

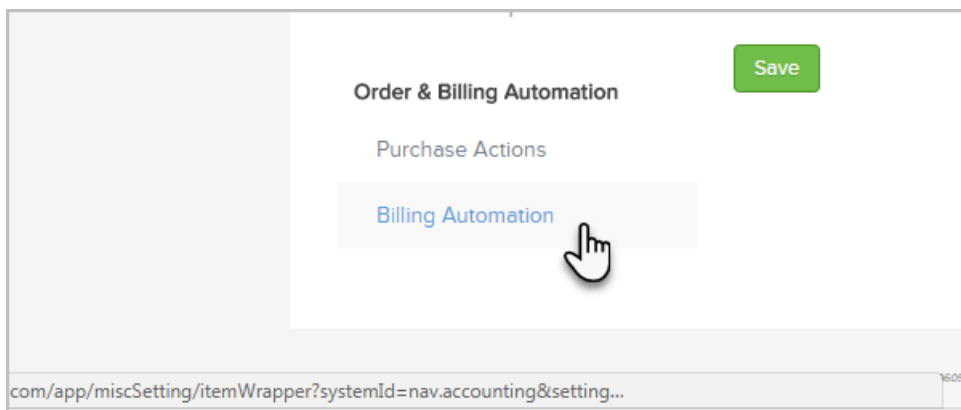
Set up automation for an autocharge

This article applies to:

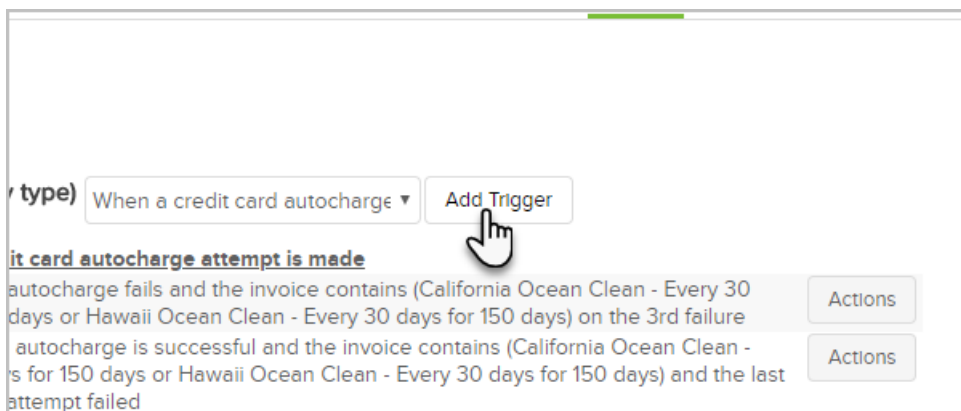
Max Classic automatically charges a credit card when a customer makes a one-time purchase and elects to pay in multiple installments (payment plan) or when they purchase a subscription program that involves recurring billing. If a customer closes a credit card account or has other issues with their card, 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 with a credit card.

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

1. Navigate 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.



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](#).

The screenshot shows the 'Manage Trigger' configuration page. Under 'Set Trigger Criteria', the trigger is set to 'When an auto charge Fails' and 'And this is:'. The 'And this is:' section has two scrollable lists. The first list contains failure criteria: 'the LAST failure (Max Retry reach)', 'the FIRST failure for the invoice', 'Failure #2', 'Failure #3' (checked), 'Failure #4', 'Failure #5', 'Failure #6', 'Failure #7', and 'Failure #8'. The second list contains product categories: 'Base Package', 'Basic Water Testing Kit', 'Calcium Hardness Kit', 'California Ocean Clean', 'California Ocean Clean - Even', 'Chemical Gloves', 'Chlorine Tablets 6-pack', 'Chlorine Tablets 6-pack - Ever', 'Chlorine Tablets 6-pack - Ever', and 'Deluxe Water Test Kit'. Under the 'Actions' section, there is one action: 'Apply 1 tag' with a sub-action 'Credit Card Failure'. There is an 'Add New Action' dropdown and 'Save Trigger' and 'Delete Trigger' buttons at the bottom.

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