How do I set up a recurring payment reminder email?

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To send automated reminders to any attendees with outstanding balances, with a link to where they can make their payment, you need to:

• Create a dedicated Payment Interactive Site

• Create a Payment Reminder Merge Doc with Token Link to the Payment Site

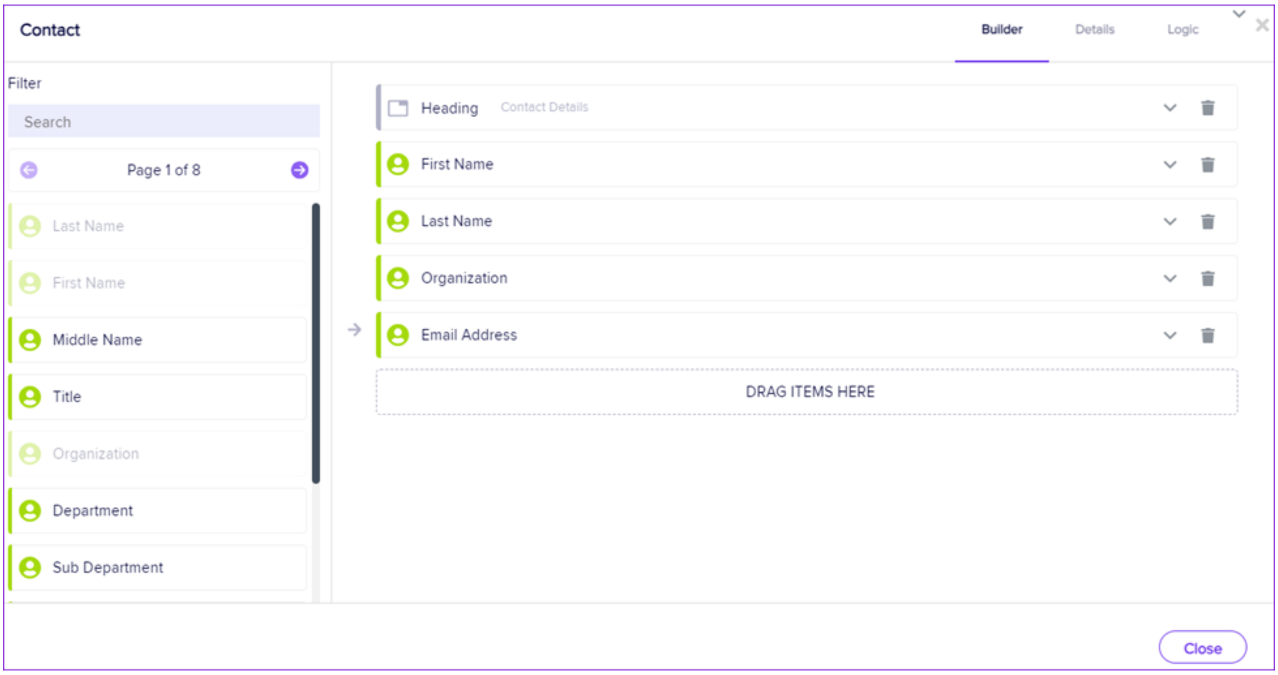
• Set up a Recurring Communication with the correct filters

1. Create a Payment Interactive Site

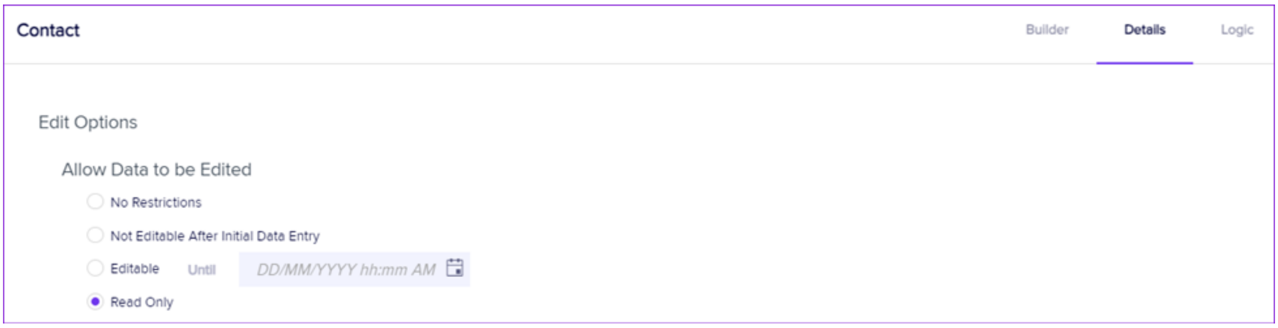
• In the **Online Panel**, under **Interactive Sites**, select **New**.

• You can call your site something like Payment Page.

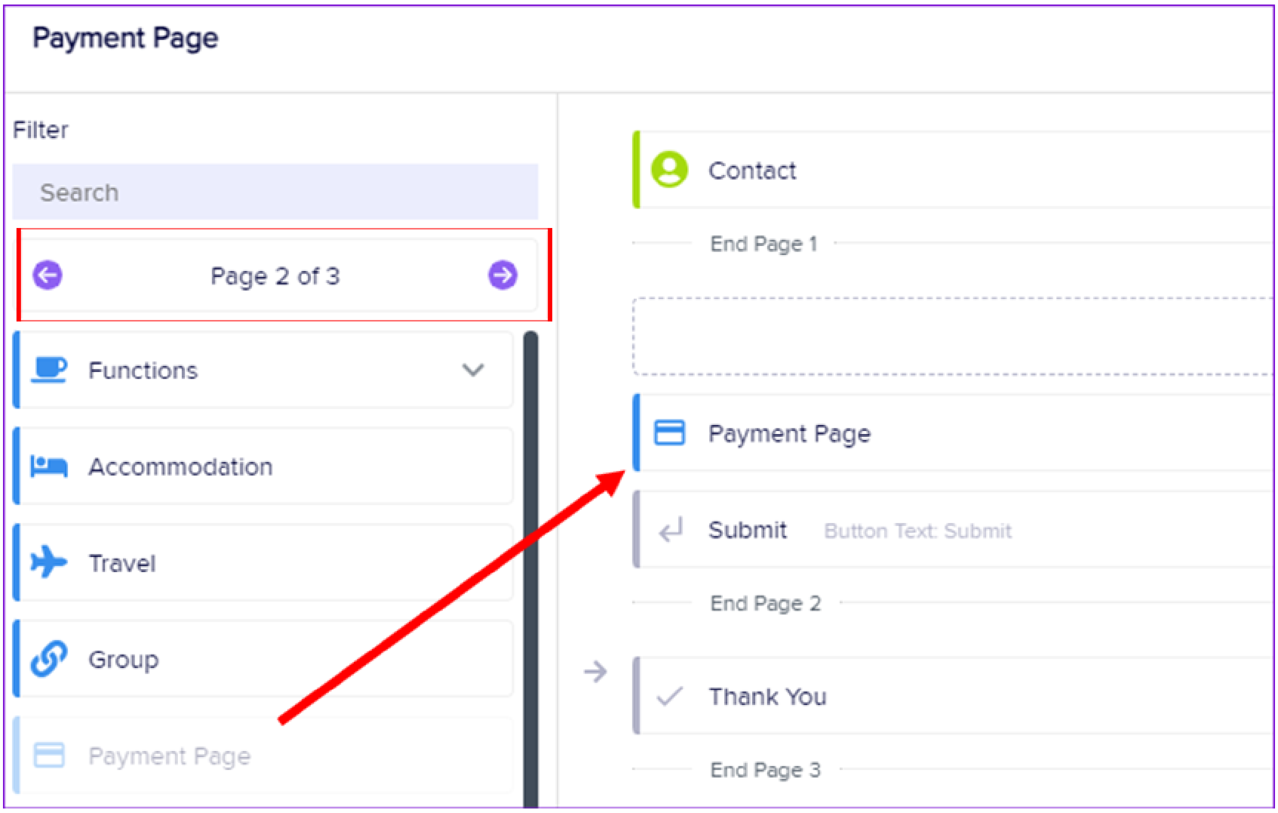
• In the **Builder** tab, add some basic contact details, so the person knows they're on the right page: First Name, Last Name, Organization and Email Address, for example.



Under the **Details** tab, set the Edit options to **Read Only**. (This makes sure someone can't alter their contact details.)



Add the Payment Page component (you may need to use the scroll function in the left-hand panel to see this component):



When opened with a personalized auto login token, the Payment Details will contain the unique payment details for the attendee in question.

You'll also need to set up the payment details you want within this payment page by clicking the cog icon.

If you want to enable online credit card payments, you also need:

1. A Payment Gateway created in Application Setup (to work with your or your client's merchant account)

2. The right Payment Gateway selected in Event Preferences

3. The right Payment Types in Financial Setup

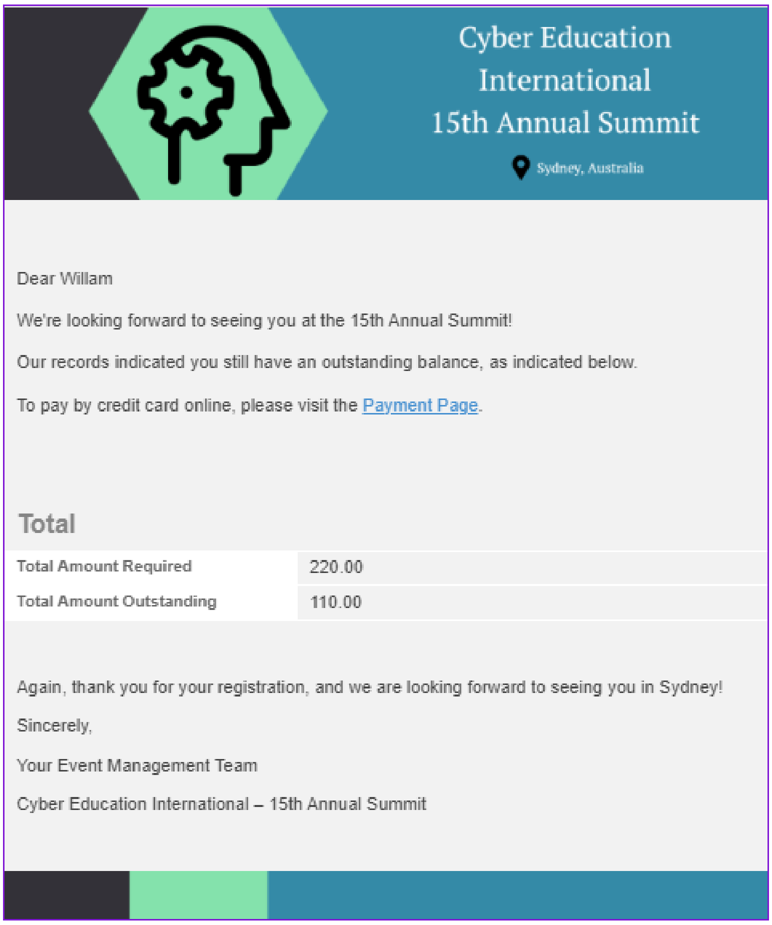
Be sure to check all the other settings on the Payment Page component (for example, whether you want attendees to be able to ask for a purchase order).

As well as using this dedicated payment site for payment reminder emails, you could link to it so you can:

- Accept payments onsite at an event using the Onsite Portal
- Accept payments from Exhibitors and Sponsors from their online portals
- Accept Payments directly from an attendee when displayed in the Organizer App (in a specific attendee record)

2. Set up a Payment Reminder Merge Doc

Your Payment Reminder to the attendee might look something like this:



Cyber Education International 15th Annual Summit

Sydney, Australia

Dear Willam

We're looking forward to seeing you at the 15th Annual Summit!

Our records indicated you still have an outstanding balance, as indicated below.

To pay by credit card online, please visit the Payment Page.

Total

Total Amount Required	220.00
Total Amount Outstanding	110.00

Again, thank you for your registration, and we are looking forward to seeing you in Sydney!

Sincerely,

Your Event Management Team

Cyber Education International – 15th Annual Summit

To create this email, in the **Communication Panel**, under **Merge Doc**, select **New**.

For type, select **Confirmation** and name it something like **Payment Reminder**.

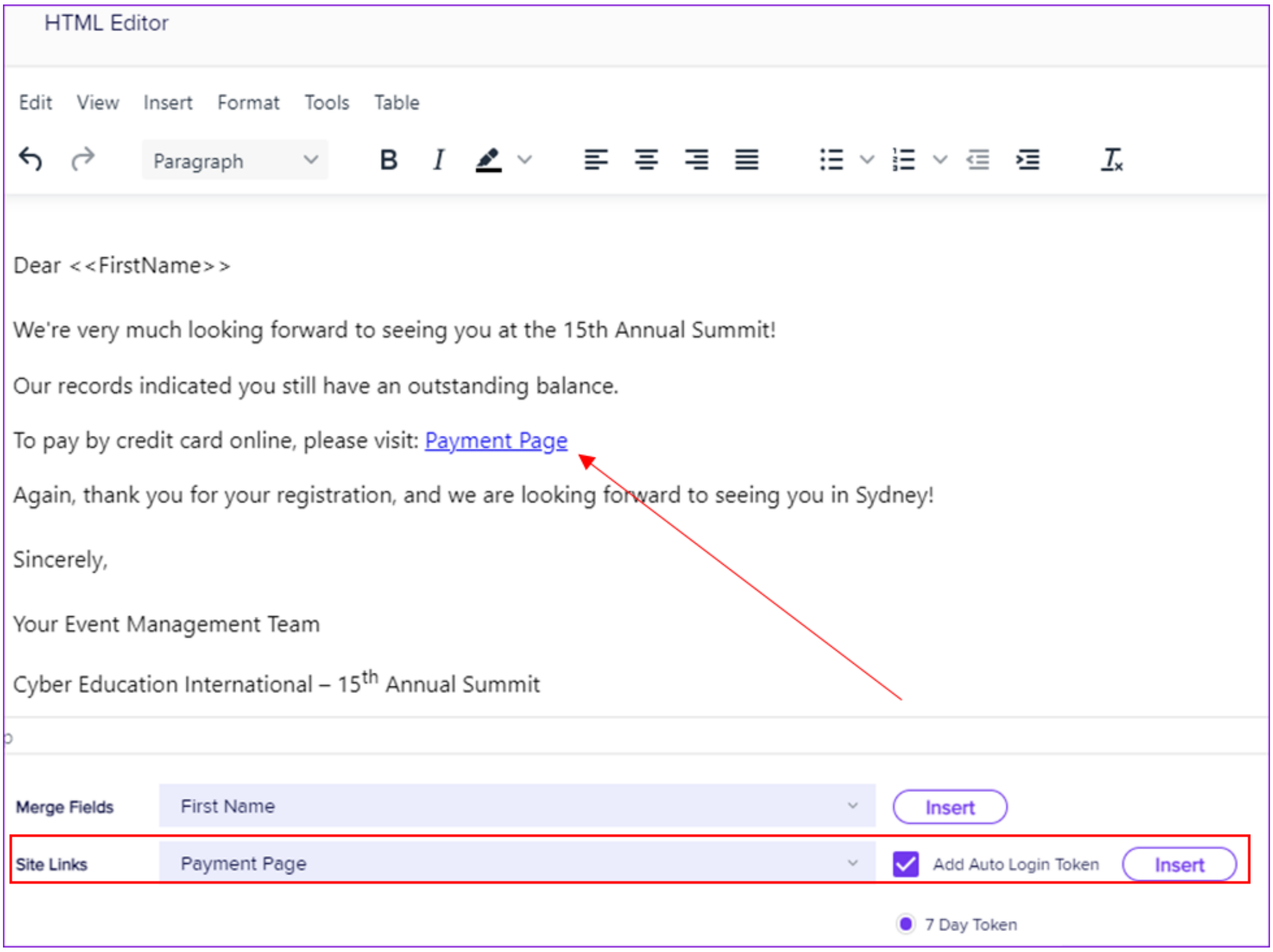
You can set up the email however you like, for example:

Add the **Contact Details** element and include some introductory text.

Add the **Money Total** element.

Add an HTML element with some closing text.

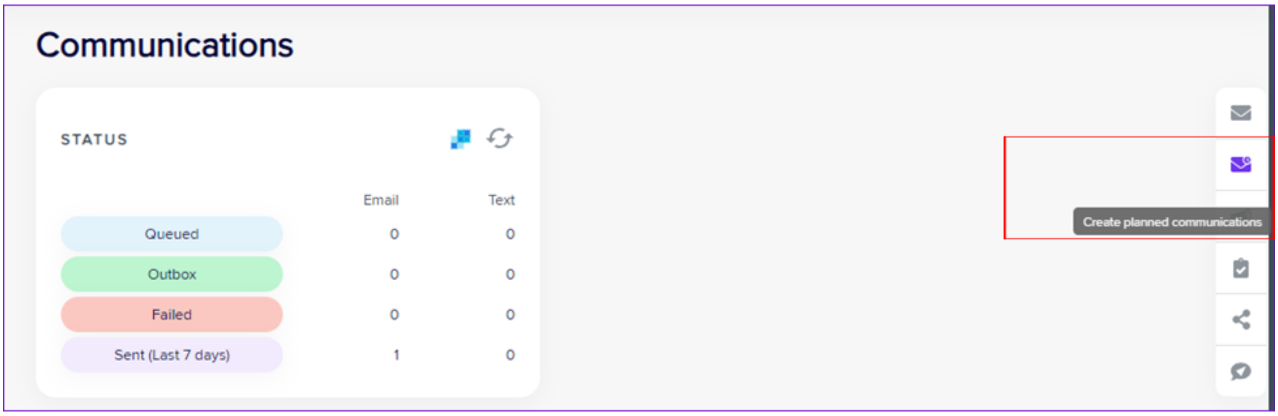
In either the Contact Details – Fields or HTLM content section, you'll want to insert **the payment site link with an Auto Login Token.**



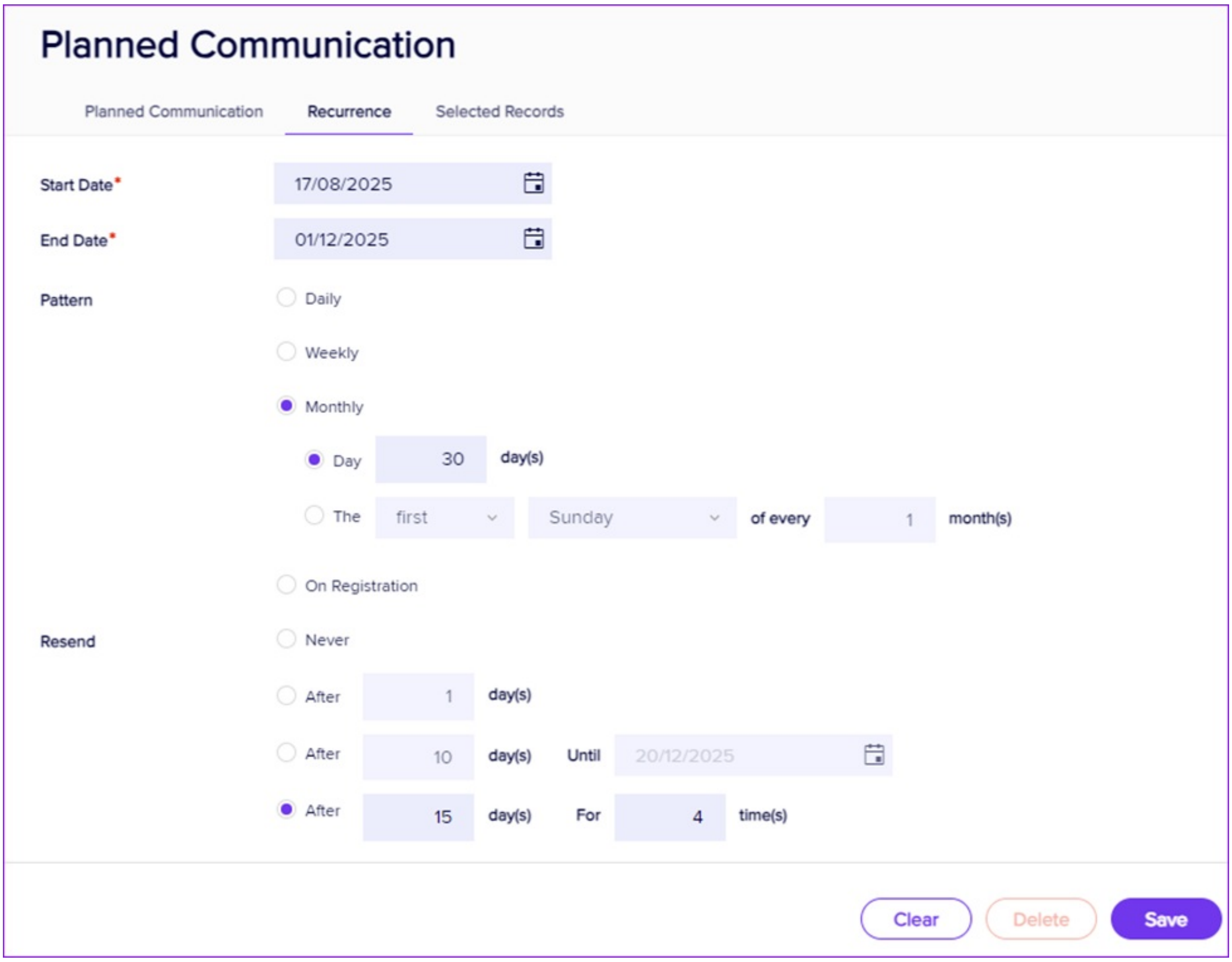
Using the Auto Login Token ensures that when the attendee clicks on the link, only their details (contact and payment due) will be shown on the form.

3. Schedule recurring communications.

• In **Communications Panel,** select **Planned Communications** from Tools



- Give your **Planned Communication** a name.
- Select the **Payment Reminder Merge Doc.**
- Select the **Start Date** of the Email Campaign.
- In **Target Group**, filter for all attendees who owe money (Financial Search Filter, Money Outstanding Option).
- Click on the **Recurrence Tab.**
- Select **Enable Recurrence.**
- Enter the **Date Range** that you want this email to be sent.
- Choose the **Pattern** (Daily, Weekly, or Monthly along with the additional send settings).
- Choose your **Resend** options.



ONLY those attendees who meet your filter for Money Owed will be sent this email.

Once all payments are made, they're no longer included on the list of recipients.

Those who still owe money will be emailed, with updated details on how much they owe.

The personalized link will take each person to 'their' payment page.

The recurring communications will continue without you needing to take further action.