



Custom Emails 101

A comprehensive guide to creating and implementing custom emails

What is a Custom Email?

- A Custom Email is an email sent to an organization when:
 - A transaction is processed
 - A recurring transaction is set up
 - A recurring transaction ends
 - A recurring transaction is declined
 - A Card associated with a recurring donation is expiring
- Custom emails that can be sent to the Donor include:
 - Transaction receipt
 - Recurring transaction receipt
 - New schedule confirmation
 - End of schedule notice

How do I set up a custom email?

- First, custom emails must be enabled, to enable custom emails, contact your sales representative or email sales@paperlesstrans.com
- Once custom emails are enabled, go to the [Virtual Terminal](#)
 - Once there, choose “Custom Emails” from the Quick Menu or the icons on the right. This will take you to the Custom Emails module.
- There are three sections in the Custom Emails module:
 - Mailer Settings (who gets the emails)
 - Activate Emails by Terminal (when emails go out)
 - Customize Emails by Terminal (what the emails say)
 - National Day of Prayer
 - Western Wishes

The “Who, When, and What” of Custom Emails

Mailer Settings (Who gets the emails)

- Merchant “To” Address – this is the email address of the person in your organization that should be receiving transaction notifications (multiple emails can be put in this field)
- “From/Reply to” Address – this is the email address that the receipts will appear to be from

Mailer Settings

Please specify the email accounts to be used for your custom emails.

Merchant "To" Address (Not applicable to emails sent to donors) *

Paperless Transactions <support@paperlesstrans.com>

"From/Reply-To" Address (Applicable to all outbound mailers) *

Paperless Transactions <support@paperlesstrans.com>

Activate Donor Emails by Terminal (When emails go out)

- Options for Donor receipts for each Terminal
 - Donation Receipts
 - Recurring Donation Receipts (Only for Scheduler Terminal)
 - New Schedule Confirmations
 - End of Schedule Notices (Only for Scheduler Terminal)

Activate Emails By Terminal

Each mailer must be individually activated by terminal. Please make your selection below.

Terminal	DONORS Donation Receipts	DONORS Recurring Donation Receipts	DONORS New Schedule Confirmations	DONORS End of Schedule Notices	MERCHANT New Donation Advisories	MERCHANT New Schedule Advisories	MERCHANT End of Schedule Advisories	MERCHANT Scheduler Decline Advisories	MERCHANT Expiring Card Advisories
Ext Trans #14440	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
mobile 13052	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT Comp Data HP #13051	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT Dyn Del HP #12972	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT Event Reg HP #13053	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT FB HP #12503	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT Sched #12504		<input type="checkbox"/>		<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SAT Simple HP #12505	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT Storefront HP #13117	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
SAT VT #12502	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
Save A Tree #13522	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			




















Activate Merchant Emails by Terminal (When emails go out)

- Options for Merchant Notifications for each Terminal

- New Donation Advisories
- New Schedule Advisories
- End of Schedule (Scheduler only)
- Scheduler Decline Advisories (Scheduler only)
- Expiring Card Advisories (Scheduler only)

Customize Emails by Terminal

Each mailer can be specifically customized for your organization. Click the pencil to edit a template below.

Mailer	Terminal	Last Modified
 Donation Receipts	Ext Trans #14440	N/A
 Donation Receipts	mobile 13052	10/9/2013 4:39:35 PM
 Donation Receipts	SAT Comp Data HP #13051	10/9/2013 4:39:33 PM
 Donation Receipts	SAT Dyn Del HP #12972	10/9/2013 4:39:34 PM
 Donation Receipts	SAT Event Reg HP #13053	10/9/2013 4:39:34 PM
 Donation Receipts	SAT FB HP #12503	10/9/2013 4:39:34 PM
 Donation Receipts	SAT Simple HP #12505	10/9/2013 4:39:35 PM
 Donation Receipts	SAT Storefront HP #13117	10/9/2013 4:39:35 PM
 Donation Receipts	SAT VT #12502	10/9/2013 4:39:35 PM
 Donation Receipts	Save A Tree #13522	10/9/2013 4:39:35 PM
 Recurring Donation Receipts	SAT Sched #12504	10/9/2013 4:39:35 PM
 New Schedule Confirmations	Ext Trans #14440	N/A
 New Schedule Confirmations	mobile 13052	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT Comp Data HP #13051	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT Dyn Del HP #12972	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT Event Reg HP #13053	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT FB HP #12503	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT Simple HP #12505	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT Storefront HP #13117	10/9/2013 4:39:35 PM
 New Schedule Confirmations	SAT VT #12502	10/9/2013 4:39:35 PM

Customize Emails by Terminal (What will the email say)

- In this section, you get to choose exactly what your email receipts and notifications will say and look like.
- You can add and format
 - Text
 - Images
 - And Links
- Once you have made all the changes to your custom emails do not forget to click “Apply Changes” at the very bottom of the page, or none of your work will be saved.

