In this exercise you'll learn how to set up a 30 day credit card expiration notification email to remind your customers that it's time to update their credit card on file.

1. From the Main Navigation, navigate to E-Commerce > Settings.

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My Nav	CRM	Marketing	E-Commerce	Admin
Dashboard	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Contacts	Companies	Email & Broadcasts	Orders	Infusionsoft Account
Campaign Builder	Opportunities	Lead Generation	Products	Users
Orders	Referral Partners	Templates	Actions	Import Data
My Day	Visitors	Legacy	Promotions	Data Cleanup
			Legacy	
Edit	Reports Settings	Reports Settings	Reports Settings	Reports Settings

2. From the menu options on the left, select Billing Automation.



3. In the top drop down menu select "When a credit card is going to expire" and then click "Add Trigger".

Triggers (by type)	When a credit card is going to expir •	Add Trigger
When a credit card autoch	Choose Trigger Type When a credit card autocharge attemp	t is made
2 - When an autocharge fails	When a credit card is going to expire	
4 - When an autocharge fails	After a successful purchase in the shop	pping cart or on an order forn

4. A new window should pop open; in this window leave the top field as **"Any Type"** and change the second field to **"30"** days. Leave "Include cards that are NOT set to be billed in the future" set to **"No"**.

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Set Trigger Criteria	1 ?	
When the credit card type is:	Апу Туре	•
and the card expires in 30	C	days.
Include cards that are NOT se	et to be billed in the future: Yes 🔵	No

5. From the actions drop down menu, select "Send an email, fax etc."

Add New Action		modu
Apply/remove ta	g	
Start/stop a cam	paign (legacy)	
Start/stop a follo	w-up sequence	
Send an email, fa	ax, etc.	
Assign a contact	to a user	
Create an appoir	ntment	
Create a task		
Create opportun	ity record	
Set a contact fiel	d to a specific value	
Create Referral P	Partner	Vec
Apply a note tem	nplate	103
Cancel a subscri	otion	
Run another acti	on set	
Share this record	d with a user	
Share this record Distribute record	l with a group of users I to another infusionsol	ft application 🗸 on" o
Send an email, fa	ax, etc.	•

- 6. Change the "What do you want to send?" to "Email".
- 7. Click the "Add" option to add a new email.

Send an Email, Fax, etc		
5 What do you want to send?		
Email	•	
Show templates in ALL categories	Please select a template	• Edit 7 Add
(Categories)	(Templates) rules are met	

- 8. Another new window should pop open. Set the title to "30 Day CC Expiration Notification".
- 9. Edit the subject line to say, "Your credit card is expiring soon!"

rempiate option	ns	
Title:	30 Day CC Expiration Notification	
Public/Private:	Public	
Compose Email		
Compose Email From: The contact's	owner	T
Compose Email From: The contact's To: The contact's p	owner rimary email address (Change) Add CC Add BCC	•

10. Click "Edit Email Body"

Edit Email Body 🔻

11. Modify the content of your email to notify the recipient that their CC on file is expiring. You can write your own email or use the text provided here:

"Hey there, I was just doing some bookkeeping and I noticed your credit card is set to bill in the future and is approaching the expiration date I have on file. Please click below to update your card info so there isn't any disruption in your service!"



12. Hit return below your paragraph to move the cursor down a line. From the **"Insert"** tab above, click on the **"Merge Fields"** button.



13. At the bottom of the list, click on "Credit Card Fields"

Merge Fields	х
Contact Fields (most common)	> 1
Contact Fields (custom)	>
Contact Fields (additional)	>
Contact Billing Address	>
Contact Shipping Address	>
Contact Optional Address	>
Owner Fields (most common)	>
Owner Fields (additional)	>
Logged-in User Fields (most common)	>
Logged-in User Fields (additional)	>
Your Company Fields (most common)	>
Your Company Fields (additional)	>
Referral Partner Fields	>
Referral Partner's Fields	>
Credit Card fields	>

14. From the list, choose **"HTML Update Link"**. Your email will now include a merge field that will show the recipient a link they can click to update their credit card information.



15. Once you're satisfied with the body of the email, click the save icon in the upper left that looks like a floppy disk.



16. Click the "Close Builder" button next to the save icon.

17. Back on the "Manage Email Template" page, scroll to the bottom and change "Ready to send?" to "yes" under Email **Readiness.** Email Readiness Ready to Send? Yes 4. 14 18. Click the "Save" button. 19. Back on the Manage Trigger page, click the **"Save"** button. Actions Send an Email, Fax, etc. What do you want to send? Email . Show templates in ALL categories • 30 Day CC Expiration Notification • Edit Add (Categories) (Templates) Only run this action when certain rules are met 20. Now click the **"Save Trigger"** button, and you're done! Actions Send an Email using the "30 Day CC Expiration Notification (Email) " template • Add New Action Save Trigger **Delete Trigger** Note: You may want to set up multiple triggers for various dates approaching the expiration of a credit card. You also may want to create a task for someone internal to reach out to them in addition to asking them to update the link. The process will be nearly identical!