Create A Billing Reminder With Merged Credit Card Information %

You can send an email reminder that a credit card is about to expire. You can only access credit card merge fields when you create emails through the Billing Automatons.

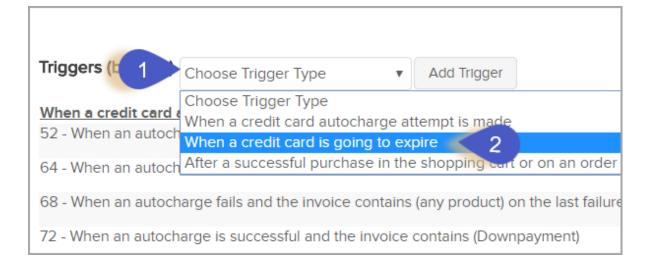
1. Go to E-Commerce > Settings

MY NAV	CRM	MARKETING	E-COMMERCE	ADMIN
Dashboard	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
My Day	Companies	Email & Broadcasts	Orders	Billing & Account
	Opportunities	Lead Generation	Products	Users
	Referral Partners	Templates	Actions	Import Data
	Visitors	Legacy	Promotions	Data Cleanup
			Legacy	

2. Click on **Billing Automation** in the *settings* menu.

Fulfillment	
Fulfillment Reports	
Order & Billing Automation	Save
Purchase Actions	
Billing Automation	

3. Select "When a Credit Card is going to expire" and click "Add Trigger"



Triggers (by type)	When a credit card is going to 🔻	Add Trigger	
When a credit card	autocharge attempt is made	J.	
52 - When an autoch	narge fails and the invoice contains	s (any product) (on the <mark>1</mark> st failure
64 - When an autoch	narge fails and the invoice contains	(any product)	on the 3rd failur
CO Milana an autorit		(

4. After you set up the criteria for an order trigger, you will add actions. Select **Sends an Email**, **Fax**, etc. from the action drop-down.

Manage Trigger	
Set Trigger Criteria 🕐	
When the credit card type is: and the card expires in 0 days. Include cards that are NOT set to be billed in the future: Yes No Actions No actions yet. Select an action from the "Add New Action" drop-down below. Add New Action	
Save Trigger Delete Trigger	

5. Select **Email** from the type drop-down and click on **Add**

	D	
When the credit card t	/pe is: Any Type	
and the card expires in		/S.
	NOT set to be billed in the future: Yes (No 💿
Actions		
Send an Email, Fa	x, etc.	
What do you want t	send?	
Email	×	
Show templates in	ALL catego 🔻 Please select a template	te 🔻 Edit Add < 2
(Catego	ies) (Templates) ion when certain rules are met	

6. Create the Email Template, inserting the credit card merge fields where appropriate. While editing the email body, click the **Insert** tab to access your merge fields. From the merge field selections, you will find **Credit Card Fields** near the

bottom of the list.

Close Builder	
Fo Insert Image Table Divider	Snippets Merge Fields 2 Ω Special chars
	Having trouble viewing this or

Employee		٦
Spouse	> alwa	У
Referral Partner Fields	>	
Referral Partner's Fields	>	-
Credit Card fields	>	
Date U	>	
Digital Products	> -	
	If you no longer wish to receive our emails, please contact m Unsubscribe	e
	Infusionsoft - my home office 1260 S Spectrum B. Chandler,	Ar



7. Save the email template.

	Employee	
	Spouse	> alway
	Referral Partner Fields	>
	Referral Partner's Fields	>
	Credit Card fields	>
	Date 🖑	>
	Digital Products	> -
Ľ		If you no longer wish to receive our emails, please contact me Unsubscribe
		Infusionsoft - my home office 1260 S Spectrum B. Chandler, Ar

8. Save the action and then click on Save Trigger.

Email Readiness	
Ready to Send? Yes	
Delete Clone	