

Recurring Billing



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Revision

Version: 24.05

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Recurring Billing Upgrade Guide

This section describes how to use this guide and where to find further information.

Audience and Purpose

This guide is written for merchants who use the legacy Recurring Billing service with secure storage and must update their order management system and recurring billing processes to use the upgraded Recurring Billing service that is available through the Business Center and the REST API.

Conventions

The following special statement is used in this document:



Important

An Important statement contains information essential to successfully completing a task or learning a concept.

Related Documentation

Visit the [Cybersource documentation hub](#) to find additional technical documentation.

Recurring Billing Developer Guide (for the REST API):

<https://developer.cybersource.com/docs/cybs/en-us/recurring-billing/developer/all/rest/recurring-billing-dev/recur-bill-dev-intro.html>

Recurring Billing User Guide:

<https://developer.cybersource.com/docs/cybs/en-us/recurring-billing/user/all/>

[rest/recurring-billing-user/recur-bill-services-intro.html](https://developer.cybersource.com/docs/rest/recurring-billing-user/recur-bill-services-intro.html)

Create a Customer Token with Validated Payment Details section in the Token Management Service Developer Guide:

<https://developer.cybersource.com/docs/cybs/en-us/tms/developer/ctv/rest/tms/tms-cust-tkn/tms-cust-tkn-create-valid-pay-intro.html>

Unified Checkout Integration Developer Guide:

<https://developer.cybersource.com/docs/cybs/en-us/unified-checkout/developer/all/rest/unified-checkout/uc-intro.html>

Secure Storage to Token Management Service Migration, Integration guidance

<https://support.visaacceptance.com/knowledgebase/knowledgearticle/?code=KA-04113>

Customer Support

For support information about any service, visit the Support Center:

<http://support.visaacceptance.com>

Recent Revisions to This Document

25.05.01

Add a new section. See [Customer Notifications](#) on page 10.

Made updates to these sections:

- [Subscription Name Changes](#) on page 17
- [Secure Acceptance Hosted Checkout Integration and Checkout API](#) on page 29

24.05

Post-Migration Information

Added new information that you must be aware of immediately after you finish your migration to the new Recurring Billing. See these topics:

- [Stabilization Period](#) on page 12
- [Subscription Name Changes](#) on page 17

24.04

This revision contains only editorial changes and no technical updates.

24.03

This revision contains only editorial changes and no technical updates.

24.02

This revision contains only editorial changes and no technical updates.

24.01

Initial release.

Introduction to Upgrading the Recurring Billing Service

Cybersource is replacing the legacy Recurring Billing service with an upgraded Recurring Billing service. You can access the service in the Business Center only, or you can access it in the Business Center along with the REST API for Recurring Billing and the Token Management Service (TMS).



Important

The Recurring Billing service is available for the REST API only. The service is not available in the SCMP API or the Simple Order API. If you use the SCMP API or the Simple Order API to create and manage subscriptions, you must integrate to the Recurring Billing service that uses the REST API.

With the upgraded Recurring Billing service, you can manage payment plans and subscriptions for recurring payment schedules. TMS stores your customer's payment information and personal data within secure Visa data centers, reducing storage risks and PCI DSS compliance scope.

The upgraded Recurring Billing product benefits merchants and customers in these ways:

- Reduces effort associated with automated payments and payment card updates.
- Decreases late payments with scheduled payments at set intervals.
- Improves customer relationships by providing a better online experience.
- Cuts your costs and reducing waste with streamlined payment processes.
- Keeps payment information secure by using tokens.

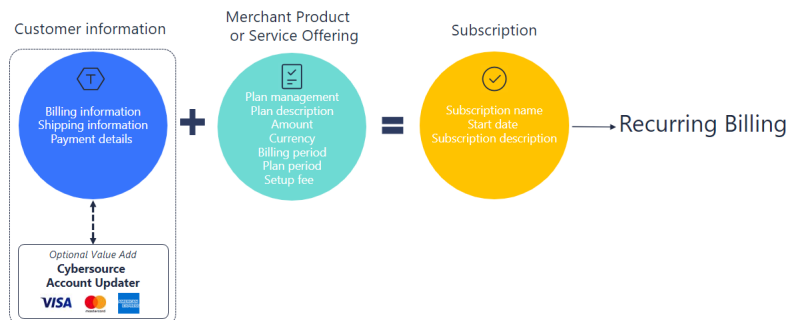
Upgraded Recurring Billing

The upgraded Recurring Billing consists of three key elements:

- Customer Token: Stores customer billing, shipping, and payment details.
- Plan: Stores the billing schedule.

- **Subscription:** Combines the token and plan, and determines the subscription start date, name, and description.

This figure illustrates the components of automatic recurring payments.



Automating Recurring Payments

Plans

Plans are a new feature in the upgraded Recurring Billing. They help you manage setup costs and recurring amounts for multiple subscriptions. You can set up and manage plans in the Business Center or through the API. A plan includes a setup fee and a recurring amount. When creating a subscription for a customer, you can assign them to a plan. If you change a plan, decide if the change applies to new subscriptions, or both new and existing subscriptions.

You can still create ad-hoc subscriptions if preferred, but these need individual management.

Plans can be retrieved, amended, activated, deactivated, or deleted.

Recurring Billing supports two types of plans:

- **Standard plans:** created and stored within the recurring billing service for re-use. You can assign these plans to multiple subscriptions.
- **One-time plans:** created specifically for a single subscription and not stored for re-use nor assigned to other subscriptions.

Plans have two billing cycle options:

- The bill has a payment schedule with no end date.
- The bill has a payment schedule with a fixed number of payments.

When creating or updating a plan, you can take these actions:

- Define the billing schedule by setting amount, currency, and frequency.
- Specify the number of billing cycles for a fixed number of payments.
- Include an optional set-up fee.
- Set up a single plan to apply to multiple individual subscriptions.
- Make changes to the plan and choose whether to apply them only to new subscriptions, or to all existing subscriptions.

Subscriptions

Subscriptions can be retrieved, amended, suspended, reactivated, or cancelled.

When creating or updating a subscription, you can take these actions:

- Quickly create a subscription defining the billing schedule with an existing plan, or you can create a one-time plan.
- Assign the customer token that represents customer billing, shipping, and payment details.
- Move subscriptions from one plan to another plan.
- Set the start date.

Upgraded Report Fields


The new Recurring Billing report contains the fields in this table:

Recurring Billing Report Fields

AccountSuffix	BillTo_State	SubscriptionID
ApplicationName	BillTo_Zip	SubscriptionName
AuthorizationCode	CardType	SubscriptionNextPaymentDate
BillingCycles	CurrencyCode	SubscriptionPaymentAmount
BillingPeriodLength	ExpirationMonth	SubscriptionRetryCount
BillingPeriodUnit	ExpirationYear	SubscriptionStartDate
BillTo_Address1	MerchantID	SubscriptionStatus
BillTo_Address2	PlanCode	SurchargeAmount
BillTo_City	PlanCurrency	SurchargeDescription
BillTo_Country	PlanName	TMSCustomerID
BillTo_Email	RequestDate	TMSPaymentInstrumentID
BillTo_FirstName	RequestID	TMSShippingID
BillTo_LastName	SetupFee	TransactionReferenceNumber
BillTo_Phone	SubscriptionCode	—

Business Center Permissions

The upgraded Recurring Billing service requires you to configure role permissions. Follow these steps to configure role permissions:

1. In the Business Center left navigation panel, click the **Account Management** icon ().
2. Click **Roles**. The Roles page appears.

3. Expand the Token Management Permissions list.

Token Management Permissions <input type="checkbox"/>	
Role Type	Selected
Token Dashboard View	<input type="checkbox"/>
Token Dashboard Manage	<input type="checkbox"/>
Token View	<input type="checkbox"/>
Token Create	<input type="checkbox"/>
Token Edit	<input type="checkbox"/>
Token Delete	<input type="checkbox"/>
On Demand Payment	<input type="checkbox"/>

4. Check the box next to the name of each role that you want to add.

5. Expand the Subscriptions and Recurring Billing Permissions list.

Subscriptions and Recurring Billing Permissions <input type="checkbox"/>	
Role Type	Selected
Subscriptions and Recurring Billing Plan View	<input type="checkbox"/>
Subscriptions and Recurring Billing Plan Management	<input type="checkbox"/>
Subscriptions and Recurring Billing Subscription View	<input type="checkbox"/>
Subscriptions and Recurring Billing Subscription Management	<input type="checkbox"/>
Subscriptions and Recurring Billing Settings View	<input type="checkbox"/>
Subscriptions and Recurring Billing Settings Management	<input type="checkbox"/>

6. Check the box next to the name of each role that you want to add.

7. Click **Save**.

Customer Notifications

The new Recurring Billing supports two customer notification methods: email and webhooks.

Email Notifications

Legacy Recurring Billing does not send customer notifications by email. The new Recurring Billing automatically sends email notifications to customers.

Webhook Notifications

Cybersource offers the Webhooks REST API. You can use it to subscribe to a webhook for a supported system event type. Designate a URL to receive notifications for that event. Webhooks let you respond to events with code.

Create and manage webhook subscriptions for Recurring Billing event types listed in the table. In the webhooks request message, set the `productId` API field to `recurringBilling`. Then, set the `eventTypes` API field to one of the values in the Event Type column of the table.

Recurring Billing Event Notifications

Product ID	Event Types	Description
recurringBilling	rbs.subscriptions.charge.failed	Notifies you of a recurring payment failure.
	rbs.subscriptions.charge.pre-notified	Notifies you of an upcoming recurring payment.
	rbs.subscriptions.charge.created	Notifies you of successful recurring payment.

To customize your notifications, use webhooks. For more details, see the Cybersource API Developer Center [Create Webhook Security Keys](#) to create a webhook test API request in the live, test console. You can test example requests for different payment processors.

Post-Migration Information

This section describes changes to how you use the new Recurring Billing service as compared to how you used the legacy system.

Creating a Subscription using the API

To create a subscription, you need a customer token. For more details, see the Cybersource API Developer Center [Create a Subscription](#) to create a test example API request.

After migration, a customer token is created in TMS for each active subscription in the legacy system. This token has the same ID as the subscription. You can use this token to create another subscription for the same customer.

To create a subscription for a new customer, you must generate a new customer token. When capturing payment card data for future use, validate the payment card account by:

- Using a payment for a zero amount, or
- If your processor does not support zero amount, using a minimal amount.

Enable the Data Enrichment for Card Verification feature to automatically choose the minimal auth amount. Contact Customer Support for more details.

The best way to perform this transaction is via the REST API. For more information, see the [Create a Customer Token with Validated Payment Details](#) section in the [Token Management Service Developer Guide](#).

If using Secure Acceptance Checkout or SCMP/SOAP API to create tokens, follow these steps:

1. Change the request field `recurring_frequency` value to `on-demand`.
2. Remove any other subscription-related fields (`recurring_*`) from the request.

Your current integration will fail once migration starts. Prepare changes on your site in advance. Before migration, create tokens as described above. After migration, create subscriptions for them.

To create a subscription, use this data from the payment response:

Customer ID:

- Payments REST API: **tokenInformation.customer.id**
- Secure Acceptance Checkout: **payment_token**
- SCMP API: **pay_subscription_create_subscription_id**
- SOAP API: **paySubscriptionCreateReply_subscriptionID**

Original Transaction ID:

- Payments REST API: **processorInformation.networkTransactionId**
- Secure Acceptance Checkout: **payment_network_transaction_id**
- SCMP API: **auth_payment_network_transaction_id**
- SOAP API: **ccAuthReply_paymentNetworkTransactionID**

Original Transaction Authorized Amount: (Required only for Diners and Discover cards)

- Payments REST API: **orderInformation.amountDetails.authorizedAmount**
- Secure Acceptance Checkout: **auth_amount**
- SCMP API: **auth_auth_amount**
- SOAP API: **ccAuthReply_amount**

For more details on creating a subscription, see to the [Create a Subscription](#) section in the [Recurring Billing User Guide](#).

Stabilization Period

For the first two weeks after you migrate from legacy Recurring Billing to the new Recurring Billing, these Recurring Billing functions are limited:

Creating a Subscription with a New Customer Flow Using the Business Center

During the payment synchronization period, you cannot use the new customer flow.

The screenshot shows the Cybersource 'Manage Subscriptions' page. A modal titled 'Select Customer Type' is open, asking 'Is this for a new or an existing customer?'. It has two options: 'New Customer' (selected) and 'Existing Customer'. Below these is an information box stating 'New Customers Disabled Temporarily for Migration'. The background shows a table of subscriptions with 5 results.

Subscription Code	Subscription Name	First Name	Last Name	Plan Name	Amount	Start Date
5	ewe 5	JOHN	DOE	Not Applicable	43.00 USD	2025-01-24 PST
4	ewe 4	JANE	SOE	Not Applicable	123.00 USD	2025-01-24 PST
3	ewe3	JOHN	DOE	Not Applicable	22.00 USD	2025-02-15 PST
2	ewe 2	JOHN	DOE	Not Applicable	21.00 USD	2025-01-24 PST
1	ewe 1	JOHN	DOE	Not Applicable	1.00 USD	2025-01-24 PST

To create a subscription for a new customer (without saved payment information), use the Token Management Service interface in the Cybersource Business Center. Follow these steps to create a customer token in the Business Center:

1. On the left navigation panel, click **Token Management**.
2. Click **Tokens**. The Tokens page appears.

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Feedback Support Notifications testrb

Account ID testrb_acct | Merchant ID testrb

Currently logged into test server

Token Management Tokens [PROFILE SETTINGS](#)

248 profiles with filters: [Organization scope: CyberSource Merchant ID](#) [Scope: All Profiles](#) [RESET](#)

Profile List

Profile ID	Title	Merchant Reference Num...	First/Last Name	Card Expiration	Status
7376420673016263304506	Sub_42	MerRefCode	JOHN DOE	01/2026	Current
3366061279230176056442	Sub_41	MerRefCode	JOHN DOE	01/2014	Current
3366057084760176056470	Sub_40	MerRefCode	JOHN DOE	01/2014	Current
3343377629850176056428	Sub_39	MerRefCode	JOHN DOE	01/2013	Current
3342662895490176056442	Sub_38	MerRefCode	JOHN DOE	01/2014	Current
3342652016020176056428	Sub_37	MerRefCode	JOHN DOE	01/2013	Current
3325300683970176056442	Sub_36	MerRefCode	JOHN DOE	01/2014	Current
3317467041010176056428	Sub_35	MerRefCode	JOHN DOE	01/2014	Current
3317460185610176056428	Sub_34	MerRefCode	JOHN DOE	01/2013	Current

Showing 1 - 10 of 248 results: 1 2 3 4 5 6 7 8 ... 25

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3. Click **New Profile**.

4. Enter the **Merchant Reference Number**, **Payment**, and **Shipping Address** details.

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Feedback Support Notifications testrb

Account ID testrb_acct | Merchant ID testrb

Token Management Tokens [Help](#)

248 profiles with filters: [Organization scope: CyberSource Merchant ID](#) [Scope: All Profiles](#)

Profile List

Profile ID	Title	Merchant Reference
7376420673016263304506	Sub_42	MerRefCode
3366061279230176056442	Sub_41	MerRefCode
3366057084760176056470	Sub_40	MerRefCode
3343377629850176056428	Sub_39	MerRefCode
3342662895490176056442	Sub_38	MerRefCode
3342652016020176056428	Sub_37	MerRefCode
3325300683970176056442	Sub_36	MerRefCode
3317467041010176056428	Sub_35	MerRefCode
3317460185610176056428	Sub_34	MerRefCode

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Add Profile

Order Information

Fields marked with * are required

Order/Merchant Reference Number*

MerRefCode

Description and Comments

(You can enter a maximum of 256 characters without line breaks.)

Merchant-Defined Data Field 1 Merchant-Defined Data Field 2

Merchant-Defined Data Field 3 Merchant-Defined Data Field 4

☐ I accept the [Terms for Usage of Merchant-Defined Data fields](#)

Payment Information

Payment Type*

Credit Card

Card Type*

Visa

Credit Card Number*

4111111111111111

Card Verification Number Card Expiration Date*

January / 2035

CANCEL SAVE

5. You can leave the **Profile Information** field blank for the system to perform a zero authorization. Alternatively, enter your own **Amount and Set Up Fee**.

6. Click **Save**.

7. A message at the top of the screen confirms that the profile is created and migration is in progress. The token is being added to TMS, so wait a moment.

Profile created successfully [DISMISS]

Warning: This MID is currently in Migration Mode from Secure Storage to TMS - As a result there will be a delay, if needed please refresh the page. [DISMISS]

tokens

248 profiles with filters: **Organization scope: CyberSource Merchant ID** **Scope: All Profiles**

Profile List

Profile ID	Title	Merchant Reference
7376420673016263304506	Sub_42	MerRefCode
3366061279230176056442	Sub_41	MerRefCode
3366057084760176056470	Sub_40	MerRefCode
3343377629850176056428	Sub_39	MerRefCode
3342662895490176056442	Sub_38	MerRefCode
3342652016020176056428	Sub_37	MerRefCode
3325300683970176056442	Sub_36	MerRefCode
3317467041010176056428	Sub_35	MerRefCode
3317460185610176056428	Sub_34	MerRefCode

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Profile Information

Title: John Doe

Company: [Empty]

Street Address 1: [Empty]

Street 1: [Empty]

Street Address 2: [Empty]

City: Los Angeles State: CA Zip/Postal Code: 01237

Country: United States

Profile Information

Title: [Empty]

Default Amount: [Empty]

Currency: United States: Dollar

Set Up Fee: [Empty]

[CANCEL] [SAVE]

8. The screen refreshes, and you see the details of the new token you just created.

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Feedback Support Notifications testrb

Account ID testrb_acct | Merchant ID testrb

Currently logged into test server

Payment Tokenization

Profile Detail: Profile ID 7379813436456992204506 [← BACK TO RESULTS](#)

Profile Information

Title	
Amount	0.00 USD
Setup Fee	0.00 USD
Start Date	Jan 28 2025
Payments Completed	0
Status	Current

Payment Information

Card Type	Visa
Account Number	xxxxxxxxxxxx1111
Expiration Date	01/2035
Bill Payment with Visa	No

Order Information

Order/Merchant Reference Number	MerRefCode
Comments	
Merchant-Defined Data Field 1	
Merchant-Defined Data Field 2	
Merchant-Defined Data Field 3	
Merchant-Defined Data Field 4	

Billing Information

First/Last Name	JOHN DOE
Company	na
Company Tax ID	
Customer ID	
Address	Street 1
City	Los Angeles
State	CA
Postal Code	01237
Country	US
Phone Number	
Email Address	test@cybs.com

Shipping Information

First/Last Name	JOHN DOE
Company	
Address	Street 1
City	Los Angeles
State	CA
Postal Code	01237
Country	US

Use the existing customer flow with the token you just created. For more information, see [Creating a Subscription with an Existing Customer Token](#) section in the [Recurring Billing User Guide](#).

Follow these steps to apply the token to an existing customer in the Business Center:

1. On the left navigation panel, click **Recurring Billing**.
2. Click **Manage Subscriptions**. The Manage Subscription page appears.
3. Click **Create Subscription**.
4. Select **Existing Customer**, and then click **Continue**.

The screenshot shows the Cybersource Recurring Billing interface. A modal dialog titled "Select Customer Type" is open, asking "Is this for a new or an existing customer?". The "Existing Customer" option is selected. Below the modal, a table displays search results for subscriptions.

Subscription Code	Subscription Name	First Name	Last Name	Plan Name	Amount	Start Date
5	ewe 5	JOHN	DOE	Not Applicable	43.00 USD	2025-01-24 PST
4	ewe 4	JANE	SOE	Not Applicable	123.00 USD	2025-01-24 PST
3	ewe3	JOHN	DOE	Not Applicable	22.00 USD	2025-02-15 PST
2	ewe 2	JOHN	DOE	Not Applicable	21.00 USD	2025-01-24 PST
1	ewe 1	JOHN	DOE	Not Applicable	1.00 USD	2025-01-24 PST

5. Enter the customer's first and last name to find the token you just created.

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Account ID: testrb_acct | Merchant ID: testrb

Currently logged into test server

Recurring Billing / [Manage Subscriptions](#)

Create Subscription

- Customer Details**

Selected customer type * = Required
Type: Existing Customer [Change](#)

Search for an existing customer

First Name * Last Name *

[Search](#)
- Payment Details**

Add how this customer will pay for this subscription
- Shipping Address Details**

Select if you'd like to add a shipping address for this subscription or not

After this period (two weeks after your migration complete date), you can leverage all features within the Business Center to create subscriptions. For more information, see [Creating a Subscription with a New Customer Token](#) in the [Recurring Billing User Guide](#).

Subscription Name Changes

For improved security, additional restrictions or validations may be applied to legacy subscription names. If a legacy subscription name contains special characters not permitted by the new service, the migration process replaces those characters with a dash ('-'), which is allowed.

For example, any underscore ('_') in a legacy subscription name is replaced with a dash ('-').



Important

When filtering and searching for subscription names, remember that legacy subscription names may have been modified during the migration to the new Recurring Billing.

These characters are allowed:

- Lowercase letters: a-z
- Uppercase letters: A-Z
- Digits: 0-9
- Special characters: ? . , \$ / @ & ! : -
- Space

These characters are restricted:

- Special Characters:
 - # (hash)
 - % (percent)
 - ^ (caret)
 - * (asterisk)
 - ((left parenthesis)
 -) (right parenthesis)
 - _ (underscore)
 - + (plus)
 - = (equals)
 - { (left curly brace)
 - } (right curly brace)
 - [(left square bracket)
 -] (right square bracket)
 - | (vertical bar)
 - \ (backslash)
 - ; (semicolon)
 - ' (single quote)
 - " (double quote)
 - < (less than)
 - > (greater than)
 - ~ (tilde)
 - ` (backtick)
- Non-ASCII Characters:
 - é (accented e)
 - ç (cedilla)
 - ü (umlaut u)
 - ñ (tilde n)
 - Ω (Greek Omega)
 - Emojis:
 - 😊 (smiling face)
 - 🚀 (rocket)
 - 💡 (light bulb)
 - Control Characters:
 - \t (tab)
 - \n (newline)
 - \r (carriage return)

Prerequisites

Before you begin using the upgraded Recurring Billing service, make sure that the prerequisites are completed:

1. Understand how you currently use the legacy Recurring Billing service.
2. Understand the actions required by Cybersource and, if relevant, your reseller.
3. Integrate to the upgraded Recurring Billing using the REST API.
4. Integrate to Payments using the REST API.
5. Become familiar with the Business Center interface for the upgraded Recurring Billing service.
6. Contact Cybersource customer support to begin migrating your legacy Recurring Billing data (tokens and subscriptions) to the new Recurring Billing service.

Here is the revised text for clarity:

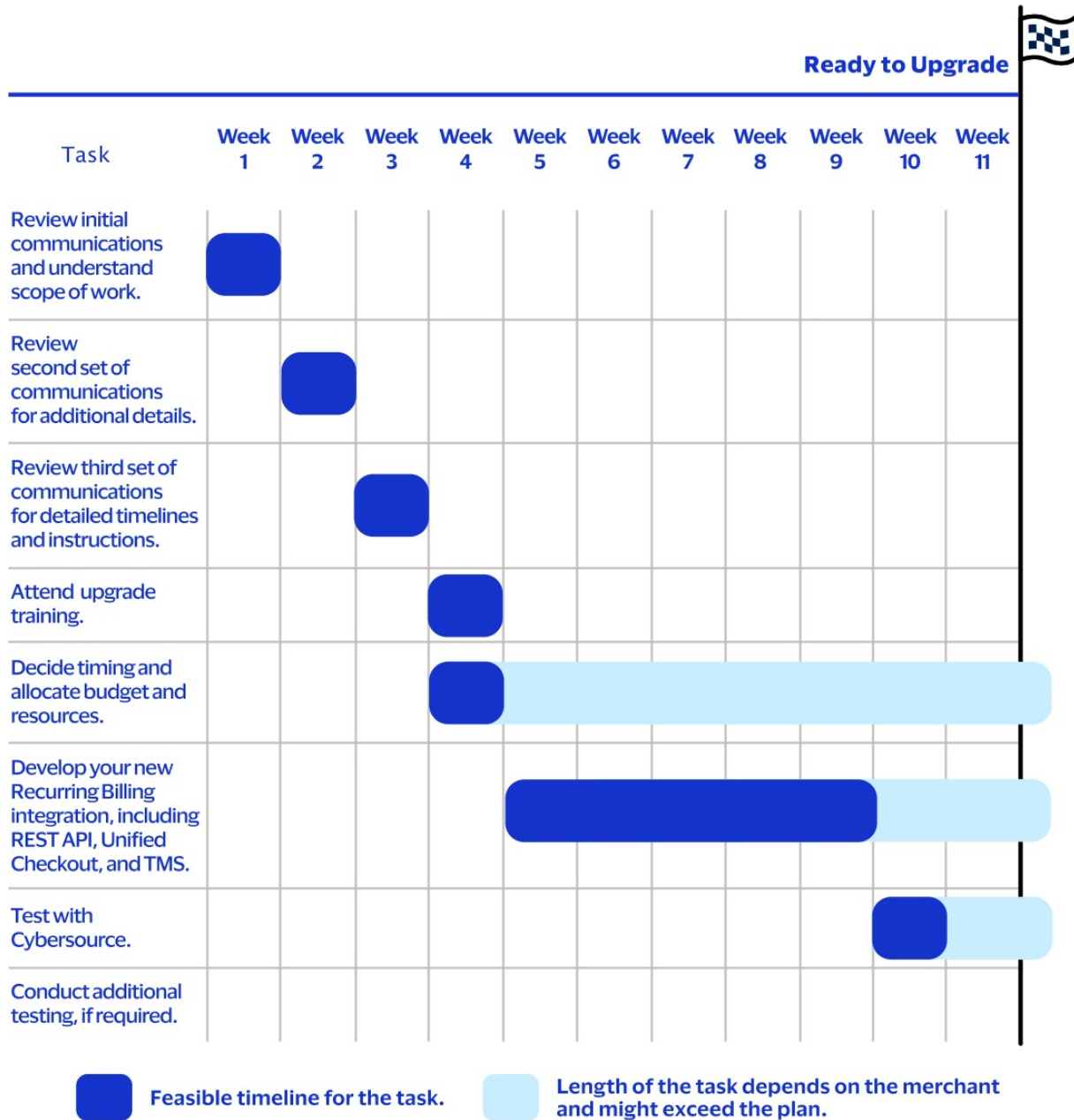


Important

Cybersource will migrate all legacy Recurring Billing tokens to TMS. Only active subscriptions will be migrated. Canceled, On Hold, or Completed subscriptions will not be included. After the migration to the new Recurring Billing Platform, historical data about the subscriptions will not be available.

Timeline

Migrating from the legacy Recurring Billing to the new Recurring Billing service takes a few weeks. This timeline example shows activities and the estimated amount of time for completion.



Timeline Example

Legacy and Upgraded Recurring Billing Feature Comparison

This table compares key features of the legacy Recurring Billing to the new Recurring Billing service.

Feature Comparison

Feature	Legacy Recurring Billing	Upgraded Recurring Billing
Subscription management	Create, manage, edit, cancel, suspend, and skip or unskip subscriptions.	Create, retrieve, amend, reactivate, suspend, and cancel subscriptions. To skip a payment, you can suspend and reactivate the subscription.
Plan management with subscription templates	Not available.	Full plan management that includes create, retrieve, amend, activate, deactivate, and delete.
Integration methods	SCMP API Simple Order API Secure Acceptance	REST API.
Online portal	Business CenterCreate subscriptions in: Recurring Billing Virtual Terminal Transaction management as a follow-on transaction Batch upload	Business CenterCreate subscriptions in: Recurring Billing Virtual Terminal (create customer token within Virtual Terminal One-time Payment and then use it to create a subscription from token management tab or create subscription using Existing Customer flow)
Data security	Secure storage tokenization, legacy with end-of-life plan.	Token Management Service (TMS).
Failed transaction retry logic	Maximum of five system retries.	Maximum of four system retries.
Payment methods	Payment cards on major networks. Bank accounts (ACH).	Payment cards on major networks. Bank accounts (ACH).
Account Updater	Optional support on secure storage.	Optional support on TMS.

Legacy and Upgraded Business Center and API Service Feature Comparison

This table lists common recurring billing key features and compares the legacy Recurring Billing service using the SCMP and Simple Order APIs to the upgraded Recurring Billing service and Token Management Service (TMS) that use the REST API and the Business Center.

API Service Feature Comparison

Feature	Legacy Recurring Billing	Upgraded Recurring Billing
Email notifications.	Set up notifications in the Business Center.	Notifications are sent automatically to the email address associated with the customer token. They contain information from the plan and subscription details for a prepayment, successful payment, or failed payment.
Merchant-initiated transactions.	For more information, see Support for Merchant-Initiated Transactions and Credential-on-File for Visa, Mastercard, and Discover .	
Optional data storage.	Other data storage where data is encrypted or not encrypted.	Not possible.
Replacement expiration dates.	Contact customer support to enable your account.	Not possible.
Customer subscription sharing.	Contact customer support to enable your account.	Not possible.
Account Updater.	Integrated with Recurring Billing to keep card data current through SCMP API or Simple Order API batch uploads and automatic updates.	Integrated with Recurring Billing to keep card data current through REST API batch uploads and automatic updates.

Legacy and Upgraded Business Center and API Service Action Comparison

This table lists common recurring billing actions and compares the legacy Recurring Billing service using the SCMP and Simple Order APIs to the upgraded Recurring Billing service and Token Management Service (TMS) that use the REST API and the Business Center.

Legacy and Upgraded Business Center API Service Action Comparison

Action	Legacy Recurring Billing	Upgraded Recurring Billing
Creating an on-demand customer profile token.	Use the create subscription service to create a subscription ID.	Use TMS with the REST API or the Business Center to create a customer token.
Creating a customer profile token with a set-up fee.	Use the create subscription service to create a subscription ID and use the authorization and capture services to charge the set-up fee.	Use TMS with the REST API or the Business Center to create a customer token.
Creating a customer profile token with a payment network token.	Use the create subscription service to create a subscription ID and authorization service to validate the payment network token.	Use TMS with the REST API or the Business Center to create a customer token.
Creating an eCheck customer profile token.	Use the create subscription service to create a subscription ID.	Use TMS with the REST API or the Business Center to create a customer token.
Creating an installment subscription with payment card or Check.	Use the create subscription service to create a subscription ID and installment subscription.	Use the REST API or the Business Center to create a plan with a fixed number of payments and to create a subscription with a customer token.

Action	Legacy Recurring Billing	Upgraded Recurring Billing
Creating an installment subscription with a payment network token.	Use the create subscription service and use the authorization service to create a subscription ID and installment subscription.	Use the REST API or the Business Center to create a plan with a fixed number of payments and to create a subscription with a customer token.
Creating a recurring subscription with a payment card or check.	Use the create subscription service to create a subscription ID and recurring subscription.	Use the REST API or the Business Center to create a plan that bills indefinitely and to create a subscription.
Creating a recurring subscription with a payment network token.	Use the create subscription service and the authorization service to create a subscription ID and recurring subscription.	Use the REST API or the Business Center to create a plan that bills indefinitely and to create a subscription.
Retrieving a subscription.	Use the retrieve subscription service to retrieve a subscription ID.	Use the Recurring Billing REST API or the Business Center to retrieve a subscription or a list of subscriptions.
Updating a subscription with a payment card.	Use the subscription update service to update a subscription payment card.	Use TMS with the REST API or the Business Center to update the customer profile token.
Removing a payment card expiration date.	Use the update subscription service to remove a subscription payment card.	Use TMS with the REST API or the Business Center to update a customer profile token.
Replacing a payment card with a payment network token.	Use the update subscription service to update a subscription ID.	Use TMS with the REST API or the Business Center to update a customer profile token.
Replacing a payment network token with a payment card.	Use the update subscription service to replace a payment network token with a payment card.	Use TMS with the REST API or the Business Center to update a customer profile token.

Action	Legacy Recurring Billing	Upgraded Recurring Billing
Updating an eCheck account number.	Use the update subscription service to update an eCheck account number.	Use TMS with the REST API or the Business Center to update a customer profile token.
Changing a payment method.	Use the update subscription service to change a subscription payment method.	Use TMS with the REST API or the Business Center to update a customer profile token.
Updating subscription payments.	Use the update subscription event service to edit a subscription.	Edit a subscription plan in the Business Center or amend the plan using the REST API.
On-demand transaction.	Use the authorization and capture service for an on-demand payment.	Use the Virtual Terminal in the Business Center.
Converting a transaction to a subscription.	Use the create subscription service to create a subscription ID using an original transaction request ID.	Use the Recurring Billing REST API or the Business Center to create a Follow-On subscription using the original transaction ID.
Cancelling a subscription.	Use the update subscription service to cancel a subscription.	Use the REST API or the Business Center to cancel a subscription.
Deleting a subscription.	Use the delete subscription service to delete a subscription.	Use the REST API or the Business Center to cancel a subscription.

Migration Activities

Cybersource will prepare you and your data for the migration, and you will update your processes and order management system.

**Important**

In some cases, we cannot decide the integration method you currently use to create subscriptions. Review all of the action cohorts to decide which one matches your needs and follow that upgrade path.

Preparation

Cybersource will inform you about migration timelines and expectations.

Cybersource will migrate all legacy Recurring Billing tokens to TMS. Only active subscriptions will migrate to the upgraded Recurring Billing service. Canceled, On hold, and Completed subscriptions will not migrate. Cybersource will provide access to these through the Business Center, the REST API, and TMS.

Cybersource will offer training for the migration to the upgraded Recurring Billing.

**Important**

No historical data about the subscriptions will be available after the migration to the new Recurring Billing Platform.

Updating Your Processes and Order Management System

You must update your processes and order management system in order to upgrade to the new Recurring Billing service.

Merchants are divided into six groups (action cohorts) according to the legacy Recurring Billing integration method. Each of the six groups has its own set of upgrade steps:

- [Business Center User Interface](#) on page 27
- [Business Center Virtual Terminal](#) on page 27
- [Business Center Transaction Management](#) on page 28
- [SCMP API and Simple Order API](#) on page 28
- [Secure Acceptance Hosted Checkout Integration and Checkout API](#) on page 29
- [Aura and Cold Fusion](#) on page 30

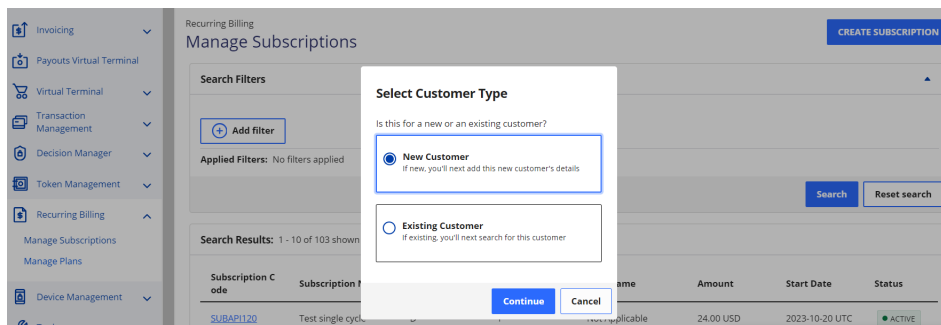
Business Center User Interface

If you use the Business Center Recurring Billing service to create and maintain subscriptions, you can continue to do so after your existing subscription tokens are migrated to the upgraded Recurring Billing and TMS in the Business Center. No API integration updates are required.

Follow these steps to prepare for your upgrade:

1. Become familiar with the new Recurring Billing service user interface in the Business Center.
2. Contact Cybersource client services to start the migration.

This image shows the upgraded Recurring Billing user interface for creating a new subscription or maintaining an existing subscription.



Example Upgraded Recurring Billing User Interface

Related Information

[Recurring Billing User Guide](#)

Business Center Virtual Terminal

If you use the Virtual Terminal to create tokens during one-time payments and to create and maintain subscriptions, you can continue to do so after your existing subscription tokens are migrated to the upgraded Recurring Billing service and TMS in the Business Center. No API integration updates are required.

Follow these steps to prepare for the migration:

1. Become familiar with the new Recurring Billing service user interface in the Business Center.

2. Become familiar with the new Recurring Billing two-step process for creating subscriptions.
3. Contact Cybersource client services to start the migration.

Related Information

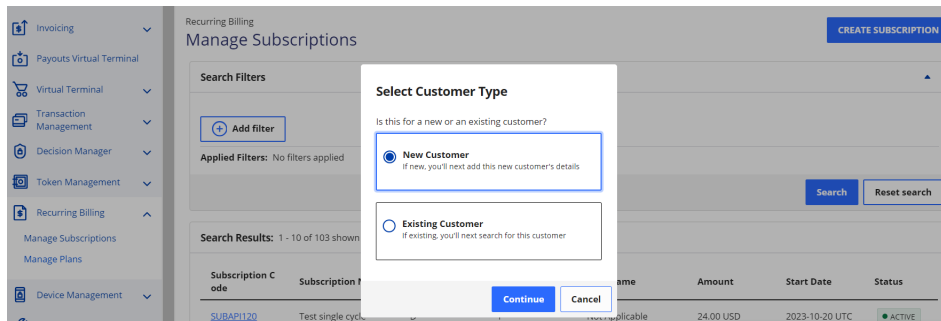
[Recurring Billing User Guide](#)

Business Center Transaction Management

If you use Business Center Transaction Management to create subscriptions, select Action and then Create Subscription on the Transaction Details screen. The system will direct you to the new Recurring Billing service user interface in the Business Center. Follow these steps to prepare for the migration:

1. Become familiar with the new Recurring Billing service user interface in the Business Center.
2. Contact Cybersource client services to start the migration.

This image shows the upgraded Recurring Billing user interface for creating a new subscription or maintaining an existing subscription.



Example Upgraded Manage Subscription User Interface

Related Information

[Recurring Billing User Guide](#)

SCMP API and Simple Order API

Important

If you use the SCMP API or Simple Order API to create and manage subscriptions, you must migrate to the Recurring Billing service that uses the REST API.

After your existing subscription tokens are migrated to the upgraded Recurring Billing and TMS in the Business Center, you can create and manage subscriptions there.

Follow these steps to prepare for the migration:

1. Integrate to the new Recurring Billing service that uses the REST API.

2. Become familiar with the new Recurring Billing service user interface in the Business Center.
3. Contact Cybersource client services to start the migration.

Related Information

- [Recurring Billing Developer Guide for the REST API](#)
- [Recurring Billing User Guide](#)
- Create a Customer Token with Validated Payment Details section in the [Token Management Service Developer Guide](#) for the REST API
- [API Field Reference for the REST API](#)

Secure Acceptance Hosted Checkout Integration and Checkout API

After migration, you can no longer create subscriptions using Hosted Checkout Integration or Checkout API. You must migrate to these services in this order:

1. Unified Checkout, to collect customer information.
2. TMS that uses the REST API, to create customer tokens from transient tokens.
3. Recurring Billing service that uses the REST API.

During the transitional phase, you can still use the system to validate and create a payment token. This process will replace the previous steps 1 and 2. To create a token in this way, change the `recurring_frequency` request field value to `on-demand`. Also, remove any other subscription-related fields (`recurring_*`) from the request.

After your existing subscription tokens are migrated to the upgraded Recurring Billing service and TMS in the Business Center, you can create and manage subscriptions there. Follow these steps to prepare for the migration:

1. Integrate to Unified Checkout to collect the payment instrument.
2. Integrate to Payments REST API to create the Customer Token from the Transient Token.
3. Integrate to the new Recurring Billing service that uses the REST API.
4. Become familiar with the new Recurring Billing service user interface in the Business Center.
5. Contact Cybersource client services to start the migration.

Related Information

- [Recurring Billing Developer Guide for the REST API](#)
- [Recurring Billing User Guide](#)
- Create a Customer Token with Validated Payment Details section in the [Token Management Service Developer Guide](#) for the REST API
- [API Field Reference for the REST API](#)
- [Unified Checkout Developer Guide](#)

Aura and Cold Fusion

If you use the Aura process or Cold Fusion to create and manage subscriptions, you must migrate to Recurring Billing service that uses the REST API.

After your existing subscription tokens are migrated to the upgraded Recurring Billing and TMS in the Business Center, you can create and manage subscriptions there.

Follow these steps to prepare for the migration:

1. Integrate to the new Recurring Billing service that uses the REST API.
2. Become familiar with the new Recurring Billing service user interface in the Business Center.
3. Contact Cybersource client services to start the migration.

Related Information

- [*Recurring Billing Developer Guide for the REST API*](#)
- [*Recurring Billing User Guide*](#)
- [*API Field Reference for the REST API*](#)

VISA Platform Connect: Specifications and Conditions for Resellers/ Partners

The following are specifications and conditions that apply to a Reseller/Partner enabling its merchants through Cybersource for Visa Platform Connect (“VPC”) processing. Failure to meet any of the specifications and conditions below is subject to the liability provisions and indemnification obligations under Reseller/Partner’s contract with Visa/Cybersource.

1. Before boarding merchants for payment processing on a VPC acquirer’s connection, Reseller/Partner and the VPC acquirer must have a contract or other legal agreement that permits Reseller/Partner to enable its merchants to process payments with the acquirer through the dedicated VPC connection and/or traditional connection with such VPC acquirer.
2. Reseller/Partner is responsible for boarding and enabling its merchants in accordance with the terms of the contract or other legal agreement with the relevant VPC acquirer.
3. Reseller/Partner acknowledges and agrees that all considerations and fees associated with chargebacks, interchange downgrades, settlement issues, funding delays, and other processing related activities are strictly between Reseller and the relevant VPC acquirer.
4. Reseller/Partner acknowledges and agrees that the relevant VPC acquirer is responsible for payment processing issues, including but not limited to, transaction declines by network/issuer, decline rates, and interchange qualification, as may be agreed to or outlined in the contract or other legal agreement between Reseller/ Partner and such VPC acquirer.

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