

# Receipts and Notifications Section

Last Modified on 09/12/2024 8:40 am PDT

The Receipts and Notifications section of your form configuration allows you to control the automated communication with your constituents, customized for any particular form.

You can configure and customize the Email Receipt and Email Notification per form. The verbiage associated with the SMS (texting) notifications cannot be edited, though these notifications can be turned off if needed.

An Email Receipt is required to be sent on any forms accepting monetary payments. The Email Notification per form submission is optional, and can be configured and sent to any internal users in your GiveSmart Fundraise account as needed.

There are a number of distinct components to this section, linked below:

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

---

## Edit Email Receipt

The **Receipt** email is initially created in the [Settings > Receipts and Notifications](#). That template is pulled into any new Activity you create. In the Receipts and Notifications section for any form, you may personalize what you want the Receipt to say, by clicking on **Edit Email**.

**NOTE:** For compliance reasons, the Email Receipt cannot be disabled on any payment forms which is why you may see the Email checkbox greyed out.

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.

By default, your Receipt Message will include a **[purchase\_summary]** merge field.

The purchase summary consists of 4 fields as shown below. Name (first and last), Amount, Date, and Payment Method.

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 full credit card used). This will allow you to send a more specialized and unique email to each supporter.

**TIP:** If the field you want to insert into in the email is not a required field on your form, then you will want to consider including a generic term or phrase when supporters don't enter that piece of information.

**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 be displayed.

---

## Disable the PDF Tax Receipt

For each activity receipt, you have the ability to remove the "Download PDF" button from the email that includes the [tax receipt configured in your Account Settings](#). This would be applicable for non-payment forms (e.g. Volunteer Sign Ups, Surveys, etc.) where a \$0 tax 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**.

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

---

## SMS Receipt

The SMS receipt is optional and enabled by default. It is a simple notification that is sent in tandem with the Email Receipt to those who provide a valid mobile number on the form. Though **the verbiage in the text notification cannot be edited**, it will include the transaction amount (if any), the [Organization Short Name](#), and the last 4 digits of the card used.

**Note:** The above verbiage associated with SMS receipts cannot be edited or customized.

## 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:
- **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:
- **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.

## Enable Email Notifications

If you want certain users in your organization to be alerted when a form is completed, check the 'Email' box by **Notify Recipient(s) on Submit** in the Receipts and Notifications section when editing your form.

Next, select **Edit Notification** to choose who you would like to receive email notifications for this form (under Notification Recipients), and edit the content of the email (Notification Message).

### 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 in your GiveSmart Fundraise account are eligible to receive these notifications. To learn how to add users, [click here](#).

### Notification Message

By default, the notification message will include basic information such as the donor name and amount. Similar to the Email Receipt message, the Notification Message can be customized/personalized as needed.

**Note:** There is not an option for users to be BCC'd on Email Receipts. In lieu of this, you may opt to use the Email Notification and select **Copy From Receipt**. This way, you will receive the same customized email content that a donor would receive. Just use caution, as selecting this option will overwrite the current Notification Message with the message configured in the Email Receipt for this form.

---