



Launch Customer Portal to Your Customers: Email Templates

You might run into the following common situations when collecting payments for your business. Reduce administrative work by empowering your customers to self serve in the new Customer Portal. Use the email templates below to communicate how your customers can conveniently and independently solve for common payment scenarios with this feature.

Introducing Customer Portal

To: Customer Email Address
From: Your Business Name
Subject Line: [New] Log In to Access Your PaySimple Account

Hi [Customer First Name],

We're pleased to announce that you can now manage payments through our brand new customer portal! Opting in is easy. Simply create or log into your PaySimple account [\[link here\]](#) and accomplish the following items without the trouble of contacting us:

- Update and add multiple payment methods online
- View upcoming payments and order history
- Set a default payment method for new and existing billing schedules

We hope you enjoy the added convenience and flexibility. Have a great day!

Best regards,

[Contact/Business Name]

Failed Payments

(PaySimple report: [Unsuccessful Transactions Report](#))

From: Your Business Name
To: Customer Email Address
Subject Line: Failed Monthly Billing - Action Required

Hi [Customer First Name],

I'm afraid we were unable to charge your account for your recurring billing schedule.



To avoid any disruption to your services in the future, please create or log into your customer portal [paste your link here] to provide a valid payment method at your convenience.

Thank you very much, and let us know if you have any questions!

Best regards,

[Contact/Business Name]

Expiring CC Information

From: Your Business Name
To: Customer Email Address
Subject Line: Credit Card Expiration

Hi [Customer First Name],

We are reaching out to provide a courtesy notification as your credit card on-file is expiring soon. To avoid any disruption to your services in the future, please create or log into your customer portal [paste your link here] to provide a valid payment method at your convenience.

Thank you very much, and let us know if you have any questions!

Best regards,

[Contact/Business Name]

View Purchase History

From: Your Business Name
To: Customer Email Address
Subject Line: View Your Purchase History

Hi [Customer First Name],



We know accessing your payment history is important to you, so we are excited to announce that you can now view it online! Simply create or log into your PaySimple account [paste your link here] and view all your purchases to date whenever and wherever is convenient for you.

Best regards,

[Contact/Business Name]

View Billing Schedule Details

From: Your Business Name
To: Customer Email Address
Subject Line: Access Your Billing Details

Hi [Customer First Name],

We're pleased to announce that you can now access your recurring billing schedule details through our brand new customer portal! Opting in is easy. Simply create or log into your PaySimple account [paste your link here] and accomplish the following items without the trouble of contacting us:

- Update and add multiple payment methods online
- View upcoming payments
- Set a default payment method for new and existing billing schedules

We hope you enjoy the added convenience and flexibility. Have a great day!

Add a Payment Method

From: Your Business Name
To: Customer Email Address
Subject Line: Add a Payment Method

Hi [Customer First Name],



It's easy to add a payment method! Follow this link and create an account if you already haven't. Just add your new payment method in the "Home" tab and you're all set!

Best regards,

[Contact/Business Name]

