



YourCause[®] from Blackbaud

CSRconnect Email Library



blackbaud[®]

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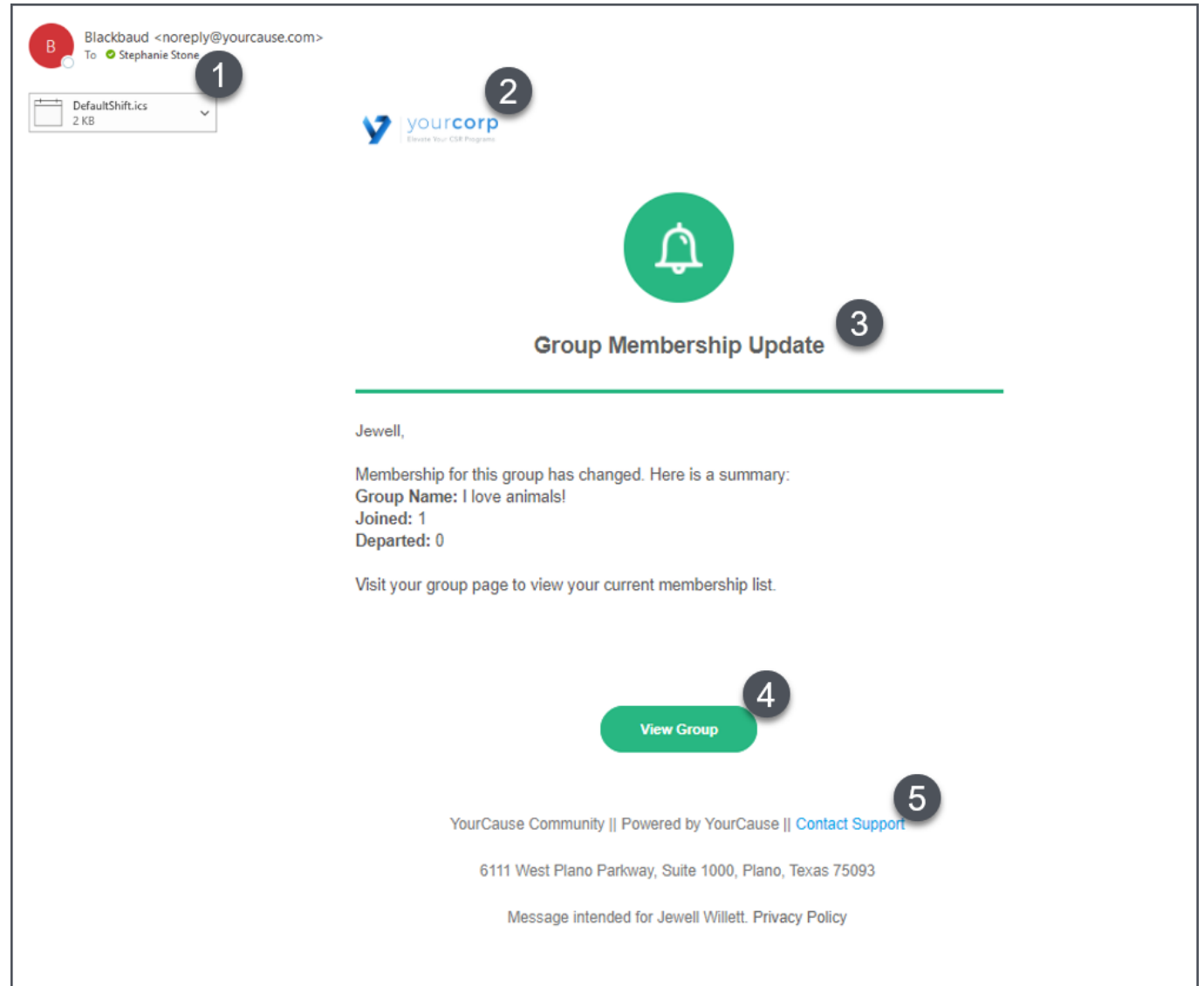
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Basic email components

1. Calendar file attachment (when relevant)
2. Client logo
3. Header
4. Link to client's YourCause community
5. Footer with client's community name and addressee



The screenshot shows an email interface with the following elements:

- 1**: Sender information: Blackbaud <noreply@yourcause.com> To: Stephanie Stone
- 2**: Client logo: yourcorp - Enable Your CSR Program
- 3**: Header: A green bell icon followed by the text "Group Membership Update"
- 4**: Call to action: A green button labeled "View Group"
- 5**: Footer: "YourCause Community || Powered by YourCause || [Contact Support](#)"

The email body text includes:

Jewell,

Membership for this group has changed. Here is a summary:
Group Name: I love animals!
Joined: 1
Departed: 0

Visit your group page to view your current membership list.

6111 West Plano Parkway, Suite 1000, Plano, Texas 75093

Message intended for Jewell Willett. [Privacy Policy](#)

Account/Admin

Description: Email sent to user when they log in with Single Sign-On (SSO)

Sender: System

Recipient: Employee user

Trigger: When a user logs in with SSO

Option to turn email on/off? No

Option to customize email? No

Subject line: [Verify Your Preferred Email](#)

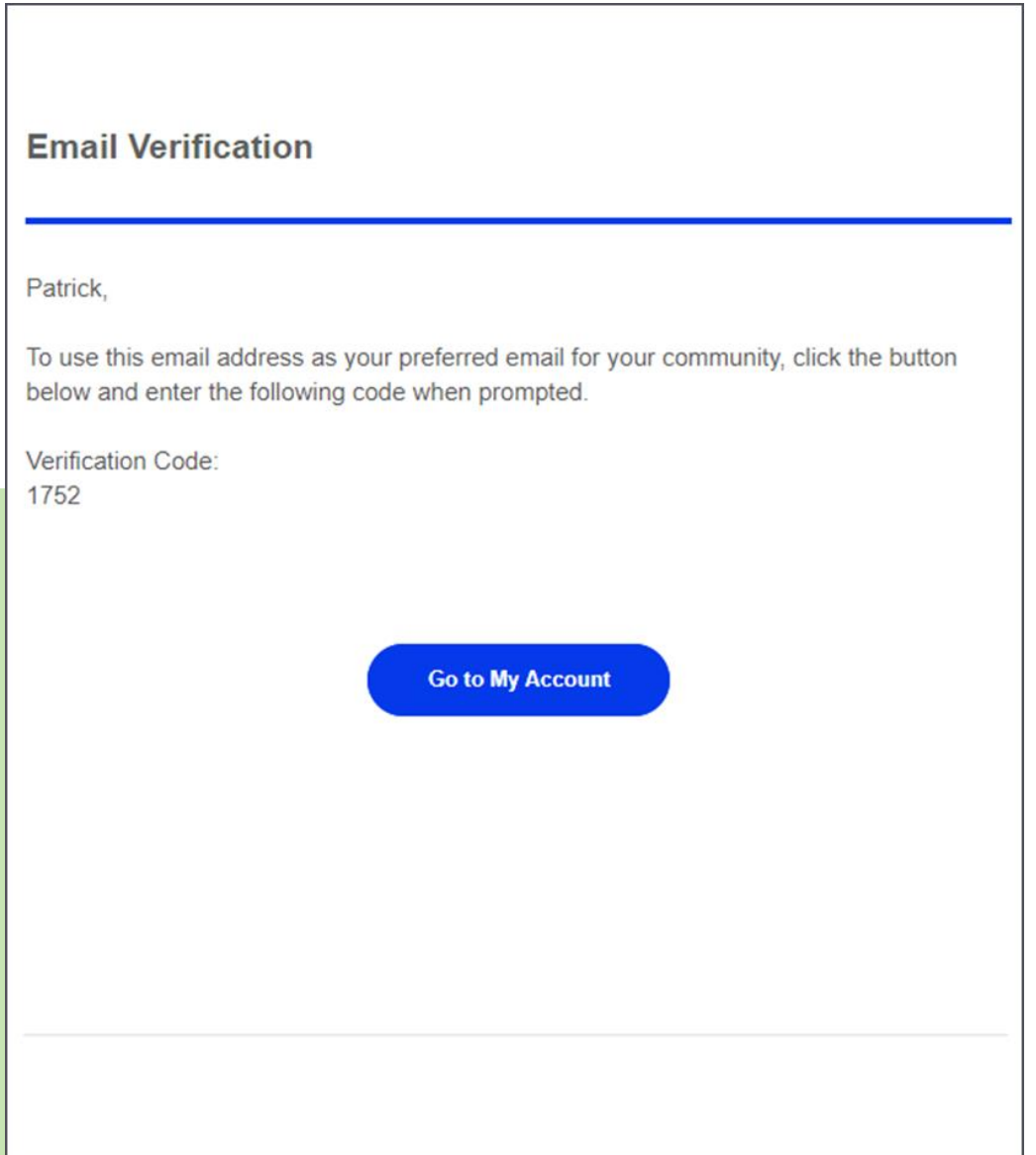
Email header: [Email Verification](#)

Email text:

{First name},

To use this email address as your preferred email for your community, click the button below and enter the following code when prompted.

Verification Code:
{4-digit code}



Description: Email sent to a user when they log in with SSO + MFA (Single Sign-On and Multifactor Authentication)

Sender: System

Recipient: Employee user

Trigger: When a user logs in with SSO + MFA

Option to turn email on/off? No

Option to customize email? No

Subject line: Verify Your Preferred Email

Email header: Email Verification

Email text:

Hello {User's email address},

We have received a sign in request for this email address, but verification is required in order to protect your privacy. To regain access, please enter the code below on the login page.

Verification Code:
{6-digit code}

If you have not attempted to sign in, please change your password to ensure your account is secure.

Email Verification

Hello YourCauseTest@yc.com,

We have received a sign in request for this email address, but verification is required in order to protect your privacy. To regain access, please enter the code below on the login page.

Verification Code:
746835

If you have not attempted to sign in, please change your password to ensure your account is secure.

Description: Email notification that a report pulled in V1 Client Admin Panel is completed

Sender: System

Recipient: Client admin

Trigger: When a client admin pulls a report in the V1 Client Admin Panel AND the report is ready to be retrieved

Option to turn email on/off? No

Option to customize email? No

Subject line: Report Complete

Email header: Your Report is Ready

Email text:

{First name},

Your report is now ready.

Report Name: {Name of report}

Date: {Date report was pulled}

Time: {Time report was pulled}

Name: {Client admin full name}

Email: {Client admin email}

The image shows a preview of an email notification. At the top, the subject line 'Your Report is Ready' is displayed in bold, followed by a thick green horizontal line. Below this, the text 'Jewell,' is shown. The main body of the email states 'Your report is now ready.' and lists the following details: 'Report Name : AllGivingReport', 'Date : 10/28/2021', 'Time : 2:31 PM', 'Name : Jewell Willett', and 'Email : Jewell.Willett@yourcause.com'. At the bottom of the preview, there is a green button with the text 'Reporting Dashboard'.

Description: Email notification that a report pulled in V2 Client Admin Panel is completed

Sender: System

Recipient: Client admin

Trigger: When a client admin pulls a report in the V2 Client Admin Panel AND the report is ready to be retrieved

Option to turn email on/off? No

Option to customize email? No

Subject line: [Export Complete](#)

Email header: [Your Recent Data Export is Ready](#)

Email text:

{First name},

This is an update on your recent export. The job has completed. See below for status information.

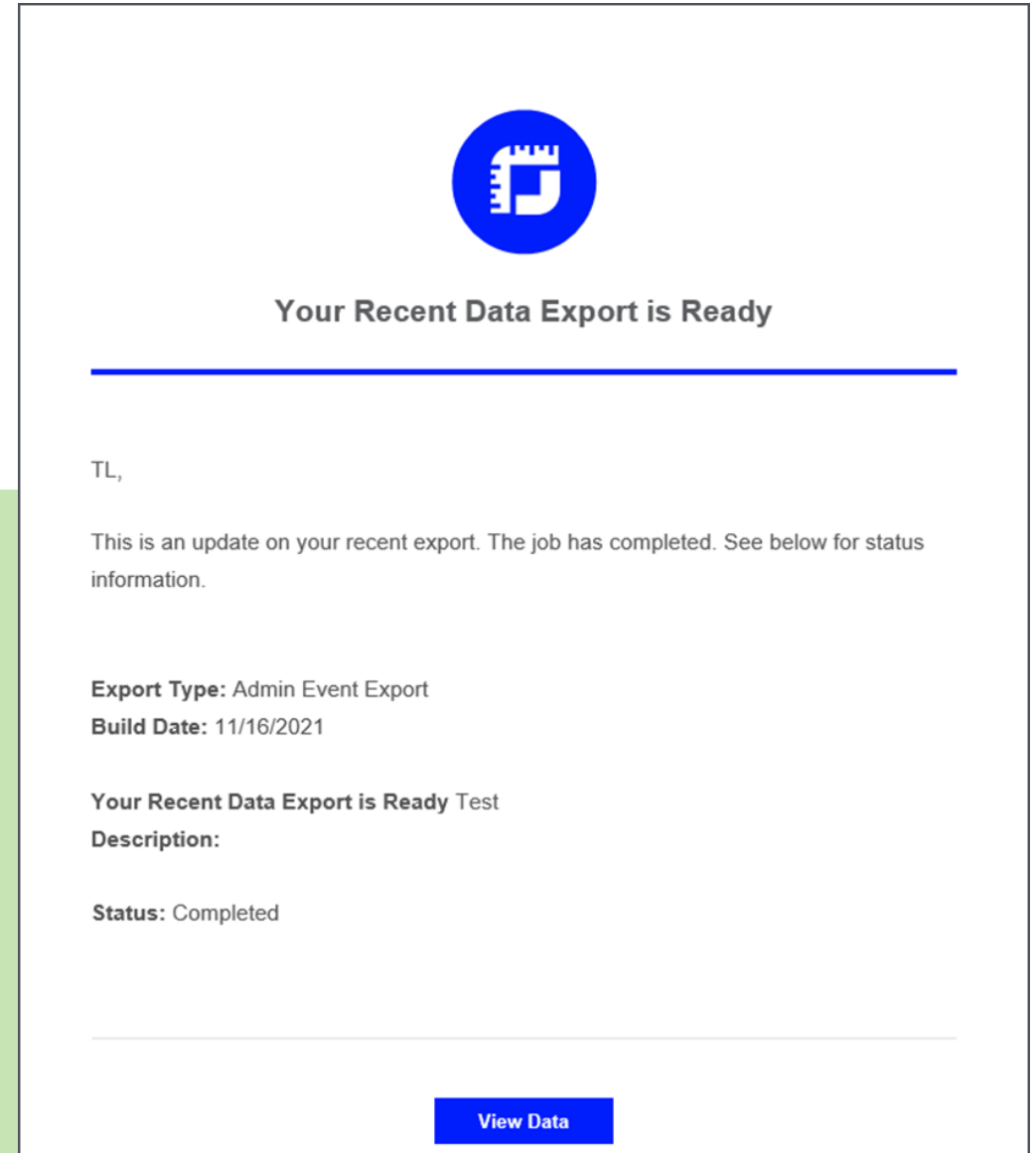
Export Type: {Type of export}

Build Date: {Date report was pulled}

Your Recent Data Export is Ready {Name of report}

Description: {Optional description of the report}

Status: Completed



The image shows a preview of an email notification. At the top center is a blue circular icon containing a white gear and a document symbol. Below the icon, the text 'Your Recent Data Export is Ready' is displayed in a bold, black font, underlined with a thick blue line. The body of the email starts with 'TL,' followed by a paragraph: 'This is an update on your recent export. The job has completed. See below for status information.' Below this, there are three lines of key-value pairs: 'Export Type: Admin Event Export', 'Build Date: 11/16/2021', and 'Your Recent Data Export is Ready Test'. This is followed by 'Description:' and 'Status: Completed'. At the bottom right, there is a blue button with the text 'View Data' in white.

Description: Email sent to employee user when they reset their password

Sender: System

Recipient: Employee user

Trigger: Employee user selects Reset Password

Option to turn email on/off? No

Option to customize email? No

Subject line: Password Reset Request

Email header: Reset Request

Email text:

{First name},

You're almost there!

Please copy and paste the following text into your web browser to reset your password:

{URL}

Reset Request

Sarah,

You're almost there!

Please copy and paste the following text into your web browser to complete your request:

<https://kimberlyclark.yourcauseuat.com/Auth/Login/ResetLink?RecoveryGuid=ebf2af3f-e186-4bec-9431-df83acacf05c>

Description: Email sent to user as part of the password reset workflow

Sender: System

Recipient: Employee user

Trigger: CHECK: user requests a password reset AND has SSO login

Option to turn email on/off? No

Option to customize email? No

Subject line: Password Reset Request

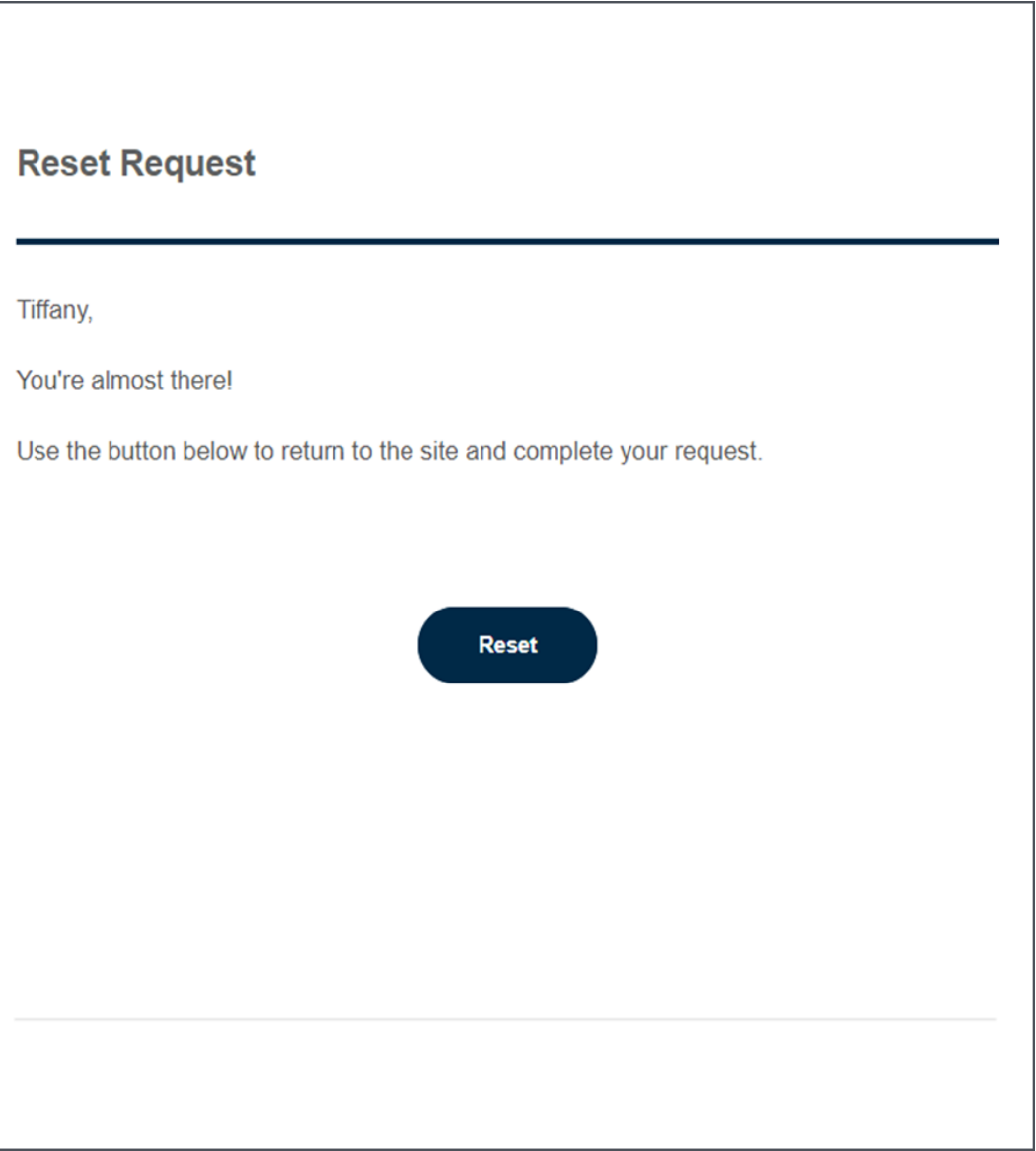
Email header: Reset Request

Email text:

{First name},

You're almost there!

Use the button below to return to the site and complete your request.



Engagement Elements

Engagement Elements

Vote Confirmation (EE001)

To employee user

Description: Notification to an employee user that their vote has been registered

Sender: System

Recipient: Employee user

Trigger: User selects choice(s) within a Voting Engagement Element (EE)

Option to turn email on/off? No

Option to customize email? Yes – Client Admin can add custom text – see note below

Customization note: Client Admin Panel, Engagements, Create New, Voting Engagement Element, Voting EE Settings, Email Message

Subject line: Thank you for participating

Email header: Submission Saved

Email text:

{First name},

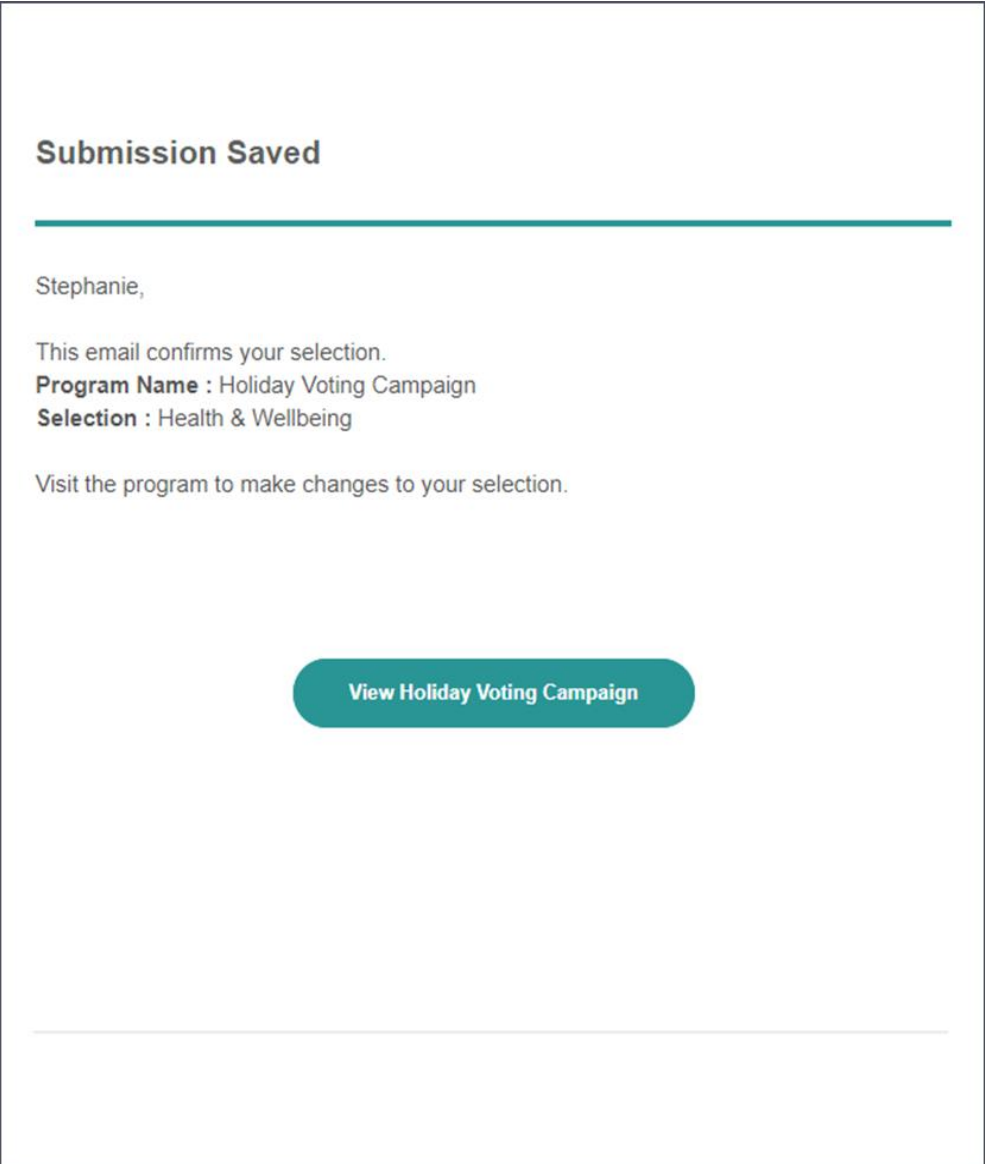
{Optional custom text}

This email confirms your selection.

Program Name: {Voting Engagement Element name}

Selection: {Option(s) selected by user}

Visit the program to make changes to your selection.



Fundraising

Description: Notification that someone has donated to a fundraiser

Sender: System

Recipient: Fundraiser creator

Trigger: Someone completes a donation on the Fundraising page

Option to turn email on/off? No

Option to customize email? No

Subject line: Fundraising Page Activity

Email header: Someone Donated to Your Fundraiser

Email text:

{First name},

Congratulations! You have received a donation to your fundraiser.

Fundraiser Name: {Name of fundraiser}

Donation Amount: {Amount in local currency}

Visit My Fundraising to learn more about the activity on your Fundraiser.



Someone Donated to Your Fundraiser

Stephanie,

Congratulations! You have received a donation to your fundraiser.

Fundraiser Name: Blessings under the BBVA

Donation Amount: 10.00 USD

Visit My Fundraising to learn more about the activity on your Fundraiser.

[View My Fundraising](#)

Description: Confirmation that fundraiser has been submitted for admin review

Sender: System

Recipient: Fundraiser creator

Trigger: Fundraiser created and submitted for admin review

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Fundraiser name} was submitted for review

Email header: Your Fundraiser is Pending Review

Email text:

{First name},

Thank you for submitting your fundraiser. It will be reviewed soon, and you will receive an email letting you know the status of your fundraiser.

Visit My Fundraisers to view your fundraiser details.

Your Fundraiser is Pending Review

Pref,

Thank you for submitting your fundraiser. It will be reviewed soon, and you will receive an email letting you know the status of your fundraiser.

Visit My Fundraisers to view your fundraiser details.

[View My Fundraisers](#)

Description: Notification that fundraiser was approved

Sender: System

Recipient: Fundraiser creator

Trigger: Client admin approves fundraiser

Option to turn email on/off? Yes

Option to customize email? Yes, client admin may enter custom text when approving fundraiser

Subject line: {Fundraiser name} was approved and published

Email header: This Fundraiser was Approved

Email text:

{First name},

Good news! Your fundraiser was reviewed and approved. It is now published and available for participants.

Fundraiser Name: {Name of fundraiser}

Organization Name: {Name of organization}

Message

{Custom text entered by client admin in Fundraisers Manager}

Visit My Fundraisers to view your fundraiser details.

This Fundraiser was Approved

Brian,

Good news! Your fundraiser was reviewed and approved. It is now published and available for participants.

Fundraiser Name:

Organization Name:

Message

{Custom text from admin review}

Visit My Fundraisers to view your fundraiser details.

[View My Fundraisers](#)

Description: Notification that fundraiser was declined

Sender: System

Recipient: Fundraiser creator

Trigger: Client admin declines fundraiser

Option to turn email on/off? Yes

Option to customize email? Yes, client admin may enter custom text when declining fundraiser

Subject line: {Fundraiser name} was reviewed and declined

Email header: This Fundraiser was Declined

Email text:

{First name},

We regret to inform you that your fundraiser was reviewed and declined.

The administrator has stated the following reason:

{Custom text entered by client admin in Fundraisers Manager}

This Fundraiser was Declined

Brian,

We regret to inform you that your fundraiser was reviewed and declined.

The administrator has stated the following reason:

{Custom text from admin review}

Description: Notification that there are pending fundraisers to review

Sender: System

Recipient: Client admin

Trigger: Pending fundraisers waiting for review. Can be configured to send daily, weekly, or monthly.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Pending Fundraisers to be Reviewed

Email header: Pending Fundraisers to be Reviewed

Email text:

{First name},

There are pending fundraisers that are ready for your review. Please visit the Fundraiser Manager panel to review these pending fundraisers.

Total Pending Fundraisers: {Number of pending fundraisers}

[Click here to view pending Fundraisers](#)



Pending Fundraisers to be Reviewed

Pref,

There are pending fundraisers that are ready for your review. Please visit the Fundraiser Manager panel to review these pending fundraisers.

Total Pending Fundraisers: 3

[Click here to view pending Fundraisers](#)

Give

Description: Confirmation email for donations managed through the Give feature

Sender: System

Recipient: Employee donor

Trigger: Employee donor completes a donation through the Give cart checkout

Option to turn email on/off? No

Option to customize email? Yes – ask your Customer Success Manager (CSM*) for help

***CSM customization note:** Manage, Master Give Settings, Cart Flow Customizations, Cart Flow–Custom Text, Cart Donation Confirmation Email Text

Subject line: Donation Confirmation

Email header: Thank you for your generosity

Email text:

{First name},

{Optional custom text}

Below is a summary of your recent donation activity:

Summary Total: {Amount in local currency}

{Organization name}

{Donation type}

{Designation} {Amount in local currency}

Amounts may be subject to applicable service fees.

For more information, view [My Giving](#)



Thank you for your generosity

Jewell,

This is the custom text for the Donation Confirmation email. It shows right below the greeting, before the donation summary. Make sure to preview this text so that it makes sense in the email's context.

Below is a summary of your recent donation activity:

Summary

Total: 20.00 USD

Feeding America

Recurring Payroll

None

20.00 USD

Amounts may be subject to applicable service fees.

For more information, view [My Giving](#)

[Go to My Giving](#)

Description: Confirmation email for donations managed through a Giving Campaign

Sender: System

Recipient: Employee donor

Trigger: Employee donor completes a donation through a Giving Campaign cart checkout

Option to turn email on/off? No

Option to customize email? Yes – ask your Customer Success Manager (CSM*) for help

***CSM customization note:** Features, Giving Campaign, New Campaign, Additional Customizations, Campaign Donation Confirmation Email

Subject line: Donation Confirmation

Email header: Thank you for participating in {Campaign name}

Email text:

{First name},

{Optional custom text}

Below is a summary of your recent pledge activity:

Summary Total: {Amount in local currency}

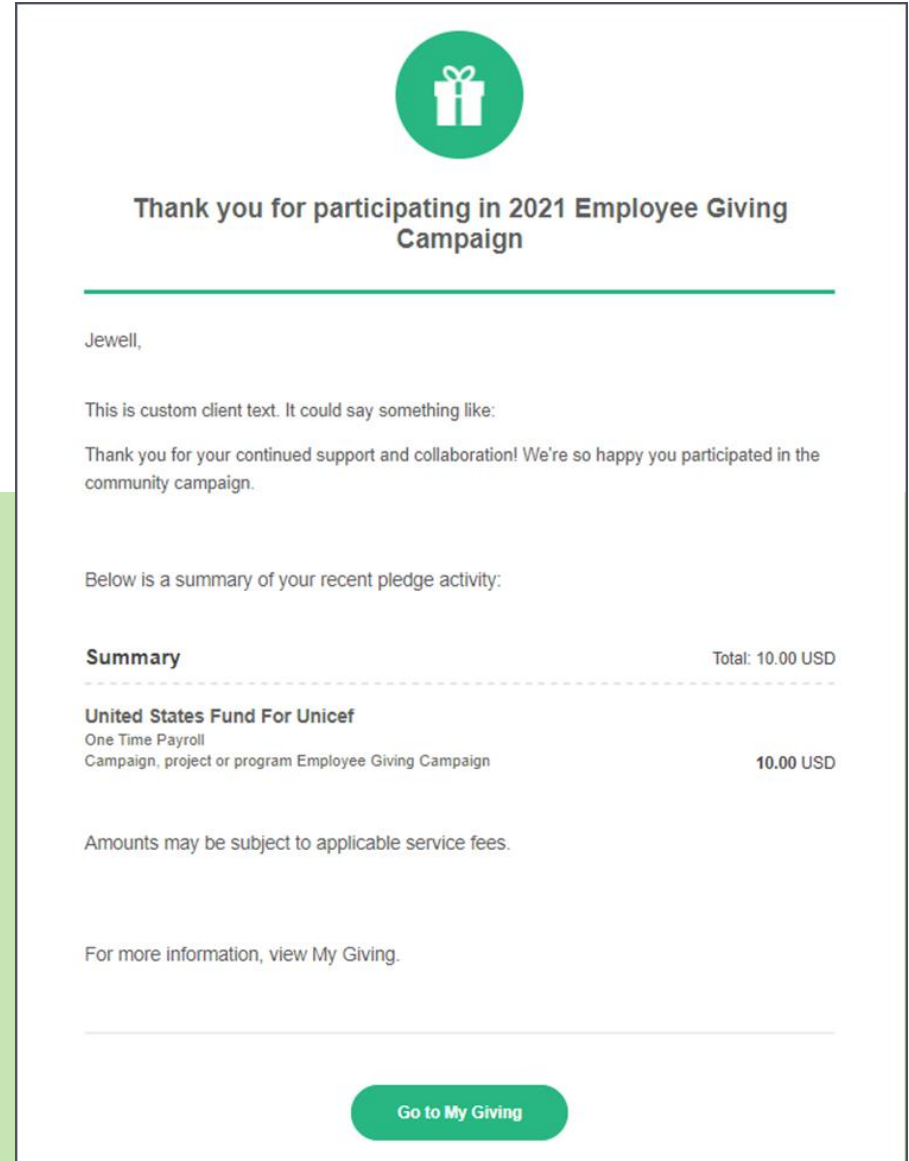
{Organization name}

{Donation type}

{Designation} {Amount in local currency}

Amounts may be subject to applicable service fees.

For more information, view My Giving.



Description: Email notification sent to employee when pay frequency changes

Sender: System

Recipient: Employee donor

Trigger: Employee's pay frequency changed

Option to turn email on/off? No

Option to customize email? No

Subject line: Payroll Deduction Change due to Pay Frequency Change

Email header: Payroll Deduction Change due to Pay Frequency Change

Email text:

Hello {Employee Name}

Your ongoing active payroll deduction(s) have been deactivated due to a change in your pay frequency with your employer. Your contributions are valuable to the agencies you support! We encourage you to update your contribution settings to continue giving if your community allows for changes or additional pledges throughout the year. You can review and, if allowed, make changes to your contribution here {link}.

Organization: {Organization name}

If you have any questions, please contact Customer Support {link}.



Payroll Deduction Change due to Pay Frequency Change

Hello Alecia,

Your ongoing active payroll deduction(s) have been deactivated due to a change in your pay frequency with your employer. Your contributions are valuable to the agencies you support! We encourage you to update your contribution settings to continue giving if your community allows for changes or additional pledges throughout the year. You can review and, if allowed, make changes to your contribution [here](#)

Organization : TL

If you have any questions, please contact [Customer Support](#)

Description: Optional email that a donor can choose to have sent to an honoree

Sender: System

Recipient: Honoree

Trigger: Employee donor completes a donation through the Give cart checkout, AND donor selects "In Honor Of" as the designation, AND donor selects the option to send an email to the honoree

Option to turn email on/off? Yes – donor chooses to send

Option to customize email? Yes – donor may add a custom message during checkout

Subject line: A Donation Has Been Made in Your Honor

Email header: A Donation was made in your honor

Email text:

{Optional custom text}

Donor Name: {Donor name}

Organization: {Organization name}

Donation Amount: {Amount in local currency}



A Donation was made in your honor

I am writing you to let you know I have made a donation in your honor

Donor Name: Jewell Willett
Organization: Feeding America
Donation Amount: 40.00 USD

Powered by YourCause

6111 West Plano Parkway, Suite 1000, Plano, Texas, 75093

You are receiving this email because one of our users chose to share thier donation activity with you. You are not subscribed to any lists and will not receive any additional emails.

[Privacy Policy](#)

Description: Email sent to an employee donor when they edit an active donation

Sender: System

Recipient: Employee donor

Trigger: Employee donor confirms an edit to an existing donation managed through Give or through a Peer-to-Peer Fundraiser

Option to turn email on/off? No

Option to customize email? No

Subject line: Edit Confirmation

Email header: Edit Confirmation

Email text:

{First name},

Your edits were received. A summary of your updated transaction is below.

Charity: {Organization name}

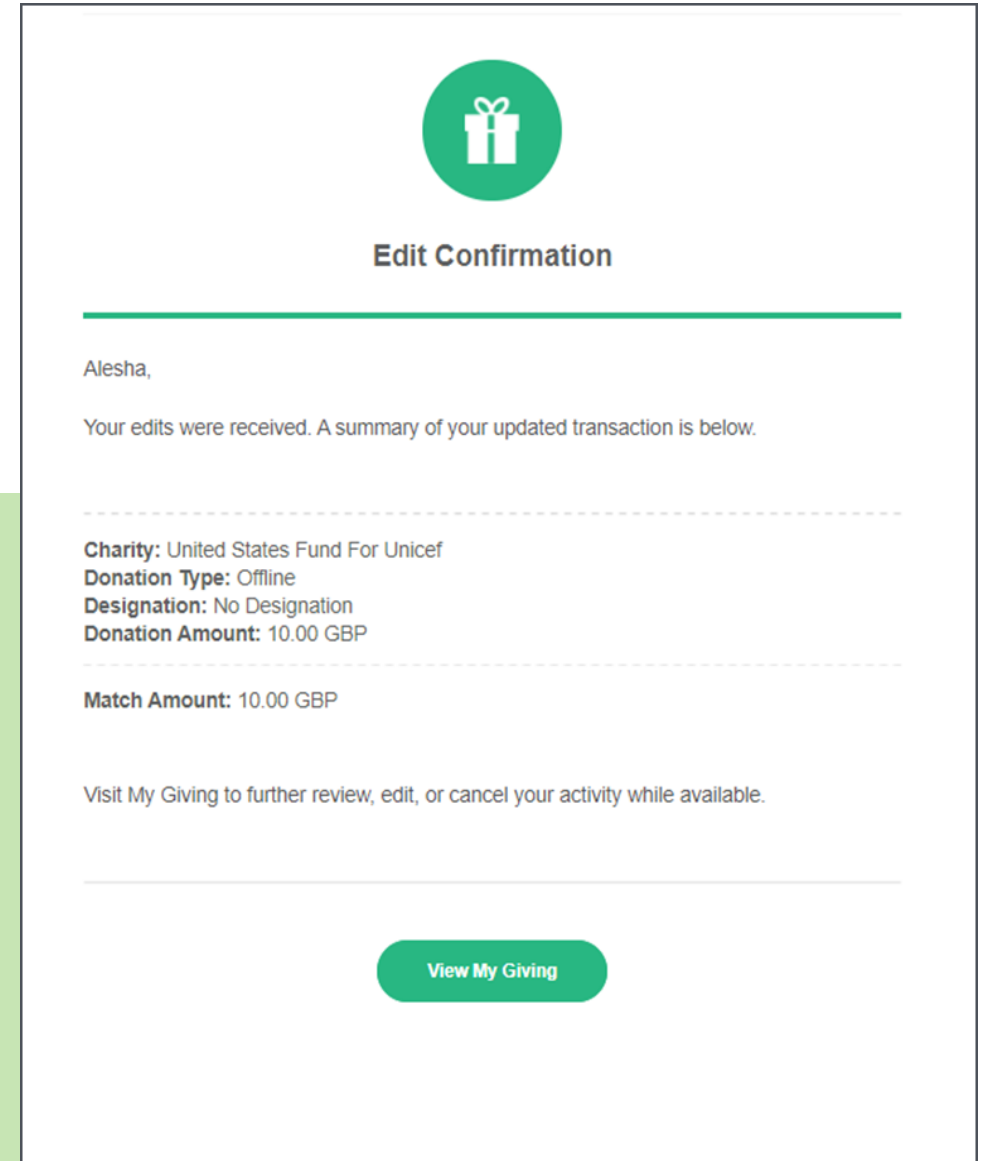
Donation Type: {Donation type}

Designation: {Designation}

Donation Amount: {Amount in local currency}

Match Amount: {Amount in local currency}

Visit My Giving to further review, edit, or cancel your activity while available.



Description: Email sent to an employee donor when they cancel an active donation

Sender: System

Recipient: Employee donor

Trigger: Employee donor confirms a cancellation of an existing donation

Option to turn email on/off? No

Option to customize email? No

Subject line: Cancellation Confirmation

Email header: Cancellation Confirmation

Email text:

{First name},

Your cancellation request was received. Below is a summary of your updated transaction.

Charity: {Organization name}

Donation Type: {Donation type}

Designation: {Designation}

Donation Amount: {Amount in local currency}

Visit My Giving to further review your changes while available.



Cancellation Confirmation

Paul,

Your cancellation request was received. Below is a summary of your updated transaction.

Charity: OPERATION KINDNESS
Donation Type: Payroll
Designation:
Donation Amount: 35.45 USD

Visit My Giving to further review your changes while available.

[View My Giving](#)

Description: Summary email sent to an employee donor when funds are sent to their designated nonprofit recipient(s) and/or designated nonprofit recipient(s) deposited the funds. Notifications are sent on a nightly basis.

Sender: System

Recipient: Employee donor

Trigger: Funds are sent to the designated nonprofit(s) and/or designated nonprofit(s) deposit the funds

Option to turn email on/off? No

Option to customize email? No

Subject line: [Donation\(s\) status update summary](#)

Email header: [Thank you for your generosity](#)

Email text:

{First name},

The transactions listed below have an updated status.

In-transit

Note: You will only receive in-transit notifications when transactions are sent either by paper check or to international processors. Transactions sent via ACH will not receive the in-transit notifications.

{Organization name}

{Amount in local currency}

Donation Designation: {Designation}

Donation Date: {Donation date}

Donation ID: {Donation ID}



Thank you for your generosity

Jewell,

The transaction(s) listed below have an updated status.

In-transit

Note: You will only receive in-transit notifications when transactions are sent either by paper check or to international processors. Transactions sent via Automated Clearing House (ACH), such as electronic bank account transfers, will not activate in-transit notifications.

AMERICAN NATIONAL RED CROSS	100.00 USD
Donation Type: Credit Card	
Donation Designation: ^ None**	
Donation Date: 2/4/2016	
Donation ID: 3548407	

Complete

Recently deposited donation(s):

MOODUS RESERVOIR PRESERVATION GROUP INCORPORATED	10.00 USD
Donation Type: Credit Card	
Donation Designation: ^ None**	
Donation Date: 4/21/2016	
Donation ID: 3548797	

For more information, view [My Giving](#).

[View My Giving](#)

Description: Summary email sent to an employee donor when funds are sent to their designated nonprofit recipient(s) and/or designated nonprofit recipient(s) deposited the funds. Notifications are sent on a nightly basis.

Sender: System

Recipient: Employee donor

Trigger: Funds are sent to the designated nonprofit(s) and/or designated nonprofit deposits the funds

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

Complete

Recently deposited donation(s):

{Organization name}

{Amount in local currency}

Donation Designation: {Designation}

Donation Date: {Donation date}

Donation ID: {Donation ID}

For more information, view My Giving.



Thank you for your generosity

Jewell,

The transaction(s) listed below have an updated status.

In-transit

Note: You will only receive in-transit notifications when transactions are sent either by paper check or to international processors. Transactions sent via Automated Clearing House (ACH), such as electronic bank account transfers, will not activate in-transit notifications.

AMERICAN NATIONAL RED CROSS	100.00 USD
Donation Type: Credit Card	
Donation Designation: ^ None**	
Donation Date: 2/4/2016	
Donation ID: 3548407	

Complete

Recently deposited donation(s):

MOODUS RESERVOIR PRESERVATION GROUP INCORPORATED	10.00 USD
Donation Type: Credit Card	
Donation Designation: ^ None**	
Donation Date: 4/21/2016	
Donation ID: 3548797	

For more information, view My Giving.

[View My Giving](#)

Groups

Description: Email sent from a group's admin to all group members

Sender: Group admin

Recipient: All group members

Trigger: Group admin uses Message All Members in My Groups

Option to turn email on/off? Yes – group admin chooses to send

Option to customize email? Yes – group admin writes the content in Groups, My Groups, Message All Members

Subject line: {Group name}: {Custom subject text entered in Send Message}

Email header: {Custom subject text entered in Send Message}

Email text:

{Custom text entered by group admin in Send Message}



We need your help

If anyone can help with the end-of-month food bank initiative and has not signed up already, please reach out to one of the admins.

Thanks!

Blackbaud Documentation || Powered by YourCause || [Contact Support](#)

6111 West Plano Parkway, Suite 1000, Plano, Texas 75093

Message intended for Ruth Bader Ginsburg. [Privacy Policy](#)

Description: Email sent to a new group member

Sender: System

Recipient: New group member

Trigger: A user joins a group or is added to the group by the group admin

Option to turn email on/off? No

Option to customize email? Yes – group admin(s) can choose to customize text.

Default text: You have been added to a group.

Subject line: Welcome to the group, {Group Name}!

Email header: Welcome to {Group name}

Email text:

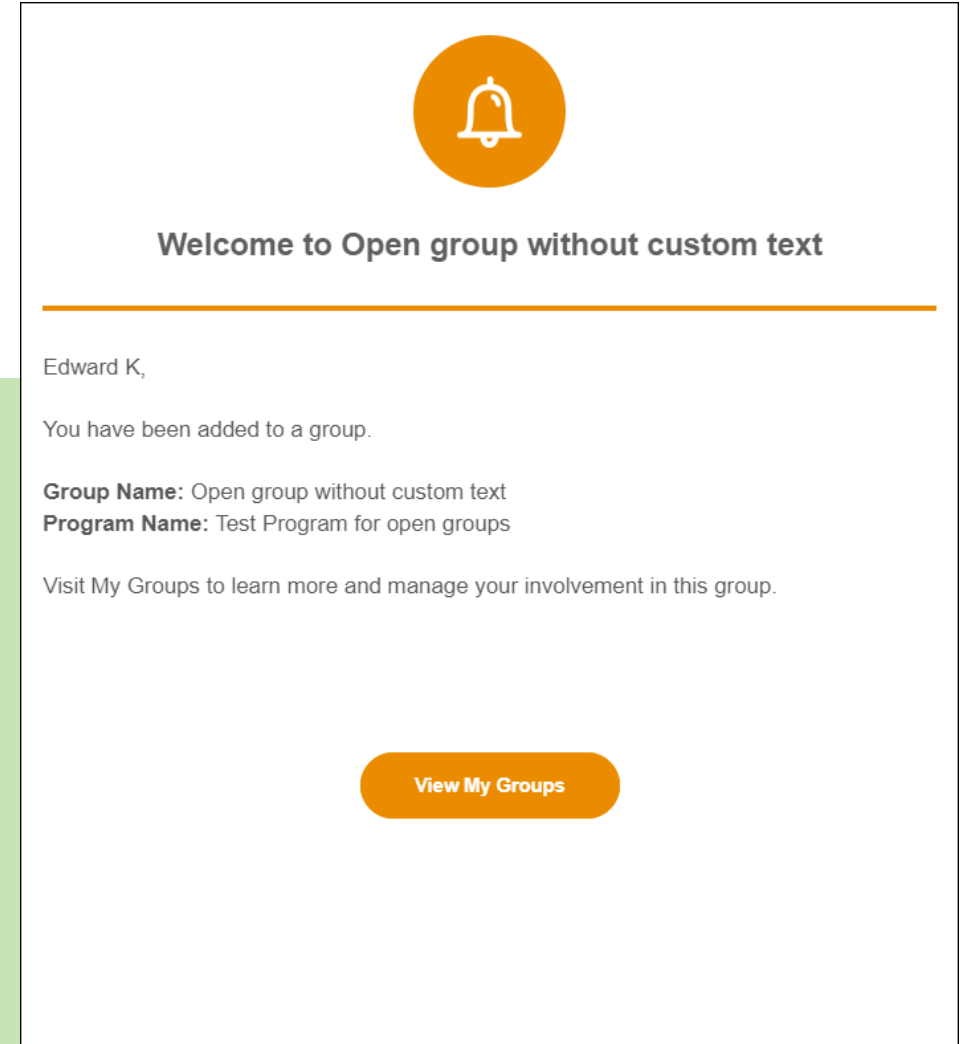
{First name},

You have been added to a group.

Group Name: {Group name}

Program Name: {Program name}

Visit My Groups to learn more and manage your involvement in this group.



Description: Email sent to a new group member

Sender: System

Recipient: New group member

Trigger: A user joins a group or is added to the group by the group admin

Option to turn email on/off? No

Option to customize email? Yes – group admin(s) can choose to customize text.

Default text: You have been added to a group.

Subject line: Welcome to the group, {Group Name}!

Email header: Welcome to {Group name}

Email text:

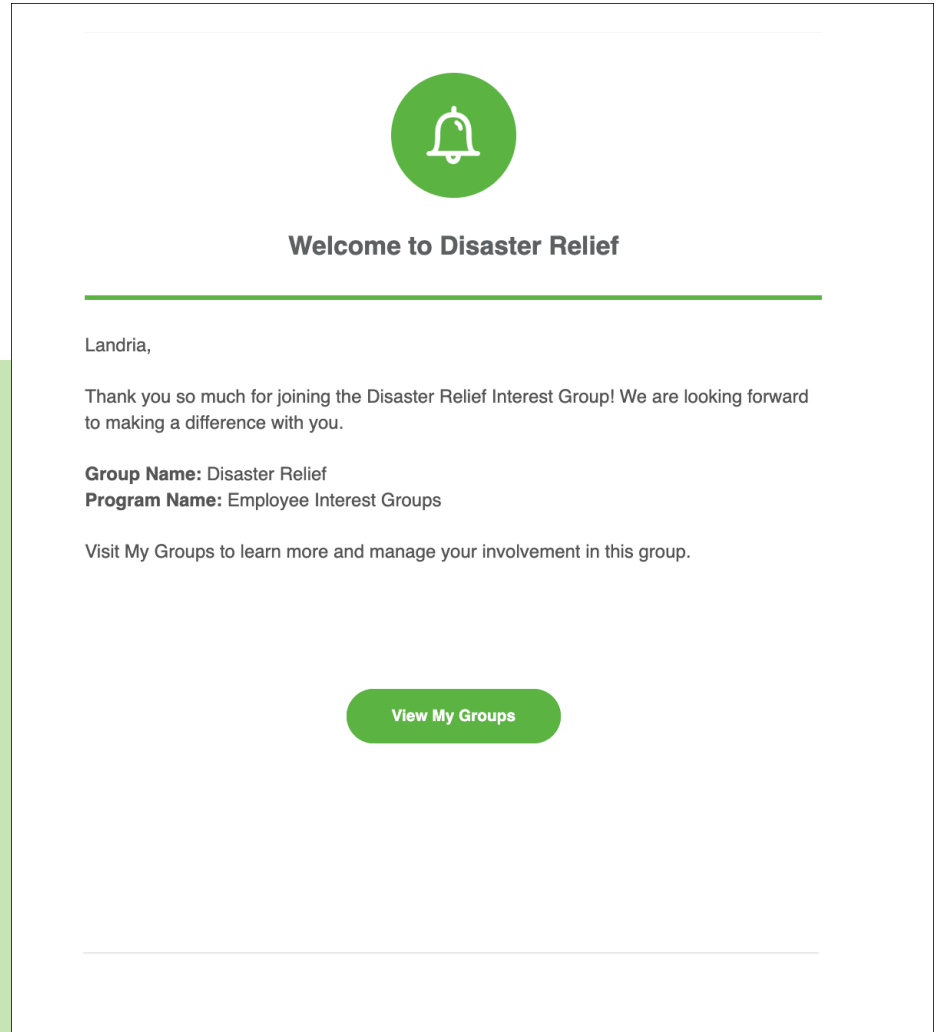
{First name},

{Optional custom text}

Group Name: {Group name}

Program Name: {Program name}

Visit My Groups to learn more and manage your involvement in this group.



Description: Email sent to an employee when they are removed from a group

Sender: System

Recipient: Group member

Trigger: A group member is removed by the group admin

Option to turn email on/off? No

Option to customize email? No

Subject line: You have been removed from a group

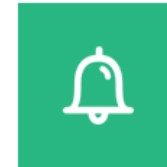
Email header: You Have Been Removed from {Group name}

Email text:

{First name},

You have been removed from {Group Name}.

Visit {Community name} to learn about other available groups.



You Have Been Removed from Onboarding Group

Rahul,

You have been removed from Onboarding Group.

Visit Blackbaud Documentation to learn about other available groups.

[View Groups](#)

Description: Email sent to an employee user who requests to join a closed group

Sender: System

Recipient: Employee user

Trigger: An employee user requests to join a closed group

Option to turn email on/off? No

Option to customize email? No

Subject line: You have requested to join a group

Email header: Group Membership Pending

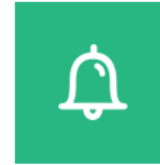
Email text:

{First name},

You have requested to join a group. You will be notified once the request has been reviewed by the group administrator.

Group Name: {Group name}

Visit My Groups to learn more and manage your involvement in this group.



Group Membership Pending

Shaun,

You have requested to join a group. You will be notified once the request has been reviewed by the group administrator.

Group Name: SCD Group

Visit My Groups to learn more and manage your involvement in this group.

[View My Groups](#)

Description: Email sent to a newly approved group member

Sender: System

Recipient: New group member

Trigger: Group admin approves a user's request to join the closed group

Option to turn email on/off? No

Option to customize email? No

Subject line: [Your request to join a group has been approved](#)

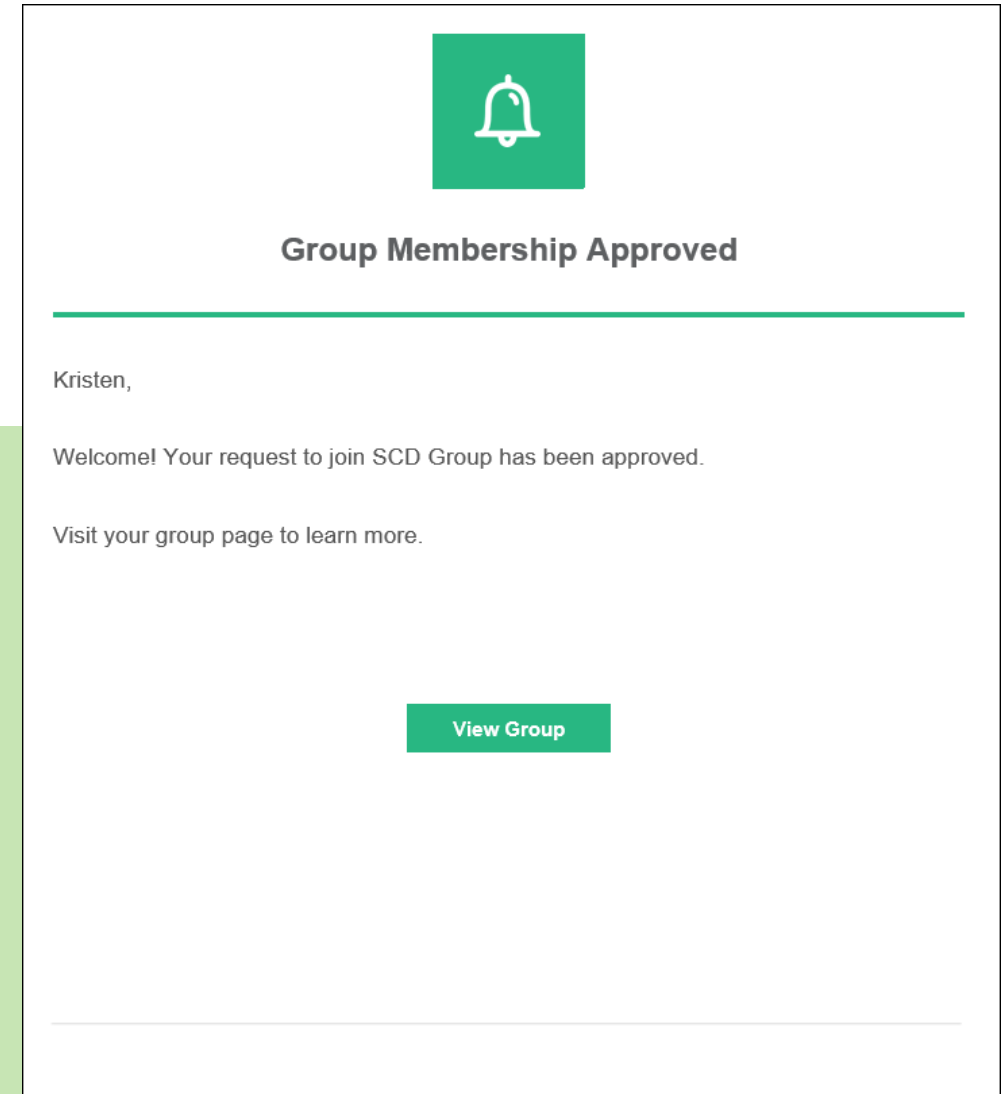
Email header: [Group Membership Approved](#)

Email text:

{First name},

Welcome! Your request to join {Group name} has been approved.

[Visit your group page to learn more.](#)



Description: Email sent when an employee is denied admission to a closed group

Sender: System

Recipient: Employee user

Trigger: Group administrator declines a user's request to join the closed group

Option to turn email on/off? No

Option to customize email? No

Subject line: [Your request to join a group has been declined](#)

Email header: [Group Membership Declined](#)

Email text:

{First name},

Your request to join {Group name} has been declined.

Visit {Community name} to learn about other available groups.

Group Membership Declined

Lauren,

Your request to join SCD Group has been declined.

Visit [Blackbaud Documentation](#) to learn about other available groups.

[View Groups](#)

Description: Email sent when a message is posted on the group page

Sender: System

Recipient: Group member (formerly only admin)

Trigger: A group member posts a message on the group page

Option to turn email on/off? Yes

Option to customize email? Yes – group member writes the content in Groups, My Groups, Group Page, Message Posts

Subject line: {Group name} – A new message has been posted

Email header: New Group Message

Email text:

{First name},

A new message has been posted in your group.

Group Name: {Group name}

Message: *Date* - {Customized content entered by member}

Posted By: {Name of member who posted message}

New Group Message

Nancy,

A new message has been posted in your group.

Group Name: Disaster Relief

Message: 06/23/2022 - I am excited to join you all and help out when disaster might strike our community!

Posted By: Landria Jordan

[View Message](#)

Description: Digest email sent when group members join or leave a group

Sender: System

Recipient: Group admin

Trigger: A group member joins or leaves a group

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Group name} – Membership Update

Email header: Group Membership Update

Email text:

{First name},

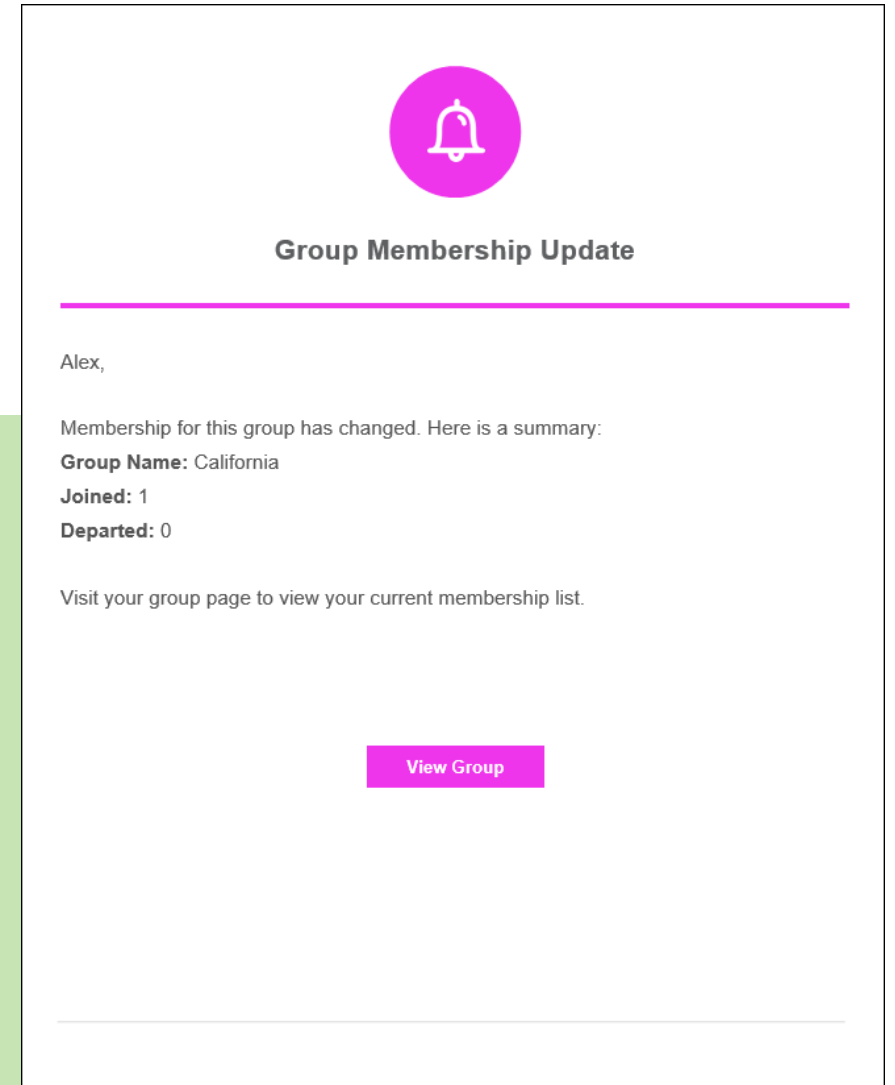
Membership for this group has changed. Here is a summary:

Group Name: {Group name}

Joined: {Number of members added or 0 if no change}

Departed: {Number of members departed or 0 if no change}

Visit your group page to view your current membership list.



Description: Email sent when a group member replies to a message page on the group page

Sender: System

Recipient: Group member

Trigger: A group member posts a reply to a message post on the group page

Option to turn email on/off? Yes

Option to customize email? Yes – group member writes the content in Groups,
My Groups, Group Page, Message Posts

Subject line: {Group name} – New Reply

Email header: Someone Replied to Your Message

Email text:

{First name},

Someone replied to your message in your group.

Group Name: {Group name}

Your Message: *Date* - {Customized content entered by member}

Their Reply: {Customized content entered by member}

Posted By: {Name of member who posted message}

Someone Replied to Your Message

Rahul,

Someone replied to your message in your group.

Group Name: Onboarding Group

Your Message: 06/01/2022 - Hi All! Looking forward to meeting everyone!

Their Reply: Welcome to the team, Rahul! It's great to have you!

Posted By: Documentation support

[View Message](#)

Description: Email sent when a new project or event is added to the group

Sender: System

Recipient: Group member

Trigger: An event or project is added to the group

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Group name} – New Opportunity

Email header: New Opportunity

Email text:

{First name},

A new opportunity has been added to your group.

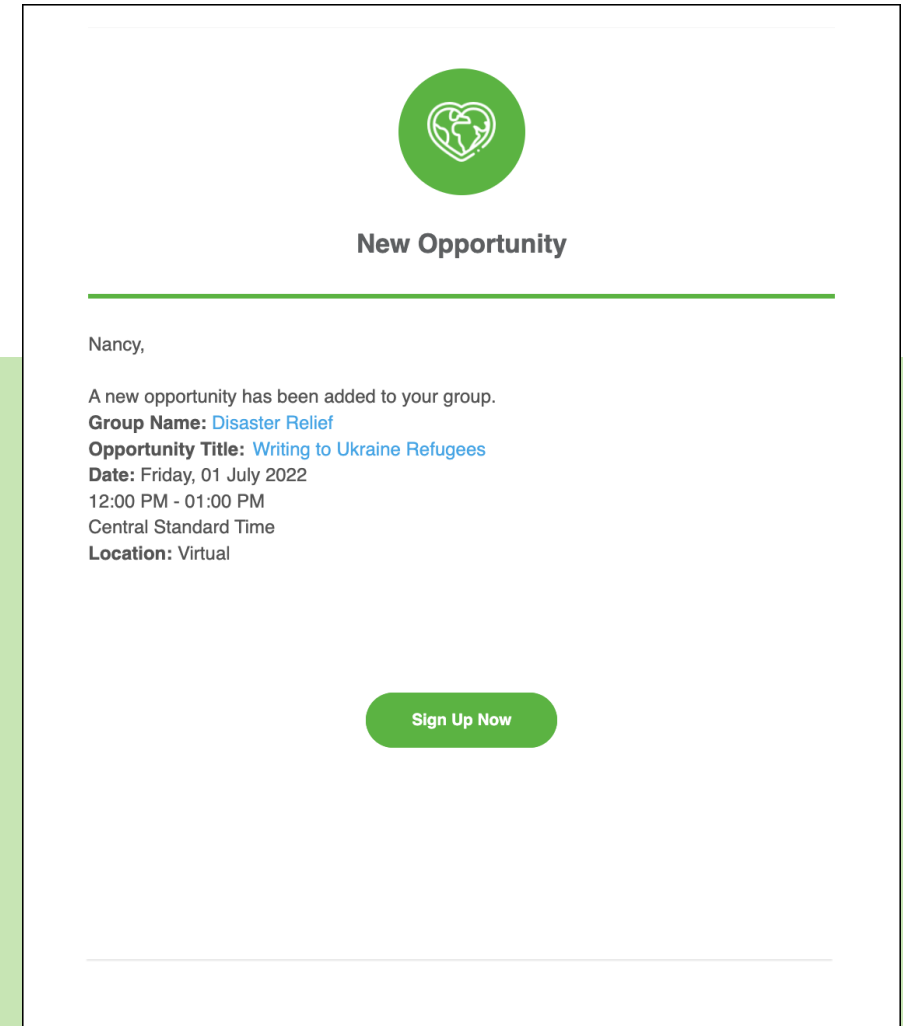
Group Name: {Group name links to group}

Opportunity Title: {Opportunity title links to opportunity}

Date: {Opportunity date(s) and time(s)}

Location: {Address or virtual}

Sign Up Now {links to the opportunity sign up page}



Description: Email sent weekly or monthly providing an overview of group activity. Email is only sent when there is recorded activity.

Sender: System

Recipient: Group member

Trigger: Weekly or monthly recurring date

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Weekly/Monthly} Activity for {group name}

Email header: {Weekly/Monthly} Activity for {group name}

{Date range}

Email text:

{First name},

Here's what {group name links to group} has been up to this past {week/month}.

{#} New Opportunity/ies (exclude if none)

{Opportunity title links to opportunity page}

{#} New Organization(s) (exclude if none)

{Organization title links to charity profile}

{#} New Message Post(s) (exclude if none)

{First 50 characters of message}...[Read More](#)

{#} New Document(s) (exclude if none)

{Document title and link to document}

(#) New Photo(s) (exclude if none)

{Link to new photo(s)}

(#) New Member(s) (exclude if none)

{Link to new member list}

Visit Your Group {link to group}

Weekly Activity for Demo 1

07/04/2022 - 07/11/2022

QA,

Here's what [Demo 1](#) has been up to this past week

1 New Opportunity
[Test for Change](#)

1 New Organization
[Refuge City Ministries](#)

1 New Document
[Test for Change](#)

1 New Photo
[View Photos](#)

8 New Members
[View Members](#)

[Visit Your Group](#)

Description: Email sent weekly or monthly providing an overview of group activity. Email is only sent when there is recorded activity.

Sender: System

Recipient: Group admin

Trigger: Weekly or monthly recurring date

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Weekly/Monthly} Member Activity for {group name}

Email header: {Weekly/Monthly} Member Activity for {group name}
{Date range}

Email text:

{First name},

Here's what your {group name links to group} members have been up to this past {week/month}.

{#} New Member(s) (exclude if no new members)

{Join date} - {member name, member email}

{total # of members participated in events} Participated in Events (exclude if none)

{# Participants} for {opportunity title and link to page}

{#} New Message Posts (exclude if none)

{First 50 characters of message}...Read More

{#} Members Left Group (exclude if none)

{Left date} - {member name, member email}

Visit Your Group {link to group}

Weekly Member Activity for Demo 1

07/04/2022 - 07/11/2022

Test,

Here's what your [Demo 1](#) members have been up to this past week

8 New Members

- 07/06/2022 - Esha Mishra1, esha.mishra@yc.com
- 07/06/2022 - test vto, test@vto.com
- 07/06/2022 - test home, home@12test.com
- 07/06/2022 - QA support, qa-support@yourcause.com
- 07/06/2022 - test userqa, e@e.com
- 07/06/2022 - test onboard2, tb2@yc.com
- 07/06/2022 - Test onboard, tb@yc.com
- 07/06/2022 - Penny BigBang, pennybb@yc.com

0 Participated in Events

3 Members Left Group

- 07/06/2022 - uv vu, w@w.com
- 07/06/2022 - Test12 User12, testuser@yc.com
- 07/06/2022 - testfirst testlast, testfirstlast2@yc.com

[Visit Your Group](#)

Description: Email sent to the group admin of a closed group when there is a new member request

pending

Sender: System

Recipient: Group admin

Trigger: Weekly or monthly recurring date

Option to turn email on/off? Yes

Option to customize email? No

Subject line: [New Membership Request for {group name}](#)

Email header: [Group Membership Pending](#)

Email text:

{First name},

You have a new membership request for:

Group Name: {group name}

Potential Member: {name, email}

Manage Membership Requests button links to **Requests** tab on **Manage Members** page for the group.

Group Membership Pending

Documentation,

You have a new membership request for:

Group Name: SCD Group

Potential Member: Lauren Kennedy, lkennedy@yc.com

[Manage Membership Requests](#)

Human Resources

Description: Email sent to user when the SFTP settings are invalid and the import file cannot be retrieved from the SFTP server

Sender: System

Recipient: Support team, other users added to HR Import notifications

Trigger: SFTP settings are invalid during an HR import

Option to turn email on/off? Yes – Remove users receiving notifications using CSRconnect Admin Portal, Jobs and Imports, HR Imports, Notifications

Option to customize email? No

Subject line: HR Settings Failed: {community name}

Email header: HR Settings Failed: {community name}

Email text:

The file acquisition settings have failed for the following community: {community name}.

Go to the HR Import section of the CSRconnect Admin Panel to revise these settings.

HR Settings Failed: Test Community 1

The file acquisition settings have failed for the following community: Test Community 1. Go to the HR Import section of the CSRconnect Admin Panel to revise these settings.

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Description: Email sent to user when an HR file import fails

Sender: System

Recipient: Support team, other users added to HR Import notifications

Trigger: An HR file import fails

Option to turn email on/off? Yes – Remove users receiving notifications using CSRconnect

Admin Portal, Jobs and Imports, HR Imports, Notifications

Option to customize email? No

Subject line: HR Import Failed: {community name}

Email header: HR Import Failed: {community name}

Email text:

The HR manual import process has failed for the following community: {community name}. Go to the HR Import section of the CSRconnect Admin Panel to review the status of this job.



HR Import Failed: tl

The HR manual import process has failed for the following community: tl. Go to the HR Import section of the CSRconnect Admin Panel to review the status of this job.

Description: Email sent to user when an HR file import succeeds

Sender: System

Recipient: Support team, other users added to HR Import notifications

Trigger: An HR file import is uploaded and successfully imported

Option to turn email on/off? Yes – Remove users receiving notifications using CSRconnect Admin Portal, Jobs and Imports, HR Imports, Notifications

Option to customize email? No

Subject line: HR Import Success: {community name}

Email header: HR Import Success: {community name}

Email text:

The HR automated import process has completed successfully for the following community: {community name}. Go to the HR Import section of the CSRconnect Admin Panel if you wish to review the status of this job.

HR Import Success: Test Community 1

The HR automated import process has completed successfully for the following community: Test Community 1. Go to the HR Import section of the CSRconnect Admin Panel if you wish to review the status of this job.

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Description: Email sent to employee user when they request to delete their personal data

Sender: System

Recipient: Employee user

Trigger: Employee user selects Request to Delete Your Data

Option to turn email on/off? No

Option to customize email? No

Subject line: You have opted out of {community name}

Email header: You have opted out of {community name}

Email text:

{First name},

Your access to the YourCause application and all data associated with your account has been removed. The process may take up to 30 days.

{First name} {Last name}

{Employee email}

Please contact your data controller / HR provider and request that your information stop being shared with the YourCause application.

You have opted out of TL Community - External2

damian,

Your access to the YourCause application and all data associated with your account has been removed. The process may take up to 30 days.

damian lillard

dametime@yc.com

Please contact your data controller / HR provider and request that your information stop being shared with the YourCause application.

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International Vetting

Description: Notification that the vetting process has started for a selected organization

Sender: System

Recipient: Employee donor

Trigger: A user requests vetting for an organization that has not been vetted.

Option to turn email on/off? No

Option to customize email? No

Subject line: [Vetting Request Confirmation](#)

Email header: [Vetting in Progress](#)

Email text:

{First name},

Thank you for starting the vetting process. We are working to establish communication with this organization and obtain the necessary documentation required to meet our vetting standards. You will receive an email once our process is complete. We do our best to expedite this process. A majority of these requests are completed in 7-10 days. If we cannot establish communication or the organization does not have the proper documentation readily available, this process can take much longer.

Request Summary

Date Of Request: {Date and time of vetting request}

Organization Name: {Organization name}

Donation Type: {Donation type}

Designation: {Designation or None}



Vetting in Progress

Tod,

Thank you for starting the vetting process. We are working to establish communication with this organization and obtain the necessary documentation required to meet our vetting standards. You will receive an email once our process is complete. We do our best to expedite this process. A majority of these request are completed in 7-10 days. If we can not establish communication or the organization does not have the proper documentation readily available, this process can take much longer.

Request Summary

Date Of Request: 09/22/2023 01:13:17 AM

Organization Name:

Donation Type:

Designation: None

[View Vetting Requests](#)

Description: Notification that an organization selected for vetting was not vetted

Sender: System

Recipient: Employee donor

Trigger: A user requests vetting for an organization that has not been vetted AND the vetting process could not be completed.

Option to turn email on/off? No

Option to customize email? No

Subject line: [Vetting Request Canceled](#)

Email header: [Vetting Canceled](#)

Email text:

{First name},

We regret to inform you that your vetting request for the organization listed below was canceled.

Vetting Request Summary

Organization Name: {Organization name}

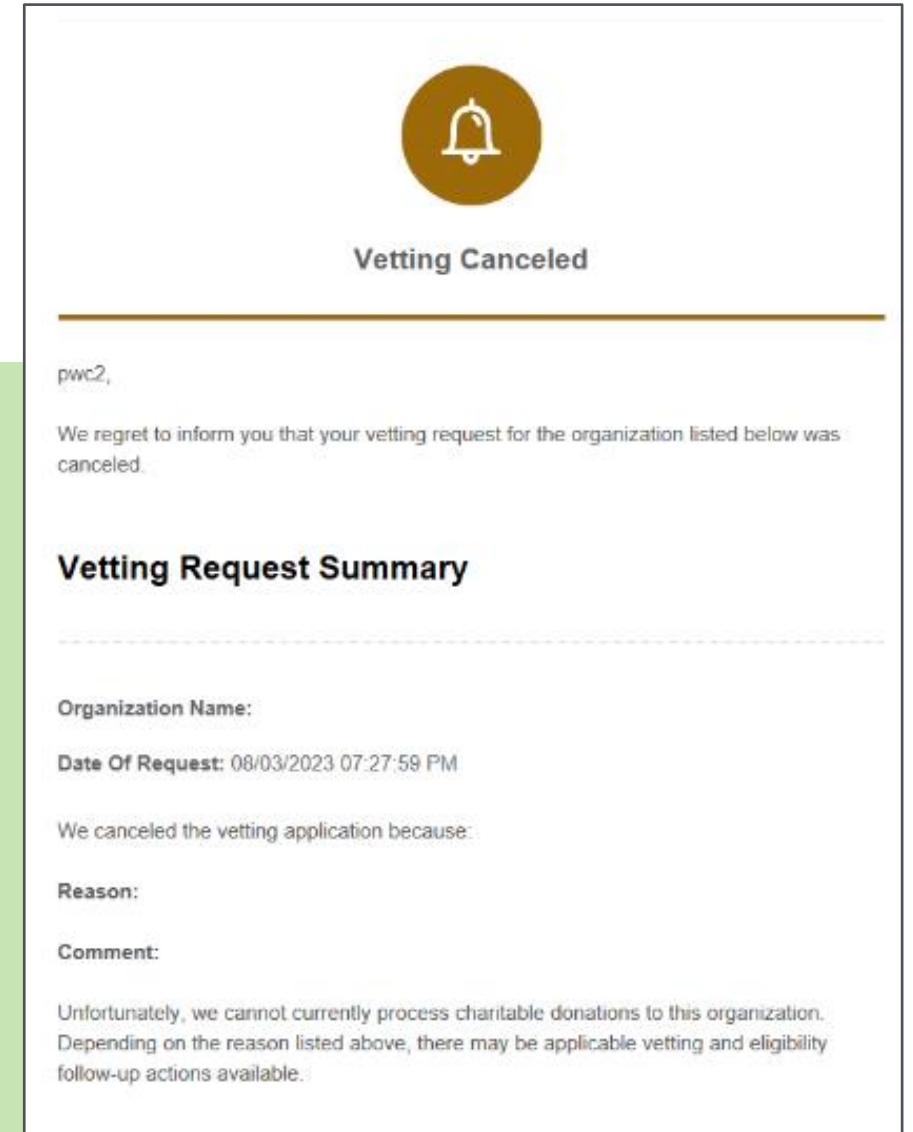
Date Of Request: {Date and time of vetting request}

We canceled the vetting application because:

Reason: {Cancellation reason}

Comment: {Cancellation comment}

Unfortunately, we cannot currently process charitable donations to this organization. Depending on the reason listed above, there may be applicable vetting and eligibility follow-up actions available.



Description: Notification that an organization selected for vetting was not approved

Sender: System

Recipient: Employee donor

Trigger: A user requests vetting for an organization that has not been vetted AND the NPOconnect vetting process denies approval for the organization

Option to turn email on/off? No

Option to customize email? No

Subject line: [Vetting Request Denied](#)

Email header: [Vetting Declined](#)

Email text:

{First name},

We regret to inform you that your vetting request for the organization listed below was declined.

Vetting Request Summary

Organization Name: {Organization name}

Date Of Request: {Date and time of vetting request}

This organization submitted a vetting application, but it did not meet our vetting standards or could not be vetted at this time.

We declined the vetting application because:

Reason: {Reason for declined vetting}

Comment: {Comment on declined vetting}

Unfortunately, we cannot process charitable donations to this organization. We encourage you to identify an alternative nonprofit organization that you would like to support.



Vetting Declined

TL,

We regret to inform you that your vetting request for the organization listed below was declined.

Vetting Request Summary

Organization Name:

Date Of Request: 06/28/2023 03:36:08 PM

This organization submitted a vetting application, but it did not meet our vetting standards or could not be vetted at this time.

We declined the vetting application because:

Reason:

Comment:

Unfortunately, we cannot process charitable donations to this organization. We encourage you to identify an alternative nonprofit organization that you would like to support.

International Vetting

Vetting Request Approved (IV003)

To employee donor

Description: Notification that an organization selected for vetting was approved

Sender: System

Recipient: Employee donor

Trigger: A user requests vetting for an organization that has not been vetted
AND the NPOconnect vetting process approves the organization

Option to turn email on/off? No

Option to customize email? No

Subject line: [Vetting Approved](#)

Email header: [Vetting Approved](#)

Email text:

{First name},

We are pleased to inform you that the organization below responded and submitted a vetting application.

We have reviewed the vetting application, approved it, and can now process charitable donations to this organization.

Please select the link below to review.

Vetting Request Summary

Organization Name: {Organization name}

Date of Request: {Date and time of vetting request}



Vetting Approved

TL,

We are pleased to inform you that the organization below, responded and submitted a vetting application.

We have reviewed the vetting application, approved it, and can now process charitable donations to this organization.

Please select the link below to review

Vetting Request Summary

Organization Name:

Date Of Request: 06/28/2023 03:36:08 PM

[View Vetting Requests](#)

Proxy

Description: Request for action sent to an employee to serve as proxy for another

Sender: System

Recipient: Proxy requestee

Trigger: Employee user selects *Send Request* in the Assign a Proxy workflow

Option to turn email on/off? No

Option to customize email? No

Subject line: Proxy Request – Action Required

Email header: Accept Your Proxy Request

Email text:

{First name},

{First and last name of requester} has granted you access to their account as their Proxy. Please visit

{Community name} to review and finalize the request.

Accept Your Proxy Request

Leah,

Jewell Willett has granted you access to their account as their Proxy.

Please visit YourCause Community to review and finalize the request.

[View My Account](#)

Description: Notification that proxy request has been declined by requestee

Sender: System

Recipient: Proxy requester

Trigger: Proxy requestee selects *Decline* in response to a proxy request

Option to turn email on/off? No

Option to customize email? No

Subject line: Proxy Access Declined

Email header: Your Proxy Request was Declined

Email text:

{First name},

{First and last name of requestee} has declined their proxy assignment.

Please visit {Community name} to view details.

Your Proxy Request was Declined

Alesha,

Jewell Willett has declined their proxy assignment.

Please visit YourCause Community to view details.

[View My Account](#)

Description: Notification that proxy request has been accepted by requestee

Sender: System

Recipient: Proxy requester

Trigger: Proxy requestee selects *Accept* in response to a proxy request

Option to turn email on/off? No

Option to customize email? No

Subject line: Proxy Access Accepted

Email header: Your Proxy Request was Accepted

Email text:

{First name},

{First and last name of requestee} has accepted their proxy assignment.

Please visit {Community name} to view details.

Your Proxy Request was Accepted

Alesha,

Jewell Willett has accepted their proxy assignment.

Please visit YourCause Community to view details.

[View My Account](#)

Description: Notification to the proxy parent that the proxy child has deactivated their own access

Sender: System

Recipient: Proxy parent

Trigger: Proxy child removes the proxy parent from Accounts You Can Access

Option to turn email on/off? No

Option to customize email? No

Subject line: Proxy Access Deactivated

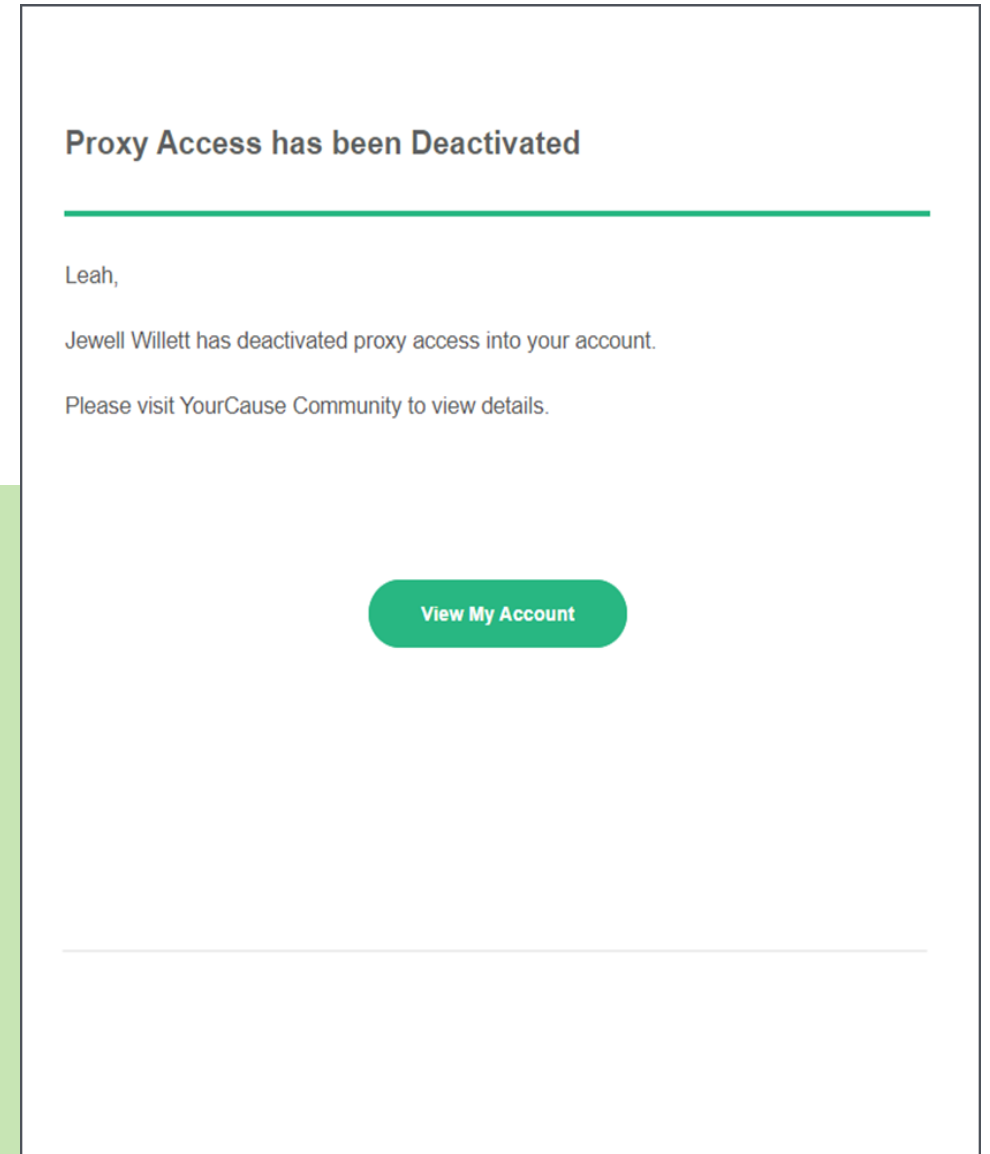
Email header: Proxy Access has been Deactivated

Email text:

{First name},

{First and last name of proxy child} has deactivated proxy access into your account.

Please visit {Community name} to view details.



Description: Notification to the proxy child that their account access has been deactivated by the proxy parent

Sender: System

Recipient: Proxy child

Trigger: Proxy parent removes the proxy child from People Authorized to Access Your Account

Option to turn email on/off? No

Option to customize email? No

Subject line: Proxy Access Deactivated

Email header: Your Proxy Access has been Deactivated

Email text:

{First name},

{First and last name of proxy parent} has deactivated your proxy access.

Please visit {Community name} to view details.

Your Proxy Access has been Deactivated

Leah,

Jewell Willett has deactivated your proxy access.

Please visit YourCause Community to view details.

[View My Account](#)

Reward Programs

Reward Programs

Incentive Redeemed Confirmation (IN001)

To employee user

Description: Confirmation sent to an employee user when they redeem an incentive

Sender: System

Recipient: Employee user

Trigger: User redeems an incentive through My Incentives

Option to turn email on/off? No

Option to customize email? Yes – Client Admin can add custom text

Customization note: Client Admin Panel, Incentives, Programs, Rules, Edit Rule/New Rule, Communication Settings

Subject line: Redemption Confirmed

Email header: {Amount in Local Currency} - Redeemed

Email text:

{First name},

Your redemption is complete.

{Reward program name}


Amount: {Amount in local currency}

Redemption Date: {Redemption date}

Organization: {Organization name}

Registration ID: {Organization registration ID}

Designation: {Designation or None}



700.00 USD - Redeemed

Jewell,

Your redemption is complete.

2021 Volunteer Participation Incentive

Amount: 700.00 USD

Redemption Date: 11/15/2021

Organization : United States Fund For Unicef

Registration ID : 13-1760110

Designation : None

[View History](#)

Description: Notification to a user that they have a new incentive available

Sender: System

Recipient: Employee user

Trigger: Admin issues an incentive to an employee user through Incentive Management

Option to turn email on/off? No

Option to customize email? No, however, admins can include an optional custom message (up to 2000 characters) and use HTML to format text.

Subject line: {Reward program/rule name}: {Amount in local currency}

Email header: {Amount in local currency} – Redeem Now

Email text:

{First name},

See below for program related information and redemption details.

{Manual issuance job name}

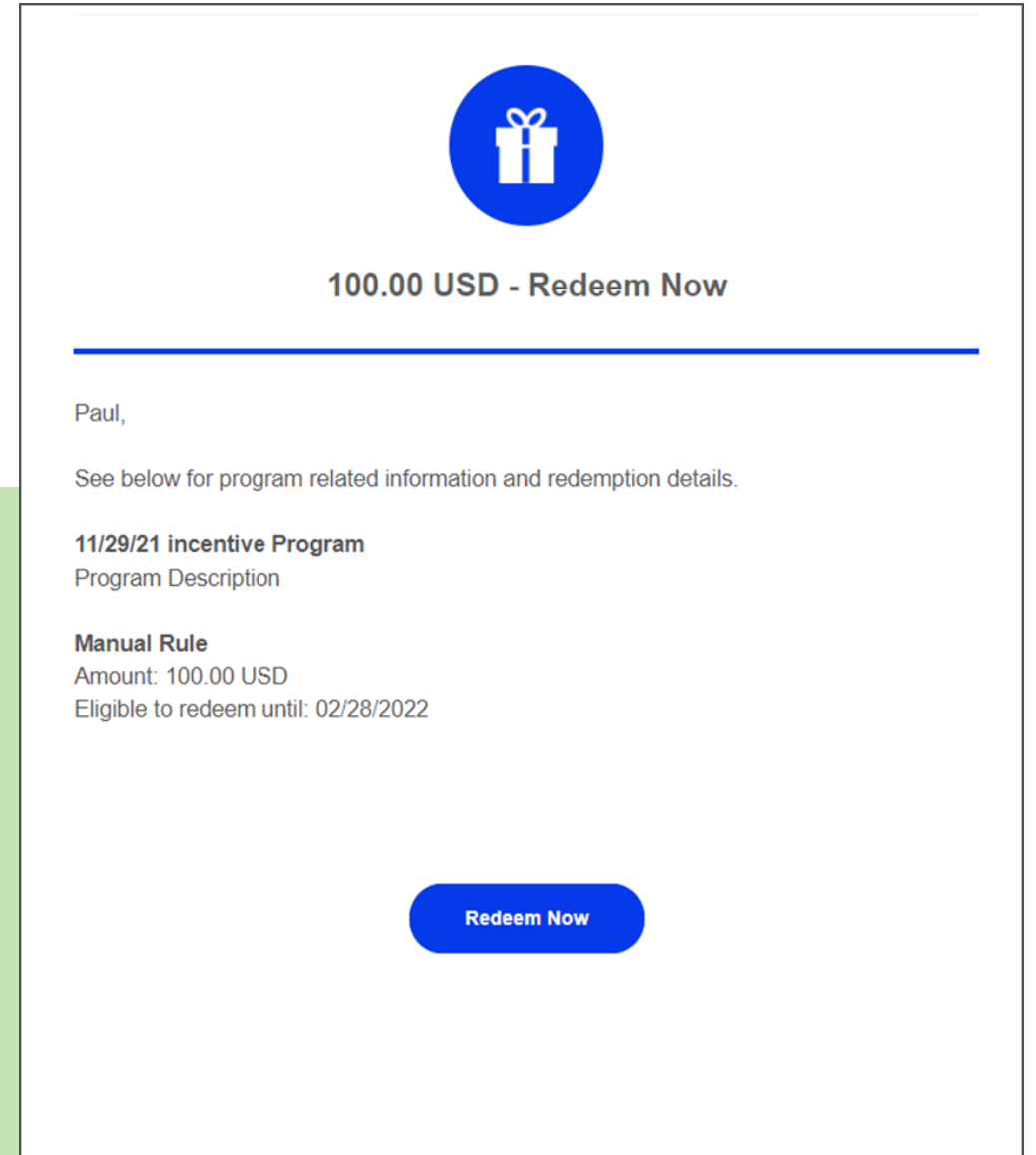
{Manual issuance job description}

{Rule name}

Amount: {Amount in local currency}

Eligible to redeem until: {Last date of redemption period}

{Optional custom message}



The image shows a preview of an email notification. At the top center is a blue circular icon containing a white gift box. Below the icon, the text "100.00 USD - Redeem Now" is displayed in a bold, black font. A horizontal blue line separates this header from the main body of the email. The body text begins with "Paul," followed by "See below for program related information and redemption details." Below this, there are two sections: "11/29/21 incentive Program" with "Program Description" underneath, and "Manual Rule" with "Amount: 100.00 USD" and "Eligible to redeem until: 02/28/2022" underneath. At the bottom right of the email preview is a blue rounded rectangular button with the text "Redeem Now" in white.

Description: Notification that a redeemed incentive was approved

Sender: System

Recipient: Employee user

Trigger: User redeems an incentive AND admin approval is required AND incentive is approved

Option to turn email on/off? No

Option to customize email? No

Subject line: Redemption Approved: {Reward program/rule name}

Email header: Redemption Approved

Email text:

{First name},

Your redemption was approved by an admin. See below for more information.

Rule Name: {Reward program/rule name}

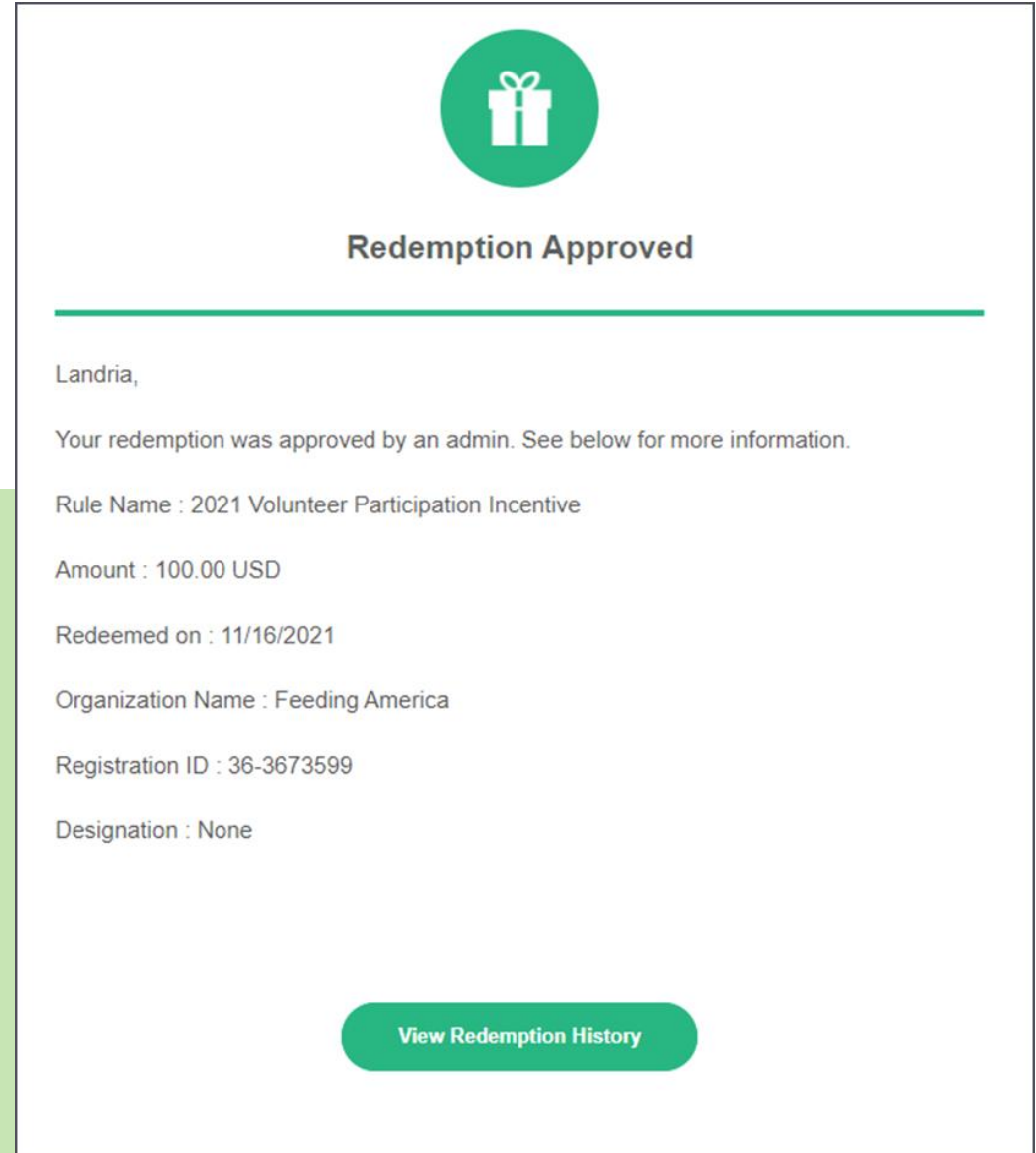
Amount: {Amount in local currency}

Redemption Date: {Redemption date}

Organization: {Organization name}

Registration ID: {Organization registration ID}

Designation: {Designation or None}



The notification card features a green circular icon with a white gift box at the top center. Below the icon, the title "Redemption Approved" is displayed in bold black text, followed by a horizontal green line. The main body of the card contains the following text: "Landria," followed by "Your redemption was approved by an admin. See below for more information." Below this, several key-value pairs are listed: "Rule Name : 2021 Volunteer Participation Incentive", "Amount : 100.00 USD", "Redeemed on : 11/16/2021", "Organization Name : Feeding America", "Registration ID : 36-3673599", and "Designation : None". At the bottom right, there is a green rounded rectangular button with the text "View Redemption History".

Description: Notification that the incentive an employee redeemed has been denied

Sender: System

Recipient: Employee user

Trigger: User redeems an incentive AND admin approval is required AND incentive is denied

Option to turn email on/off? No

Option to customize email? Yes – Client Admin can add custom text to the individual email when they decline each redemption request

Customization note: CSRconnect admin portal, Incentives, Incentive Management, Decline

Subject line: [Redemption Denied: {Reward program/rule name}](#)

Email header: [Redemption Denied](#)

Email text:

[{First name}](#),

Your redemption was denied by an admin. If the admin provided any additional information, you can view their comments below.

[{Optional custom text}](#)

Rule Name: [{Reward program/rule name}](#)

Amount: [{Amount in local currency}](#)

Redeemed on: [{Date of attempted redemption}](#)

Organization Name: [{Organization name}](#)

Registration ID: [{Organization registration ID}](#)

Designation: [{Designation or None}](#)



Redemption Denied

Jewell,

Your redemption was denied by an admin. If the admin provided any additional information, you can view their comments below.

Admin Message : Unfortunately, we cannot approve incentives for volunteer hours for this particular organization due to company policy. Please contact your community admin for more details.

Rule Name : 2021 Volunteer Participation Incentive

Amount : 1600.00 USD

Redeemed on : 11/16/2021

Organization Name : Perot Museum of Nature and Science

Registration ID : 75-6067569

Designation : None

[View Redemption History](#)

Description: Notification that an employee's incentive is about to expire

Sender: System

Recipient: Employee user

Trigger: 10 days before expiration date of reward program/rule

Option to turn email on/off? Yes – Client Admin can activate - see note below

Option to customize email? No

Email setting note: CSRconnect admin portal, Incentives, Programs, Rules, Edit Rule/New Rule, Communication Settings, Expiration Reminder

Subject line: Expires in 10 Days: {Reward program/rule name}

Email header: Expiration Reminder

Email text:

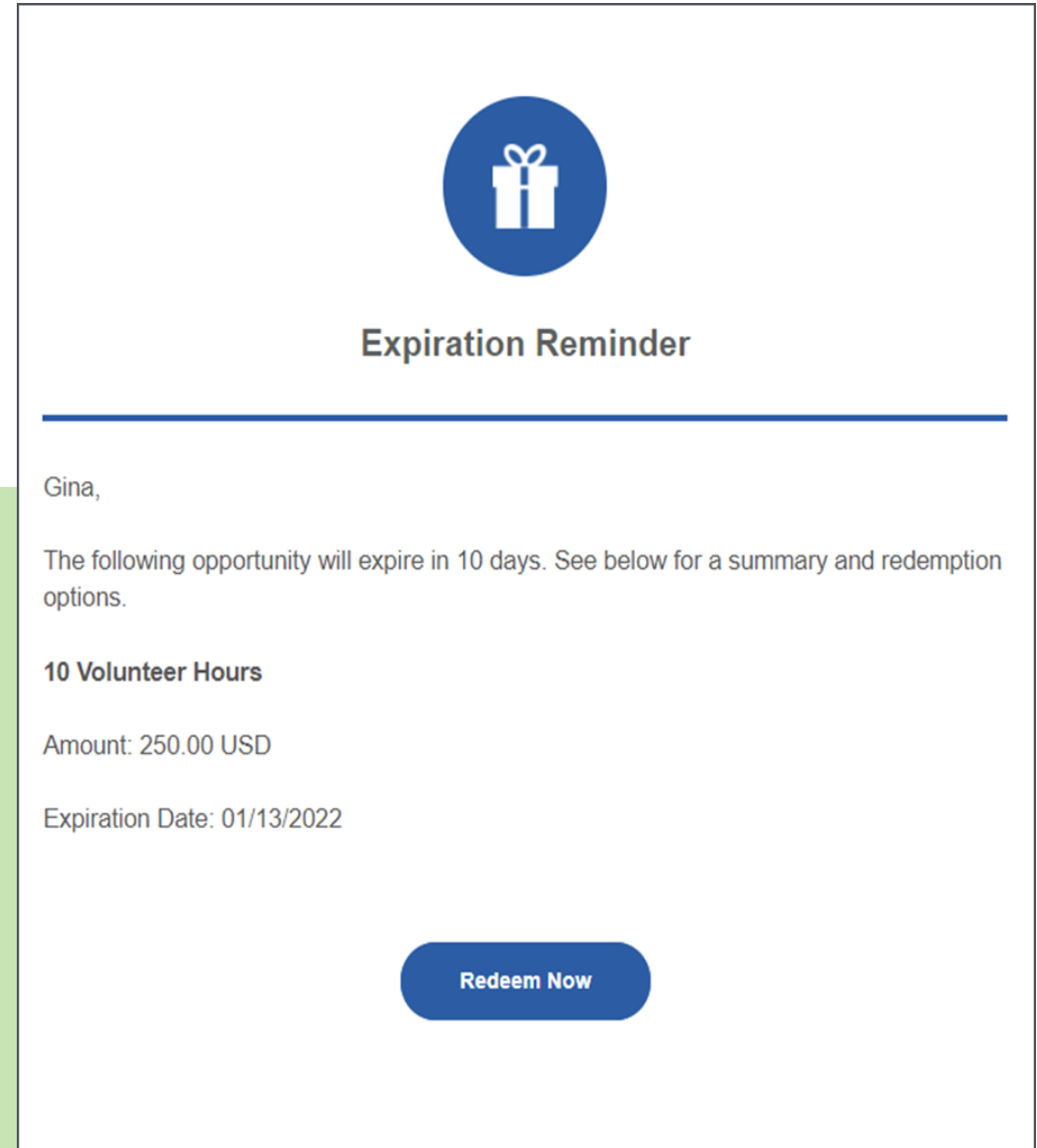
{First name},

The following opportunity will expire in 10 days. See below for a summary and redemption options.

{Reward program/rule name}

Amount: {Amount in local currency}

Expiration Date: {Expiration date}



The image shows a preview of an email notification. At the top center is a blue circular icon containing a white gift box. Below the icon, the text "Expiration Reminder" is displayed in a bold, dark blue font. A horizontal blue line separates the header from the main content. The main content begins with the name "Gina," followed by a paragraph: "The following opportunity will expire in 10 days. See below for a summary and redemption options." Below this is the title "10 Volunteer Hours" in bold. The details "Amount: 250.00 USD" and "Expiration Date: 01/13/2022" are listed. At the bottom right, there is a blue rounded rectangular button with the text "Redeem Now" in white.

Reward Programs

Incentive Redeemed – Approval Exists (IN006)

To employee user

Description: Notification that an admin must approve before the redeemed incentive can be applied

Sender: System

Recipient: Employee user

Trigger: User confirms redemption of an incentive through My Incentives AND the client's program settings require Client Admin approval

Option to turn email on/off? No

Option to customize email? Yes – Client Admin can add custom text – see note below

Customization note: Client Admin Panel, Incentives, Programs, Edit Rule/New Rule, Communication Settings

Subject line: [Redemption Confirmed - {Incentive rule name}](#)

Email header: [Redemption Complete. Pending Approval](#)

Email text:

{First name},

Your redemption is complete. However, there is still an admin approval process before we can create the transaction. Please allow some time for this process to take place. You will receive an email when an admin has addressed your request.

Approval Process Explanation: {Custom text provided by Client Admin}

Rule Name: {Rule name}

Program Name: {Reward program name}

Amount: {Amount in local currency}

Redemption Date: {Date of attempted redemption}

Organization: {Organization name}

Registration ID: {Organization registration ID}



Redemption Complete. Pending Approval

Alesha,

Your redemption is complete. However, there is still an admin approval process before we can create the transaction. Please allow some time for this process to take place. You will receive an email when an admin has addressed your request.

Approval Process Explanation : We approve these incentives every two weeks.

Rule Name : 2021 Volunteer Participation Incentive

Program Name : 2021 Incentives Program

Amount: 138.00 GBP

Redemption Date: 12/09/2021

Organization : United States Fund For Unicef

Registration ID : 13-1760110

[View History](#)

Reward Programs

Incentive Redeemed – Charity Compliance Exists (IN007)

To employee user

Description: Notification that an organization must clear a compliance review before the redeemed incentive can be applied

Sender: System

Recipient: Employee user

Trigger: User confirms redemption of an incentive through My Incentives AND the client's program settings require a compliance review

Option to turn email on/off? No

Option to customize email? No

Subject line: Redemption Confirmed. Pending Compliance – {Incentive rule name}

Email header: Redemption Complete. Pending Compliance

Email text:

{First name},

Your redemption is complete. However, the recipient organization has not agreed to one or more required compliance statements for this program. This may delay or prevent our ability to process this redemption. You will be notified when the organization has handled this compliance issue.

If you know someone at this organization, you can send them the following instructions to expedite the process.

{Text continues. Refer to email image for additional text.}



Redemption Complete. Pending Compliance

Jewell,

Your redemption is complete. However, the recipient organization has not agreed to one or more required compliance statements for this program. This may delay or prevent our ability to process this redemption. You will be notified when the organization has handled this compliance issue.

If you know someone at this organization, you can send them the following instructions to expedite the process.

1. Create an account or login at <https://nonprofit.yourcause.com/login>
2. Click on compliance alert in the notifications panel on the right side of the dashboard.
3. Accept all compliance statements that apply.

Rule Name : 2021 General Incentive/Reward

Program Name : 2021 Incentives Program

Amount: 350.00 USD

Redemption Date: 12/30/2021

Organization : Cougar Fund Inc

Registration ID : 31-1796418

[View History](#)

Reward Programs

Incentive Eligibility Update (IN010)

To employee user

Description: Notification to an employee that they have earned an incentive

Sender: System

Recipient: Employee user

Trigger: User becomes eligible for an incentive by meeting the rule requirement(s)

Option to turn email on/off? No

Option to customize email? No

Subject line: Eligibility Update: {Reward program name}

Email header: Eligibility Update

Email text:

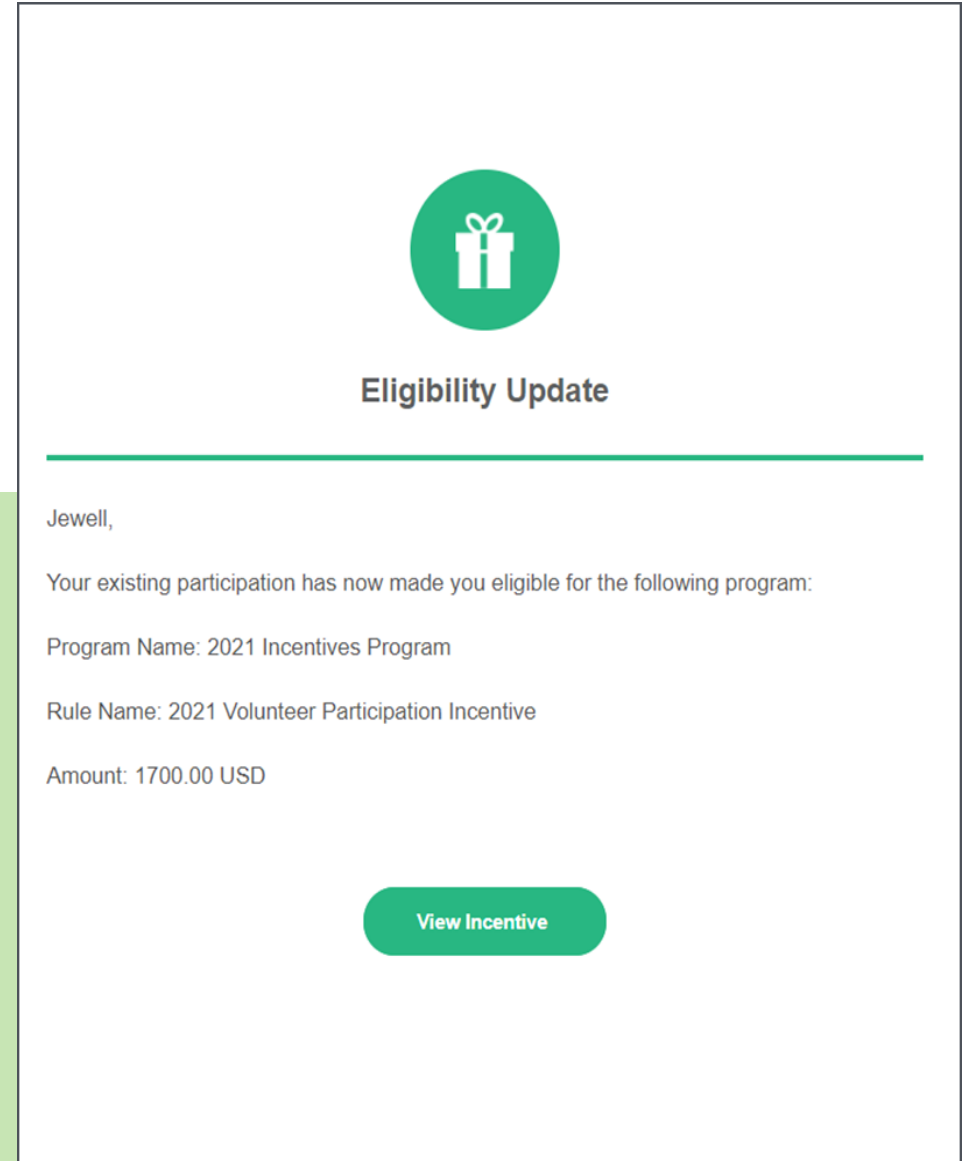
{First name},

Your existing participation has now made you eligible for the following program:

Program Name: {Reward program name}

Rule Name: {Rule name}

Amount: {Amount in local currency}



The image shows a preview of an email notification. At the top center is a green circular icon containing a white gift box. Below the icon, the text "Eligibility Update" is displayed in a bold, black font. A horizontal green line separates this header from the main body of the email. The body text is as follows: "Jewell," followed by "Your existing participation has now made you eligible for the following program:". Below this, three lines of text provide details: "Program Name: 2021 Incentives Program", "Rule Name: 2021 Volunteer Participation Incentive", and "Amount: 1700.00 USD". At the bottom right of the email body, there is a green rounded rectangular button with the text "View Incentive" in white.

Description: Notification to an employee that their redeemed incentive was revoked

Sender: System

Recipient: Employee user

Trigger: Client Admin revokes the redemption of an incentive

Option to turn email on/off? Yes – Client Admin can choose not to send

Option to customize email? Yes – Client Admin can add custom text when they revoke the redemption

Customization note: CSRconnect admin portal, Jobs and Imports, Revoke Incentives

Subject line: Incentive Status Updated: {Reward program name}

Email header: Incentive Status Updated

Email text:

{First name},

Unfortunately, your redemption has been revoked for the following reason:

{Custom text}

Program Name: {Reward program name}

Amount: {Amount in local currency}

Original Issued Date: {Date incentive was issued}

Date Revoked: {Date incentive was revoked by admin}



Incentive Status Updated

Tess,

Unfortunately, your redemption has been revoked for the following reason:

We cannot approve your incentive at this time due to a missing requirement. Please return to the community and redeem your incentive including the designation. Please contact support if you have any additional questions.

Program Name: 2021 Manual Incentives Testing

Amount: 700.00 USD

Original Issued Date: 9/23/2021 6:59:44 PM

Date Revoked: 9/29/2021 2:36:16 PM

[View Incentive](#)

Reward Programs

Volunteer Grant Denied (I001)

To volunteer grant applicant

Description: Notification to an employee that their application for a volunteer grant was declined

Sender: System

Recipient: Volunteer grant applicant

Trigger: Client admin selects Decline in response to a volunteer grant request

Option to turn email on/off? No

Option to customize email? Yes – client admin can add text when they decline the request

Subject line: Grant Declined

Email header: Your Request has been Declined

Email text:

{First name},

Unfortunately, the request you submitted cannot be approved, and has been declined.

Additional Information: {Any additional information added by client admin}

Program Name: {Reward program name}

Organization Name: {Organization name}

Request Amount: {Amount in local currency}

Date Requested: {Date of grant request}

Date Declined: {Date client admin declined request}

[View My Volunteering](#) to review the status of this request.

Your Request has been Declined

Tim,

Unfortunately, the request you submitted cannot be approved, and has been declined.

Additional Information: N/A

Program: MS Individual Grant Only

Organization Name: Community Works

Request Amount: 20.00 USD

Date Requested: 10/26/2021

Date Declined: 01/05/2022

[View My Volunteering](#) to review the status of this request.

[View My Volunteering](#)

Description: Notification to an employee that they need to resubmit their application for a volunteer grant

Sender: System

Recipient: Volunteer grant applicant

Trigger: Client admin selects Resubmit in response to a volunteer grant request

Option to turn email on/off? No

Option to customize email? Yes – client admin can add text within the Resubmit modal

Subject line: Please re-submit your Grant application

Email header: Your Request Needs Attention

Email text:

{First name},

It looks like your request needs to be updated and re-submitted.

Additional Information: {Any additional information added by client admin}

Program: {Volunteer grant program name}

Organization Name: {Organization name}

Request Amount: {Amount in local currency}

Date Requested: {Date of grant request}

Resubmission Requested: {Date client admin requested the resubmission}

[View My Volunteering](#) to review the status of this request.

Your Request Needs Attention

Jewell,

It looks like your request needs to be updated and re-submitted.

Additional Information: This is the optional text added to the message for the employee when a client admin selects Resubmit on a pending Grant Request.

Program: 2021 Team Grant Test Program

Organization Name: North Texas Food Bank

Request Amount: 100.00 USD

Date Requested: 12/1/2021

Resubmission Requested: 1/13/2022

[View My Volunteering](#) to review the status of this request.

[View My Volunteering](#)

Reward Programs

Volunteer Grant Approved (I003)

To volunteer grant applicant

Description: Notification to an employee that their application for a volunteer grant was approved

Sender: System

Recipient: Volunteer grant applicant

Trigger: Client admin selects Approve in response to a volunteer grant request

Option to turn email on/off? No

Option to customize email? No

Subject line: [Grant Application Approved](#)

Email header: [Grant Application Approved](#)

Email text:

{First name},

Congratulations! Your request has been approved.

Program: {Volunteer grant program name}

Organization Name: {Organization name}

Request Amount: {Amount in local currency}

Date Requested: {Date of grant request}

Resubmission Requested: {Date client admin requested the resubmission}

[View My Volunteering](#) to review the status of this request.



Grant Application Approved

Jewell,

Congratulations! Your request has been approved.

Program: Test Team Grant

Organization Name: The Knowledge Center Inc

Request Amount: 20.00 USD

Date Requested: 10/22/2021

Date Approved: 11/19/2021

[View My Volunteering](#) to review the status of this request.

[View My Volunteering](#)

Reward Programs

Match Request Denied (I004)

To employee donor

Description: Notification to an employee that their request to match a donation was declined

Sender: System

Recipient: Employee donor who applies for a matching gift

Trigger: Client admin declines the user's match request

Option to turn email on/off? No

Option to customize email? Yes – client admin can add text when they decline the request

Subject line: Match Declined

Email header: Your Request has been Declined

Email text:

{First name},

Thank you for submitting a request. Unfortunately, the request has been declined for the following reason:

Additional Information: {Any additional information added by client admin}

Program: {Reward program name}

Organization Name: {Organization name}

Request Amount: {Amount in local currency}

Date Requested: {Date of match request}

Date Declined: {Date client admin declined match request}

[View My Giving](#) to review the status of this request.

Your Request has been Declined

Genevieve,

Thank you for submitting a request. Unfortunately, the request has been declined for the following reason:

Additional Information: Clearing matches for testing.

Program: Education Match 2021

Organization Name: UNIVERSITY OF VIRGINIA DARDEN SCHOOL FOUNDATION

Request Amount: 6000.00 USD

Date Requested: 9/20/2021

Date Declined: 12/10/2021

[View My Giving](#) to review the status of this request.

[View My Giving](#)

Description: Notification to an employee that they need to resubmit their request to match a donation

Sender: System

Recipient: Employee donor who applies for a matching gift

Trigger: Client admin selects Resubmit in response to a matching gift request

Option to turn email on/off? No

Option to customize email? Yes – client admin can add text when they request the resubmission

Subject line: [Please Re-submit Your Match Application](#)

Email header: [Your Request Needs Attention](#)

Email text:

{First name},

Your match application needs to be updated and re-submitted. To resubmit your donation, please visit your “My Giving” page, click “Edit” on the donation you’re resubmitting, and update the donation details as requested.

Additional Information: {Any text added by client admin}

Program: {Reward program name}

Organization Name: {Organization name}

Request Amount: {Amount in local currency}

Date Requested: {Date of match request}

Resubmission Requested: {Date of resubmission request}

[View My Giving](#) to review the status of this request.

Your Request Needs Attention

Baker,

Your match application needs to be updated and re-submitted. To resubmit your donation, please visit your 'My Giving' page, click 'Edit' on the donation you're resubmitting, and update the donation details as requested.

Additional Information: test

Program: 2021 Offline Match

Organization Name: IN-N-OUT BURGERS FOUNDATION

Request Amount: 150.00 USD

Date Requested: 11/16/2021

Resubmission Requested: 11/16/2021

[View My Giving](#) to review the status of this request.

[View My Giving](#)

Reward Programs

Match Request Approved (I006)

To employee donor

Description: Notification to an employee that their request to match a donation was approved

Sender: System

Recipient: Employee donor who applies for a matching gift

Trigger: Client admin approves the user's match request

Option to turn email on/off? No

Option to customize email? No

Subject line: Match Request Approved

Email header: Your Request has been Approved

Email text:

{First name},

Congratulations! Your match request was approved. You can view the status of this donation on your "My Giving" page.

Program: {Reward program name}

Organization Name: {Organization name}

Request Amount: {Amount in local currency}

Date Requested: {Date of match request}

Date Approved: {Date client admin approved the request}

[View My Giving](#) to review the status of this request.



Your Request has been Approved

Michael,

Congratulations! Your match request was approved. You can view the status of this donation on your 'My Giving' page.

Program: 2021 Offline Match

Organization Name: IN-N-OUT BURGERS FOUNDATION

Request Amount: 2000.00 USD

Date Requested: 11/16/2021

Date Approved: 11/16/2021

[View My Giving](#) to review the status of this request.

[View My Giving](#)

Stranded Funds Automation

Emails sent when a recipient organization's
charitable contributions remain uncashed/undeposited

Description: Notification alerting the donor that the uncashed check will expire in 30 days

Sender: System

Recipient: Employee donor

Trigger: Check date = 30 days until void

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution for {org charity name} - Deadline Approaching -
Uncashed Check

Email header: Response Needed for Charitable Contribution

Email text:

Hello {First name},

On {date of donation}, you used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {insert company/foundation name}'s charitable giving program.

We sent a paper check containing your charitable contribution to your selected charitable organization on {Check Date} but they haven't cashed it during the last 90 days. If no action is taken, we'll void the check in 30 days.



Response Needed for Charitable Contribution

Hello Shelly,

On 05/05/2020, you used Assure Quality to send a monetary donation to Agape House Of Prayer.

[YourCause](#) helps to manage qatestcommunity's charitable giving program.

We sent a paper check containing your charitable contribution to your selected charitable organization on 12/03/2021 but they haven't cashed it during the last 90 days. If no action is taken, we'll void the check in 30 days.

Since we haven't heard from Agape House Of Prayer, we're now asking for your help. If you know someone within the charitable organization, please ask them to deposit the check within 30 days or advise that they request a new check by visiting our [Nonprofit Portal](#).

Your selected charitable organization must take action in the next 30 days or we'll void the check.

- If we void the check, we will ask you to choose another eligible charitable organization to receive your contribution.
- If your contribution included matching funds, you will be able to redirect those funds.

Original Transaction Information

Organization: Agape House Of Prayer
Address: 39 Goodale Rd Ste 2, Mattapan, Ma, 02126
Registration ID: 00-0841363
Original Payment Date: 12/03/2021
Transaction Amount: 208
Transaction ID: 3692795

[Go to My Giving](#)

Description: Notification alerting the donor that the uncashed check will expire in 30 days

Sender: System

Recipient: Employee donor

Trigger: Check date = 30 days until void

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

Since we haven't heard from {org charity name}, we're now asking for your help. If you know someone within the charitable organization, please ask them to deposit the check within 30 days or advise that they request a new check by visiting our {Nonprofit Portal}.

Your selected charitable organization must take action in the next 30 days or we'll void the check.

- If we void the check, we will ask you to choose another eligible charitable organization to receive your contribution.
- If your contribution included matching funds, you will be able to redirect those funds.

Original Transaction Information

Organization: {Organization Name}


Address: {Disbursement Address}

Registration ID:

Original Payment Date: {Check Date}

Transaction Amount:

Transaction ID:



Response Needed for Charitable Contribution

Hello Shelly,

On 05/05/2020, you used Assure Quality to send a monetary donation to Agape House Of Prayer.

[YourCause](#) helps to manage qatestcommunity's charitable giving program.

We sent a paper check containing your charitable contribution to your selected charitable organization on 12/03/2021 but they haven't cashed it during the last 90 days. If no action is taken, we'll void the check in 30 days.

Since we haven't heard from Agape House Of Prayer, we're now asking for your help. If you know someone within the charitable organization, please ask them to deposit the check within 30 days or advise that they request a new check by visiting our [Nonprofit Portal](#).

Your selected charitable organization must take action in the next 30 days or we'll void the check.

- If we void the check, we will ask you to choose another eligible charitable organization to receive your contribution.
- If your contribution included matching funds, you will be able to redirect those funds.

Original Transaction Information
Organization: Agape House Of Prayer
Address: 39 Goodale Rd Ste 2, Mattapan, Ma, 02126
Registration ID: 00-0841363
Original Payment Date: 12/03/2021
Transaction Amount: 208
Transaction ID: 3692795

[Go to My Giving](#)

Description: Notification alerting the donor to reissue or redirect funds within 14 days

Sender: System

Recipient: Employee donor

Trigger: Hold reason triggered

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution Redirect Needed – 14 Day Notice

Email header: Redirect Request – 14 Day Notice

Email text:

Hello {First name},


You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {Company/Foundation Name}'s charitable giving program.

We could not process your donation to the charitable organization you selected.

{Reason for the stranded fund}

Please sign into {Community Name} to resolve this matter by using the button below. You have the option to resend the funds to the same organization or select a new organization to receive your charitable contribution. If this donation is part of a recurring payroll pledge, the pledge and any deductions scheduled for a future date have been cancelled. You can set up a new payroll pledge in CSRconnect.



Redirect Request - 14 Day Notice

Hello ,

You used to send a monetary donation to

[YourCause](#) helps to manage charitable giving program.

We could not process your donation to the charitable organization you selected.

The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response.

Please sign into CSRConnect to resolve this matter by using the button below. You have the option to resend the funds to the same organization or select a new organization to receive your charitable contribution.

If this donation is part of a recurring payroll pledge, the pledge and any deductions scheduled for a future date have been cancelled. You can set up a new payroll pledge in CSRconnect.

If you do not take an action in the next 14 days, we will automatically redirect your donation to . This transaction cannot be reversed.

Original Transaction Information
Organization:
Address:
Amount:
Transaction:

[Take Action Now](#)

Description: Notification alerting the donor to reissue or redirect funds within 14 days

Sender: System

Recipient: Employee donor

Trigger: Hold reason triggered

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

If you do not take an action in the next 14 days, we will automatically redirect your donation based on your employer's alternate organization configuration. This transaction cannot be reversed.


Original Transaction Information

Organization:

Address:

Amount:

Transaction:



Redirect Request - 14 Day Notice

Hello ,

You used to send a monetary donation to

[YourCause](#) helps to manage charitable giving program.

We could not process your donation to the charitable organization you selected.

The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response.

Please sign into CSRConnect to resolve this matter by using the button below. You have the option to resend the funds to the same organization or select a new organization to receive your charitable contribution.

If this donation is part of a recurring payroll pledge, the pledge and any deductions scheduled for a future date have been cancelled. You can set up a new payroll pledge in CSRconnect.

If you do not take an action in the next 14 days, we will automatically redirect your donation to . This transaction cannot be reversed.

Original Transaction Information
Organization:
Address:
Amount:
Transaction:

[Take Action Now](#)

Description: Notification alerting the donor to reissue or redirect funds within 7 days

Sender: System

Recipient: Employee donor

Trigger: Hold reason triggered +7 days

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution Redirect Needed – 7 Day Notice

Email header: Redirect Request – 7 Day Notice

Email text:

Hello {First name},

You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {Company/Foundation Name}'s charitable giving program.

We could not process your donation to the charitable organization you selected.

{Reason for the stranded fund}

Please sign into {Community Name} to resolve this matter by using the button below. You have the option to resend the funds to the same organization or select a new organization to receive your charitable contribution. If this donation is part of a recurring payroll pledge, the pledge and any deductions scheduled for a future date have been cancelled. You can set up a new payroll pledge in CSRconnect.



Redirect Request - 7 Day Notice

Hello ,

You used to send a monetary donation to

[YourCause](#) helps to manage charitable giving program.

We could not process your donation to the charitable organization you selected.

The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response.

Please sign into CSRConnect to resolve this matter by using the button below. You have the option to resend the funds to the same organization or select a new organization to receive your charitable contribution.

If this donation is part of a recurring payroll pledge, the pledge and any deductions scheduled for a future date have been cancelled. You can set up a new payroll pledge in CSRconnect.

If you do not take an action in the next 7 days, we will automatically redirect your donation to . This transaction cannot be reversed.

Original Transaction Information

Organization:

Address:

Amount:

Transaction:

[Take Action Now](#)

Description: Notification alerting the donor to reissue or redirect funds within 7 days

Sender: System

Recipient: Employee donor

Trigger: Hold reason triggered +7 days

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

If you do not take an action in the next 7 days, we will automatically redirect your donation based on your employer's alternate organization configuration. This transaction cannot be reversed.

Original Transaction Information

Organization:

Address:

Amount:

Transaction:

The image shows a preview of an email notification. At the top center is a red square icon with a white gift symbol. Below the icon is the title "Redirect Request - 7 Day Notice" in bold black text, followed by a horizontal red line. The main body of the email is in a light gray font. It starts with "Hello," followed by a blank space. The next line says "You used" followed by a blank space, "to send a monetary donation to" followed by a blank space. The following line says "[YourCause](#) helps to manage" followed by a blank space, "charitable giving program." The next paragraph states: "We could not process your donation to the charitable organization you selected." The following paragraph says: "The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response." The next paragraph says: "Please sign into CSRConnect to resolve this matter by using the button below. You have the option to resend the funds to the same organization or select a new organization to receive your charitable contribution." The following paragraph says: "If this donation is part of a recurring payroll pledge, the pledge and any deductions scheduled for a future date have been cancelled. You can set up a new payroll pledge in CSRconnect." The next paragraph says: "If you do not take an action in the next 7 days, we will automatically redirect your donation to" followed by a blank space, ". This transaction cannot be reversed." Below this is a section titled "Original Transaction Information" with the following labels: "Organization:", "Address:", "Amount:", and "Transaction:". At the bottom right of the email preview is a red button with the text "Take Action Now" in white.

Description: Notification confirming the donor's choice to redirect donation(s) with matches.

Sender: System

Recipient: Employee donor

Trigger: Donor redirected donation

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution with Match Redirection Confirmation

Email header: Donation Redirected

Email text:

Hello {First name},

You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {insert company/foundation name}'s charitable giving program.

This message confirms your choice to redirect your donation(s). Please allow 12-24 hours for the system to reflect these changes in your account.

Original Transaction Information

Organization:

Address:

Registration ID:

Amount:

Transaction(s):



Donation Redirected

Hello Aaron,

You used tl to send a monetary donation to St George Cathedral.

[YourCause](#) helps to manage tl's charitable giving program.

This message confirms your choice to redirect your donation(s). Please allow 12-24 hours for the system to reflect these changes in your account.

Original Transaction Information

Organization: St George Cathedral

Address: 523 E Broadway, South Boston, Ma, 021274415

Registration ID: 00-0029215

Amount: 955.00 INR

Transaction(s): 3781460, 3781484

Employee Donation Redirected To

Organization: OPERATION KINDNESS

Address: 3201 Earhart Dr, Carrollton, Tx, 75006

Registration ID: 75-1553350

Amount: 900.00 INR

Employer-sponsored Donation Redirected To

Organization: OPERATION KINDNESS

Address: 3201 Earhart Dr, Carrollton, Tx, 75006

Registration ID: 75-1553350

Amount: 55.00 INR

Description: Notification confirming the donor's choice to redirect donation(s) with matches.

Sender: System

Recipient: Employee donor

Trigger: Donor redirected donation

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

Employee Donation Redirected To

Organization:

Address:

Registration ID:

Amount:

Employer-sponsored Donation Redirected To

Organization:

Address:

Registration ID:

Amount:



Donation Redirected

Hello Aaron,

You used tl to send a monetary donation to St George Cathedral.

[YourCause](#) helps to manage tl's charitable giving program.

This message confirms your choice to redirect your donation(s). Please allow 12-24 hours for the system to reflect these changes in your account.

Original Transaction Information

Organization: St George Cathedral

Address: 523 E Broadway, South Boston, Ma, 021274415

Registration ID: 00-0029215

Amount: 955.00 INR

Transaction(s): 3781460, 3781484

Employee Donation Redirected To

Organization: OPERATION KINDNESS

Address: 3201 Earhart Dr, Carrollton, Tx, 75006

Registration ID: 75-1553350

Amount: 900.00 INR

Employer-sponsored Donation Redirected To

Organization: OPERATION KINDNESS

Address: 3201 Earhart Dr, Carrollton, Tx, 75006

Registration ID: 75-1553350

Amount: 55.00 INR

Description: Notification confirming the donor's choice to redirect donation(s).

Sender: System

Recipient: Employee donor

Trigger: Donor redirected donation

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution Redirection Confirmation

Email header: Donation Redirected

Email text:

Hello {First name},

You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {insert company/foundation name}'s charitable giving program.

This message confirms your choice to redirect your donation(s). Please allow 12-24 hours for the system to reflect these changes in your account.



Donation Redirected

Hello Jewell,

You used yc to send a monetary donation to Iglesia Bethesda Inc.

[YourCause](#) helps to manage yc's charitable giving program.

This message confirms your choice to redirect your donation(s). Please allow 12-24 hours for the system to reflect these changes in your account.

Original Transaction Information

Organization: Iglesia Bethesda Inc

Address: 13 Cummingham St, Lowell, Ma, 01852

Registration ID: 00-0587764

Amount: 25.00 USD

Transaction(s): 3780822

Redirected To

Organization: Iglesia Bethesda Inc

Address: 13 Cummingham St, Lowell, Ma, 01852

Registration ID: 00-0587764

Amount: 25.00 USD

Description: Notification confirming the donor's choice to redirect donation(s).

Sender: System

Recipient: Employee donor

Trigger: Donor redirected donation

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

Original Transaction Information

Organization:

Address:

Registration ID:

Amount:

Transaction(s):

Redirected To

Organization:

Address:

Registration ID:

Amount:



Donation Redirected

Hello Jewell,

You used yc to send a monetary donation to Iglesia Bethesda Inc.

[YourCause](#) helps to manage yc's charitable giving program.

This message confirms your choice to redirect your donation(s). Please allow 12-24 hours for the system to reflect these changes in your account.

Original Transaction Information

Organization: Iglesia Bethesda Inc

Address: 13 Cummingham St, Lowell, Ma, 01852

Registration ID: 00-0587764

Amount: 25.00 USD

Transaction(s): 3780822

Redirected To

Organization: Iglesia Bethesda Inc

Address: 13 Cummingham St, Lowell, Ma, 01852

Registration ID: 00-0587764

Amount: 25.00 USD

Description: Notification advising donor that a donation payment was redirected based on their original organization selection.

Sender: System

Recipient: Employee donor

Trigger: Donation redirected

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution Redirected

Email header:

Email text:

Hello {First name},

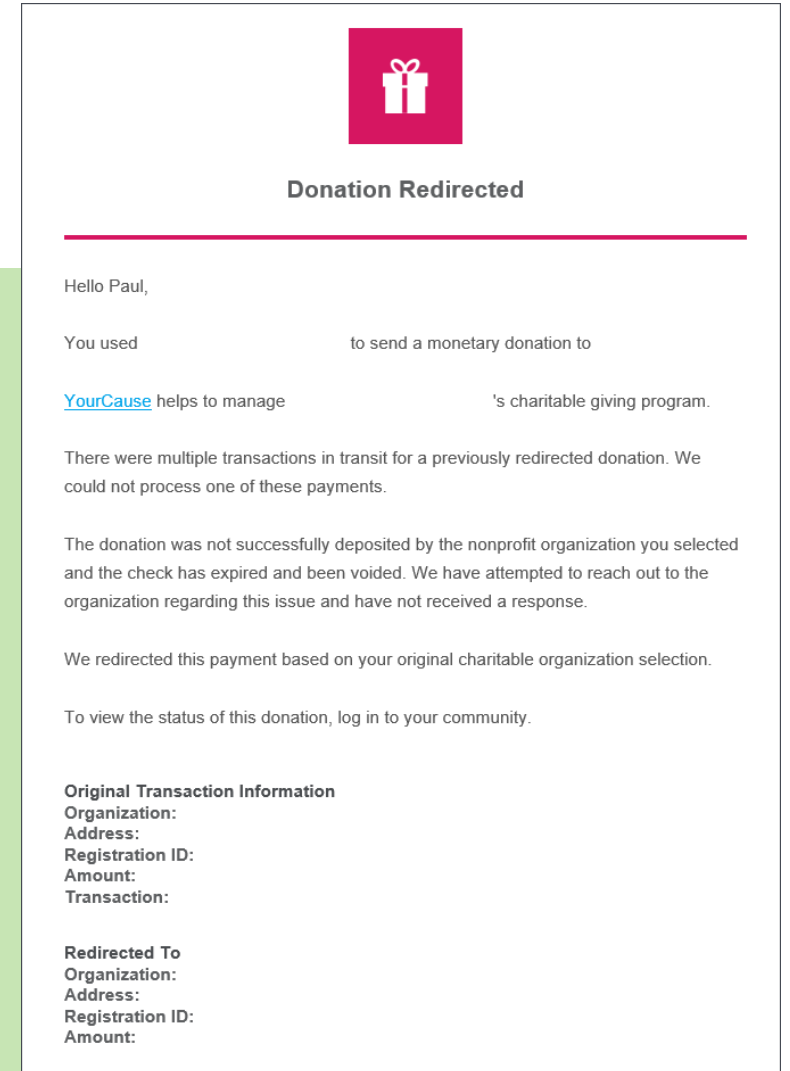
You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {insert company/foundation name}'s charitable giving program.

There were multiple transactions in transit for a previously redirected donation. We could not process one of these payments.

{Reason for the stranded fund}

We redirected this payment based on your original charitable organization selection.



Description: Notification advising donor that a donation payment was redirected based on their original organization selection.

Sender: System

Recipient: Employee donor

Trigger: Donation redirected

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

To view the status of this donation, [log in to your community](#).

Original Transaction Information

Organization:

Address:

Registration ID:

Amount:

Transaction:


Redirected To

Organization:

Address:

Registration ID:

Amount:



Donation Redirected

Hello Paul,

You used _____ to send a monetary donation to _____.

[YourCause](#) helps to manage _____'s charitable giving program.

There were multiple transactions in transit for a previously redirected donation. We could not process one of these payments.

The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response.

We redirected this payment based on your original charitable organization selection.

To view the status of this donation, [log in to your community](#).

Original Transaction Information
Organization:
Address:
Registration ID:
Amount:
Transaction:

Redirected To
Organization:
Address:
Registration ID:
Amount:

Description: Notification alerting donor of 14-day expiration and fund redirect to alternate organization

Sender: System

Recipient: Employee donor

Trigger: Donation automatically redirected after inaction

Option to turn email on/off? No

Option to customize email? Yes – Client Admin can add custom text – see note below

Customization note: CSRconnect Admin Portal, Transaction Redirects, Stranded Funds Automation, Auto Redirect Communication

Subject line: Charitable Contribution Redirected Due to Inaction

Email header: Donation Redirected

Email text:

Hello {First name},

You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {insert company/foundation name}'s charitable giving program.

We recently contacted you because we could not process your donation to the charitable organization you selected.

{Reason for the stranded fund}

There was a 14-day period during which you could resend the funds to the original charitable organization, or you could choose another charitable organization to receive your donation.

Since we did not receive instruction on how to proceed, we automatically redirected your donation to {your employer's alternate organization}. In addition, we stopped any multiple deductions that applied to this donation.



Donation Redirected

Hello Chihhao,

You used _____ to send a monetary donation to _____

[YourCause](#) helps to manage _____'s charitable giving program.

We recently contacted you because we could not process your donation to the charitable organization you selected.

The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response.

There was a 14-day period during which you could resend the funds to the original charitable organization, or you could choose another charitable organization to receive your donation.

Since we did not receive instruction on how to proceed, we automatically redirected your donation to _____. In addition, we stopped any multiple deductions that applied to this donation.

Please allow 12-24 hours for the system to reflect these changes in your account.

This is custom text setup by feature Administrator. Max limit is 1000 characters.

Original Transaction Information

Organization:
Address:
Registration ID:
Amount:
Transaction:

Redirected To
Organization:
Address:
Registration ID:
Amount:

Description: Notification alerting donor of 14-day expiration and fund redirect to alternate organization

Sender: System

Recipient: Employee donor

Trigger: Donation automatically redirected after inaction

Option to turn email on/off? No

Option to customize email? Yes – Client Admin can add custom text – see note below

Customization note: CSRconnect Admin Portal, Transaction Redirects, Stranded Funds Automation, Auto Redirect Communication

Email text (continued):

Please allow 12-24 hours for the system to reflect these changes in your account.

{Optional custom text}

Original Transaction Information

Organization:

Address:

Registration ID:

Amount:

Transaction:


Redirected To

Organization:

Address:

Registration ID:

Amount:



Donation Redirected

Hello Chihhao,

You used _____ to send a monetary donation to _____.

[YourCause](#) helps to manage _____'s charitable giving program.

We recently contacted you because we could not process your donation to the charitable organization you selected.

The donation was not successfully deposited by the nonprofit organization you selected and the check has expired and been voided. We have attempted to reach out to the organization regarding this issue and have not received a response.

There was a 14-day period during which you could resend the funds to the original charitable organization, or you could choose another charitable organization to receive your donation.

Since we did not receive instruction on how to proceed, we automatically redirected your donation to _____. In addition, we stopped any multiple deductions that applied to this donation.

Please allow 12-24 hours for the system to reflect these changes in your account.

This is custom text setup by feature Administrator. Max limit is 1000 characters.

Original Transaction Information
Organization:
Address:
Registration ID:
Amount:
Transaction:

Redirected To
Organization:
Address:
Registration ID:
Amount:

Description: Notification advising donor that a donation payment was redirected to their employer's alternate organization.

Sender: System

Recipient: Employee donor

Trigger: Donation automatically redirected

Option to turn email on/off? No

Option to customize email? No

Subject line: Charitable Contribution Automatically Redirected

Email header: Donation Redirected

Email text:

Hello {First name},

You used {Community Name} to send a monetary donation to {org charity name}.

YourCause (LINK) helps to manage {insert company/foundation name}'s charitable giving program.

You previously chose to redirect your {donation type} donation. We could not process your donation to the charitable organization you selected for redirection.

{Reason for the stranded fund}

For this reason, we automatically redirected your donation to {your employer's alternate organization}.



Donation Redirected

Hello Mary,

You used _____ to send a monetary donation to _____

[YourCause](#) helps to manage _____'s charitable giving program.

You previously chose to redirect your _____ donation. We could not process your donation to the charitable organization you selected for redirection.

{Reason for the stranded fund}

For this reason, we automatically redirected your donation to _____

Original Transaction Information

Organization:

Address:

Registration ID:

Amount:

Transaction:

Redirected To

Organization:

Address:

Registration ID:

Amount:

Description: Notification advising donor that a donation payment was redirected to their employer's alternate organization.

Sender: System

Recipient: Employee donor

Trigger: Donation automatically redirected

Option to turn email on/off? No

Option to customize email? No

Email text (continued):

Original Transaction Information

Organization:

Address:

Registration ID:

Amount:

Transaction:


Redirected To

Organization:

Address:

Registration ID:

Amount:



Donation Redirected

Hello Mary,

You used _____ to send a monetary donation to _____.

[YourCause](#) helps to manage _____'s charitable giving program.

You previously chose to redirect your _____ donation. We could not process your donation to the charitable organization you selected for redirection.

{Reason for the stranded fund}

For this reason, we automatically redirected your donation to _____.

Original Transaction Information
Organization:
Address:
Registration ID:
Amount:
Transaction:

Redirected To
Organization:
Address:

Registration ID:
Amount:

Stranded Funds Automation

Ineligible Charity Notification (SC010)

To admin

Description: Notification advising admin that a default organization for Stranded Funds Automation became ineligible for giving.

Sender: System

Recipient: Admin

Trigger: A default organization is not eligible for giving, requires vetting, or is removed from the community's charity bucket

Option to turn email on/off? No

Option to customize email? No

Subject line: [Stranded Funds Automation - Action Required](#)

Email header: [Ineligible Charity Notification](#)

Email text:

Your community selected {Organization Name} as the default charity where stranded funds are automatically redirected if donors do not select an alternate organization within the time period allowed. Unfortunately, this organization is not currently eligible or is no longer an option in your community's Give program.

You must log into CSRconnect to update your community's default charity.

Organization:

Address:



Ineligible Charity Notification

Your community selected Los Seguidores De Hurtado as the default charity where stranded funds are automatically redirected if donors do not select an alternate organization within the time period allowed. Unfortunately, this organization is not currently eligible or is no longer an option in your community's Give program.

You must log into CSRconnect to update your community's default charity.

Organization: Los Seguidores De Hurtado

Address: Lautaro 743, Coyhaique

[Take Action Now](#)

Volunteer - Events

Description: Email sent from event creator/organizer to participant(s)

Sender: Event creator/organizer

Recipient: Participant

Trigger: Event creator/organizer sends a message to participants in Manage Participants

Option to turn email on/off? Yes – event creator/organizer can choose whether to send a message to participants

Option to customize email? Yes – the event creator/organizer adds custom text for the Subject and Message fields

Subject line: Message from {Event name}

Email header: New Event Message

Email text:

{First name},

You have received a message from the coordinator of the following event:

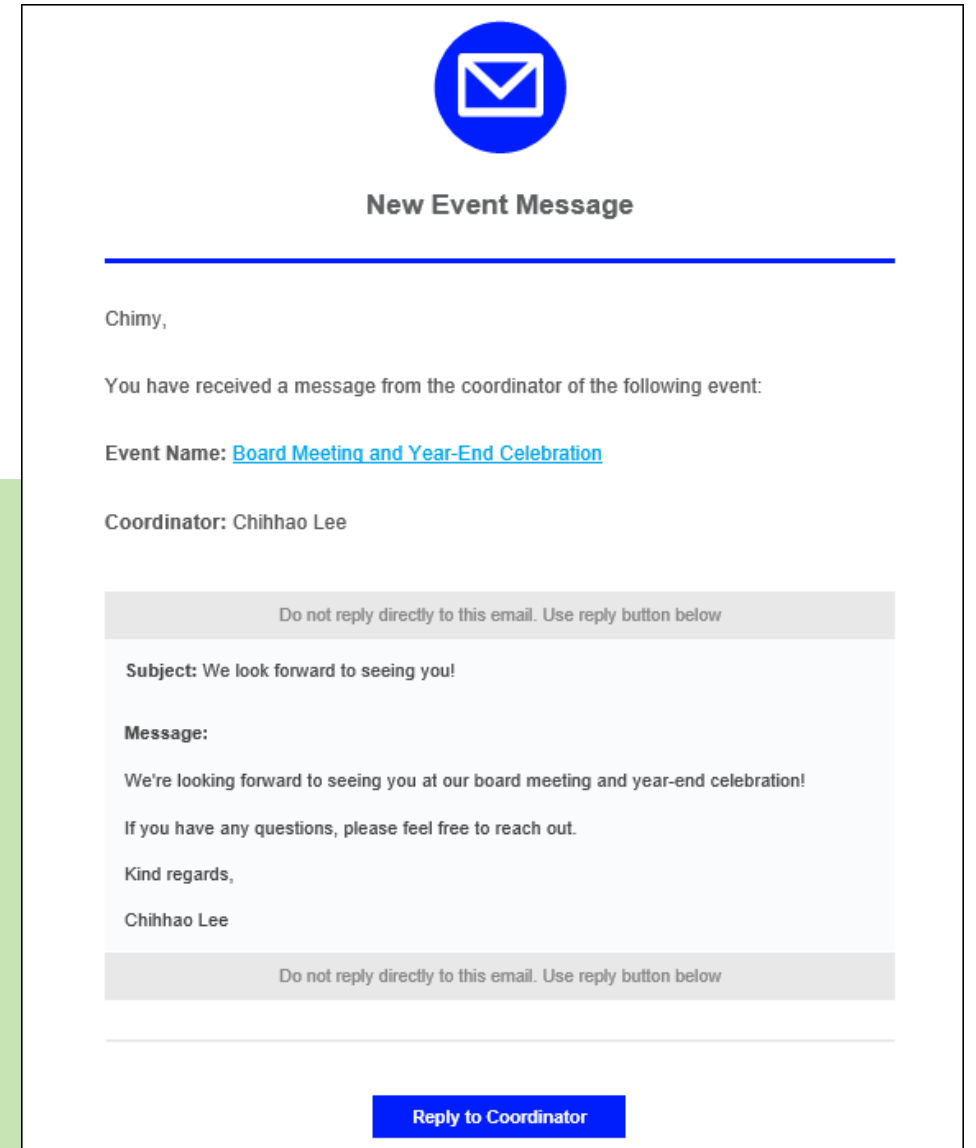
Event Name: {Event name}

Coordinator: {Event coordinator name}

Subject: {Custom text}

Message: {Custom text}

The **Reply to Coordinator** button links to the coordinator/contact's email address.



The image shows a preview of an email titled "New Event Message". At the top, there is a blue circular icon with a white envelope symbol. Below the icon, the title "New Event Message" is displayed in bold. A horizontal blue line separates the header from the main content. The main content starts with the name "Chimy," followed by the text "You have received a message from the coordinator of the following event:". Below this, the event name is listed as "Event Name: Board Meeting and Year-End Celebration" with a blue link. The coordinator's name is "Coordinator: Chihhao Lee". A grey box contains the instruction "Do not reply directly to this email. Use reply button below". The email body text includes "Subject: We look forward to seeing you!", "Message: We're looking forward to seeing you at our board meeting and year-end celebration!", "If you have any questions, please feel free to reach out.", "Kind regards,", and "Chihhao Lee". Another grey box with the same instruction is at the bottom. A blue button labeled "Reply to Coordinator" is positioned at the very bottom of the preview.

Volunteer - Events

Participant Added (V002)

To participant

Description: Email sent when an event creator adds a participant

Sender: System

Recipient: Participant

Trigger: Event creator adds a participant to an event in Manage Participants

Option to turn email on/off? Yes

Option to customize email? No

Calendar (.ics) file is attached to the email

Subject line: You have been added to a volunteer event: {Event name}

Email header: You've Been Added to an Event

Email text:

{First name},

{Event creator full name} added you as a participant to the following event:

Event Name: {Event name}

Organization Name: {Charity name}

Location: {Event location}

Shifts {Total hours}

{Shift name}

{Shift date(s) and time(s)} {Hours} Hrs.



You've Been Added to an Event

Chimy,

Chihhao Lee added you as a participant to the following event:

Event Name: Take a Hike for Animal Rescue

Organization Name: Cleveland Animal Protective League

Location:

1729 Willey Avenue

Cleveland,OH,44113

Shifts

Total Hours: 2.00



Main Shift

11/20/2021 09:00:00 AM-11/20/2021 11:00:00 AM Eastern Standard Time

2.00 Hrs

[View Event Details](#)

Description: Email sent when an event creator adds a participant

Sender: System

Recipient: Participant

Trigger: Event creator adds a participant to an event in Manage Participants

Option to turn email on/off? Yes

Option to customize email? No

Note: Sent for each shift

Subject line: You've been added from the waitlist: {Event name}

Email header: You've Been Added from the Waitlist

Email text:

{First name},

Good news! You have been added as a participant to the following shift:

Shift: {Shift name} ({Total hours} Hrs.)

{Shift date(s) and time(s)}

Event Name: {Event name}

Organization Name: {Charity name}

Location: {Event location}

You've Been Added from the Waitlist

Meena,

Good news! You have been added as a participant to the following shift:

Shift: Main Shift (2.00 Hrs)

11/20/2021 09:00:00 AM - 11/20/2021 11:00:00 AM Eastern Standard Time

Event Name: [Take a Hike for Animal Rescue](#)

Organization Name: Cleveland Animal Protective League

Location:

1729 Willey Avenue

Cleveland,OH,44113

Description: Email sent when a participant is removed from an event, shift, or occurrence

Sender: System

Recipient: Participant

Trigger: Event creator deletes a participant from an event, shift, or occurrence in Manage Participants

Option to turn email on/off? Yes

Option to customize email? No

Calendar (.ics) file is attached to the email

Note: When a participant is removed, so are any guests. The guests will also receive emails about the removal. Recipients receive an email for each shift they are removed from.

Subject line: Participation Removed: {Event name}

Email header: Participation Removed

Email text:

{First name},

The following participation was removed by the coordinator. Please contact the event coordinator if you have any questions about why you were removed.

Event Name: {Event name}

Shift Removed: {Shift name}

{Shift date(s) and time(s)}

Coordinator: {Event contact's first and last name}

Coordinator Email: {Event contact's email address}

Visit My Volunteering to view your events and participation information. [View My Volunteering](#) {hyperlink}

Participation Removed

Chimy,

The following participation was removed by the coordinator. Please contact the event coordinator if you have any questions about why you were removed.

Event Name: Take a Hike for Animal Rescue

Shift Removed: Main Shift

11/20/2021 09:00:00 AM - 11/20/2021 11:00:00 AM Eastern Standard Time

Coordinator: Chihhao Lee

Coordinator Email: tlee@yc.com

Visit My Volunteering to view your events and participation information. [View My Volunteering](#)

Description: Email sent to creator when a participant leaves a shift or event

Sender: System

Recipient: Event creator

Trigger: Participant leaves a shift or event in My Volunteering or in Participate

Option to turn email on/off? Yes

Option to customize email? No

Note: Any guests of the participant are also removed from the shift or event when a participant leaves. The event creator does not receive emails about guests.

Subject line: A volunteer has left your event - {Event name}

Email header: Participant Update

Email text:

{First name},

We would like to inform you that a participant has left your event.

Event: {Event name}

Participant: {Participant full name}

Visit Manage Events to edit your event and manage participants.

Participation Update

Chihhao,

We would like to inform you that a participant has left your event.

Event Name : Take a Hike for Animal Rescue

Participant : Chimy Lee

Visit Manage Events to edit your event and manage participants.

[View Manage Event](#)

Description: Notification that an event is full

Sender: System

Recipient: Event creator

Trigger: The last spot is filled for an event with one start/end time AND a capacity has been set for the event

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Event name} is full

Email header: Event Update

Email text:

{First name},

Good news! The last spot for your event is now full.

Event: {Event name}

Visit [Manage Events](#) to increase your event capacity or edit other event details.

Event Update

Chihhao,

Good news! The last spot for your event is now full.

Event Name : Take a Hike for Animal Rescue

Visit [Manage Events](#) to increase your event capacity or edit other event details.

[View Manage Event](#)

Description: Notification that an occurrence of an event is full

Sender: System

Recipient: Event creator

Trigger: The last spot is filled for an occurrence of an event with one start/end time AND a capacity has been set for the event

Option to turn email on/off? Yes

Option to customize email? No

Subject line: An occurrence for your event is full

Email header: Event Update

Email text:

{First name},

Good news! The last spot for your event occurrence is now filled.

Event: {Event name}

Occurrence Date: {Date of occurrence}

Visit Manage Events to increase your event capacity or edit other event details.

Event Update

Chihhao,

Good news! The last spot for your event occurrence is now filled.

Event Name : Weekly Committee Meeting

Occurrence Date : 11/12/2021

Visit Manage Events to increase your event capacity or edit other event details.

[View Manage Event](#)

Description: Email sent to creator when an event shift has been filled

Sender: System

Recipient: Event creator

Trigger: The last spot is filled for a shift with a capacity set (one-time or recurring)

Option to turn email on/off? Yes

Option to customize email? No

Subject line: A shift is full in {Event name}

Email header: Event Update

Email text:

{First name},

Good news! One of your shifts is now full.

Event Name: {Event name}

Shift Name: {Shift name}

Visit Manage Events to increase your event capacity or edit other event details.

Event Update

Chihhao,

Good news! One of your shifts is now full.

Event Name : Weekly Board Discussion

Shift Name : Main Shift

Visit Manage Events to increase your event capacity or edit other event details.

[View Manage Event](#)

Volunteer - Events

Guest Added (V011)

To participant's guest

Description: Confirmation of a guest's upcoming participation

Sender: System

Recipient: Guest of an event participant

Trigger: A participant adds a guest and confirms the guest's participation in Sign Up

Option to turn email on/off? No

Option to customize email? No

Calendar (.ics) file is attached to the email

Subject line: You have been invited to a volunteer opportunity with {Community name}

Email header: We are Excited for you to Join Us

Email text:

{First name},

{Participant's full name} has added you to a volunteer event through the {Community name}

volunteering community:

Event Name: {Event name}


Organization Name: {Charity name}

Location: {Event location}

Shifts {Total hours}

{Shift name}

{Shift date(s) and time(s)} {Hours} Hrs.



We are Excited for you to Join Us

Jimmy,


Chihhao Lee has added you to a volunteer event through the TL Community - External volunteering community:

Event Name: Weekly Committee Meeting

Organization Name: GREATER CLEVELAND FOOD BANK INC

Location:
601 Lakeside Avenue East

Cleveland,OH,44114

Shifts	Total Hours: 1.00
 Main Shift 11/12/2021 06:00:00 PM - 11/12/2021 07:00:00 PM Eastern Standard Time	1.00 Hrs

[Contact Event Coordinator](#)

Description: Notification of removal from an event, shift, or occurrence

Sender: System

Recipient: Guest of an event participant

Trigger: Guest's participant is removed from or leaves an event, shift, or occurrence

Option to turn email on/off? No

Option to customize email? No

Subject line: Participation Removed: {Event name}

Email header: Participation Removed

Email text:

{First name},

The following participation was removed by either the event coordinator or the individual that added you to the event.

Event Name: {Event name}

Shift Removed: {Shift name}

{Shift date(s) and time(s)}

Participation Removed

Meena,

The following participation was removed by either the event coordinator or the individual that added you to the event.

Event Name: Take a Hike for Animal Rescue

Shift Removed: Main Shift

11/20/2021 09:00:00 AM - 11/20/2021 11:00:00 AM Eastern Standard Time

Description: Confirmation that a participant logged volunteer activity

Sender: System

Recipient: Employee user

Trigger: Employee enters individual activity in Record Individual Activity

Option to turn email on/off? No

Option to customize email? Yes

Subject line: Thank you for entering your volunteer activity

Email header: Individual Activity Recorded

Email text:

{First name},

Thank you for entering your individual volunteer activity.

Activity Name: {Activity name}

Organization Name: {Charity name}

Location Name:

{Activity location}

Entries

Total Hours: {Total hours}

{Shift date(s)}

{Hours} Hrs



Individual Activity Recorded

Paul,

Thank you for entering your individual volunteer activity.

Activity Name: Test

Organization Name: American Legion

Location:

Dallas

Dallas, TX,

Entries

Total Hours: 11



11/03/2021

11 Hrs

[My Individual Activity](#)

Volunteer - Events

Participation Confirmation (V014)

To participant

Description: Confirmation of an employee's one-time or recurring participation

Sender: System

Recipient: Participant

Trigger: Employee confirms participation through Sign Up

Option to turn email on/off? Yes

Option to customize email? No

Calendar (.ics) file is attached to the email

Subject line: Thank you for signing up for: {Event name}

Email header: You Signed Up! {Event name}

Email text:

{First name},

Thank you for signing up to volunteer. Here is a summary of your participation:

Event Name: {Event name}


Organization Name: {Charity name}

Location: {Event location}

Shifts Total Hours: {Total hours}

{Shift name}

{Shift date(s) and time(s)} {Hours} Hrs.



You Signed Up!

Take a Hike for Animal Rescue

Patrick,

Thank you for signing up to volunteer. Here is a summary of your participation:

Event Name: Take a Hike for Animal Rescue

Organization Name: Cleveland Animal Protective League

Location:
1729 Willey Avenue

Cleveland, OH, 44113

Shifts	Total Hours: 2
<p>🕒 Main Shift 11/20/2021 09:00:00 AM - 11/20/2021 11:00:00 AM Eastern Standard Time Guests: N/A</p>	2 Hrs

[View Event Details](#)

Description: Email to a participant announcing the removal of a volunteer event

Sender: System

Recipient: Participant

Trigger: Event creator deletes an event or cancels all shifts for a one-time event

Option to turn email on/off? No

Option to customize email? No

Subject line: [There's been a change to {Event name}](#)

Email header: [Your Event has been Removed](#)

Email text:

{First name},

Your event has been removed or cancelled.

Hours you may have logged in connection with this event have also been removed. Please contact the event coordinator if you have any questions as to why your event was removed.

Event Name: {Event name}

Event Coordinator Email: {Email address of event coordinator}

Organization Name: {Organization name}

Location: {Event location}

Event Summary

{Total hours}

{Shift name}

{Shift date(s) and time(s)}

Visit [Search Opportunities](#) to find more volunteer events that interest you.



Your Event has been Removed

Sharon,

Your event has been removed or cancelled

Hours you may have logged in connection with this event have also been removed. Please contact the event coordinator if you have any questions as to why your event was removed.

Event Name : Take a Hike for Animal Rescue

Event Coordinator Email : YC-Support@yourcause.com

Organization Name : Cleveland Animal Protective League

Location :

1729 Willey Avenue

Cleveland,OH,44113

Event Summary

2.00 hours

🕒 **Take a Hike for Animal Rescue - Main Shift**
04/23/2022-04/23/2022 Eastern Standard Time

2.00 hrs

Visit [Search Opportunities](#) to find more volunteer events that interest you.

[Search Opportunities](#)

Volunteer - Events

Waitlist Participation Confirmation (V016)

To participant

Description: Email to a participant confirming their inclusion on the waitlist

Sender: System

Recipient: Participant

Trigger: Participant expresses interest in participating in a full event

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Thank you for your interest in {Event Name}

Email header: You're on the waitlist! {Event Name}

Email text:

{First name},

Thank you for your interest in this event. You are currently registered on the waitlist for the shifts listed below. You will receive a separate email if a spot for a shift becomes available and you will automatically be added as a participant. Here is a summary of your waitlist participation:

Event Name: {Event name}

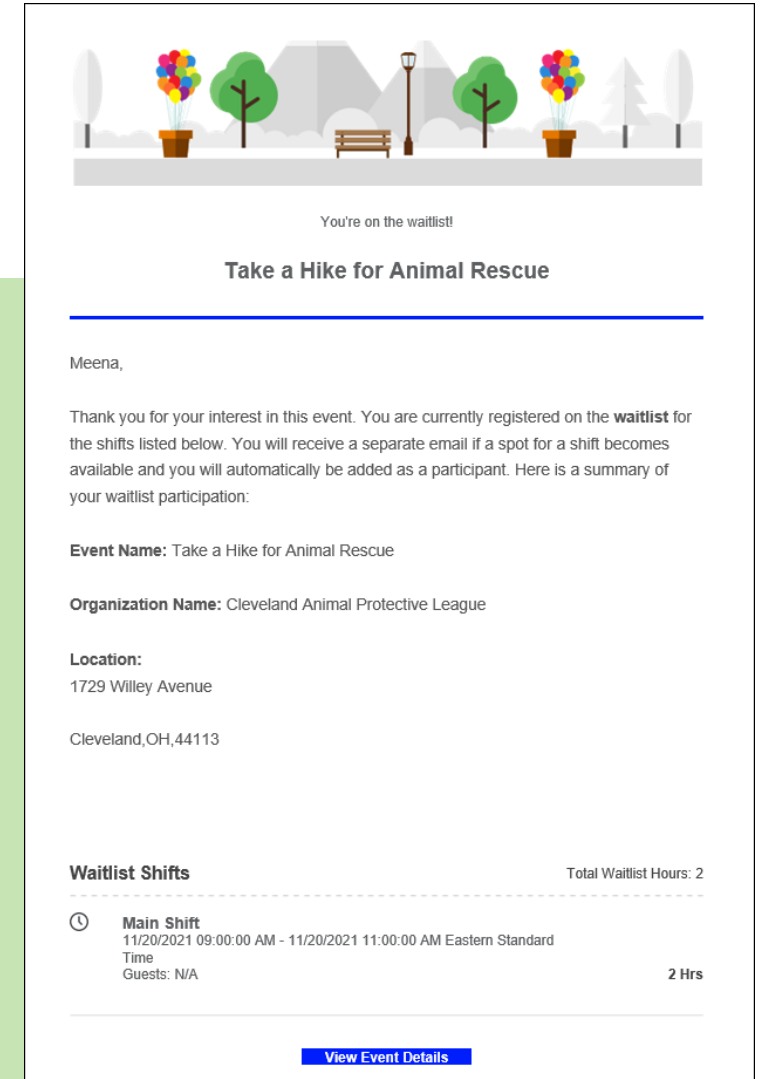
Organization Name: {Organization name}

Location: {Event location}

Waitlist Shifts {Total hours}

{Shift name}

{Shift date(s) and time(s)}



Description: Recurring event deleted/canceled (all occurrences canceled)

Sender: System

Recipient: Participant

Trigger: Organizer/creator deletes or cancels a parent event in a series

Option to turn email on/off? No

Option to customize email? No

Subject line: There's been a change to your recurring event - {Event Name}

Email header: Your Event has been Removed

Email text:

{First name},

A recurring event that you signed up for has been cancelled.

Hours you may have logged in connection with this event have also been removed. Please contact the event coordinator if you have any questions as to why your shift was removed.

Event Name: {Event name}

Event Coordinator Email: {Event coordinator's email address}


Organization Name: {Organization name}

Location: {Event location}

Event Summary {Total hours}

{Shift name}

{Shift date(s) and time(s)}



Your Event has been Removed

Chihhao,


A recurring event that you signed up for has been cancelled.

Hours you may have logged in connection with this event have also been removed. Please contact the event coordinator if you have any questions as to why your shift was removed.

Event Name : Weekly Committee Meeting
Event Coordinator Email : tee@yc.com
Organization Name : GREATER CLEVELAND FOOD BANK INC

Location :
601 Lakeside Avenue East

Cleveland,OH,44114

Event Summary		1.00 hours
 Weekly Committee Meeting - Main Shift 11/12/2021-11/13/2021 Eastern Standard Time		1.00 hrs

Visit Search Opportunities to find more volunteer events that interest you.

[Search Opportunities](#)

Volunteer - Events

Participation Reminder (V019)

To participant

Description: Participation reminder (48 hours before participation start time)

Sender: System

Recipient: Participant

Trigger: Organizer/creator deletes or cancels a parent event in a series

Option to turn email on/off? Yes

Option to customize email? No

Calendar (.ics) file is attached to the email

Subject line: [Reminder for {Event Name}](#)

Email header: [You have a Volunteer Event Soon](#)

Email text:

{First name},

This is a reminder for your upcoming event.

Event Name: {Event name}

Event Coordinator Email: {The first contact on the list}


Organization Name: {Organization name}

Location: {Event location}

Total Hours: {Total hours}

{Shift name}

{Shift date(s) and time(s)}



You have a Volunteer Event Soon

Patrick,

This is a reminder for your upcoming event.

Event Name : pat event

Event Coordinator Email : pshaw@yc.com

Organization Name : Pats Charity

Location :
Virtual Event

Total Hours:	1.00 Hours
<hr/>	
first shift 11/11/2021 01:00:00 PM-11/11/2021 02:00:00 PM Eastern Standard Time	1.00 Hrs
<hr/>	

[My Volunteering](#)

Volunteer - Events

Post Event Reminder (V020)

To participant

Description: Post event reminder (24 hours after shift end time)

Sender: System

Recipient: Participant

Trigger: Sent 24 hours after the shift's end time (UTC)

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Event Name} - Did you attend?

Email header: Thank You for Volunteering

Email text:

{First name},

Thank you for your participation.

If applicable, visit My Volunteering to edit your volunteer participation details. **If you did not participate, please delete or remove the event from My Volunteering.**

Thank You for Volunteering

Meena,

Thank you for your participation.

If applicable, visit My Volunteering to edit your volunteer participation details. **If you did not participate, please delete or remove the event from My Volunteering.**

[My Volunteering](#)

Description: Participation update based on date changes made to the event

Sender: System

Recipient: Participant

Trigger: Date changes made to the event

Option to turn email on/off? Yes

Option to customize email? No

Subject line: [There has been a change in your participation for {Event Name}](#)

Email header: [Participation Update](#)

Email text:

{First name},

The event organizer has made changes that affect your participation. See below for a summary of those changes:

Change Summary:

{Change details}

Visit [My Volunteering](#) to view your events and participation information.



Participation Update

Timmy,

The event organizer has made changes that affect your participation. See below for a summary of those changes:

Change Summary:

Main Shift 11/28/2022 09:00:00 Eastern Standard Time

Action Taken: You have been moved.

New Shift: Default Shift : 10/03/2022 09:00:00 Eastern Standard Time

Main Shift 12/05/2022 09:00:00 Eastern Standard Time

Action Taken: You have been moved.

New Shift: Default Shift : 10/10/2022 09:00:00 Eastern Standard Time

Visit [My Volunteering](#) to view your events and participation information. [My Volunteering](#)

Description: Event creator submitted an event for approval

Sender: System

Recipient: Event creator

Trigger: Event creator submits an event draft for approval

Option to turn email on/off? No

Option to customize email? No

Subject line: {Event Name} was submitted for review

Email header: Your Event is Pending Review

Email text:

{First name},

Thank you for submitting your event. It will be reviewed soon, and you will receive an email letting you know the status of your event.

Visit Event Management to view your event details.

Your Event is Pending Review

Chihhao,

Thank you for submitting your event. It will be reviewed soon, and you will receive an email letting you know the status of your event.

Visit Event Management to view your event details.

[View Event Management](#)

Volunteer - Events

Event Review Approved (V024)

To event creator

Description: Event draft approved and published by admin

Sender: System

Recipient: Event creator

Trigger: Event creator receives approval for their draft

Option to turn email on/off? No

Option to customize email? No

Subject line: {Event Name} was approved and published

Email header: This Event was Approved

Email text:

{First name},

Good news! Your event was reviewed and approved. It is now published and available for participants.

Event Name: Take a Hike for Animal Rescue

Organization Name: Cleveland Animal Protective League

Message

{Optional custom text}

Visit Event Management to view your event details and manage your event participants

This Event was Approved

Chihhao,

Good news! Your event was reviewed and approved. It is now published and available for participants.

Event Name: Take a Hike for Animal Rescue

Organization Name: Cleveland Animal Protective League

Message

Looks great - thanks for agreeing to coordinate this event!

Visit Event Management to view your event details and manage your event participants.

[View Event Management](#)

Volunteer - Events

Event Review Declined (V025)

To event creator

Description: Event draft reviewed and declined by admin

Sender: System

Recipient: Event creator

Trigger: Admin declines event

Option to turn email on/off? No

Option to customize email? Yes

Subject line: {Event Name} was reviewed and declined

Email header: This Event was Declined

Email text:

{First name},

We regret to inform you that your event was reviewed and declined.

The administrator has stated the following reason:

{Custom text}

This Event was Declined

Chihhao,

We regret to inform you that your event was reviewed and declined.

The administrator has stated the following reason:

Hi Chihhao,

This includes most of the necessary information, but please include more detail in the event title and description.

Volunteer - Events

Events Approvals Pending (V026)

To admin

Description: Pending events waiting for admin review

Sender: System

Recipient: Admin

Trigger: Event(s) pending approval

Option to turn email on/off? No

Option to customize email? No

Subject line: [Pending Events to be Reviewed](#)

Email header: [Pending Events to be Reviewed](#)

Email text:

{First name},

There are pending events that are ready for your review. Please visit the Event Manager panel to review these pending events.

Total Pending Events: {Total number of events}



Pending Events to be Reviewed

Fnu,

There are pending events that are ready for your review. Please visit the Event Manager panel to review these pending events.

Total Pending Events: 30

Description: Event update summary (roll-up email) sent to the event creator

Sender: System

Recipient: Event creator

Trigger: Sent once each day there is an applicable update.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: [Event Update: {Event Name}](#)

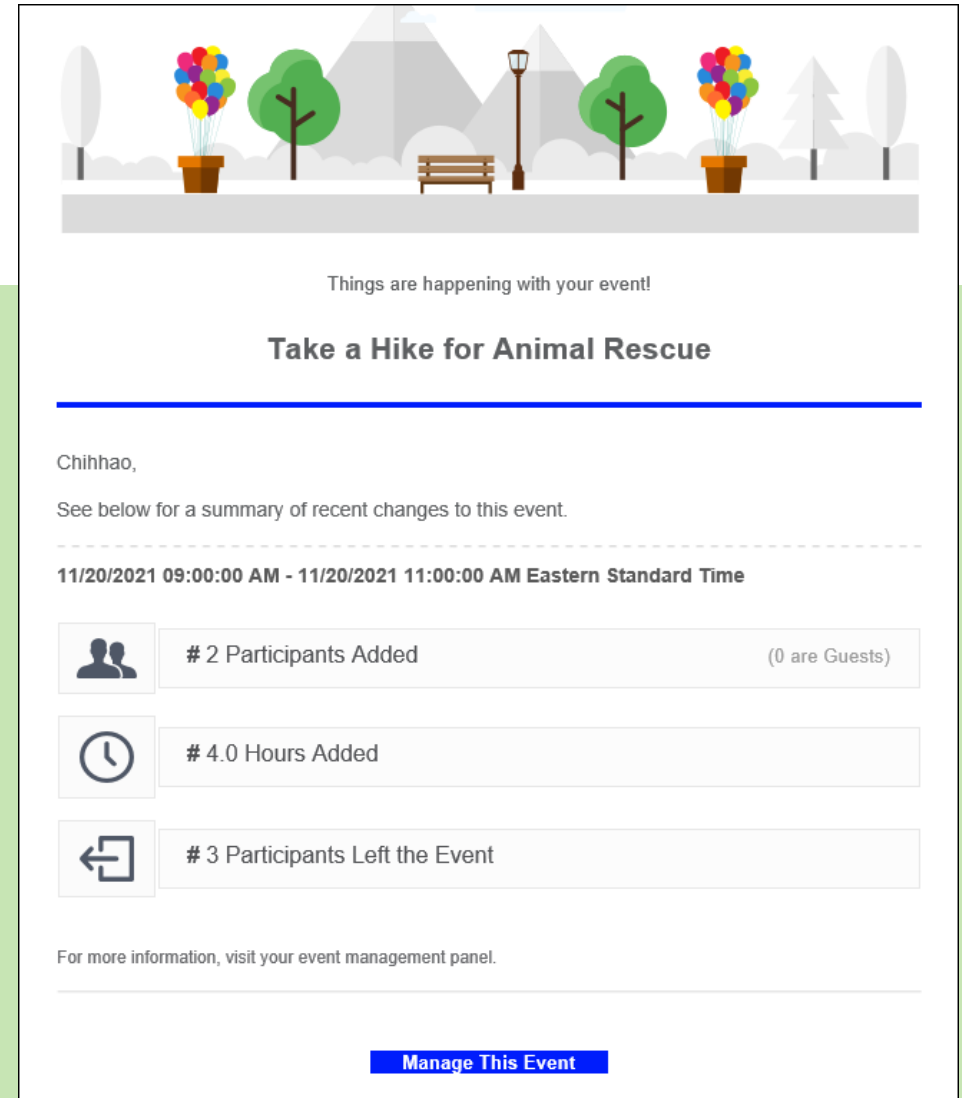
Email header: [Things are happening with your event!](#)

Email text:

[{First name}](#),

[See below for a summary of recent changes to this event.](#)

[{Event Details}](#)



The image shows a preview of an email update for an event titled "Take a Hike for Animal Rescue". The email header features a decorative banner with a park scene including trees, a bench, a lamp, and balloons. Below the banner, the text reads "Things are happening with your event!" followed by the event title "Take a Hike for Animal Rescue" in bold. A blue horizontal line separates the header from the main content. The main content starts with a greeting "Chihhao," and a line of text "See below for a summary of recent changes to this event." A dashed horizontal line follows. Below this, the event time is specified as "11/20/2021 09:00:00 AM - 11/20/2021 11:00:00 AM Eastern Standard Time". Three summary items are listed in a light gray box with icons: "# 2 Participants Added" (with a note "(0 are Guests)"), "# 4.0 Hours Added", and "# 3 Participants Left the Event". At the bottom, there is a line of text "For more information, visit your event management panel." and a blue button labeled "Manage This Event".

Description: Participant added to event by an event creator/organizer but must answer required questions.

Sender: System

Recipient: Participant

Trigger: Creator/organizer manually adds a participant (individually or in bulk) and there are required questions applied.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Action Required for {Event Name}

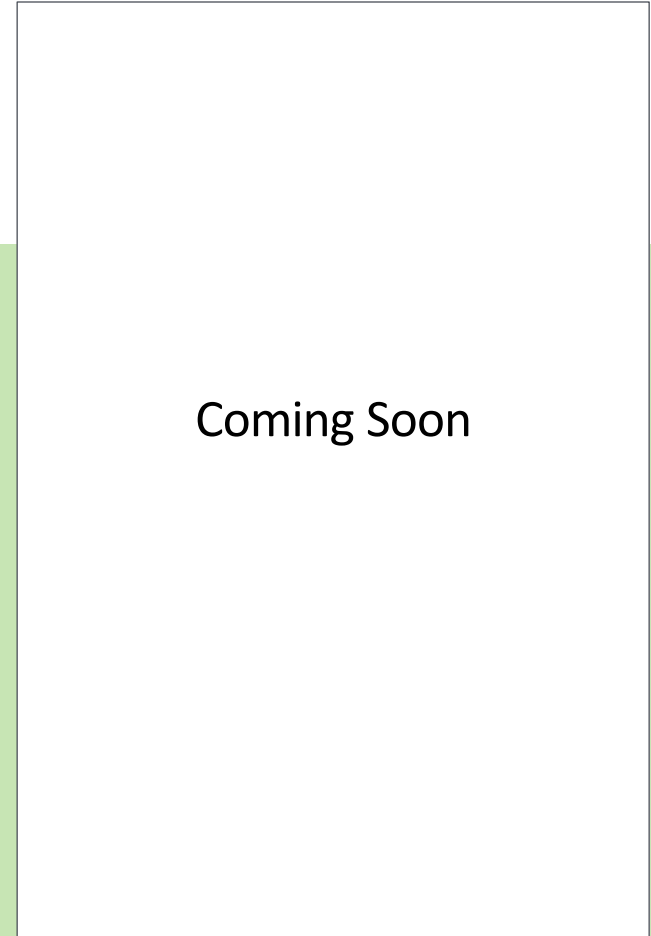
Email header: You have required questions to be answered.

Email text:

{First name},

As part of being a participant for {EVENT NAME}, there are required questions that must be addressed.

Visit [My Volunteering](#) to view this participation and answer all required questions.



Coming Soon

Volunteer - Events

Organizer Added (V030)

To organizer

Description: Organizer added by event creator/another organizer

Sender: System

Recipient: Organizer

Trigger: Event creator/organizer adds an organizer

Option to turn email on/off? Yes

Option to customize email? No

Subject line: You've been added as an Organizer {Event Name}

Email header: Event Update

Email text:

{First name},

{Event creator/organizer name} has added you as an Organizer for the following event:

Event Name: {Event Name}

Visit Manage Events to edit your event and manage participants.

Event Update

Meena,

Chihhao Lee has added you as an Organizer for the following event:

Event Name: Take a Hike for Animal Rescue

Visit Manage Events to edit your event and manage participants.

[View Manage Event](#)

Volunteer - Events

Organizer Removed (V031)

To organizer

Description: Organizer removed by event creator/another organizer

Sender: System

Recipient: Organizer

Trigger: Event creator/organizer removes an organizer

Option to turn email on/off? Yes

Option to customize email? No

Subject line: You've been removed as an Organizer - Event Name

Email header: Event Update

Email text:

{First name},

{Event creator/organizer name} has removed you as an Organizer for the following event:

Event Name: {Event Name}

Event Update

Sharon,

YC Support has removed you as an Organizer for the following event:

Event Name: Take a Hike for Animal Rescue

Description: CRA participations pending review

Sender: System

Recipient: Admin

Trigger: Participant(s) answer CRA survey questions that provide detail on their event participation

Option to turn email on/off? No

Option to customize email? No

Subject line: CRA Participations Pending Review

Email header: CRA Participations Pending Review

Email text:

{First name},

There are new CRA participations that are ready for your review. Please visit the CRA Request Manager panel to review these pending participations.

Total Pending Participations: {Total pending number of participations}



CRA Participations Pending Review

Brian,

There are new CRA participations that are ready for your review. Please visit the CRA Request Manager panel to review these pending participations.

Total Pending Participations: 1

Description: Recurring individual activity participation reminder

Sender: System

Recipient: Participant

Trigger: Recurring individual activity – sent on the day of scheduled participation

Option to turn email on/off? Yes

Option to customize email? No

Subject line: {Event name} – Did you participate?

Email header: Thank you for Volunteering

Email text:

{First name}

Thank you for the following participation:

Date: MM/DD/YYYY

Hours: {Number of hours}

If applicable, visit My Volunteering to edit your volunteer participation details.

If you did not participate, please delete or remove the activity entry from My Volunteering.

Go to My Volunteering {hyperlink}



Thank you for Volunteering

Documentation

Thank you for the following participation:

Date : 02/11/2023

Hours : 2.00 Hrs

If applicable, visit My Volunteering to edit your volunteer participation details.

If you did not participate, please delete or remove the activity entry from My Volunteering.

[Go to My Volunteering](#)

Volunteer – NPOconnect Events

Volunteer – NPOc Events

Participation Confirmation (NPO001)

To participant

Description: Email to a participant confirming their registration for a volunteer event created through NPOconnect

Sender: System

Recipient: Participant

Trigger: User signs up for shift(s) through Search Opportunities, Sign Up

Option to turn email on/off? No

Option to customize email? No

Calendar (.ics) file is attached to the email

Subject line: Sign-Up Confirmation: {Event name}

Email header: You signed up! {Event name}
{Event name}

Email text:

{First name},

Thank you for signing up to volunteer. Here is a summary of your participation:

Event Name: {Event name}

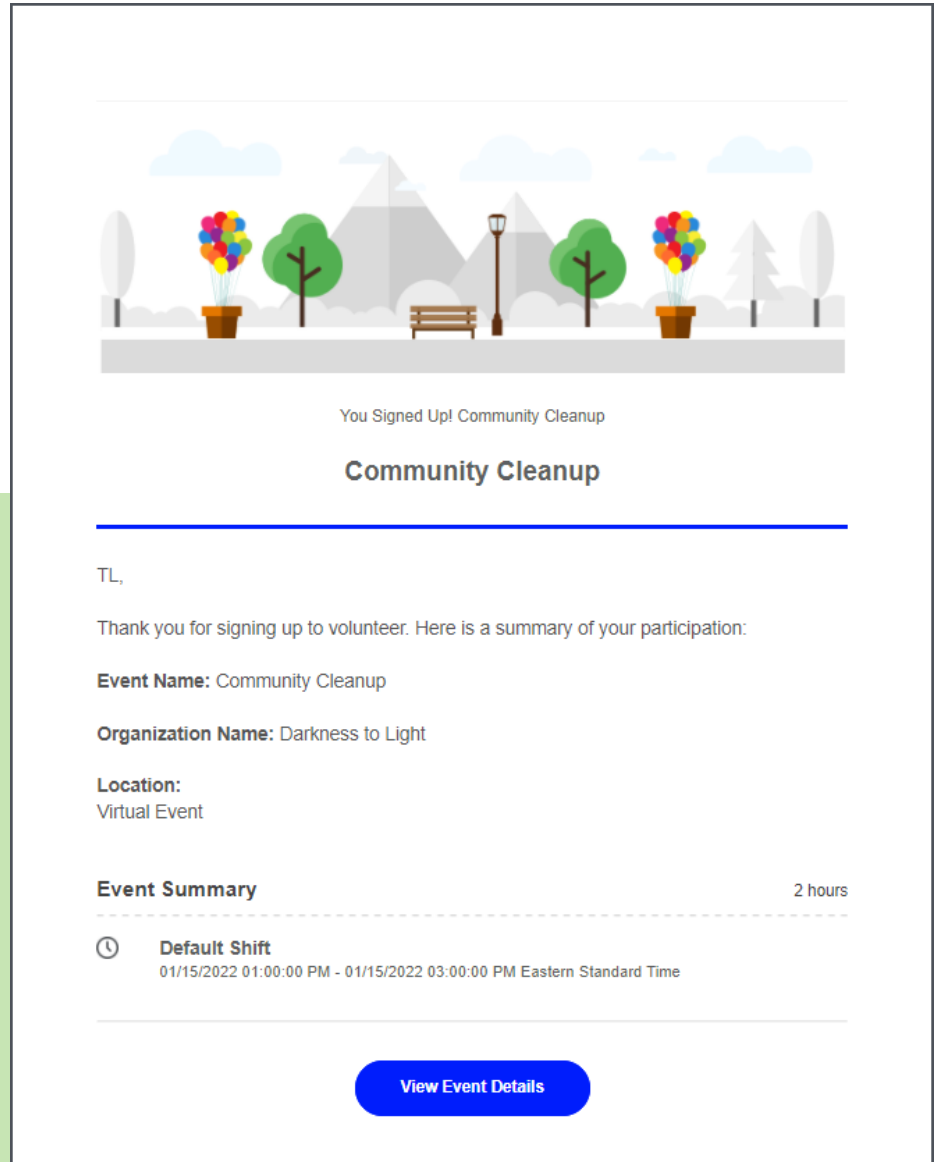
Organization Name: {Organization name}

Location: {Event location}

Event Summary {Total hours}

{Shift name}

{Shift date(s) and time(s)}



Volunteer – NPOc Events

Event Deleted (NPO002)

To participant

Description: Email to a participant announcing the removal of a volunteer event created through NPOconnect

Sender: System

Recipient: Participant

Trigger: Event creator deletes an event through NPOconnect

Option to turn email on/off? No

Option to customize email? No

Subject line: Event Update: {Event name}

Email header: Your Event has been Removed

Email text:

{First name},

Your event has been removed or cancelled.

Any hours recorded for this event have been removed. Please contact the event coordinator if you have any questions as to why your event was removed.

Event Name: {Event name}

Event Coordinator Email: {Email address of event coordinator}


Organization Name: {Organization name}

Location: {Event location}

Event Summary {Total hours}

{Shift name}

{Shift date(s) and time(s)}



Your Event has been Removed

TL,


Your event has been removed or cancelled

Any hours recorded for this event have been removed. Please contact the event coordinator if you have any questions as to why your event was removed.

Event Name : Giving Jumpstart
Event Coordinator Email : Jennifer.Still@blackbaud.com
Organization Name : Darkness To Light

Location :
Virtual Event

Event Summary 2.00 hours

 **Giving Jumpstart - Volunteer Sign-Up**
01/08/2022-01/09/2022 Eastern Standard Time

[Search Opportunities](#)

Description: Email to a participant notifying them that their participation was removed from an upcoming volunteer event created through NPOconnect

Sender: System

Recipient: Participant

Trigger: Event creator removes the participant's shift from the event OR the event creator removes the participant from the event

Option to turn email on/off? Yes – within the NPOconnect platform

Option to customize email? No

Subject line: Participation Removed: {Event name}

Email header: Participation Removed

Email text:

{First name},

The following participation was removed by the coordinator. Please contact the event coordinator if you have any questions about why you were removed.

Event Name: {Event name}

Shift Removed: {Shift name}

{Shift date and time}

Coordinator: {Name of event coordinator}

Coordinator Email: {Email address of event coordinator}

Visit My Volunteering to view your events and participation information. {View My Volunteering link}.

Participation Removed

TL,

The following participation was removed by the coordinator. Please contact the event coordinator if you have any questions about why you were removed.

Event Name: Community Garden Cleanup

Shift Removed: Main Shift

01/14/2022 08:00:00 AM - 01/16/2022 07:00:00 PM Eastern Standard Time

Coordinator: Jennifer

Coordinator Email: Jennifer.Still@blackbaud.com

Visit My Volunteering to view your events and participation information. [View My Volunteering](#)

Volunteer – NPOc Events

Participation Reminder (NPO004)

To participant

Description: Email to a participant reminding them of their registration for an upcoming volunteer event created through NPOconnect

Sender: System

Recipient: Participant

Trigger: 48 hours prior to shift start time

Option to turn email on/off? Yes – within the NPOconnect platform

Option to customize email? No

Calendar (.ics) file is attached to the email

Subject line: Event Reminder: {Event name}

Email header: You have a Volunteer Event Soon

Email text:

{First name},

This is a reminder for your upcoming event.

Event Name: {Event name}

Event Coordinator Email: {Email address of event coordinator}


Organization Name: {Organization name}

Location: {Event location}

Event Summary {Total hours}

{Shift name}

{Shift date(s) and time(s)}



You have a Volunteer Event Soon


TL,

This is a reminder for your upcoming event.

Event Name : Community Cleanup
Event Coordinator Email : Jennifer.Still@blackbaud.com
Organization Name : DARKNESS TO LIGHT

Location :
Virtual Event

Event Summary 2.00 hours

 **Default Shift**
01/15/2022 01:00:00 PM-01/15/2022 03:00:00 PM Eastern Standard Time

[My Volunteering](#)

Description: Email to a participant reminding them of their registration for an upcoming volunteer event created through NPOconnect

Sender: System

Recipient: Participant

Trigger: 24 hours after shift end time

Option to turn email on/off? Yes – within the NPOconnect platform

Option to customize email? No

Subject line: {Event name} - Did you participate? - {Event name}

Email header: Thank you for Volunteering

Email text:

{First name},

Thank you for the following participation:

Date: {Date of participation}

Hours: {Total hours}

If applicable, visit My Volunteering to edit your volunteer participation details.

If you did not participate, please delete or remove the activity entry from My Volunteering.

Go to My Volunteering {hyperlink}

Thank you for Volunteering

TL,

Thank you for the following participation:

Date : 01/12/2022

Hours : 5.00 Hrs

If applicable, visit My Volunteering to edit your volunteer participation details.

If you did not participate, please delete or remove the activity entry from My Volunteering.

[Go to My Volunteering](#)

Description: Notification to the coordinator of an event created through NPOconnect that a participant has removed their participation

Sender: System

Recipient: Event coordinator

Trigger: User selects Edit Participation, Remove Participation for the event

Option to turn email on/off? No

Option to customize email? No

Subject line: A volunteer has left your event - {Event name}

Email header: Participant Update

Email text:

{First name},

We would like to inform you that a participant has left your event.

Event: {Event name}

Participant: {First and last name of participant}

Visit Volunteer Events to edit your event and manage participants.

Participant Update

Jennifer,

We would like to inform you that a participant has left your event.

Event: Community Garden Cleanup

Participant: TL Support

Visit Volunteer Events to edit your event and manage participants.

[View Volunteer Events](#)

Volunteer - Projects

Volunteer - Projects

Sign Up Confirmation (P001)

To participant

Description: Applies to “Join” registration. Sent when a participant signs up for a project

Sender: System

Recipient: Participant

Trigger: Participant signs up for a project

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Thank you for signing up for - {Project name}

Email header: You Signed Up!

Email text:

{First name},

Thank you for signing up to volunteer. Here is a summary of your participation:

Project Name: {Project name}

Organization Name: {Charity name}

Location: {Project location}

Confirmed Role: {Project role}



You Signed Up! Community Cleanup

Chimy,

Thank you for signing up to volunteer. Here is a summary of your participation:

Project Name: Community Cleanup

Organization Name: United Way of Greater Cleveland Fund

Location:

Cleveland

Cleveland, OH,

Confirmed Role: Volunteer

[View My Volunteering](#)

Description: Applies to “Express Interest” registration. Sent after a participant expresses interest in a project.

Sender: System

Recipient: Participant

Trigger: Participant expresses interest in a project

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Thank you for Expressing Interest in {Project name}

Email header: Thank you for expressing your interest to {Project name}

Email text:

{First name},

Thank you for your interest in this project. Your participation is currently pending review by the project organizer. If confirmed for a role, you will receive a separate email to confirm that participation. Here is a summary of your pending roles:

Project Name: {Project name}


Organization Name: {Charity name}

Location: {Project location}

Roles:

{Project role}

{Role description}



**Thank you for expressing your interest to
Community Cleanup 1**

Chimy,

Thank you for your interest in this project. Your participation is currently pending review by the project organizer. If confirmed for a role, you will receive a separate email to confirm that participation. Here is a summary of your pending roles:

Project Name: Community Cleanup 1
Organization Name: United Way of Greater Cleveland Fund
Location:
Cleveland
Cleveland,OH,

Roles:

Volunteer
Complete tasks as assigned.

[View My Volunteering](#)

Volunteer - Projects

Participant Confirmed For Role (P003)

To participant

Description: Sent after a project organizer confirms a participant who had expressed interest in a role.

Sender: System

Recipient: Participant

Trigger: Project organizer confirms a participant

Option to turn email on/off? Yes

Option to customize email? Yes

Subject line: You have been confirmed for a volunteer project - {Project name}

Email header: You've Been Confirmed for a Project

Email text:

{First name},

Good news! You have been confirmed for the following role, in which you had previously expressed interest:

Role Name: {Project role}

Role Description: {Role description}

Role Skills: {Role skills}

Note: Any additional pending roles for this project have been removed by the organizer.

Project Name: {Project name}

Organization Name: {Charity name}

Custom Message: {Custom message}

Visit My Volunteering to view your projects and participation information.

You've Been Confirmed for a Project

Chimy,

Good news! You have been confirmed for the following role, in which you had previously expressed interest:

Role Name: Volunteer

Role Description: Complete tasks as assigned.

Role Skills:

Note: Any additional pending roles for this project have been removed by the organizer.

Project Name: Community Cleanup 1

Organization Name: United Way of Greater Cleveland Fund

Custom Message:

Visit My Volunteering to view your projects and participation information.

[View My Volunteering](#)

Description: Sent when a project organizer invites a participant to join a project based on their skills, interests, or location.

Sender: System

Recipient: Participant

Trigger: Project organizer invites a participant to join a project.

Option to turn email on/off? Yes

Option to customize email? Yes

Subject line: You have been invited to a Project {Project name}

Email header: You have been invited to participate in a Project: {Project name}

Email text:

{First name},

The organizer of this project thinks you would be a good fit for the following role:

Role Name: {Project role}

Role Description: {Role description}

Role Skills: {Role skills}

Project Name: {Project name}

Organization Name: {Charity name}

Custom Message: {Custom message}

Visit the project page to learn more about the project and to confirm your participation.

You have been invited to participate in a Project: Monthly Food Bank Coordination

Rahul,

The organizer of this project thinks you would be a good fit for the following role:

Role Name: Project Manager/Coordinator

Role Description: Identify and accommodate for food bank requests and requirements. Schedule and publicize volunteer opportunities. Recruit and meet with prospective volunteers.

Role Skills: Event Design & Planning, Food & Beverage, Food Safety, Design Thinking, Strategic Planning

Project Name: Monthly Food Bank Coordination

Organization Name: GREATER CLEVELAND FOOD BANK INC

Custom Message:

Your skill set is impressive and closely matches what we are looking for in a Project Manager/Coordinator. We'd love to have you on the team!

Visit the project page to learn more about the project and to confirm your participation.

[View Project Page](#)

Description: Sent when a project organizer removes a previously-confirmed participant from a project and role.

Sender: System

Recipient: Participant

Trigger: Project organizer removes a participant from a project and role.

Option to turn email on/off? Yes

Option to customize email? Yes

Subject line: You have been invited to a Project {Project name}

Email header: You have been invited to participate in a Project: {Project name}

Email text:

{First name},
You have been removed from the following project by the organizer. Please contact the organizer if you have any questions about why you were removed.

Project Name: {Project name}

Organizer: {Organizer name}

Organizer Email: {Organizer email address}

Custom Message: {Custom message}

Roles Removed:

{Project role}

Note: Any hours logged against this role have been removed as well.

Visit My Volunteering to view your projects and participation information.

Participation Update

Chimy,

You have been removed from the following project by the organizer. Please contact the organizer if you have any questions about why you were removed.

Project Name: Community Cleanup

Organizer: Chihhao Lee

Organizer Email: tlee@yc.com

Custom Message:

Since we didn't get the signed releases needed for participation, we must regrettably remove you from the project.

Roles Removed:

Volunteer

Note: Any hours logged against this role have been removed as well.

Visit My Volunteering to view your projects and participation information.

[View My Volunteering](#)

Description: Custom message sent from a project organizer to participants

Sender: Organizer

Recipient: Participant

Trigger: Organizer sends a message to participants. This can either be sent automatically or scheduled for

Option to turn email on/off? No

Option to customize email? Yes

Subject line: Message From: {Project name}

Email header: New Project Message

Email text:


{First name},

You have received a message from the organizer of your project.

Project Name: {Project name}

Project Organizer: {Organizer name}

Message: {Custom message}



New Project Message

Chimy,

You have received a message from the organizer of your project.

Project Name: Community Cleanup
Project Organizer: Chihhao Lee
Message:

Thank you, Chimy, for agreeing to be an organizer for the Community Cleanup. We can definitely use your help!

Kind regards,

Chihhao Lee

[Reply To Organizer](#)

Volunteer - Projects

Project Cancelled (P007)

To participant

Description: Sent to a participant when a project organizer removes or deletes a project. Removes hours the participant logged against the project.

Sender: System

Recipient: Participant

Trigger: Project organizer removes or deletes a project

Option to turn email on/off? Yes

Option to customize email? No

Subject line: [There's been a change to {Project name}](#)

Email header: N/A

Email text:

[{First name}](#),

Your project has been removed or cancelled.

Project Name: {Project name}

Organization Name: {Charity name}

Organizer Email: {Organizer email address}

Location: {Project location}

Any pending or confirmed roles, along with any hours you may have logged in connection with this project have also been removed. Please contact the project organizer if you have any questions as to why your project was removed.

Visit [Search Opportunities](#) to find more volunteer projects that interest you.

Paul,

Your project has been removed or cancelled.

Project Name: Community Cleanup

Organization Name: United Way of Greater Cleveland Fund

Organizer Email: tim.lee@blackbaud.me

Location:

Cleveland

Cleveland,OH,

Any pending or confirmed roles, along with any hours you may have logged in connection with this project have also been removed. Please contact the project organizer if you have any questions as to why your project was removed.

Visit [Search Opportunities](#) to find more volunteer projects that interest you.

[Search Opportunities](#)

Volunteer - Projects

Organizer Added (P008)

To participant

Description: Sent when a project creator/organizer adds a participant as a secondary project organizer.

Sender: System

Recipient: Participant

Trigger: Project creator/organizer adds a participant as a secondary project organizer.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: You've been added as an Organizer - {Project name}

Email header: Project Update

Email text:

{First name},

{Project creator/organizer} has added you as an Organizer for the following project:

Project Name: {Project name}

Visit the project management panel to edit the project and manage participants.

Project Update

Chimy,

Chihhao Lee has added you as an Organizer for the following project:

Project Name: Community Cleanup

Visit the project management panel to edit the project and manage participants.

[Manage This Project](#)

Description: Sent when a project creator/organizer removes a participant from a secondary project organizer role.

Sender: System

Recipient: Participant

Trigger: Project creator/organizer removes a participant from a secondary project organizer role.

Option to turn email on/off? Yes

Option to customize email? Yes

Subject line: Removed from Project: {Project name}

Email header: Project Update

Email text:

{First name},

You have been removed from the following project by the organizer. Please contact the organizer if you have any questions about why you were removed.

Project Name: {Project name}

Organizer: {Organizer name}

Organizer Email: {Organizer email address}

Custom Message: {Custom message}

Roles Removed:

{Project role}

Note: Any hours logged against this role have been removed as well.

Visit My Volunteering to view your projects and participation information.

Participation Update

Chimy,

You have been removed from the following project by the organizer. Please contact the organizer if you have any questions about why you were removed.

Project Name: Community Cleanup

Organizer: Chihhao Lee

Organizer Email: tlee@yc.com

Custom Message:

Since we didn't get the signed releases needed for participation, we must regrettably remove you from the project.

Roles Removed:

Volunteer

Note: Any hours logged against this role have been removed as well.

Visit My Volunteering to view your projects and participation information.

[View My Volunteering](#)

Volunteer - Projects

Project Started (P010)

To organizer

Description: Sent when someone selects **Start Project** for the listed project. Sent to organizers who are set to receive email notifications (**Receive email notifications?** check box selected in **CSRconnect admin portal, Project Administrators**).

Sender: System

Recipient: Organizers

Trigger: Sent when someone selects **Start Project** for the listed project.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: The following project has been started - {Project name}

Email header: Project Update

Email text:

{First name},

The following project has been started:

Project Name: {Project name}

Started By: {Email address}

Visit the project management panel to edit the project and manage participants.

Project Update

Chihhao,

The following project has been started:

Project Name: Community Cleanup

Started By: tim.lee@blackbaud.me

Visit the project management panel to edit the project and manage participants.

[Manage This Project](#)

Volunteer - Projects

Project Closed (P011)

To organizer

Description: Sent when someone selects **Complete Project** for the listed project. Sent to organizers who are set to receive email notifications (**Receive email notifications?** check box selected in **CSRconnect admin portal, Project Administrators**).

Sender: System

Recipient: Organizers

Trigger: Sent when someone selects **Complete Project** for the listed project.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: The following project has been closed - {Project name}

Email header: Project Update

Email text:

{First name},

The following project has been closed:

Project Name: {Project name}

Closed By: {Email address}

Visit the project management panel to edit the project and manage participants.

Project Update

Chihhao,

The following project has been closed:

Project Name: Community Cleanup 1

Closed By: tim.lee@blackbaud.me

Visit the project management panel to edit the project and manage participants.

[Manage This Project](#)

Description: Sent when a confirmed participant left the project by navigating to **My Volunteering, Edit Participation**. Sent to organizers who are set to receive email notifications (**Receive email notifications?** check box selected in **CSRconnect Admin Portal, Project Administrators**).

Sender: System

Recipient: Organizers

Trigger: Sent when a confirmed participant left the project by navigating to **My Volunteering, Edit Participation**.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: A volunteer has left your project - {Project name}

Email header: Participant Update

Email text:

{First name},

We would like to inform you that a participant has left your project.

Project Name: {Project name}

Role: {Project role}

Participant: {Participant name}

Participant Email: {Participant email address}

Visit the project management panel to edit the project and manage participants.

Participant Update

Chihhao,

We would like to inform you that a participant has left your project.

Project Name: Community Cleanup 1

Role: Volunteer

Participant: Chimy Lee

Participant Email: chimy@yc.com

Visit the project management panel to edit the project and manage participants.

[Manage This Project](#)

Description: Roll-up summary email lists project participation updates. Sent to organizers who are set to receive email notifications (**Receive email notifications?** check box selected in **CSRconnect Admin Portal, Project Administrators**).

Sender: System

Recipient: Organizers

Trigger: Sent once each day there is an applicable update

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Project Update: {Project name}

Email header: Things are happening with your Project! {Project name}

Email text:

{First name},

See below for a summary of recent changes to this project.

{Project Details}

For more information, visit your project management panel.

Things are happening with your Project! Community Cleanup

Chihhao,

See below for a summary of recent changes to this project.

1 Participants Added

1 Participants left the Project

For more information, visit your project management panel.

[Manage This Project](#)

Volunteer - Projects

Participant Added to Project (P014)

To participant

Description: Sent when a project organizer adds a participant to a project and role.

Sender: System

Recipient: Participants

Trigger: Sent when a project organizer adds a participant to a project and role.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Participation Added: {Project name}

Email header: Participation Update

Email text:

{First name},

The organizer of this project has added you to the following role:

Project Name: {Project name}

Organization Name: {Charity name}

Role Added: {Project role}

Organizer: {Organizer name}

Organizer Email: {Organizer email address}

Visit My Volunteering to view your projects and participation information.

Participation Update

Chimy,

The organizer of this project has added you to the following role:

Project Name: Community Cleanup

Organization Name: United Way of Greater Cleveland Fund

Role Added: Volunteer

Organizer: Chihhao Lee

Organizer Email: tle@yc.com

Visit My Volunteering to view your projects and participation information.

[View My Volunteering](#)

Description: Sent when an organizer moves a participant from an originally confirmed role to a new role.

Sender: System

Recipient: Participants

Trigger: Sent when an organizer moves a participant from an originally confirmed role to a new role.

Option to turn email on/off? Yes

Option to customize email? No

Subject line: Participation Update: {Project name}

Email header: Participation Update

Email text:

{First name},

The project role you were previously confirmed for has been changed by the organizer. See below for a summary of those changes:

Project Name: {Project name}

Previous Role: {Previous project role}

New Role: {New project role}

Note: Any hours logged against your previous role will remain with that role.

Organizer: {Organizer name}

Organizer Email: {Organizer email address}

Please contact the organizer if you have any questions about why this change was made.

Visit My Volunteering to view your projects and participation information.

Participation Update

Chimy,

The project role you were previously confirmed for has been changed by the organizer. See below for a summary of those changes:

Project Name: Community Cleanup

Previous Role: Volunteer

New Role: Organizer

Note: Any hours logged against your previous role will remain with that role.

Organizer: Chihhao Lee

Organizer Email: tlee@yc.com

Please contact the organizer if you have any questions about why this change was made.

Visit My Volunteering to view your projects and participation information.

[View My Volunteering](#)

Description: Email sent from client admin to event creator/organizer

Sender: Client admin

Recipient: Project creator

Trigger: Client admin selects **Approve Project** on the CSRconnect admin portal, Opportunity Manager, Projects Manager

Option to turn email on/off? Yes – YC admin can toggle setting in YC admin, New Volunteering, Communication Settings

Option to customize email? Yes – the client admin can add custom text to the Message field.

Subject line: {Project name} was approved and published

Email header: N/A

Email text:

{Project creator's first name},

Good news! Your project was reviewed and approved. It is now published and available for participants.

Project Name: {Project name}

Organization Name: {Charity name}

Message: {Custom text}

Visit Opportunities Management to view your project details and manage your project participants.

YC,

Good news! Your project was reviewed and approved. It is now published and available for participants.

Project Name: Food bank collection

Organization Name: GREATER CLEVELAND FOOD BANK INC

Message

N/A

Visit Opportunities Management to view your project details and manage your project participants.

[View Opportunities Management](#)

Description: Email sent from event creator/organizer to participant(s)

Sender: Client admin

Recipient: Project creator

Trigger: Client admin selects **Decline Project** on the CSRconnect admin portal, Opportunity Manager, Projects Manager tab

Option to turn email on/off? Yes – YC admin can toggle setting in YC admin, New Volunteering, Communication Settings

Option to customize email? Yes – the client admin can add custom text to the Message field.

Subject line: {Project name} was reviewed and declined

Email header: This Project was Declined

Email text:

{Project creator's first name},

We regret to inform you that your project was reviewed and declined.

The administrator has stated the following reason:

Message: {Custom text}

This Project was Declined

YC,

We regret to inform you that your project was reviewed and declined.

The administrator has stated the following reason:

Thank you for submitting this project request. We have an overlapping initiative in place for this charity right now, but please feel free to resubmit a project request next quarter.

Description: Email sent from client admin to event creator/organizer

Sender: System

Recipient: Project creator

Trigger: Project creator/organizer submits a project request for approval

Option to turn email on/off? Yes – YC admin can toggle setting in YC admin, New Volunteering, Communication Settings

Option to customize email? No

Subject line: {Project name} was submitted for review

Email header: Your Project is Pending Review

Email text:

{Project creator's first name},

Thank you for submitting your project. It will be reviewed soon, and you will receive an email letting you know the status of your project.

Visit Opportunities Management to view your project details.

Your Project is Pending Review

YC,

Thank you for submitting your project. It will be reviewed soon, and you will receive an email letting you know the status of your project.

Visit Opportunities Management to view your project details.

[View Opportunities Management](#)

Description: Reminder email sent from system to client admin

Sender: System

Recipient: Client admin

Trigger: Client admin has pending reviews and chooses to receive reminder emails set up through the CSRconnect admin portal (CSRconnect admin portal, Volunteer, Opportunity Manager, Projects Manager, Manage Email Settings). Client admins can receive daily messages at 11:59 p.m. UTC.

Option to turn email on/off? Yes – YC admin can toggle setting in YC admin, New Volunteering, Communication Settings

Option to customize email? No

Subject line: Pending Projects to be Reviewed

Email header: Pending Projects to be Reviewed

Email text:

{Client admin's first name},

There are pending projects that are ready for your review. Please visit the Opportunity Manager panel to review these pending projects.

Total Pending Projects: 1



Pending Projects to be Reviewed

YC,

There are pending projects that are ready for your review. Please visit the Opportunity Manager panel to review these pending projects.

Total Pending Projects: 1

Volunteer - Projects

Volunteer Recommendation Email (TBD)

To employee user

Description: Bi-weekly volunteer recommendation email with up to five projects that contain at least one of the employee's skills listed in their profile.

Sender: System

Recipient: Employees with skills that match volunteer opportunities

Trigger: Volunteer projects that match the skills listed in the employee's profile

Option to turn email on/off? Yes – Employees can choose to opt-out using **Volunteer Recommendation Email** located on **My Account, Communication Settings**.

Option to customize email? No

Subject line: {Employee's first name}, you have new opportunities waiting for you

Email header: Looking to Volunteer? Check out these new opportunities!

Email text:

{Employee's first name},

We have matched you to the following volunteer opportunities related to your skills:

{Project link}

{Organization name}

{Project dates}

{Location}

Cause Area: {Cause Area}


Skills: {Employee's identified matching skills}

Looking for more ways to volunteer?

Looking to Volunteer? Check out these new opportunities!

Patrick,

We have matched you to the following volunteer opportunities related to your skills:



[Groups Virtual Address Test](#)
AMERICAN NATIONAL RED CROSS
June 01, 2022 - May 31, 2023
Virtual (Online Only)
Cause Area: Human Services
Skills: Financial Modeling

Looking for more ways to volunteer?

Search Opportunities

Volunteer Time Off (VTO)

Description: Email sent to employee user to confirm their VTO request was submitted

Sender: System

Recipient: Employee user

Trigger: Employee submits VTO request

Option to turn email on/off? No

Option to customize email? No

Subject line: Request Submitted

Email header: {VTO feature name} - Submitted

Email text:

{First name},

This message confirms you successfully submitted your request.

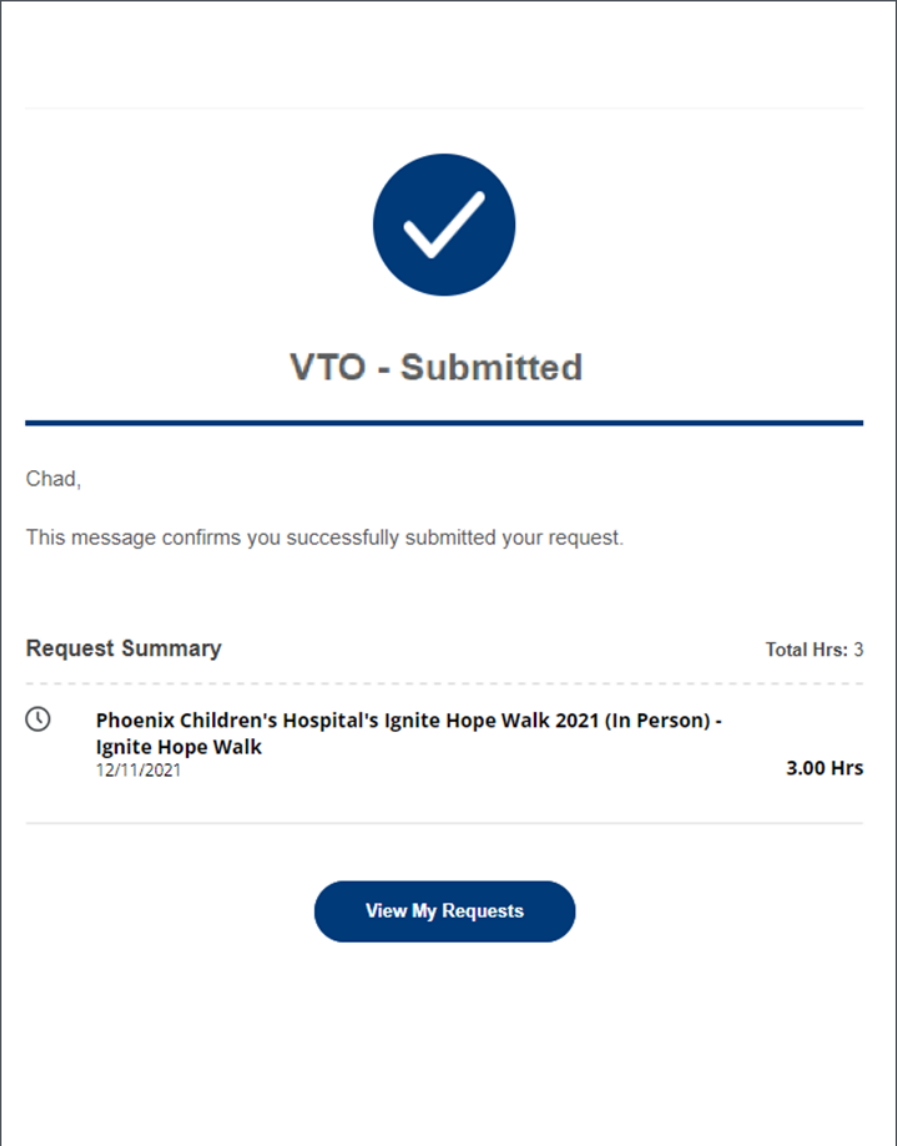
Request Summary

Total Hrs: {Total hours}

{Organization name} - {Event name}

{Date of event}

{Total hours}



The image shows a preview of an email titled "VTO - Submitted". At the top center is a dark blue circle containing a white checkmark. Below this is the title "VTO - Submitted" in bold. A horizontal line separates the header from the body. The body starts with "Chad," followed by "This message confirms you successfully submitted your request." Below this is a "Request Summary" section. It features a clock icon, the event name "Phoenix Children's Hospital's Ignite Hope Walk 2021 (In Person) - Ignite Hope Walk", the date "12/11/2021", and "3.00 Hrs" on the right. At the bottom right of the email body is a dark blue button with the text "View My Requests".

Description: Email sent to the manager of a user who submitted a VTO request

Sender: System

Recipient: Manager of employee user who submitted VTO request

Trigger: Employee submits VTO request

Option to turn email on/off? No

Option to customize email? No

Subject line: Request needs attention

Email header: None

Email text:

{First name},

An employee has submitted a request for: {VTO feature name}. This request requires your approval.

[View Your Request](#) {hyperlinked}

Savannah,

An employee has submitted a request for: Desert Financial VTO. This request requires your approval.

[View Your Request](#)

Description: Email sent to employee user to confirm their VTO request was approved

Sender: System

Recipient: Employee user

Trigger: Client admin approves user's VTO request

Option to turn email on/off? No

Option to customize email? No

Subject line: Request Approved: {VTO feature name}

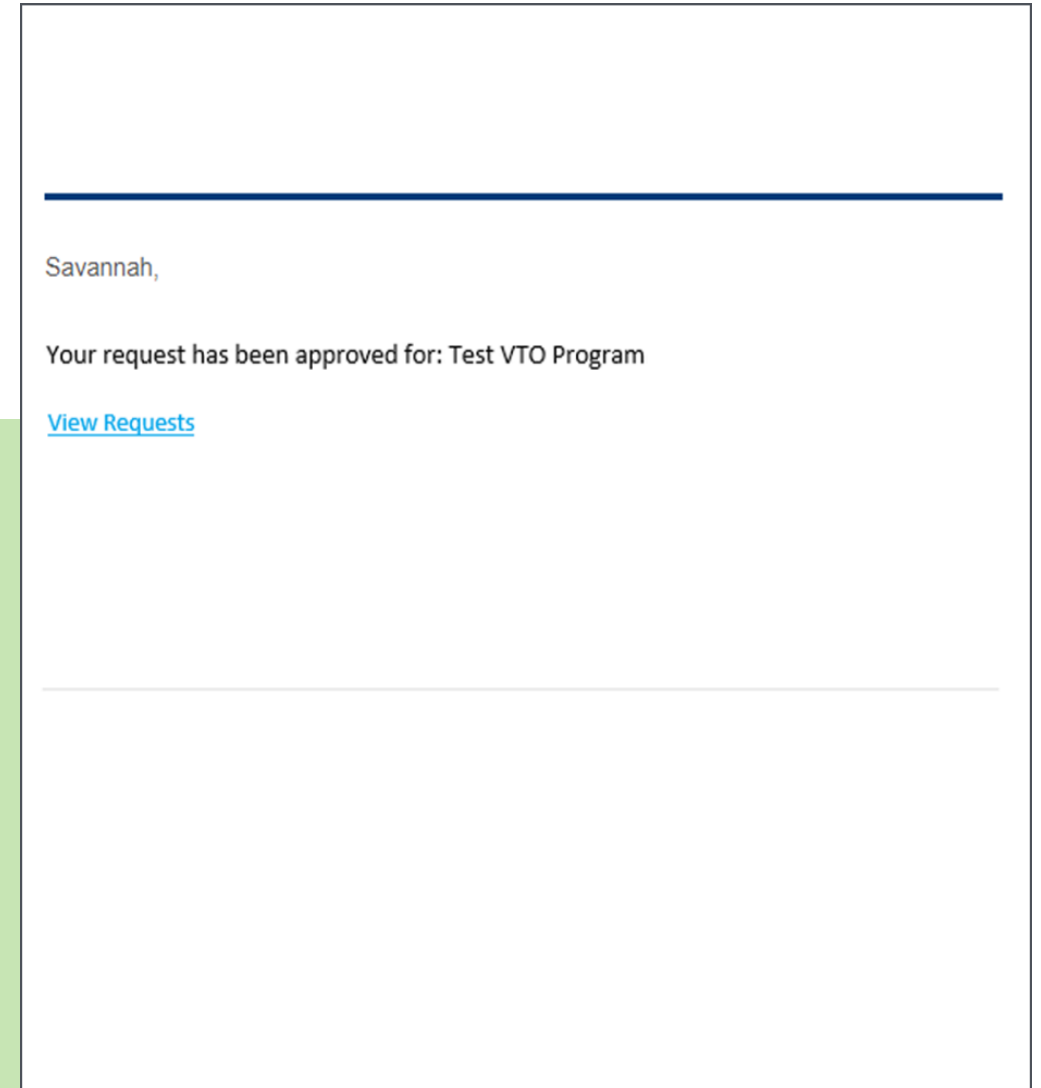
Email header: None

Email text:

{First name},

Your request has been approved for: {VTO feature name}.

[View Requests](#) {hyperlinked}



Description: Email sent to employee user to confirm their VTO request was denied

Sender: System

Recipient: Employee user

Trigger: Client admin declines user's VTO request

Option to turn email on/off? No

Option to customize email? No

Subject line: Request Denied: {VTO feature name}

Email header: None

Email text:

{First name},

Your request has been declined for: {VTO feature name}

