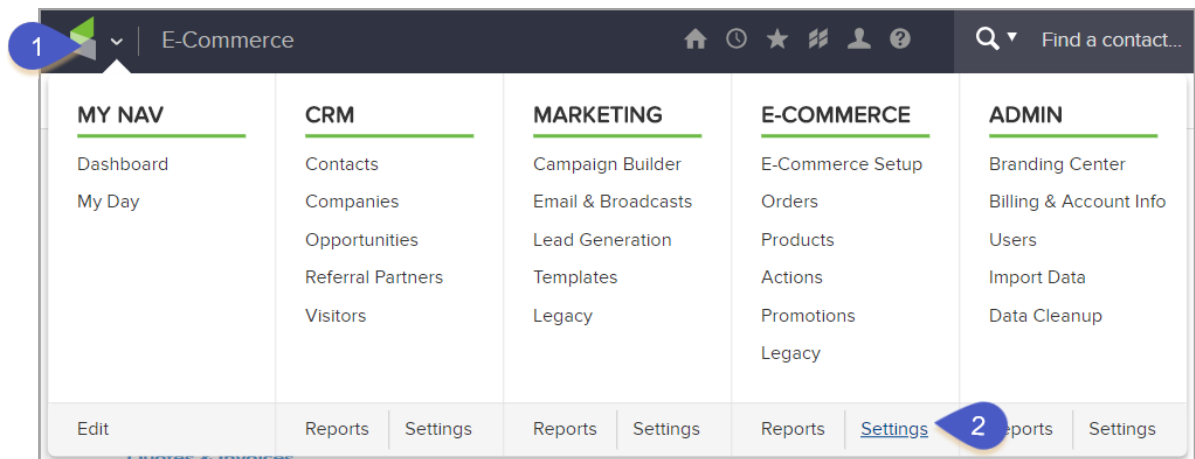


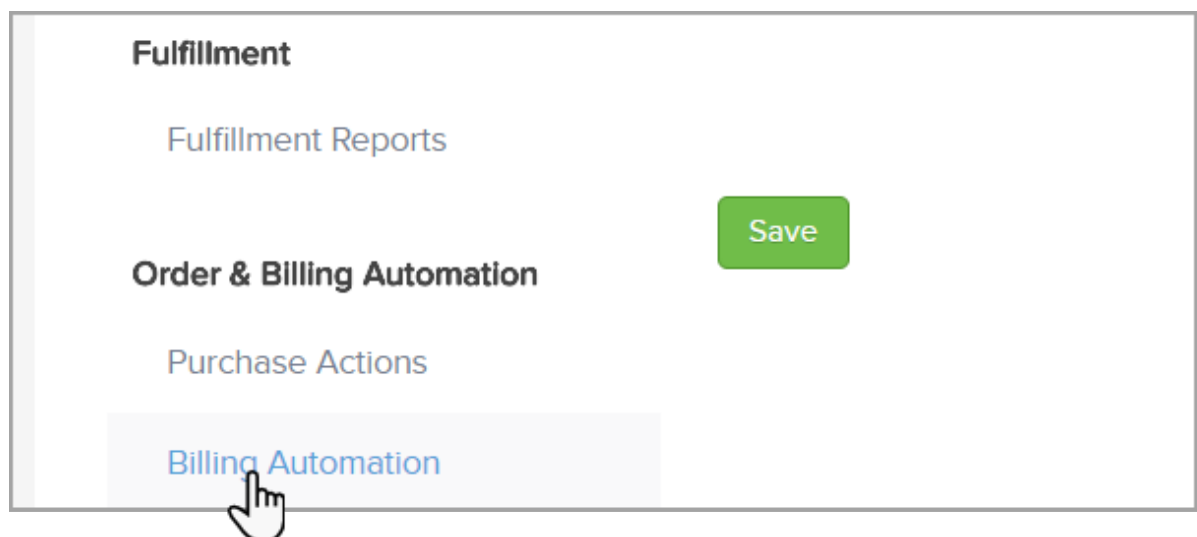
Create A Billing Reminder With Merged Credit Card Information🔗

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 Automations.

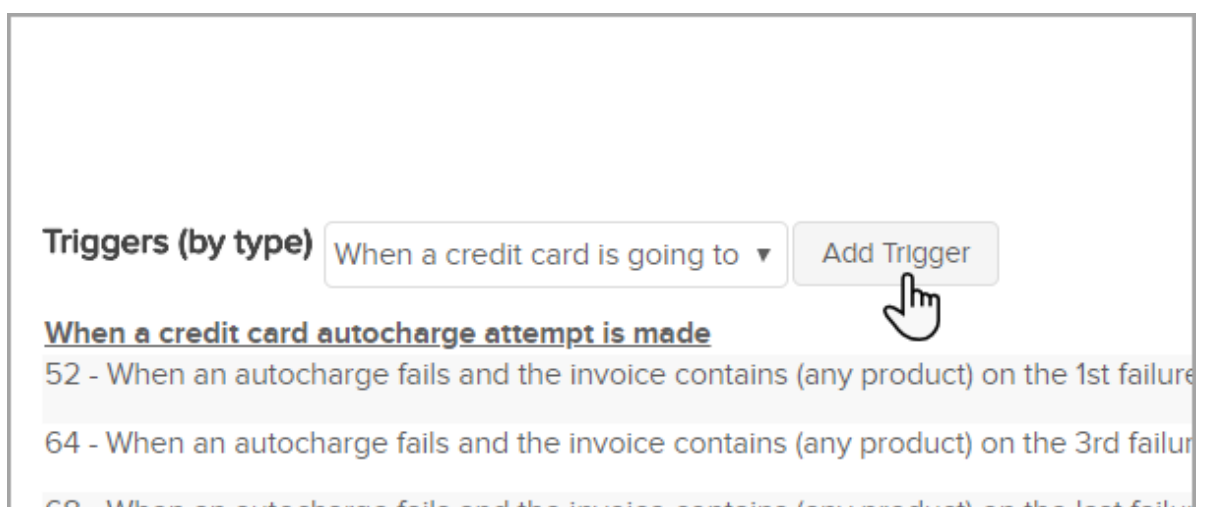
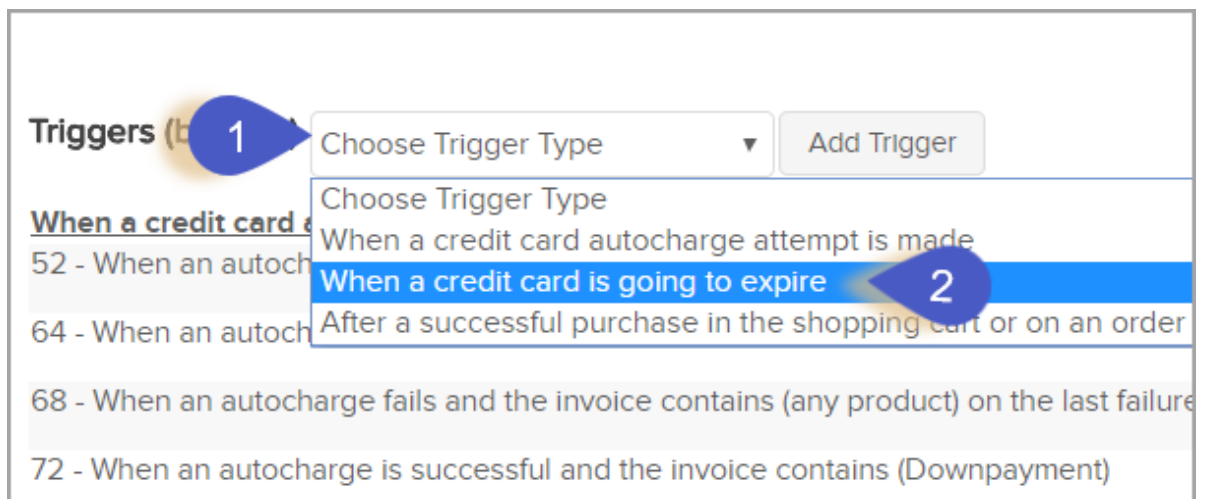
1. Go to E-Commerce > Settings



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



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



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 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.

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

Manage Trigger

Set Trigger Criteria ?

When the credit card type is: and the card expires in days.

Include cards that are NOT set to be billed in the future: Yes ☐ No ☒

Actions

Send an Email, Fax, etc.

What do you want to send?

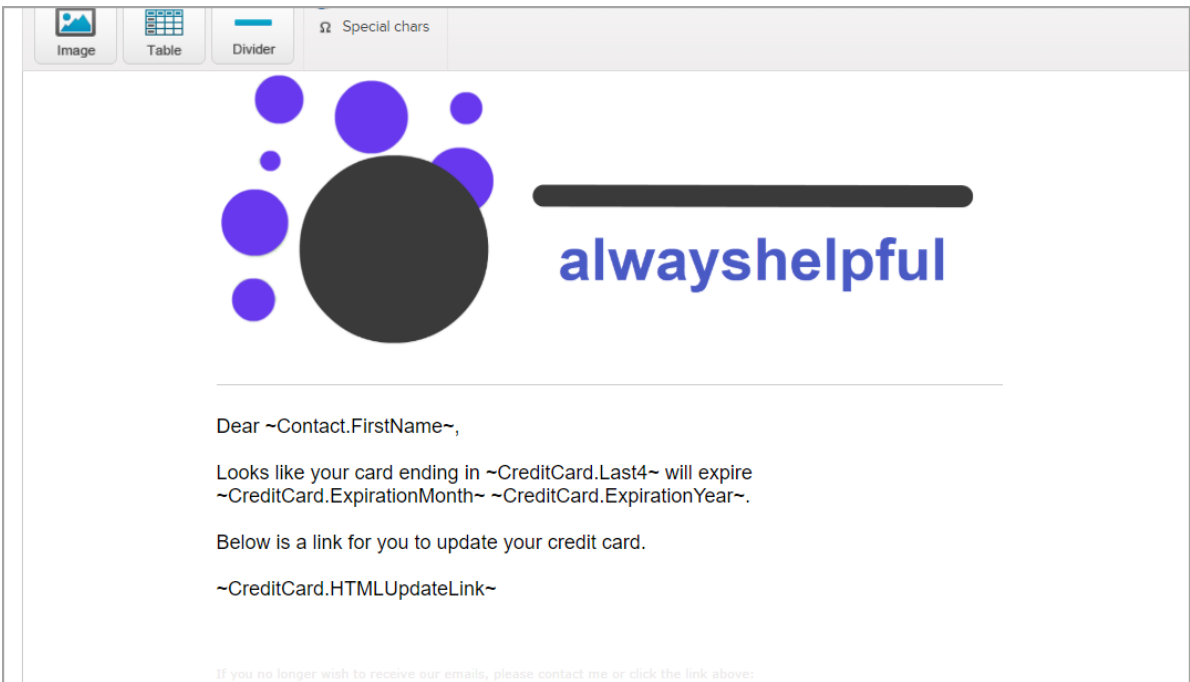
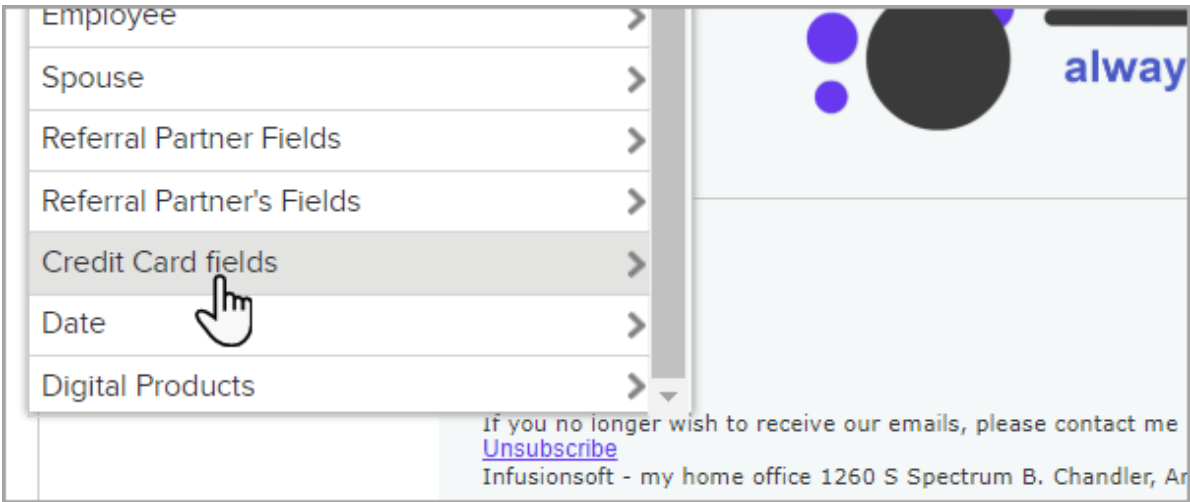
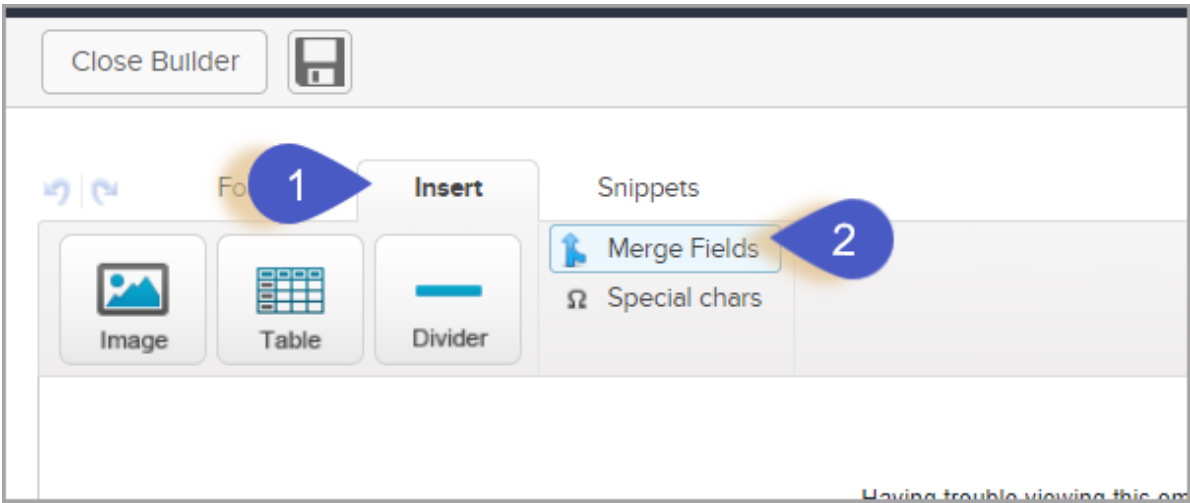
Show templates in ALL category

(Categories) (Templates)

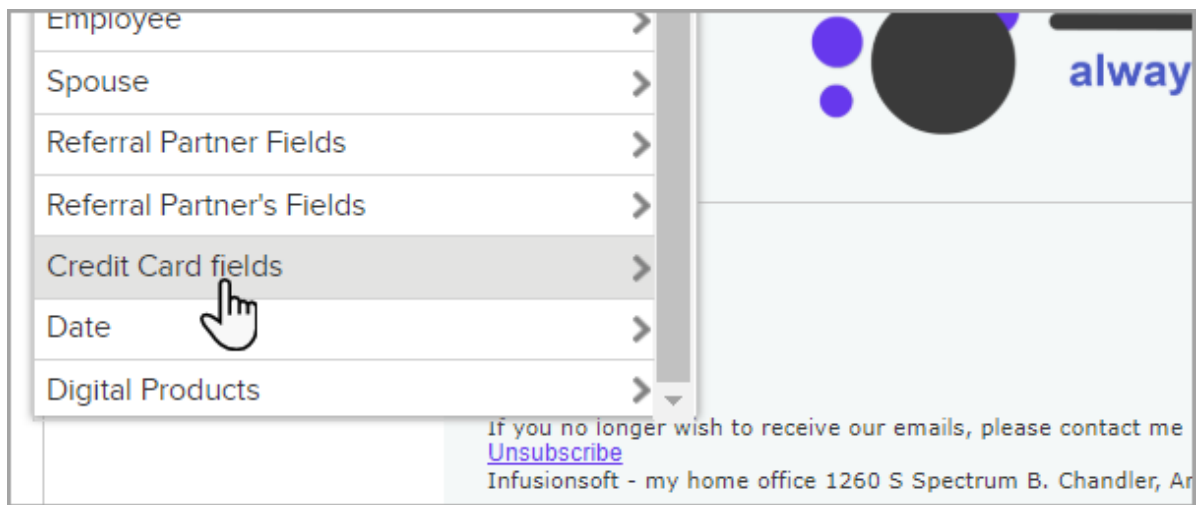
☐ Only run this action when certain rules are met

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.



7. **Save** the email template.



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

