	<input type="text"/>
Expiration Date:	<input type="text"/> (MMYY)
CVC Code:	<input type="text"/>

---

Routing Number:	<input type="text"/>
Account Number:	<input type="text"/>
Account Type:	Personal Checking ▾
Entry Class Code:	Select ▾

---

Site ID:	JAHR ▾
Transaction Date:	10/05/2017 <input type="text"/>
Transaction Type:	Debit (Sale From Customer) ▾
New Transaction Amount:	0.00 <input type="text"/>
Sales Tax:	0.00 <input type="text"/>
Custom 1:	<input type="text"/>
Custom 2:	9AE720A2D68544A
Custom 3:	<input type="text"/>
Memo:	<input type="text"/>

OR