Create A Billing Reminder With Merged Credit Card Information %

This article applies to:

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
- 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 (b	Choose Trigger Type	Add Trigger		
When a credit card 52 - When an autoch	when a credit card autocharge a			
64 - When an autoch	When a credit card is going to ex	· · · · · · · · · · · · · · · · · · ·	order	
68 - When an autocharge fails and the invoice contains (any product) on the last failure				
72 - When an autoch	narge is successful and the invoice	contains (Downpayment)		

Triggers (by type)	When a credit card is going to 🔻	Add Trigger	
When a credit card a	autocharge attempt is made	d'	
52 - When an autoch	arge fails and the invoice contains	(any product) (on the 1st failure
64 - When an autoch	arge fails and the invoice contains	(any product) o	on the 3rd failur
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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: Any Type and the card expires in and the future: Yes No and and and and and and and and	
Save Trigger Delete Trigger	

5. Select $\ensuremath{\mathsf{Email}}$ from the type drop-down and click on $\ensuremath{\mathsf{Add}}$

	?						
When the credit card	type is: Any Typ	e	v				
ind the card expires			days.				
nclude cards that are		oilled in the future: Y	es 🔘	No 🖲			
Send an Email, I	,						
What do you want	to send?						
What do you want	to send?						
-	*	Please select a tem	plate	▼ Edit	Add		

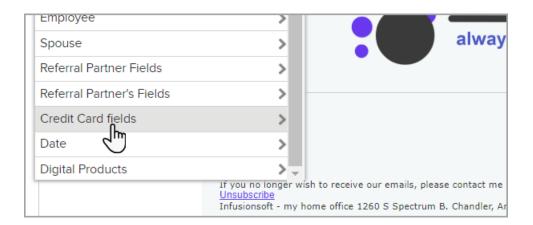
Create the Email Template, inserting the credit card merge fields where appropriate. While editing the email body, click the Insert tab to access your merge fields. From the merge field selections, you will find Credit Card Fields near the bottom of the list.

Close Builder	
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	Havina trouble viewing this on

Employee	
Spouse	> alway
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 me <u>Unsubscribe</u> Infusionsoft - my home office 1260 S Spectrum B. Chandler, A

Image Table Divider Ω Special chars	
	alwayshelpful
Dear ~Contact.FirstName~, Looks like your card ending in ~ ~CreditCard.ExpirationMonth~ Below is a link for you to update ~CreditCard.HTMLUpdateLink~	~CreditCard.ExpirationYear~. 9 your credit card.

7. Save the email template.



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

Email Readiness
Ready to Send? Yes
Save Delete Clone