

Receipts and Notifications Section

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The Receipts and Notifications section of your form configuration allows you to control the automated communication with your constituents.

You can choose to use both texting (SMS) and/or Email. Both forms of notification are enabled by default.

There are three distinct components to this section:

- [Receipt - Edit Email](#)
- [Disable PDF Download](#)
- [Recurring Payments](#)
- [Notify Recipient\(s\) on Submit](#)

Receipts and Notifications

Receipt

 Edit Email ☒ SMS ☒ Email

Recurring Payments

Payment Receipt

☒ SMS ☒ Email

Upcoming Payment Reminder

☒ SMS ☒ Email

Credit card expires in 30 days

☒ SMS ☒ Email

Credit card expired

☒ SMS ☒ Email

Notify Recipient(s) on Submit

 Edit Notification ☐ Email

Receipt - Edit Email

The **Receipt** email is initially created in the **Settings > Receipts and Notifications**. That template is pulled into the Activity where you can now personalize what you want the Receipt to say, by clicking on **Edit Email**.

When you edit the email, the top section shows you the body of the email that you can format using the Rich Text Editor functions to add links, colors, images and more.

Edit Email Receipt

Receipt Message

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Personalize

Thank you for your purchase! We look forward to seeing you.

Order Summary:

[purchase_summary]

p

Characters: 91

13 words

Contact Email

givesmartqa@gmail.com

Email entered is shown on all receipts and notifications for donors with inquiries.

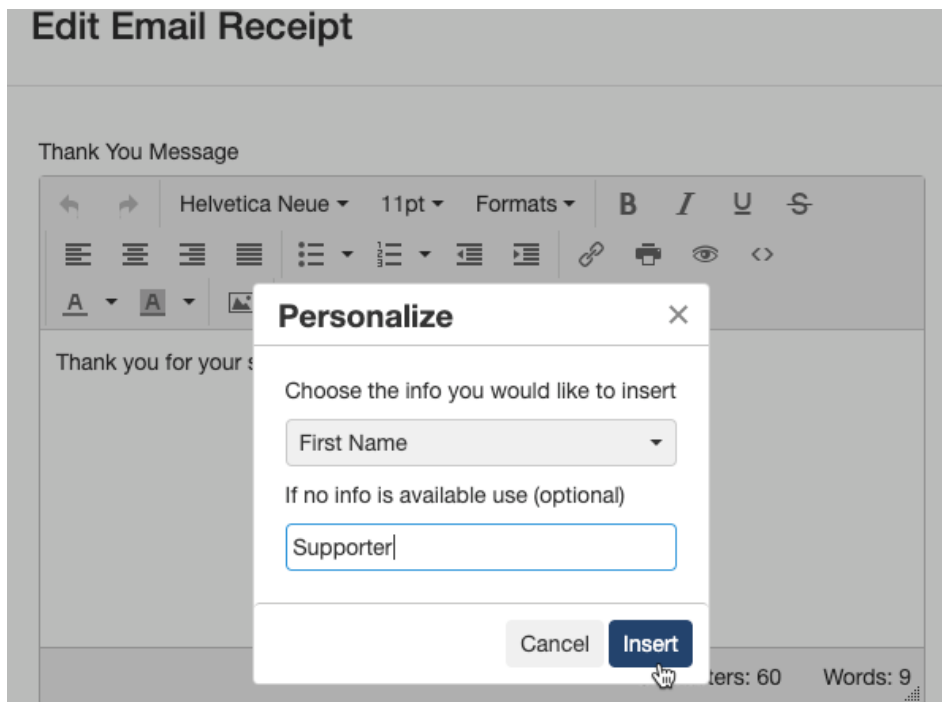
Cancel

Save

You can also click the **Personalize** button to include the supporter's name or any of the information collected on the form (except, of course, the credit card information). This will allow you to send a more specialized and unique to each supporter.

If the field on your form that you want to include as a personalized element in the email is not a required item, then you will want to consider including a generic term or phrase when supporters don't enter that piece of information.

Edit Email Receipt



NOTE: When including the **Payment Method** variable in a receipt or notification, both the credit card type and last four digits of the card number will now be displayed.

Disable PDF Download in Email

For each activity receipt, you have the ability to remove the download a PDF statement button from the email. This would be applicable for non-payment forms where a \$0 receipt is not necessary.

While editing the activity, select **Receipts & Notifications > Edit Email**.

Scroll to the **Include Tax Info** section, and toggle off the **Show** switch. Click **Save**.

Edit Email Receipt

Emails will send from this address

Email Subject Line

Receipt

Your preferred subject line for the donation receipt email

Contact Phone

Phone entered is shown on all receipts and notifications for donors with inquiries.

Include Tax Info

Donors can claim tax deduction with an IRS compliant receipt.

Show



Compliance Message

No goods or services were received in return for this gift. GiveSmart Suite Demo is a 501(c)(3) charity.

Preview PDF Attachment

Cancel

Save

This will now remove the Download PDF button from the automated email.

Hello Jane,

Thank you for your donation to NP.org.

Name:

Jane Smith

Amount:

\$103.62

Date:

09/01/23

Payment Method:

Credit Card ending in 1111

Download PDF

For questions about this transaction, please contact gifts@np.org

No goods or services were received in return for this gift. NP.org is a 501(c)(3) charity.

Recurring Payments

The **Recurring Payments** portion allows you to enable or disable the notifications sent to your recurring donors in different situations. Your donors can receive these notifications via **SMS** (Text) and/or **Email** depending on which ones you check or uncheck.

- **Payment Receipt:** This is the message that is sent once the donation has been charged. The email version will be what you write in the **Email Receipt** for any other donation. The SMS version will look like this:

Thanks for giving to Bettie - Inc..
Your weekly donation of \$190.00 has been processed.
AUTH: Request was processed successfully.
Txt HELP for help
Text STOP to unsubscribe.

- **Upcoming Payment Reminder:** This message is sent about 3-4 days before the next donation will be charged. The email version will be what you write in the **Email Receipt** for any other donation. The SMS version will look like this:

Thanks for giving to Manisha CC.
Your weekly donation of \$2.42 will be processed this Tuesday.
To change, call [866-976-7999](tel:866-976-7999).
Text STOP to unsubscribe.

- **Credit card expires in 30 days:** If the credit card's expiration date is approaching, the supporter will be alerted so they can provide a new date or credit card.
- **Credit card expired:** This alerts the donor that their credit card is expired and they will need to update it to continue donating.

Notify Recipient(s) on Submit

If you want someone from your organization to be alerted when a form is completed, you can put a check in the Email box by **Notify Recipient(s) on Submit**.

When you click **Edit Notification**, you can select who you would like to receive the email and edit the content of the email.

Edit Email Notification

Notification Recipient(s)

Notification Message

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Personalize

Someone donated to your keyword: [keyword_details]. Here are the details:
Name: [donor_name]
Amount: \$[amount]

p » span

Characters: 108 Words: 15

Cancel

Save

Notification Recipient(s)

When you click in the box to add who you would like to receive the notification, it will automatically drop down and show you the users in your account. As you type, it will filter the list so you can more easily find the proper recipient. Select one or more recipients as desired.

Note: Only users of your GiveSmart Fundraise account can receive these notifications. To learn how to add users, [click here](#).

Notification Message

You can tailor the message you wish to send your recipients. The items in dark blue are the variables that will populate in the message, so the recipient can see which Activity was used, the Donor's name and how much they've donated. If you delete any of those items, you can just type it back in for it to work again: [keyword_details], [donor_name], [amount].

If you delete everything from the message, you can copy in the exact details from the receipt the donor will receive by clicking on **Copy From Receipt**, so it will act as if you were BCC'd on the donor's email, but you will not receive their PDF receipt.

