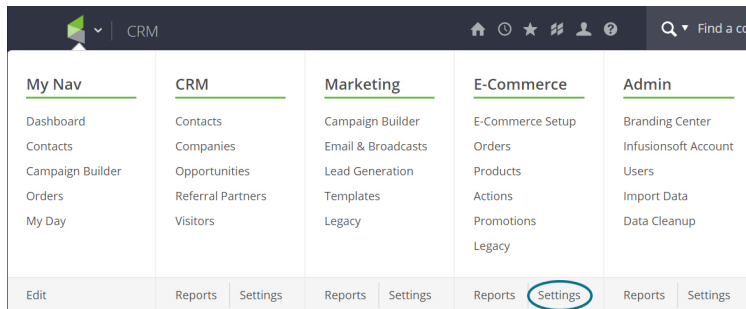
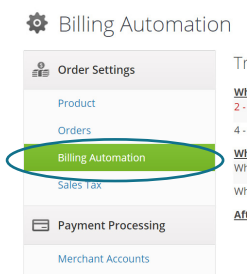


In this exercise you'll learn how to set up a 30 day credit card expiration notification email to remind your customers that it's time to update their credit card on file.

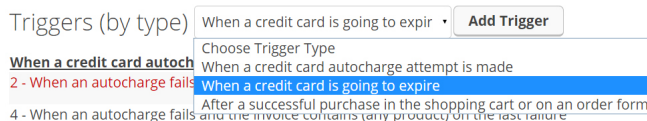
1. From the **Main Navigation**, navigate to **E-Commerce > Settings**.



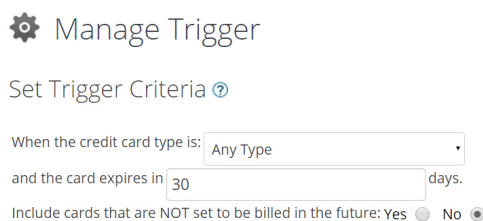
2. From the menu options on the left, select **Billing Automation**.



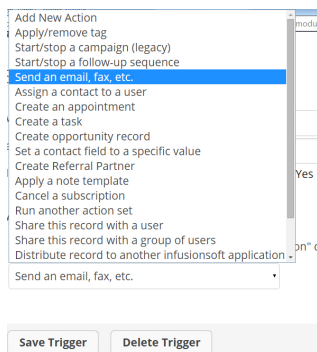
3. In the top drop down menu select "When a credit card is going to expire" and then click **"Add Trigger"**.



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"**.



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



6. Change the "What do you want to send?" to **"Email"**.

7. Click the **"Add"** option to add a new email.

Actions

Send an Email, Fax, etc.

6 What do you want to send?  
Email

Show templates in ALL categories (Categories) Please select a template (Templates) Edit 7 Add

☐ Only run this action when certain rules are met

Save Cancel

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!"**

General Categories & Follow-up Sequence

Template Options

Title: 30 Day CC Expiration Notification

Public/Private: Public

Compose Email

From: The contact's owner

To: The contact's primary email address (Change) Add CC | Add BCC

Subject: Your credit card is expiring soon Merge

Send As: ☐ HTML (graphics & colors) ☐ Plain Text (no graphics) ☒ HTML & Plain Text

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!"*


Format Insert Snippets

Format Font family Font size

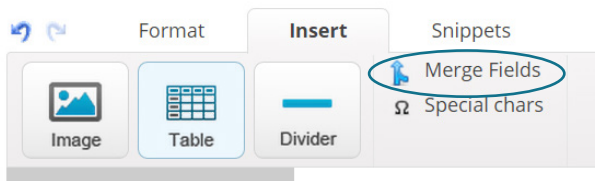
Link Unlink Paste as Text: Off Find Find & Replace Layout & Style

Hey there,

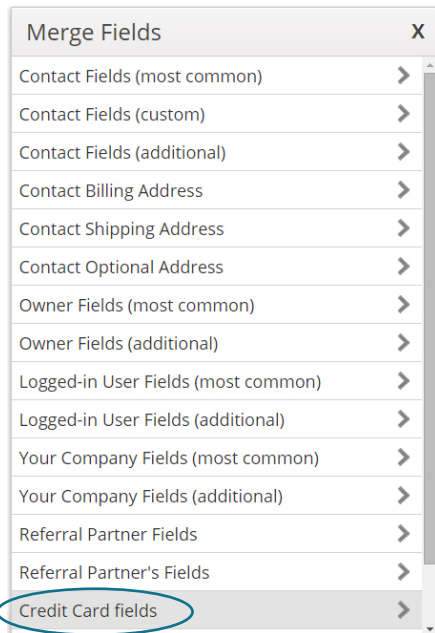
I was just doing some bookkeeping and I noticed your credit card is set to bill in the future and is approaching the expiration date I have on file. Please click below to update your card info so there isn't any disruption in your service!

 Small Business Growth Expert  
GREGORY JENKINS  
Live Trainer  
866-800-0004  
greg.jenkins@infusionsoft.com

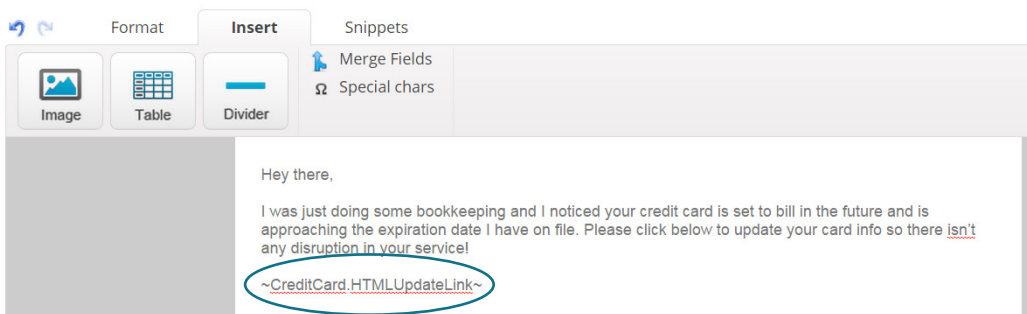
12. Hit return below your paragraph to move the cursor down a line. From the **“Insert”** tab above, click on the **“Merge Fields”** button.



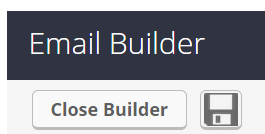
13. At the bottom of the list, click on **“Credit Card Fields”**



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?



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 (Categories) 30 Day CC Expiration Notification (Templates) Edit Add

☐ Only run this action when certain rules are met

**Save** Cancel

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!*