



#iGiveCatholic Email Templates



Creating this year's iGive Email Templates using templates from iGiveCatholic

1. If you would like to use templates you created last year, skip to step 11.
If you would like to set these templates up together, send me an email. We'll set up a date.
If you feel comfortable setting them up yourself, continue to step 2.
2. Click **Communication** and choose **Templates**.
3. To find the templates from #iGiveCatholic, search for *give, you will see all 4. The dates in the template name indicate when the Foundation suggests the templates be sent.

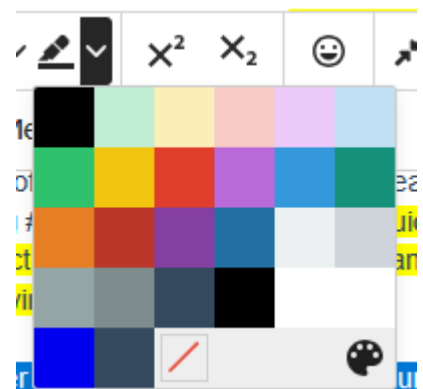
The screenshot shows a search window titled "Template Name" with a search bar containing "*give". Below the search bar, four results are listed:

1 #iGiveCatholic Pre Giving 2025 (< 11/17)
2 #iGiveCatholic Advanced 2025 (11/17)
3 #iGiveCatholic Day Of 2025 (Dec 2)
4 #iGiveCatholic Post Giving 2025 (> 12/2)

4. Click one of the pre-designed templates available for your use to open it.
5. Click **Actions** and choose **Copy**.
6. Click the **Copy Record** button. (Ignore this error "You must have file attach rights in order to copy records")
7. Click **Edit Record** and change the **Template Name** to include your parish name.
8. Select YOUR work contact from the **From Contact** pull down menu.
9. Select YOUR work contact from the **Reply To Contact** pull down menu.
10. Select YOUR name from the **Template User** pull down menu and click **Save**.
11. Click **Tools** and choose **Template Editor**
12. Edit the text of the message as you see fit.

If you are using templates from iGiveCatholic, suggested text has been supplied for your use. Be on the look out for the colored text indicating sections you must change. You can use the highlighter button to remove the yellow. Chose the button with the red line (Remove Color.)

13. Click the **Save** button and click the **Close** button. Click **Close** again.
14. Follow the instructions for sending the email found on page 1 under the **Using your template:** heading.



Sending your email:

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

- B. 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.
- C. Click **Contacts**.
- D. Choose the view named **Email Active Contacts > age 18**. When it comes to duplicate email, the system will only send one email.
- E. Check the box at the bottom of the list to select all contacts.
- F. Click **Actions** and choose **Message**.
- G. Click **Insert** drop down menu found under the **Message** tab.
- H. Hover over **Templates** and **Select Contact Fields Templates**.
- I. Select **your** #IgiveCatholic template and click **Send**.
- J. **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.eriecd.org/images/pdf/computer/mp/messagestatus.pdf>