#iGiveCatholic Email Templates

Editing your template to send an iGiveCatholic email to adult contacts:

1. Click **Communication** and choose **Templates**.

2. Double click to open your parish **#iGiveCatholic Day Of** template.

   Note: Templates exist for sending email prior (#iGiveCatholic **Pre** Giving) and for after (#iGiveCatholic **Post** Giving) See page 2 for instructions on creating those email for parish.

3. Click **Edit Record** and make sure these fields are set correctly:
   - **From Contact**
   - **Reply To Contact**
   - **Template User**

4. Click **Save**.

5. Click **Tools** and choose **Template Editor**

6. Edit the text of the message as you see fit.   **Read it carefully there are sections to customize.**

7. Click the **Save** button and click the **Close** button. Click **Close** again.

Using your template: **Note**: If the email should come from your pastor, he will have to follow these instructions signed on as himself.

A. Important: Clear any sticky/saved selections:
   a. Click **Home** on the left menu and click **My Selections** on top of screen.
   b. Check the box at the bottom of the screen to select every contact.
   c. Click the **Actions** button and choose **Clear** and then click the **Clear** button.

B. Click **Contacts.**

C. Choose the view named **Email List over 18 w Part** which lists active contacts over 18 with email addresses. One email per email address will be sent even if two contacts share the address.

D. Check the box at the bottom of the list to select all contacts.

E. Click **Actions** and choose **Message.**

F. Click **Insert** drop down menu found under the **Message** tab.

G. Hover over **Templates** and **Select Contact Fields Templates.**

H. Select **your** new template and click **Send**.

I. **Tomorrow**:
   a. Click **Communications** and choose **Messages**.
   b. Click on your message to open it and then click the **Recipients** tab.
      Any recipients marked as **Bounced**, **Unsubscribed** and **Spam Reported** should be reviewed and contact records changed to either correct the email address (bounced) or marked as **Bulk Email Bulk Opt out** set to **yes** (Unsubscribed) or delete the email address (Spam Reported).   Learn more here:
      https://www.eriercd.org/images/pdf/computer/mp/messagestatus.pdf

Creating Pre and Post iGive Email Templates

1. Click **Communication** and choose **Templates**.

2. Click one of the pre-designed templates available for your use to open it.

    - The **"Pre Giving"** email would ideally be sent the Tuesday PRIOR to Thanksgiving week.

    - The **"Post Giving"** email should go out a week after iGiveCatholic

3. Click **Actions** and choose **Copy**.

4. Click the **Copy Record** button. (Ignore this error "You must have file attach rights in order to copy records")

5. Click **Edit Record** and change the **Template Name** to include your parish name.

6. Select YOUR work contact from the **From Contact** pull down menu.

7. Select YOUR work contact from the **Reply To Contact** pull down menu.

8. Select YOUR name from the **Template User** pull down menu and click **Save**.

9. Click **Tools** and choose **Template Editor**

10. Edit the text of the message as you see fit. Suggested text has been supplied for your use. Be on the look out for the text enclosed in brackets [ ] to customize the email.

11. Click the **Save** button and click the **Close** button. Click **Close** again.

12. Follow the instructions for sending the email found on page 1 under the **Using your template**: heading.