paperless
TRANSACTIONS

Paperless Transactions introduces our Back Office

Custom Emails Module

A new and improved Custom Emails module that delivers robust, segmented donor receipting and internal notification options...customized to your organization!

Custom Emails FEATURES

Here is a look at all that you can do when you configure Custom Emails for your organization.

Save time with Global Email Templates

Want to customize each mailer with the same data and design elements. Simply save a Global Email Template & let the system do the rest! With this type of configuration, you can set up Custom Emails in just a few minutes! You can also revert to Parent templates at anytime.

Create Mailers by the Type of Transaction

Segment your mailers by the type of transaction-for example, 1x donors can receive one email receipt type while recurring donors receive another type. Hosting event registration payments? You can have the email receipt serve as a ticket and be customized by event.

Expanded Internal Mailers

Many organizations want incoming notifications to their staff when a donation occurs. With an expanded lineup of Internal Mailers, your staff can receive emails for donation alerts, refund alerts, donation schedule summaries, or even for (approaching) expiring donor cards.

Donation Threshold Notifications

Want to know when a donation amount exceeds your maximum amount card policy so you can instantly contact that donor or investigate for possible fraud? These important notifications help to maintain card security and put you in touch with your thresholds.
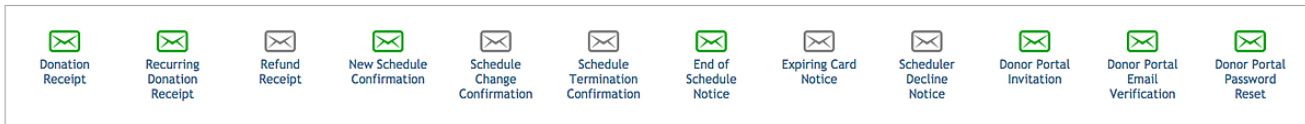
Configuring Custom Email Receipts 101

Here's a step-by-step guide to configuring Custom Receipt Emails.

When setting up Custom Emails for the first time, you must first log into the Paperless Virtual Terminal, navigate to the Custom Emails menu, and you will see the below screen.
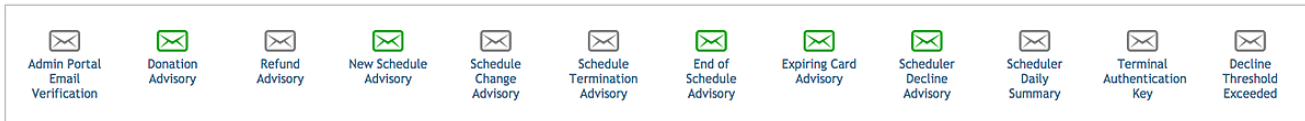

Now, start with the Donor Mailers and click into (just to get started) the first Donor Mailer called 'Donation Receipt' (you should see the below screen):
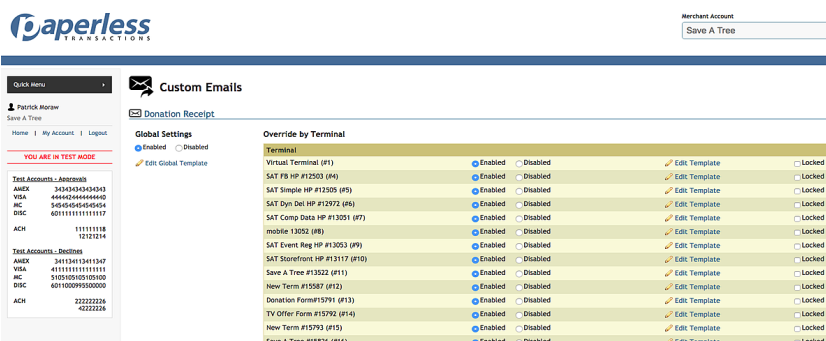
You will see all of the Custom Mailers broken into different types of Processing Terminal ID's (or commonly referred to as TID's) where

transactions can occur.

The most common TID's are:

VT (for transactions processed through the Virtual Terminal)

API (for transactions processed via API through a 3rd party software partner)

Scheduler (for transaction processed that revolve around recurring schedules)

HP (for transactions processed through a 'Hosted Page' that Paperless is hosting for you).

If you want ALL of you donor receipts to display the same design and copy, you can simply click on the 'Edit Global Template' option and customize it to your liking (like the below example).
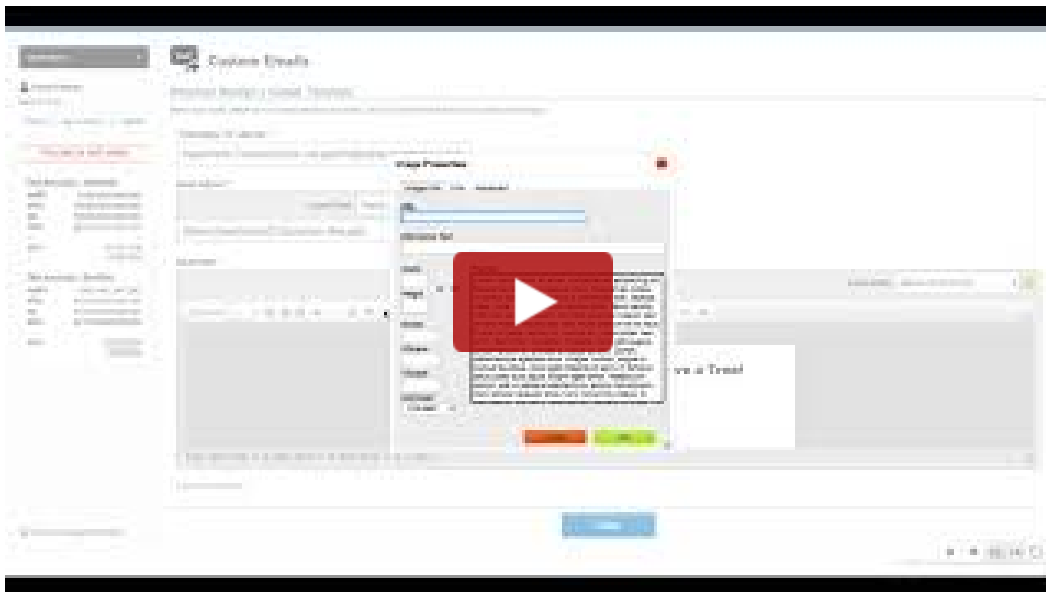
*Make sure to "Lock" a Mailer when you do not want other users to modify that mailer.

**Also, you can copy a Mailer from another TID when you'd like for that mailer to be configured for more than one TID.

Once you make any changes, you must click 'Done' in the mailer itself, then 'Return to List' before clicking on 'Apply Changes" in order to finalize those changes..
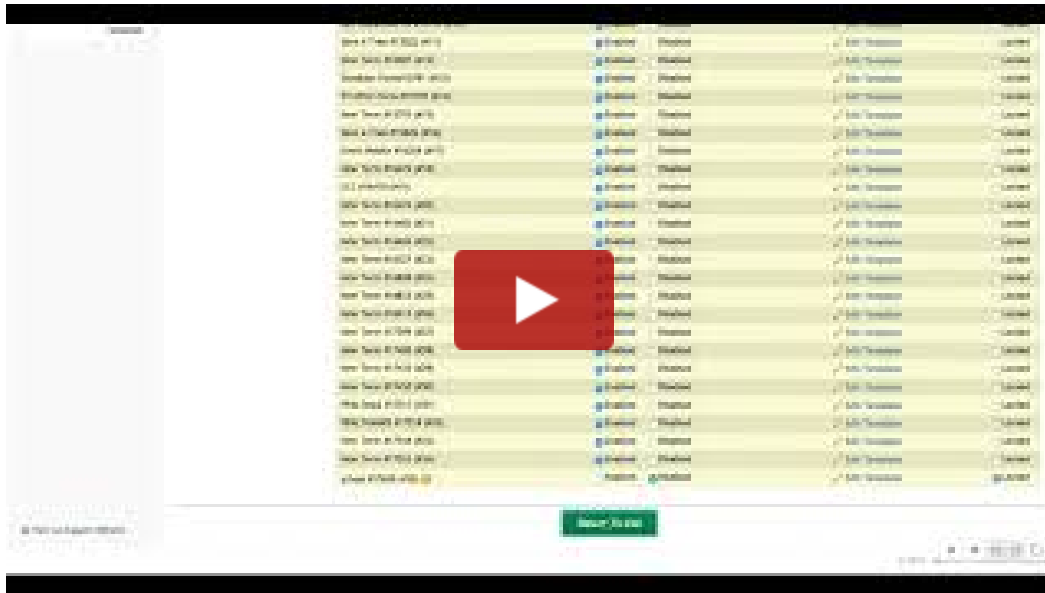
Configuring Custom Internal Mailers 101

Here's a step-by-step guide to configuring Custom Internal Emails.

Follow the same steps for modifying the Custom Receipts mailers and select an Internal Mailer to modify.

Once you've selected the Internal Mailer, you can:

- Add email recipients from your staff
- Edit the Subject Line to create urgency with your staff
- Modify the mailer copy to include all of the advisory details that you require
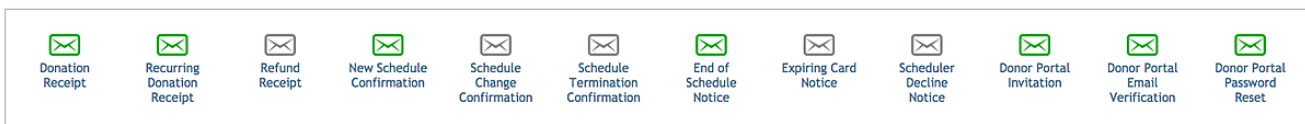
Configuring Custom Email Receipts 201

Here's a step-by-step guide to configuring Custom Receipt Emails and spending a little more time on designing a custom look and feel.

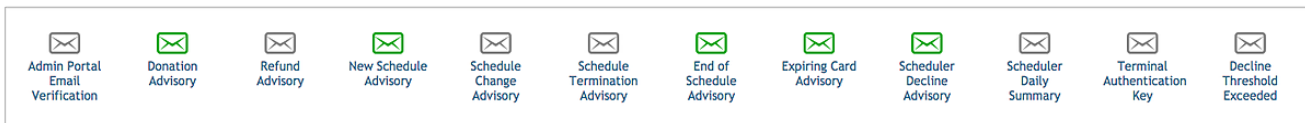Follow the same steps (as seen in on the previous section) and select a Receipt mailer to modify.

With any email receipt mailer, you can view the source code and make changes to the design or content (as seen below).

You can also change the following aspects of any Mailer:

- From/Reply-To Address
- Subject (include configurable field values)
- Email Body (include configurable field values)

Schedule a Custom Emails Training

If you'd like to schedule a training time with a Paperless Transactions team member, you can do so by clicking the Button below and selecting a time that is convenient for you/your team.

This training is designed to be a 15-minute call and is focused around coaching clients through the main components of Custom Emails.

Each client is empowered to customize their own emails however they would like and our team can help get you started in that direction with a Custom Emails Training!

Schedule a Training