



REALCONTROL SCHEDULER

2015

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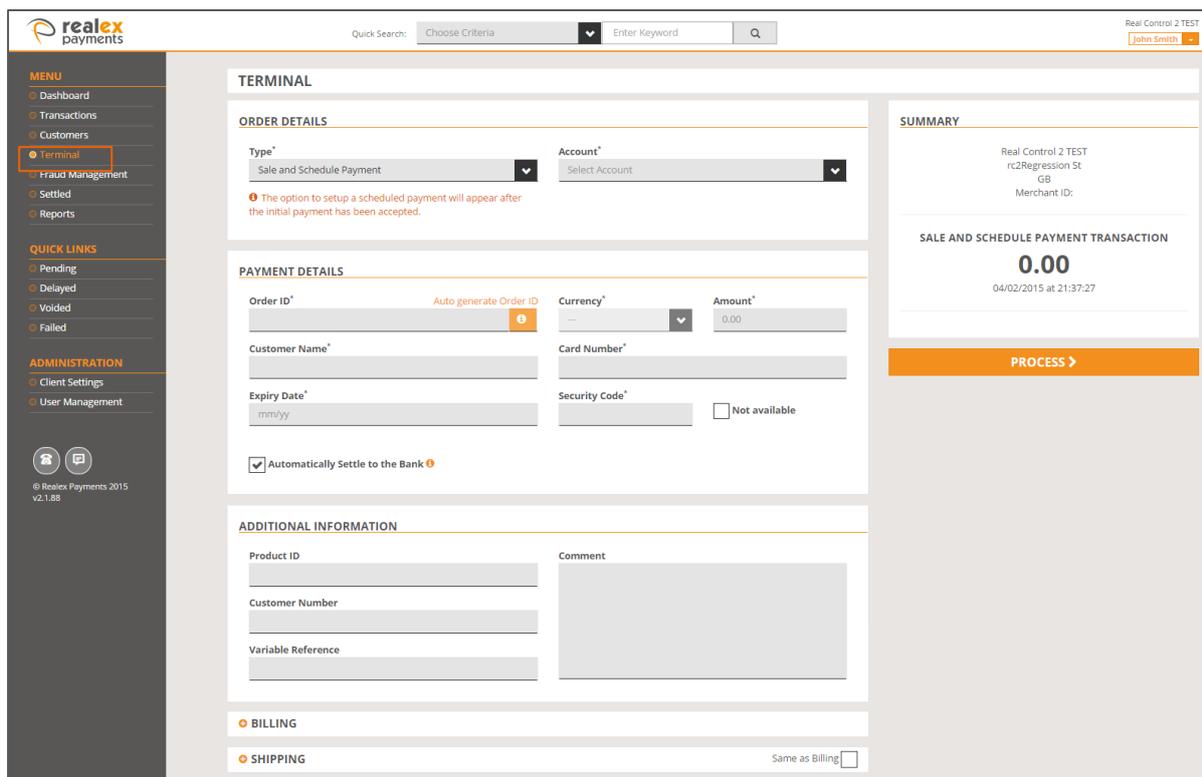
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1 SCHEDULER TERMINAL

To access the Scheduler Terminal you will need to choose **'Terminal'** from the navigation menu on the left side of the RealControl dashboard.

In the **'Order Details'** section of the **'Terminal'** you can select the scheduler options from the **'Type'** drop down. Within the **'Type'** section you can choose:

- Sale and Schedule Payment
- Card Verification and Schedule Payment
- Future Dated Payment



Note:

1. Only Administrators, Power Users and Sales Agents have permissions to process these transaction types on RealControl.
2. The Scheduler terminal is not enabled by default and will need to be requested. For more information on this please contact Realex Payments Support Team.

1.1 SALE AND SCHEDULE PAYMENT

A **'Sale and Schedule Payment'** will allow an upfront payment to be processed while also setting up the customers schedule in RealControl.

1. When you choose **'Sale and Schedule Payment'** the below message will appear:

ORDER DETAILS

Type* Account*

Sale and Schedule Payment Select Account

1 ⓘ The option to setup a scheduled payment will appear after the initial payment has been accepted.

Once you have entered all of the transaction details, click **'Process'**.

- This will process the upfront payment and you will also get the option to set up the new schedule. Click on **'Schedule Payment(s)'** as below:

✔ Sale and Schedule Payment Successful (ScheduleNew) 10.00 EUR
✕

Authorisation Code 123456	Security Code Not Checked	AVS Postcode Not Checked	AVS Address Not Checked	SCHEDULE PAYMENT(S) VIEW TRANSACTION PRINT RECEIPT
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2

TERMINAL

ORDER DETAILS

Type* Account*

Sale and Schedule Payment 10pmaib

ⓘ The option to setup a scheduled payment will appear after the initial payment has been accepted.

PAYMENT DETAILS

Order ID* Auto generate Order ID	Currency*	Amount*
ScheduleNew ⓘ	EUR	10.00
Customer Name*	Card Number*	
Test	4242424242424242	
Expiry Date*	Security Code*	<input type="checkbox"/> Not available
12/19	115	

Automatically Settle to the Bank ⓘ

SUMMARY

Real Control 2 TEST
rc2Regression St
GB
Merchant ID: 653487322

SALE AND SCHEDULE PAYMENT TRANSACTION

10.00 EUR

09/01/2015 at 03:52:24

Order ID: ScheduleNew

VISA

**** * 4242
Test
12/19

By clicking the **'Schedule Payment(s)'** option, the below screen will appear allowing you to insert the schedule details.

3. Input the schedule details including all mandatory fields which are marked with an asterisk (fields which are not marked as mandatory can be edited at a later date if needed).
4. Once all of the mandatory fields have been input, click on **'Process'** to process the scheduled payment. You will be offered the option to view the Payers details once the schedule has processed successfully.

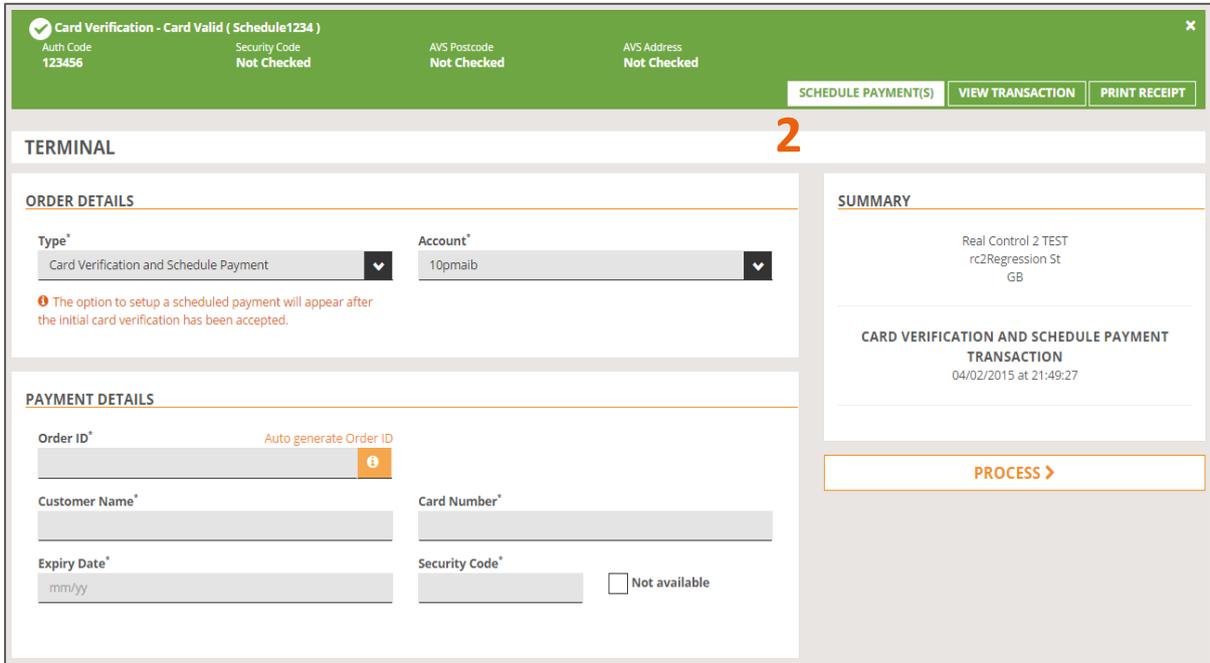
1.2 CARD VERIFICATION AND SCHEDULE PAYMENT

The Card Verification transaction type can be used to check a card is valid and active without authorising or holding funds. Cards may be verified by processing a **'Card Verification and Scheduled Payment'** request. This will not take a payment from a customer's card but will verify that transaction can be processed on the card before saving the details against a stored customer.

Note: Card verification is not supported by all acquiring banks, to determine if your acquiring bank supports card verification, please contact Realex Payments Support Team for further information.

1. When you choose **'Card Verification and Scheduled Payment'** the below message will appear:

- Input the card details as normal, the system will remove the option of adding an amount. Click on **'Process'**. If the card is successful the option to set up **'Schedule Payment(s)'** will appear below.



Card Verification - Card Valid (Schedule1234)

Auth Code: 123456 | Security Code: Not Checked | AVS Postcode: Not Checked | AVS Address: Not Checked

SCHEDULE PAYMENT(S) | VIEW TRANSACTION | PRINT RECEIPT

2

TERMINAL

ORDER DETAILS

Type*
Card Verification and Schedule Payment

Account*
10pmaib

The option to setup a scheduled payment will appear after the initial card verification has been accepted.

PAYMENT DETAILS

Order ID* Auto generate Order ID

Customer Name*

Expiry Date*
mm/yy

Card Number*

Security Code* Not available

SUMMARY

Real Control 2 TEST
rc2Regression St
GB

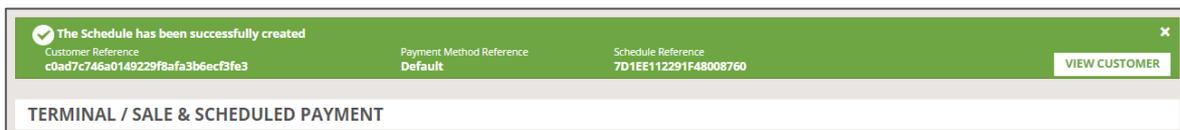
CARD VERIFICATION AND SCHEDULE PAYMENT TRANSACTION
04/02/2015 at 21:49:27

PROCESS >

By clicking **'Schedule Payment(s)'** the scheduler terminal screen will appear as shown in *'Point 3 of Section 1.1'*. The details which are mandatory will need to be completed but the non-mandatory fields can be completed at a later time.

- Input the schedule details including all mandatory fields which are marked with an asterisk (fields which are not marked as mandatory can be edited at a later date if needed).

All of the same options will apply when setting up the schedule and will include Daily, Weekly, Monthly and Yearly options to choose from. When the schedule has been processed successfully the below message will appear and you will have the option to the customers details by clicking on **'View Customer'**.



The Schedule has been successfully created

Customer Reference: c0ad7c746a0149229f8afa3b6ecf3fe3 | Payment Method Reference: Default | Schedule Reference: 7D1EE112291F48008760

VIEW CUSTOMER

TERMINAL / SALE & SCHEDULED PAYMENT

1.3 FUTURE DATED PAYMENT

A **'Future Dated Payment'** is a once off payment that is set up in advance of the payment due date. You will need to enter the date of the once off payment within the **'Payment Date'** field as below.

1. When you choose **'Future Dated Payment'** the below message will appear:

ORDER DETAILS

Type*
 Future Dated Payment ▼

Account*
 Select Account ▼

Payment Date*
 6 Feb 2015

1 ⓘ A once off payment will be taken on the above date.

Once all of the transaction details have been populated and the transaction is successful, the customer's details are automatically stored. A customer ref and card ref will be automatically generated for the payer.

✓ **The Schedule has been successfully created** ✕

Customer Reference f5e3d78c-ba0f-49de-936b-99aea487c6b3	Payment Method Reference Default	Schedule Reference 66AA204348FF483E89D3
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[VIEW CUSTOMER](#)

When you click on **'View Customer'**, the payers profile will appear with all of their saved details from the scheduled transaction as below.

CUSTOMER [EDIT CUSTOMER](#)

Customer reference 3f65c3f2b9534c7b89bc182cb547882d	Customer name John Smith	Phone -
Company -	Address -	Email -

[ADD PAYMENT METHOD](#)

PAYMENT METHODS

228dc8d04822479980db2346d7d9 3ba5	John Smith	**** * 4242 12/19
		TAKE PAYMENT MORE-

🔗 3786c190339c41c89fDC
15.50 EUR Yearly on the 6th of February, from Feb 6, 2015, 1 times
Ran 0 of 1 times

[✎](#) [🗑️](#)
 Edit Delete

For more information on managing customers and recurring payers please see the [Realex Payments Customers – User Guide](#).



GOT ANY QUESTIONS?
LET US KNOW.

SUPPORT

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