

PDF Attachments

Rallybound **PDF Attachments** is a feature that allows organizations to automatically have a PDF generated for each online donation, offline donation, ticket purchase, and registrations with which a donation was submitted. This PDF is sent to the donor as an attachment in the donation, ticket, or registration autoresponder email. The specific auto-responders are listed below:

1. Offline Donation Verified
2. Online Donation Confirmation
3. Registration Member Registration (role reg) OR Registration Confirmation
4. Ticket Purchased Confirmation

This feature can be enabled on any campaign site or standalone page. Please contact Rallybound support if you would like this enabled.

Editing Your PDF Attachment

Once the feature is enabled, the PDF template can be edited in the Admin Panel, under *Email > PDF Receipt*.

This feature was built as a way to provide tax receipts, but it may be used for other purposes. So, by default, the template includes the following:

- A statement that it is an official receipt for income tax purposes
- Name and address of the non profit
- Organization's tax ID
- Unique donation ID
- Receipt issue date
- Donor's full name and address
- Gift amount
- Message from organization to donor

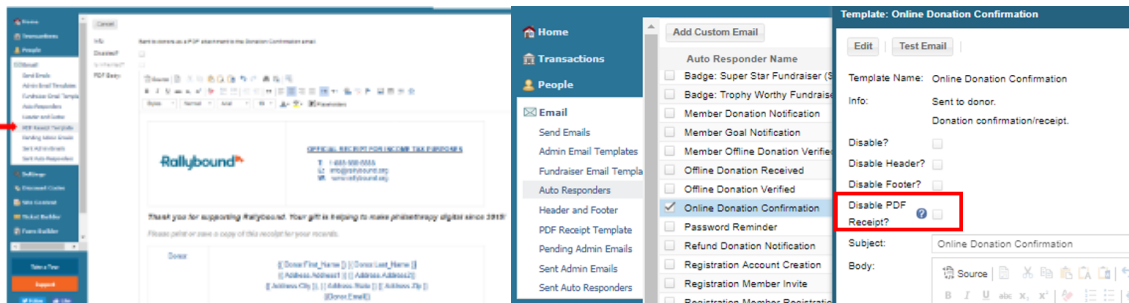
Using Rallybound's standard text-editor, the template can be further customized as desired, for example to include the organization's logo, a signature, and /or custom text. Placeholders may be used as well, just like in email templates. PDFs are generated in Letter size (8.5x11 in).

Admins have the option to disable PDF attachments in the Admin Panel by clicking 'Disable' in the PDF Receipt section of the Email settings. In addition, PDF Attachments can be turned off for specific autoresponder templates if desired. This setting can be found on relevant templates as '*Disable PDF attachment*'.



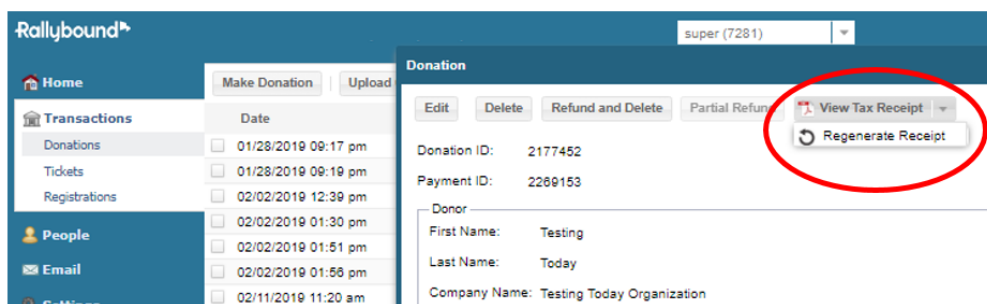
Note

To comply with relevant laws in some locales, there is an option to lock the PDF from being edited by the user in PDF-editing software. If you would like to enable this feature, please contact us. Please be aware that this feature also has the somewhat negative effect of email providers not being able to scan the file for viruses and consequently presenting a message to be careful when downloading.



Accessing and Resending PDF Attachments

Previously generated PDFs can be found in the Admin Panel on the donation record by clicking the button on top of the donation record. If any information has been changed, admins can re-generate the PDF by clicking the "Regenerate Receipt" option.



If an email that previously had a PDF attachment associated with it is resent (from the Email > Sent Auto Responders tab), the PDF Attachment will be resent with the email. If the PDF was regenerated, the newer version will be attached to the resent email.

Partial Refund on Donations

In the event of a partial refund on the donation, a new receipt will be generated and sent to the donor with the Refund Confirmation email. The new receipt includes the updated amount and a statement that it is a "replacement receipt."