Send a Text to Unpaid Users Post Fundraiser

At the conclusion of checkout or the next day, send a text to users with a remaining balance. Choose to include or exclude users whose balance is marked as pledged. Recipients are linked to their Pay page to secure the balance on a credit card of choice.

Best Practice: Ensure all users are marked as paid in the campaign. We recommend reviewing and closing all unpaid accounts no later than 1 week post-event, including those paid by check or cash. This prevents delayed payments processing and provides a timeline for Accounting to review final revenue numbers.

Note: Confirm Self Checkout is set to Yes from Dashboard > Payments Container > Settings before sending the text.

Watch a video

Send paid balance text

1. From the **Admin Navigation**, select **Communications** > **Text** > **+New Text**.
2. From the 'Template' dropdown select Post-Event Balance.
3. Click Apply.
4. Recipients, To, and Message fields pre-populate.
   - To pre-populates with Unpaid - Exclude Pledges.
     - Click the dropdown arrow to adjust to Unpaid - Include Pledges if desired.
5. Click Send, Save as Draft or Schedule the message to be automatically sent at a time of your choosing.

Note: The text sender receives an additional text, to the number on file, to confirm the text sent successfully.