How Your Customers Update Their Credit Cards🔗
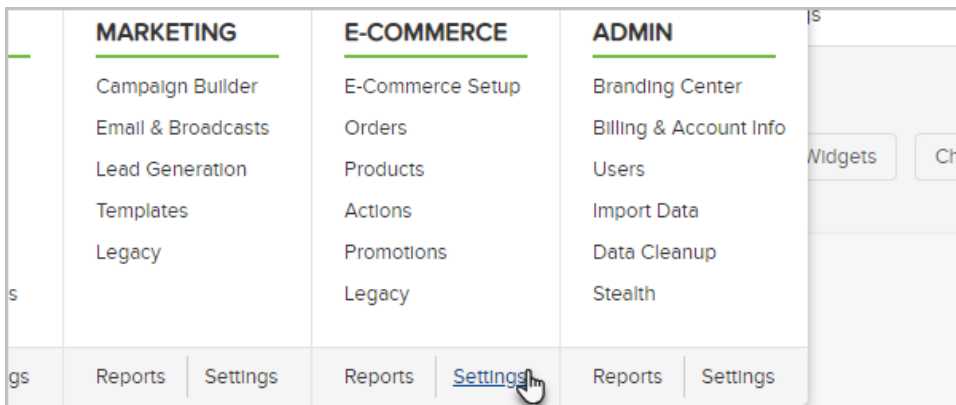
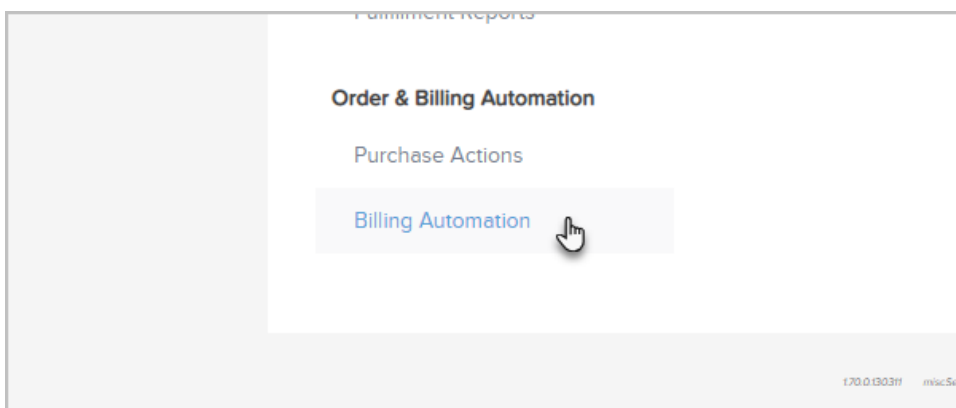This article applies to:

[Max](#)
[Max Classic](#)

> **Pro-Tip!** Follow the steps below, to automate the credit card update process. If you don't have all of this set up previously to a card failing, you could simply create an order form with a $0 product and have them fill it out to capture their new card info. Then you would manually go into their order record and apply the new card to the order.

The Infusionsoft E-Commerce module includes a secure portal your customers can use to update their credit card information online. The credit card update merge fields are available when you create billing related email templates through **E-Commerce > Settings > Order Settings > Billing Automation**. The credit card merge fields only work if the email is initiated from an order trigger.
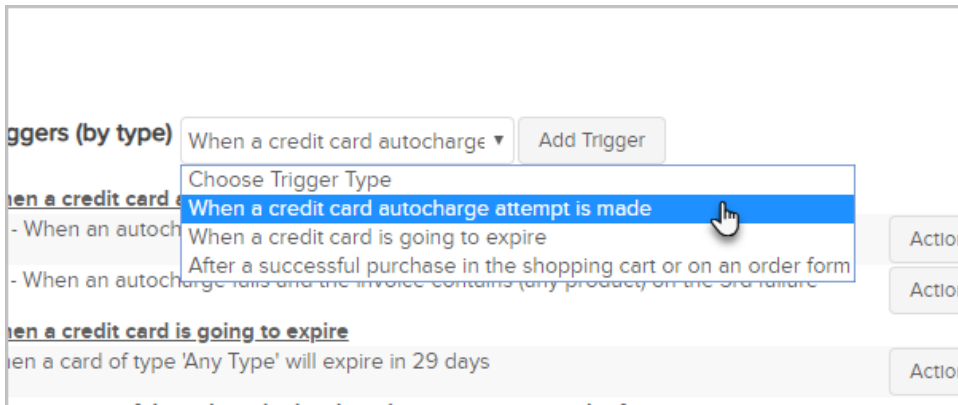
1. Go to **E-Commerce > Settings**

2. Click on **Billing Automation** in the **settings** menu at the bottom left of the page
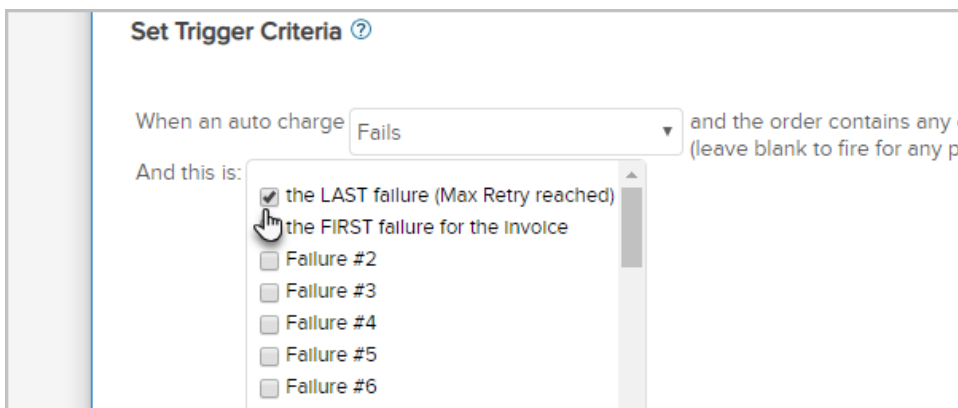

3. Select an **Order Trigger** type from the drop-down and then click on **Add Trigger** to set the Trigger criteria. For
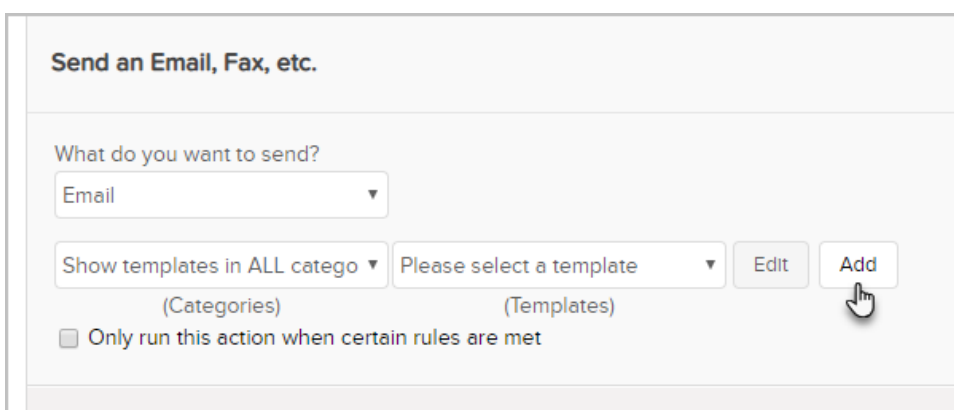
example, we will choose, **When a credit card autocharge attempt is made** and click on the **Add Trigger** button.
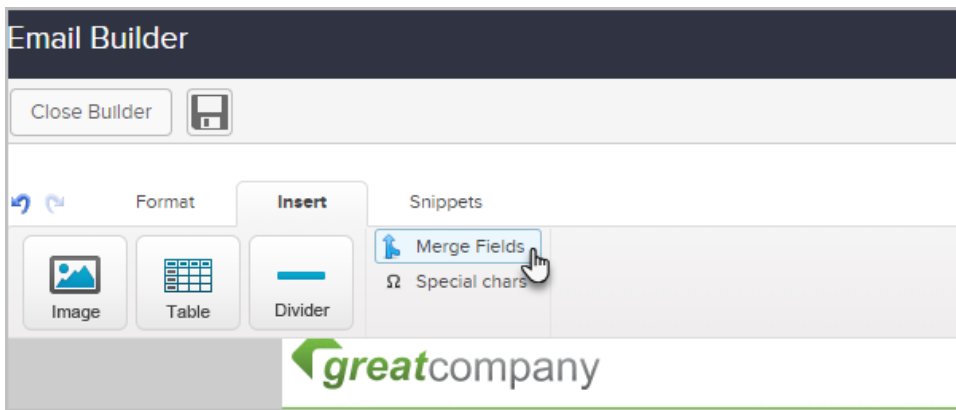

4. We'll choose when the card fails on the **Last failure (Max Retry reached)**; by default, this number is **3**.
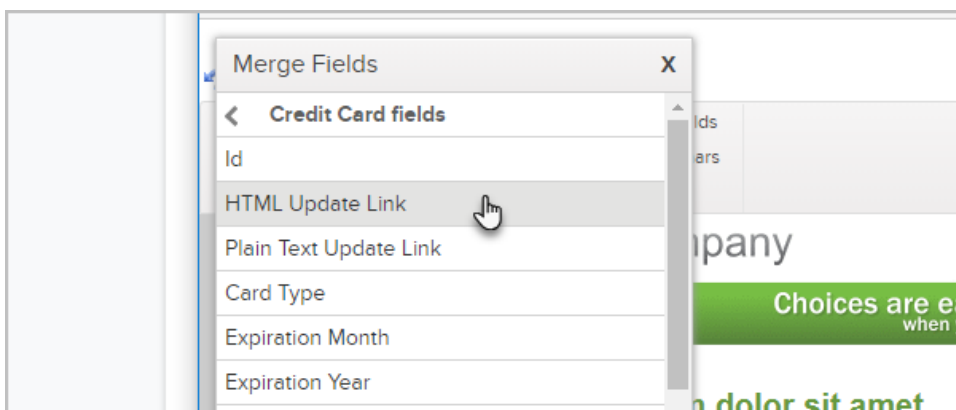

5. Under **Actions**, select the **Send an Email** and click on the **Add** button to create a new email.

6. Click inside the body of the email where you would like to merge the update link and click on the **Merge Fields** button.

7. Merge in the the HTML and/or the Plain Text credit card update link in the email. You may also want to merge in the last 4 digits of the card, so that they are sure which card needs to be updated.

8. ○ **Important Note!** These billing automation triggers are set up to send out a Credit Card update email to the customer ONLY! Do not add CC or BCC to another person as this will prevent the email from sending due to PCI compliance regulations.

9. Finish and **Save** the email, then **Save** the action and **Save** the trigger.

   Don't Forget the Actions! You need to assign actions to alert you when a customer submits a credit card update. **The system does not automatically switch billing to the new card. You must manually change the credit card for orders and subscriptions**. However, the update process can be automated with the help of a third-party service, like CustomerHub. To manually update the Subscription, please see this Article.

10. Go to the *Credit Card* section in **E-commerce > Settings > Orders** to customize the page appearance and assign **Actions** that fire off when someone clicks on the update link in an email or fills out the form.

Click here to check out our website

Clicked Update Credit Card link: Actions

Updated Credit Card via link: Actions

Notifications

Notification Email Address:

Merchant Failures Before Notification: 4

(consecutive)