

Chase Payments FTU-v2 Emails

FINAL Content

(CMC-43042)

Chase Payments Segment Team: Grace Chang (Marketer), Karena Chen (Analyst)
XD Creative Dev: Ryan-Vincent Alvarez (Design), Suzanne Richards (Copy)
CMC Email Dev/ Eloqua Build: Julie Kerr (CMC Payments Marketer), Ryan Robles (HTML Dev Lead)

Launch Date: Tuesday, April 30, 2019

PowerPoint Shared Location (Contact: Julie Kerr, CMC Payments):

https://docs.google.com/presentation/d/1XTtfKsx6_RY5dsPAiiQccx92EvwEFgSrOHORSo6718/edit?usp=sharing

Data/ Eloqua Build Requirements (Contact: Julie Kerr, CMC Payments):

<https://docs.google.com/spreadsheets/d/1MsRGqBYZ9fTGVJmnSJ5c9mxIJhGWsViMRL8uAUSyIis/edit?usp=sharing>

Email 1-v2:
Day 0-3, Merch-Acct-Open-Date= past 0-3 Days

Eloqua Creative Name:
43042-CMC-US-SBG-QBO_PMTS-FTU-v2:ChasePmts_EM-1_Day_0-3_Merch-Acct-Open-Date=0-3-Days

Eloqua Creative Location:
<https://secure.p03.eloqua.com/Main.aspx#emails&id=15593>

Email Links & URLs

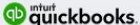
“Sign in” (link):
<https://qbo.intuit.com/login>

Create invoice [button]:
<https://qbo.intuit.com/login?pagereq=invoice>

Watch the video (link):
<https://youtu.be/k3-i0mmaoZA>

Check it out (link):
<https://attendee.gotowebinar.com/rt/1081371177190375170?source=Payments+FTU+EM>

SL: Say hi to QuickBooks Payments.
PH: You're ready to take card & bank payments.

 [Sign in](#)

Welcome to QuickBooks Payments

You're just an invoice away from getting paid.

[Create invoice](#)



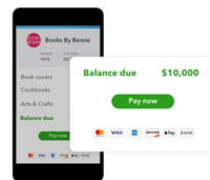
See money sooner



Get paid with a click

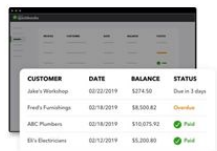
Select your payment methods to put a **Pay now** button on your invoice.

[Watch the video](#)



Let them pay online

Customers select **Pay now**, and your payment is headed to your bank.



CUSTOMER	DATE	BALANCE	STATUS
Jade's Workshop	02/22/2019	\$214.50	Due in 3 days
Fresh's Farmhouse	02/18/2019	\$8,500.82	Overdue
ABC Plumbers	02/18/2019	\$10,075.92	Paid
EV's Electronics	02/12/2019	\$5,200.80	Paid

See every move

Find out when customers view and pay invoices. And track money all the way to your account.

[View on web](#)

Watch QuickBooks Payments in action
Learn everything sales receipt, receive payment, reporting, and more from an expert in our new webinar.
[Check it out](#)

[View on web](#)



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43042-1



Email 2-v2:
Day 0-40, PE-Invoice-Sent

Eloqua Creative Name:
43042-CMC-US-SBG-QBO_PMTS-FTU-v2:ChasePmts_EM-2_Day_0-40
_PE-Invoice-Sent


Eloqua Creative Location:
<https://secure.p03.eloqua.com/Main.aspx#emails&id=15594>

Email Links & URLs

“Sign in” (link):
<https://qbo.intuit.com/login>

Find out how [button]:
https://quickbooks.intuit.com/ftu/payments/setup/#take_payments

SL: Your first clickable invoice is on the way.
PH: Check out all the ways you could get paid.







intuit quickbooks [Sign in](#)

Get paid your way







Whether it's nearby or far away, you've got options.

[Find out how](#)

So many ways to get paid

-  **Online**
Send invoices with **Pay now** buttons that can get you paid up to 3x faster.*
-  **In person**
Enjoy a free mobile card reader to accept payments on the go.
-  **Far away**
Key in credit or debit card numbers for payments from remote customers.
-  **Scheduled**
Send invoices automatically with recurring payments.

[View on web](#)





     

*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.







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*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.

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Email 3 - New:
Day 0-40, Paid-on-Intuit-Rails

Eloqua Creative Name:
43042-CMC-US-SBG-QBO_PMTS-FTU-v2:ChasePmts_EM-3_Day_0-40_Paid-on-Intuit-Rails

Eloqua Creative Location:
<https://secure.p03.eloqua.com/Main.aspx#emails&id=15595>

Email Links & URLs

“Sign in” (link):
<https://qbo.intuit.com/login>

Check it out [button]:
<https://qbo.intuit.com/app/sales>

<https://qbo.intuit.com/login?pagereq=sales> (NEW, per 5.02 Request from Grace Chang. Added to Eloqua HTML on 5.02.19, 5:35pm PT).

SL: You just got a payment.
PH: Here’s to many more.

qb intuit quickbooks. [Sign in](#)

Paid! High five!

Someone just sent you a payment.

[Check it out](#)

[View on web](#)

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Email 4b - New:
Day 7-30, Paid-Outside-of-Intuit-Rails

Eloqua Creative Name:
43042-CMC-US-SBG-QBO_PMTS-FTU-v2:ChasePmts_**EM-4b_Day_7-30**
_Paid-Outside-of-Intuit-Rails

Eloqua Creative Location:
<https://secure.p03.eloqua.com/Main.aspx#emails&id=15596>

Email Links & URLs

“Sign in” (link):
<https://qbo.intuit.com/login>

Create invoice [button]:
<https://qbo.intuit.com/login?pagereq=invoice>

SL: Put a Pay now button on it.
PH: And watch automated accounting in action.

Get paid faster
Put a **Pay now** button on your next invoice.
[Create invoice](#)

Let's do this
Get paid with a click
Select your payment methods to put a **Pay now** button on your invoice.
[Watch the video](#)

Let them pay online
Customers select **Pay now**, and your payment is headed to your bank.

See every move
Find out when customers view and pay invoices. And track money all the way to your account.

CUSTOMER	DATE	BALANCE	STATUS
Jake's Workshop	02/22/2019	\$274.50	Over 3 days
Rod's Furnishings	02/18/2019	\$8,500.82	Overdue
ABC Plumbers	02/18/2019	\$16,075.12	Paid
8th Electricians	02/12/2019	\$8,200.80	Paid

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Email 5-v2:
Day 10, NO-Inv-Created or NO-Inv-Sent

Eloqua Creative Name:
43042-CMC-US-SBG-QBO_PMTS-FTU-v2:ChasePmts_EM-5_Day_10_NO-Inv-Created_or_NO-Inv-Sent

Eloqua Creative Location:
<https://secure.p03.eloqua.com/Main.aspx#emails&id=15597>

Email Links & URLs

“Sign in” (link):
<https://qbo.intuit.com/login>

Try it now [button]:
<https://qbo.intuit.com/login?pagereq=invoice>

SL: Together you'll get paid fast.
PH: We'll track payments and update books, too.

Get paid up to 3x faster*

Pay now buttons let customers pay invoices as soon as they see them.

[Try it now](#)

How it's done

Get paid with a click
Select your payment methods to put a **Pay now** button on your invoice.

[Watch the video](#)

Let them pay online
Customers select **Pay now**, and your payment is headed to your bank.

See every move
Find out when customers view and pay invoices. And track money all the way to your account.

CUSTOMER	DATE	BALANCE	STATUS
Jake's Workshops	02/22/2019	\$274.50	Due in 3 days
Fred's Funnelings	02/18/2019	\$8,500.82	Overdue
ABC Plumbers	02/18/2019	\$10,075.92	Paid
BY's Electricians	01/12/2019	\$5,208.80	Paid

[View on web](#)



*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.

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Email 6-v2:
Day 20, NO-Inv-Created or NO-Inv-Sent

Eloqua Creative Name:
43042-CMC-US-SBG-QBO_PMTS-FTU-v2:ChasePmts_EM-6_Day_20_NO-Inv-Created_or_NO-Inv-Sent

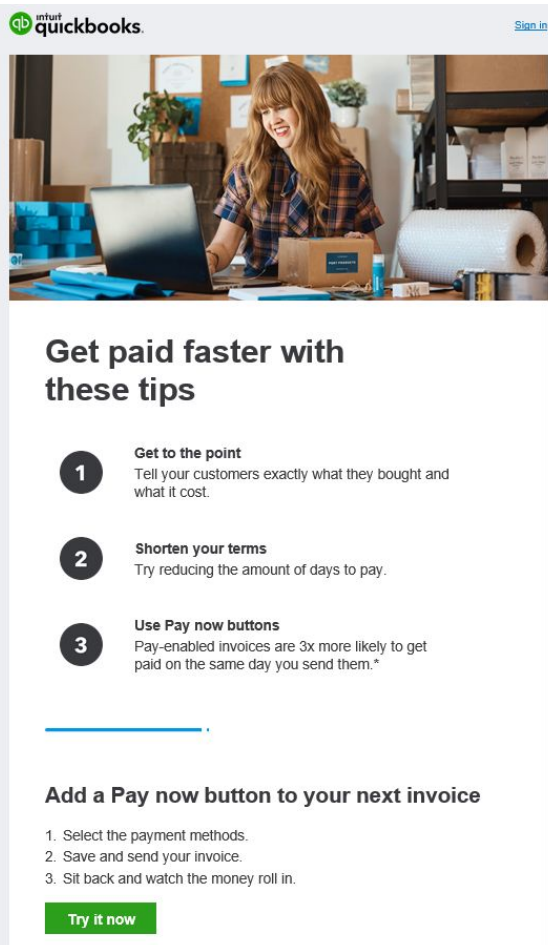
Eloqua Creative Location:
<https://secure.p03.eloqua.com/Main.aspx#emails&id=15598>

Email Links & URLs

“Sign in” (link):
<https://qbo.intuit.com/login>

Try it now [button]:
<https://qbo.intuit.com/login?pagereq=invoice>

SL: Have invoicing questions?
PH: We'll tell you how to get paid fast.



The advertisement features a woman in a plaid shirt smiling at a laptop in a warehouse setting. The main headline is "Get paid faster with these tips". It lists three tips: 1. Get to the point (Tell your customers exactly what they bought and what it cost), 2. Shorten your terms (Try reducing the amount of days to pay), and 3. Use Pay now buttons (Pay-enabled invoices are 3x more likely to get paid on the same day you send them.*). Below the tips is a section titled "Add a Pay now button to your next invoice" with three steps: 1. Select the payment methods, 2. Save and send your invoice, and 3. Sit back and watch the money roll in. A green "Try it now" button is at the bottom.

Get paid faster with these tips




- 1 Get to the point**
Tell your customers exactly what they bought and what it cost.
- 2 Shorten your terms**
Try reducing the amount of days to pay.
- 3 Use Pay now buttons**
Pay-enabled invoices are 3x more likely to get paid on the same day you send them.*

Add a Pay now button to your next invoice

1. Select the payment methods.
2. Save and send your invoice.
3. Sit back and watch the money roll in.

[Try it now](#)

[View on web](#)







  

*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.

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Chase Payments FTU Emails

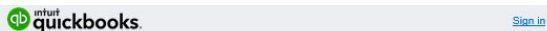
New V2 vs. Old V1

side-by-side content

Email 1-v2 (CMC-43042): Day 0-3, Merch-Acct-Open-Date= past 0-3 Days

SL: Say hi to QuickBooks Payments.

PH: You're ready to take card & bank payments.



Welcome to QuickBooks Payments

You're just an invoice away from getting paid.

[Create invoice](#)



See money sooner



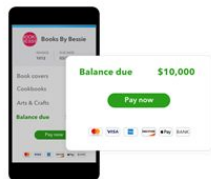
Get paid with a click

Select your payment methods to put a **Pay now** button on your invoice.

[Watch the video](#)

Let them pay online

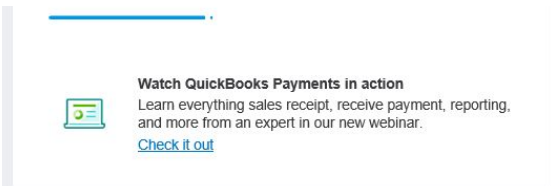
Customers select **Pay now**, and your payment is headed to your bank.



CUSTOMER	DATE	BALANCE	STATUS
Jake's Workshop	02/22/2019	\$274.50	Over 3 days
Fred's Fundraising	02/18/2019	\$8,550.82	Overdue
ABC Publishers	02/18/2019	\$10,075.92	PAID
XYZ Electronics	02/12/2019	\$5,200.80	PAID

See every move

Find out when customers view and pay invoices. And track money all the way to your account.



Watch QuickBooks Payments in action

Learn everything sales receipt, receive payment, reporting, and more from an expert in our new webinar.

[Check it out](#)

[View on web](#)



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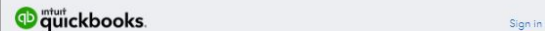
Previous Version 1 of Email 1:

Live from 12.20.18 – 4.29.19. Replaced with NEW Version 2 creative on 4.30.19.

Email 1-v1 (CMC-42272): Day 0-3, Merch-Acct-Open-Date= past 0-3 Days

SL: It's official! Say hi to QuickBooks Payments.

PH: You're approved to take card & bank payments.



Welcome! Here's how to get paid in QuickBooks

1. [Sign in](#) to QuickBooks to get started.
2. To get paid on an invoice, create your invoice and add your customer's email address. Check the **Cards** and **Bank transfer (ACH)** boxes to accept credit or debit cards and bank transfer payments. Select **Save and send** to email your invoice.
3. Your customer will receive the invoice with a **Pay now** button that links to a secure portal where they can pay it online. You'll be able to see when your invoice has been sent, viewed, paid, and deposited in the [invoice tab](#).
4. Once your invoice has been paid, your books will update automatically. If it was a credit or debit card payment, check your bank account for your money in 2-3 days. Paid by bank transfer? You should see your money in 5 days.
5. Send this invoice on a regular basis? Make it recurring. [See how](#)

[View on web](#)



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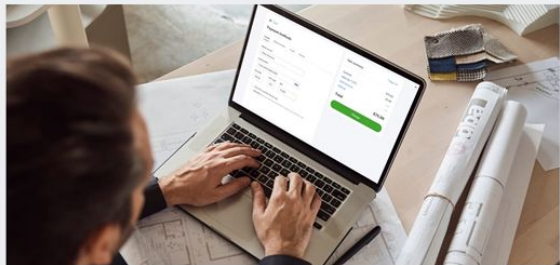
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42272-1

Email 2-v2 (CMC-43042): Day 0-40, PE-Invoice-Sent

SL: Your first clickable invoice is on the way.

PH: Check out all the ways you could get paid.

 [Sign in](#)



Get paid your way

Whether it's nearby or far away, you've got options.

[Find out how](#)

So many ways to get paid



Online

Send invoices with **Pay now** buttons that can get you paid up to 3x faster.*



In person

Enjoy a free mobile card reader to accept payments on the go.



Far away

Key in credit or debit card numbers for payments from remote customers.



Scheduled

Send invoices automatically with recurring payments.

[View on web](#)



*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.

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 powering prosperity



turbotax



quickbooks



proconnect



mint

Previous Version 1 of Email 2:

Live from 12.20.18 – 4.29.19. Replaced with NEW Version 2 creative on 4.30.19.

Email 2-v1 (CMC-42272): Day 0-40, PE-Invoice-Sent

SL: Hooray! You just sent your first pay-enabled invoice.

PH: Check out all the ways to get paid.

 [Sign in](#)



Get paid all the ways

Then sit back and watch money roll in



Online: Send invoices with a **Pay now** button. Check whether you want to accept cards or bank transfer from the top and select **Save and send**. Your pay-enabled invoice is on its way! [See how](#)



In person: Swipe cards with your free mobile card reader. [Get yours now](#)



Remote: Key in customer credit or debit card numbers to take payment from remote customers. Collect payment on an invoice or create a new one for work done. [See how](#)



Recurring payments: Have customers who pay weekly or monthly? [Set up recurring payments](#)

Email 3 (New!) - CMC-43042: Day 7-30, Paid-on-Intuit-Rails

SL: You just got a payment.

PH: Here's to many more.



[Sign in](#)



Paid! High five!

Someone just sent you a payment.

[Check it out](#)

[View on web](#)



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Email 4b (New!) - CMC-43042: Day 7-30, Paid-Outside-of-Intuit-Rails

SL: Put a Pay now button on it.

PH: And watch automated accounting in action.

qb **intuit** quickbooks. [Sign in](#)

Get paid faster

Put a **Pay now** button on your next invoice.

Create invoice



Let's do this

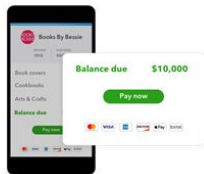


Get paid with a click
Select your payment methods to put a **Pay now** button on your invoice.

[Watch the video](#)

Let them pay online

Customers select **Pay now**, and your payment is headed to your bank.



CUSTOMER	DATE	BALANCE	STATUS
John's Bookings	02/22/2019	\$75,130	Due in 1 Day
Paul's Fundings	02/18/2019	\$8,500.82	Overdue
ABC Plumber	02/18/2019	\$10,275.92	Paid
DE's Electronics	02/12/2019	\$5,200.80	Paid

See every move

Find out when customers view and pay invoices. And track money all the way to your account.

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43042-4b

intuit. powering prosperity | turbotax | quickbooks | proconnect | mint

Previous Email 4 REPLACED with NEW Email 4b population & creative:

Live from 12.20.18 – 4.29.19. Replaced with NEW 4b email on 4.30.19.

Email 4 (CMC-42272): Day 7-30, NON-PE-Inv-Sent & PE-Inv-NOT-Sent

SL: Have you activated online payments? Set up is easy!

PH: Here's how to help customers pay you faster.

qb **intuit** quickbooks. [Sign in](#)



Get paid with a click. Check your payment checkboxes to activate online payments.

Take the fuss out of getting paid by checking your payment checkboxes on your online invoices. Pay-enabled invoices are 3X more likely to get paid on the same day you send them.*

Customers click your invoice, and you're paid. Every payment you take appears directly in QuickBooks Payments. Plus, QuickBooks matches payments with invoices so your books are reconciled automatically.

Sign in to QuickBooks and select **Banking** to check out your reconciled transactions. All done!

Activate online payments

[View on web](#)

Email 5-v2 (CMC-43042): Day 10, NO-Inv-Created or NO-Inv-Sent

SL: Together you'll get paid fast.

PH: We'll track payments and update books, too.

Previous Version 1 of Email 5:

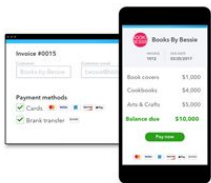
Live from 12.20.18 – 4.29.19. Replaced with NEW Version 2 creative on 4.30.19.

qb intuit **quickbooks** [Sign in](#)

Get paid up to 3x faster*

Pay now buttons let customers pay invoices as soon as they see them.

[Try it now](#)

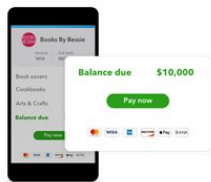


How it's done



Get paid with a click
Select your payment methods to put a **Pay now** button on your invoice.

[Watch the video](#)



Let them pay online

Customers select **Pay now**, and your payment is headed to your bank.

CUSTOMER	DATE	BALANCE	STATUS
Jane's Workshop	02/22/2019	\$274.50	Due in 2 days
Patty's Fundraising	02/18/2019	\$8,300.82	Overdue
ABC Publishers	02/18/2019	\$10,075.92	Paid
EV's Electronics	02/12/2019	\$5,200.80	Paid

See every move

Find out when customers view and pay invoices. And track money all the way to your account.

[View on web](#)



*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.

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intuit prospering possibility |

Email 5-v1 (CMC-42272): Day 10, NO-Inv-Created or NO-Inv-Sent

SL: Get paid faster with simple online payments.

PH: Go digital - your customers will thank you!

qb intuit **quickbooks** [Sign in](#)

Accept online payments directly in invoices to get paid 3x faster*

Setup only takes a few seconds.

Online payments are easier for everyone. Online bank transfers mean you don't have to deal with checks, cash, or the bank down the street.

Customers click your online invoice, you're paid, and we record it all for you in QuickBooks.

Start getting paid today!

1. Click the **Try it now** button.
2. Check the **Cards** and/or **Bank transfer** boxes.
3. Click the green **Save and send** button to email your invoice - and you're done!

[Try it now](#)



Email 6-v2 (CMC-43042): Day 20, NO-Inv-Created or NO-Inv-Sent

SL: Have invoicing questions?

PH: We'll tell you how to get paid fast.

 [Sign In](#)



Get paid faster with these tips

1

Get to the point

Tell your customers exactly what they bought and what it cost.

2

Shorten your terms

Try reducing the amount of days to pay.

3

Use Pay now buttons

Pay-enabled invoices are 3x more likely to get paid on the same day you send them.*

Add a Pay now button to your next invoice

1. Select the payment methods.
2. Save and send your invoice.
3. Sit back and watch the money roll in.

[Try it now](#)

[View on web](#)



*3x more likely to be paid on same day based on U.S. merchants who send invoices through QuickBooks Online from January to December 2017.

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Previous Version 1 of Email 6:

Live from 12.20.18 – 4.29.19. Replaced with NEW Version 2 creative on 4.30.19.

Email 6-v1 (CMC-42272): Day 20, NO-Inv-Created or NO-Inv-Sent

SL: Have invoicing questions?

PH: Here's how to get your invoices paid fast.

 [Sign In](#)

Make sure your invoices are top-notch with these tips

Clarify, clarify: All invoices should clearly state what was bought and what it cost. QuickBooks will autofill every product or service you enter and auto-generate a unique number for fast, error-free invoicing.

Shorten your terms: Net 30 days used to be the terms of choice, but net 7 days is becoming more common. Try out different terms to see what works best. But remember the the longer you give them, the tighter your cash flow can get.

Put a "Pay now" button on it: Customers love paying online because they don't have to fuss with checks and stamps. And pay-enabled invoices are 3X more likely to get paid on the same day you send them.* Every payment you take appears directly in QuickBooks Payments. Plus, QuickBooks matches payments with invoices so your books are reconciled automatically.

Send your invoices with a "Pay now" button today.

1. Check the **Cards** and/or **Bank transfer** boxes at the top of your online invoice.
2. Select **Save and send**. Your pay-enabled invoice is on its way! [See how](#)

Ready to try these tips? [Sign in to send an invoice](#)

[Sign in](#)