

Credit Card Expiration - Addition of Automatic Notifications (13857) [Enhancement]

Last Modified on 01/23/2023 3:07 pm EST

A new notification template has been created to notify an account's billing contacts that the credit card on file will soon expire. Notifications are triggered 30 days from, 7 days from and the day of expiration. Billing contacts will receive notifications in the form of either a text or email based on their notification preference setting.

The screenshot displays the 'NOTIFICATION TEMPLATE SETUP' interface. At the top, there is a table with columns: ID, NAME, DEFAULT SUBJECT, TYPE, CONTENT TYPE, CREATED BY, SURVEY TYPE, RESPONSE REQUEST TYPE, ACTIVE, PREVIEW EMAIL, and PREVIEW TEXT. A single row is visible with ID 79, NAME 'Credit Card Expiration Notice', DEFAULT SUBJECT 'Credit Card Expiration Notice', TYPE 'Credit Card Expiration', CONTENT TYPE 'text/html', CREATED BY 'Do not use', SURVEY TYPE, RESPONSE REQUEST TYPE, ACTIVE 'Yes', PREVIEW EMAIL 'Preview', and PREVIEW TEXT 'Preview'.

An 'EDIT NOTIFICATION TEMPLATE' dialog box is open, showing the following details:

- TYPE: Credit Card Expiration
- NAME: Credit Card Expiration Notice
- ACTIVE: Yes
- RESPONSE REQUEST TYPE: (empty)
- Design Mode: Email Design (selected), Text Message Design
- DEFAULT SUBJECT: Credit Card Expiration Notice
- CONTENT TYPE: text/html
- DEFAULT MESSAGE:

```
You: @@creditcardtype; credit card ending with @@lastfourdigits; is set to expire on @@expirationdate;.  
<br/><br/>  
Please contact us to update your automatic payment settings to avoid an interruption of service.  
<br/><br/>  
@@division.logo;<br/>  
@@division.name;<br/>  
@@division.city, @@division.state;<br/>  
Phone: @@division.mainphone;<br/>  
@@division.email;<br/>
```
- KEY PATHS: A list of system paths including account.accountClass.name, account.atnTo, account.billgroup, account.billingAddress.addressLine1, account.billingAddress.addressLine2, account.billingAddress.city, account.billingAddress.postalCode, account.billingAddress.state, account.billingAddress.state, account.billingcontact1.email, account.billingcontact1.name, account.billingcontact2.email, account.billingcontact2.name, account.billingEmail, account.billingPhone, account.id, and account.name.
- A 'SAVE' button is located at the bottom of the dialog.

Pathway: Accounting > Credit Card Expiration; Setup > System > Notification Template - Credit Card Expiration