

Automate Your Collections Process

Presented By: Donna Sneed

Getting Your Money

Benefits

- Save Time
 - Reduce time you spend trying to connect with customers to obtain new billing information,
 - or collect on an overdue balance.
 - What if you could eliminate all of those hours and spend your time doing something else?
- Reduce Overhead
 - Automated Notices & Reminders
 - Automated Customer Hub Account Creation
- Increase Cash Flow
 - Conveniently
 - Quickly
 - Any time of day

Automating Your Collections Process

- When an Auto Charge Attempt is Made
 - Fails (Default)
 - Is Successful
- Select which attempt it is
 - First
 - Last (from max try setting)
 - Or any number in between
- Select one or more products that
 - To apply to all products do not select any from the list (leave blank)
- Add Your Actions
 - Apply a Tag
 - Send an HTTP Post (Automatically Create a Customer Hub Account)
 - Add to a Sequence
 - Create a Task
 - Assign a person to User

Setting up Customer Hub

Infocus Performance

Page Management Look & Feel Settings

Application Settings

General Settings

Subdomain	infocus	.customerhub.net
Infusionsoft App	infocus	.infusionsoft.com
Infusionsoft API Key	ca3862b8c0eebbadb20788b9d0eb5d6d	
Application Name	Infocus Performance	
Support Email	donna.sneed@infusionsoft.com	
Infusionsoft Merchant Id	2	
Currency	\$ Dollar ▼	
Payment Notifications	<input checked="" type="radio"/> On <input type="radio"/> Off	
Payment Notify Email	donna.sneed@infusionsoft.com	
WYSIWYG Editor	<input checked="" type="radio"/> On <input type="radio"/> Off	

Setting up Customer Hub

Infusionsoft Action Sets

This is the Infusionsoft Action Set Id that will be run when you have a new user that creates a new login for your CustomerHub app.

New User Action

12

This is the Infusionsoft Action Set Id that will be run when there was a success payment posted through CustomerHub.

Successful Payment Action

13

This is the Infusionsoft Action Set Id that will be run when there was a failed payment attempt made through CustomerHub.

Failed Payment Action

14

[Update Settings](#)

Get the Update Before It Expires

- When a Credit Card is about to Expire

Set Up Action

Setup Trigger

Trigger Information

Set Trigger Criteria

When the credit card type is: Visa 

and the card expires in 10 days.

Include cards that are NOT set to be billed in the future: Yes ☐ No ☒

You can add a new action using the drop down below, or [copy action\(s\) from some other action set...](#)

ACTIONS

Add New Action



 Save Trigger

 Delete Trigger

Customer Hub Information

- Website
 - www.customerhub.net
 - Register for a Free 30 Day Trial
- HTTP Post to another Serve
 - Action that you will want to set-up to automatically create an account when the first auto charge attempt fails.
 - https://infusionsoft.customerhub.net/web_services/add_user?send_email=false

- Thank You