

Set up automation for credit card expiration

This article applies to:

[Max Classic](#)

You can set up billing triggers that help you proactively communicate with a customer when their card is about to expire. This type of follow up will reduce auto-charge failures due to expired credit cards.

Expiration Trigger Timing: The billing automation triggers work off of the last day of the month for the month in which the card is set to expire. For example, if you set the trigger to activate 10 days prior to expiration, and the card expires 2/2020, the trigger will activate on 2/19/2020 – 10 days prior to the end of the month in which the card expires.

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

1. Go to **E-Commerce > Settings** in the master nav.
2. Click on **Billing Automation** in the *Settings* menu.
3. Select *When a credit card is going to expire* from the drop down and click on the **Add Trigger** button.
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4. Set the Trigger Criteria.
 - 1. Select the card type from the drop down. The default is *Any Type*.
 2. Enter the days before expiration. This will allow you to schedule follow up based on the card expiration date.
 3. Choose cards to include based on auto-charge status. The default setting is *No*, meaning only the customers whose cards have future charges will receive follow up. Set this to *Yes* if you want this automation to apply to ALL of your customers; even those who do not have active subscription billing.
5. Add Actions **Example Actions**. A couple of typical actions would be:
 - Send a task to someone in your company to reach out to the customer
 - Send the customer an email reminder to update their card.
 - Add a tag
6. Click **Save Trigger**.

PLEASE NOTE: If you have multiple "Billing Automation Triggers" (AKA Action Sets) for expired credit cards, and you create a new one, all current expired credit cards will retroactively be triggered again by the newly created "Billing Automation Trigger."
