

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

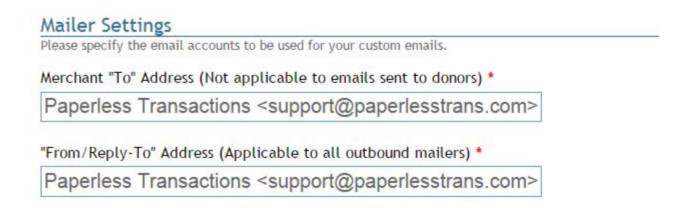
How do I set up a custom email?

- 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 <u>Virtual Terminal</u>
 - 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



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)

| 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 | | | | | | | | | |
| mobile 13052 | 2 | | | | | | | | |
| SAT Comp Data HP #13051 | | | | | | | | | |
| SAT Dyn Del HP #12972 | € | | <u> </u> | | | | | | |
| SAT Event Reg HP #13053 | € | | | | | | | | |
| SAT FB HP #12503 | • | | | | | | | | |
| SAT Sched #12504 | | | | | | | | | |
| SAT Simple HP #12505 | • | | | | | | | | |
| SAT Storefront HP #13117 | ≥ | | | | | | | | |
| SAT VT #12502 | € | | | | | | | | |
| Save A Tree #13522 | • | | | | | | | | |

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)

| | Mailer | Terminal | Last Modified |
|---|-----------------------------|--------------------------|----------------------|
| P | Donation Receipts | Ext Trans #14440 | N/A |
| 9 | Donation Receipts | mobile 13052 | 10/9/2013 4:39:35 PM |
| P | Donation Receipts | SAT Comp Data HP #13051 | 10/9/2013 4:39:33 PM |
| 9 | Donation Receipts | SAT Dyn Del HP #12972 | 10/9/2013 4:39:34 PM |
| 9 | Donation Receipts | SAT Event Reg HP #13053 | 10/9/2013 4:39:34 PM |
| 9 | Donation Receipts | SAT FB HP #12503 | 10/9/2013 4:39:34 PM |
| 9 | Donation Receipts | SAT Simple HP #12505 | 10/9/2013 4:39:35 PM |
| 9 | Donation Receipts | SAT Storefront HP #13117 | 10/9/2013 4:39:35 PM |
| 9 | Donation Receipts | SAT VT #12502 | 10/9/2013 4:39:35 PM |
| 9 | Donation Receipts | Save A Tree #13522 | 10/9/2013 4:39:35 PM |
| P | Recurring Donation Receipts | SAT Sched #12504 | 10/9/2013 4:39:35 PM |
| 7 | New Schedule Confirmations | Ext Trans #14440 | N/A |
| 9 | New Schedule Confirmations | mobile 13052 | 10/9/2013 4:39:35 PM |
| 9 | New Schedule Confirmations | SAT Comp Data HP #13051 | 10/9/2013 4:39:35 PM |
| P | New Schedule Confirmations | SAT Dyn Del HP #12972 | 10/9/2013 4:39:35 PM |
| 9 | New Schedule Confirmations | SAT Event Reg HP #13053 | 10/9/2013 4:39:35 PM |
| 9 | New Schedule Confirmations | SAT FB HP #12503 | 10/9/2013 4:39:35 PM |
| 9 | New Schedule Confirmations | SAT Simple HP #12505 | 10/9/2013 4:39:35 PM |
| 9 | New Schedule Confirmations | SAT Storefront HP #13117 | 10/9/2013 4:39:35 PM |
| 7 | New Schedule Confirmations | SAT VT #12502 | 10/9/2013 4:39:35 PM |

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

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

Thank you for your donation to Western Wishes!

METHOD: Visa vvvv5498

DATE/TIME: 5/28/2014 12:40:11 PM

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.