

MEMBER EMAILS

- Gmail
- SendGrid

STRIPE

- Payment Receipts
 - New
 - Recurring
- Refunds
 - New Payments
 - Recurring Payments

Ascension

- Payment Receipts
 - New + Recurring
- Welcome Emails *Combine?*
- Forgot Password Emails
- Refunds
 - New + Recurring
- Pending Cancellation
 - Cancelled plan that has future re-bill

Salesforce

Connected to Member + create Case

Churn Buster

- Retry Payment - Day 3
- Retry Payment - Day 7
- Retry Payment - Day 15
- Retry Payment - Day 20
- Retry Payment - Day 25

COMPARISON DONE ON DAY 30

=
Cancelled

From: member@planname.com
 [reply to: member@ascensiondental.com]

From: member@planname.com
 [reply to: member@ascension...]

1 CB account for each plan. Emails merged in CB.

API + Metadata

API

API

Reply's

Reply's

API

