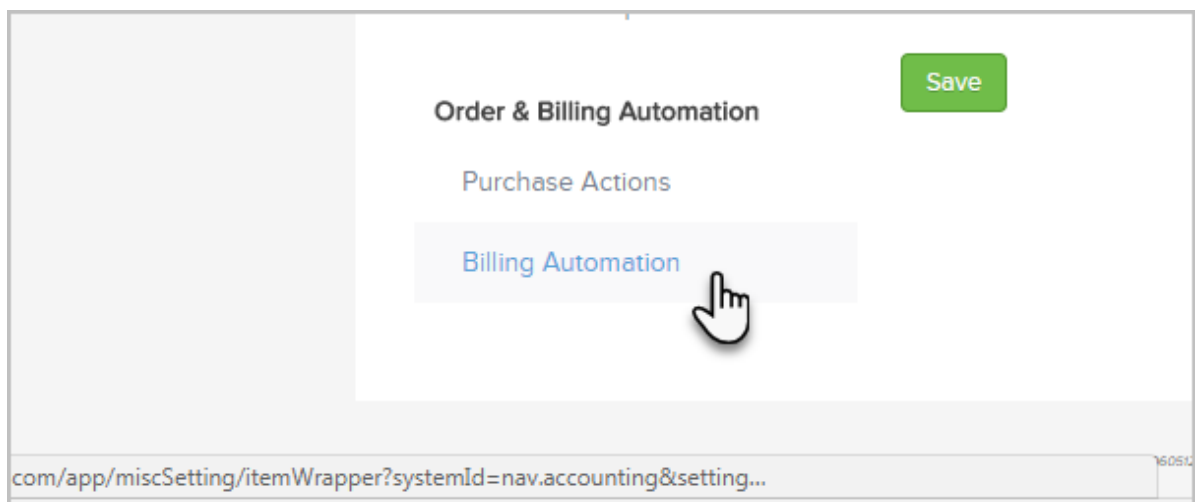


Set Up Automation When An Autocharge Fails Or Is Successful🔗

Infusionsoft automatically charges a credit card when a customer makes a one-time purchase and elects to pay in multiple installments (payment plan) or when they purchase a subscription program that involves recurring billing. If a customer closes a credit card account or has other issues with their card, the auto-charges will not process. When this happens, you will not be able to collect the funds until the problem is resolved. You can set up billing automation that will alert both you and the customer that there is an issue.

PayPal Transactions: Please note that orders and subscriptions that are paid with PayPal, will not trigger Billing Automation.

1. Go to **E-Commerce > Settings**
2. Click on **Billing Automation** in the *Settings* menu at the bottom-left of the page



3. Choose a trigger type from the drop-down and click on the **Add Trigger** button.

type) When a credit card autocharge ▼ Add Trigger

When a credit card autocharge attempt is made

When a credit card autocharge fails and the invoice contains (California Ocean Clean - Every 30 days or Hawaii Ocean Clean - Every 30 days for 150 days) on the 3rd failure Actions

When a credit card autocharge is successful and the invoice contains (California Ocean Clean - Every 30 days or Hawaii Ocean Clean - Every 30 days for 150 days) and the last attempt failed Actions

4. Set the Trigger Criteria.

1. Select an autocharge event from the drop-down: **Fails** or **Is Successful**.
2. (Optional) Select specific products. If you do not set a product criteria, the trigger will apply to all products and subscription programs.
 1. Select the Fail or Success criteria.
 2. Failure Criteria
 3. Success Criteria

5. Add Actions. In this example, a tag "Credit Card Failure" is applied to the contact on the third failed autocharge attempt. You could then [initiate a campaign when that tag is applied](#).

Manage Trigger

Set Trigger Criteria ⓘ

When an auto charge Fails ▼ and the order contains any of these products: (leave blank to fire for any product)

And this is:

☐ the LAST failure (Max Retry reach)
 ☐ the FIRST failure for the Invoice
 ☐ Failure #2
 ☒ Failure #3
 ☐ Failure #4
 ☐ Failure #5
 ☐ Failure #6
 ☐ Failure #7
 ☐ Failure #8

☐ Base Package
 ☐ Basic Water Testing Kit
 ☐ Calcium Hardness Kit
 ☐ California Ocean Clean
 ☐ California Ocean Clean - Ever
 ☐ Chemical Gloves
 ☐ Chlorine Tablets 6-pack
 ☐ Chlorine Tablets 6-pack - Ever
 ☐ Chlorine Tablets 6-pack - Ever
 ☐ Deluxe Water Test Kit
 ☐ ...

Actions

Apply 1 tag

- Credit Card Failure

Edit ×

Add New Action ▼

Save Trigger Delete Trigger

6. Click on the **Save Trigger** button.
