



# Alerting parishioners to a scam



## Creating your template:

1. Click **Communication** and choose **Templates**.
2. Click the template named **Scam Warning** to open it.
3. Click **Actions** and choose **Copy**. Then click the **Copy Record** button. Ignore this error ""You must have file attach rights in order to copy records""
4. Click **Edit Record** and change the **Template Name** to include your parish name.
5. Select YOUR work contact from both the **From Contact** **AND** the **Reply To Contact** pull down menu.
6. Select your name from the **Template User** pull down menu and click **Save**.
7. Select your parish from the **User Group** pull down menu. Group names begin with "Parish Group"
8. Click **Tools**; choose **Template Editor** and edit the text of the message as you see fit.
9. Click the **Save** button and click the **Close** button. Click **Close** again.

## Using your template

- 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**. This view lists active contacts over 18 with email addresses. One email per email address will be sent.
- 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 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>