

Adding & Managing an Email & Letter Template

Last Modified on 04/26/2023 4:40 pm EDT

Donor Management System

Custom Message Templates can be used for [Single Emails, Thanking your Donor](#) (Email & [Letter](#) formats), and other [MailMerge](#) functions. These Templates can be used to save emails and letters that you plan to send on a recurring basis.

The DMS comes with three **pre-built custom message templates** which you're welcome to customize further:

1. Acknowledgement Email - Yearly
2. Acknowledgement Receipt - Single transaction
3. Basic - Thank You Email

If needed, you can also **create your own custom templates** entirely from scratch.

Considerations:

- If you're looking to modify the default email messages that get automatically sent with your **Tax Receipts**, check out how to [Modify the Default Tax Receipt Emails](#) instead.
- If you're looking to send a **Bulk Email (DMS Mail)**, you can [modify your Bulk Email Templates](#) instead.

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Managing a Message Template

1. Visit your **administrative Settings**.
2. Under **Communications**, select **Message Templates**

Administer CanadaHelps DMS

Customize Data and Screens

Website Forms

Contact Types

Activity Types

Tags (Categories)

Communications

Organization Address and Contact Info

Print Page (PDF) Formats

Message Templates

Localization

Date Formats

System Settings

Payment Processor Settings

Import/Export Mappings

Misc (Undelete, PDFs, Limits, Logging, etc.)

Receipt Settings

CanadaHelps Contribute

Manage Campaigns

GL Accounts

Funds

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CanadaHelps Campaign Group

Campaign Groups

DMS Mail

Headers, Footers, and Automated Messages

DMS Templates

From Email Addresses

Draft, Schedule, and Manage DMS Mails

Mailchimp Settings



Settings > Message Templates

3. Next, you will see a list of all of your current Templates.

4. You can then *Edit*, *Disable* or *Delete* each Message Template on the list

Message Templates

User-driven Messages

System Workflow Messages

Message templates allow you to easily create similar emails or letters on a recurring basis. Messages used for membership renewal reminders, as well as event and activity related reminders should be created via Schedule Reminders. You can also use message templates for CanadaHelps Mail (bulk email) content. However, subscribe, unsubscribe and opt-out messages are configured at Administer > CanadaHelps Mail > Headers, Footers and Automated Messages.

+ Add Message Template

Message Title	Message Subject	Enabled?			
Acknowledgement Email - Yearly	Yearly Acknowledgement Email	Yes	Edit	Disable	Delete
Acknowledgement Receipt - Single transaction	Acknowledgement Receipt	Yes	Edit	Disable	Delete
Attachment Test	Attachment Test	Yes	Edit	Disable	Delete
Basic - Thank You Email	[contact.first_name], thank you!	Yes	Edit	Disable	Delete
Dedication Letter for Printing		Yes	Edit	Disable	Delete
Donation in Memory Template	A gift made with love	Yes	Edit	Disable	Delete
Donor Re-engagement Template	[contact.first_name], here's what's new at Wellness Ave!	Yes	Edit	Disable	Delete
First-Time Donor Thank you	[contact.first_name], we're so thankful for your gift!	Yes	Edit	Disable	Delete
General Thank you		Yes	Edit	Disable	Delete
Letterhead		Yes	Edit	Disable	Delete
Test		Yes	Edit	Disable	Delete
Thank you - Cheque Donations		Yes	Edit	Disable	Delete
Thank you - Dedication message	Thank you for your recent donation	Yes	Edit	Disable	Delete
Ukraine Donation Thank You		Yes	Edit	Disable	Delete
Year in Review- 2022	Year in Review- 2022	Yes	Edit	Disable	Delete
Year-in-Review 2021	Year-in-Review 2021	No	Edit	Enable	Delete
Your Generosity Has Allowed Us to Move Mountains	[contact.first_name], your generosity has allowed us to move mountains!	Yes	Edit	Disable	Delete

+ Add Message Template

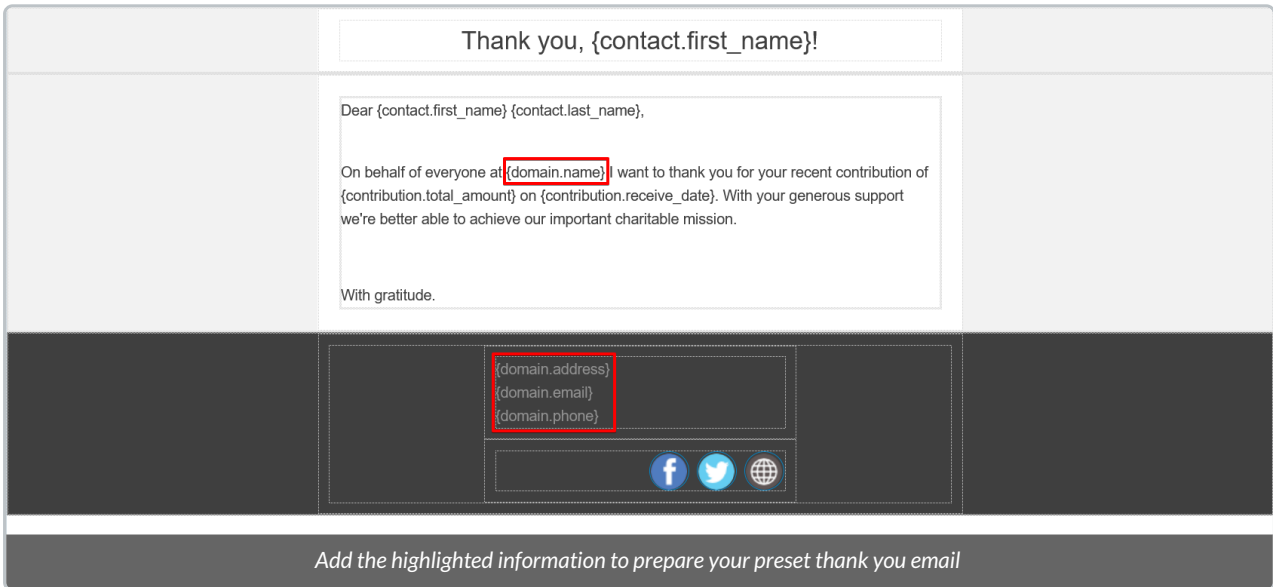
Edit, Disable and Delete a Message Template

Recommended Modifications to your Pre-Built Templates

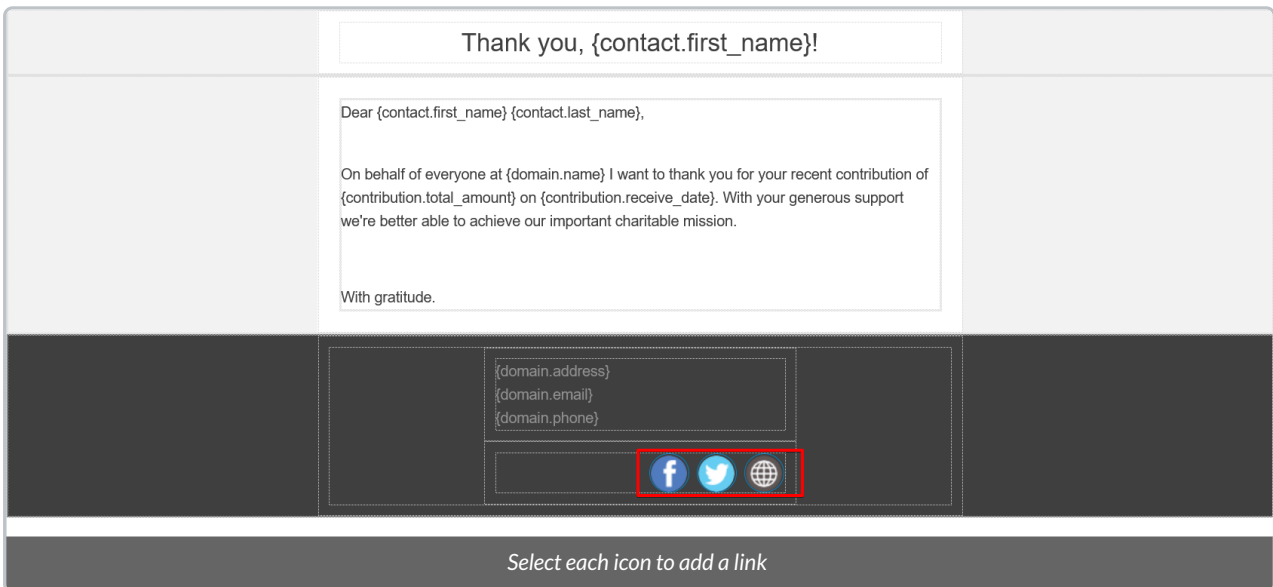
Message Templates can be used for **Single Emails** and **Thanking your Donor**. In order to prepare your **Thank you Template to be sent**, there are some changes that should be made.

1. Fill in the highlighted sections below with your charity information. Alternatively, you can fill in your

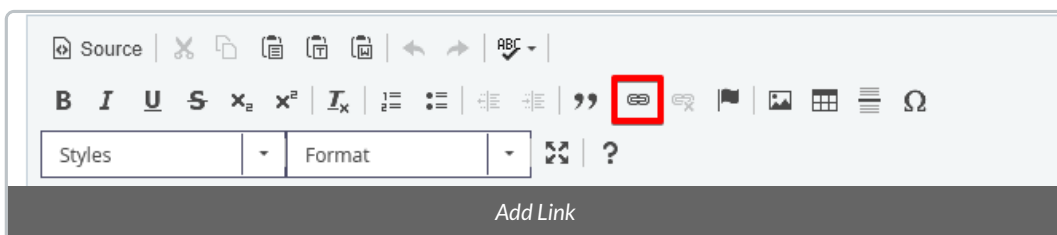
Organization information in your administrative Settings to allow these merge fields to autofill correctly.



2. Add links to your social media platforms. By default, Facebook, Twitter, and website icons are displayed on the email template. If undesired, you can delete these icons instead.



3. Select the **Add Link** button in the editing panel:



4. Add each link to the **URL** box, and select **https://** from the **Protocol** dropdown menu and Select **OK**.

Link
✕

Link Info
Target
Upload
Advanced

Display Text

Link Type

URL
▼

Protocol

https://
▼

URL

Add URL

Tip: You can also use the below **Rich Text options** to enhance your Template text.



Bold

Italicize

Underline

~~Strikethrough~~

Subscript/Superscript



Remove all formatting



1. Numbered list

- Bulleted list

Increase or Decrease Indent

Insert Block Quote



Add Image

Add Table

Insert Horizontal Line



Pick Font Style and Font Size

Adding Images to your Message Templates

When creating/editing your Message Templates, you may also want to **include relevant graphics** throughout the template, such as a header image across the top, or an image that appears in line with your text.

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DMS Templates

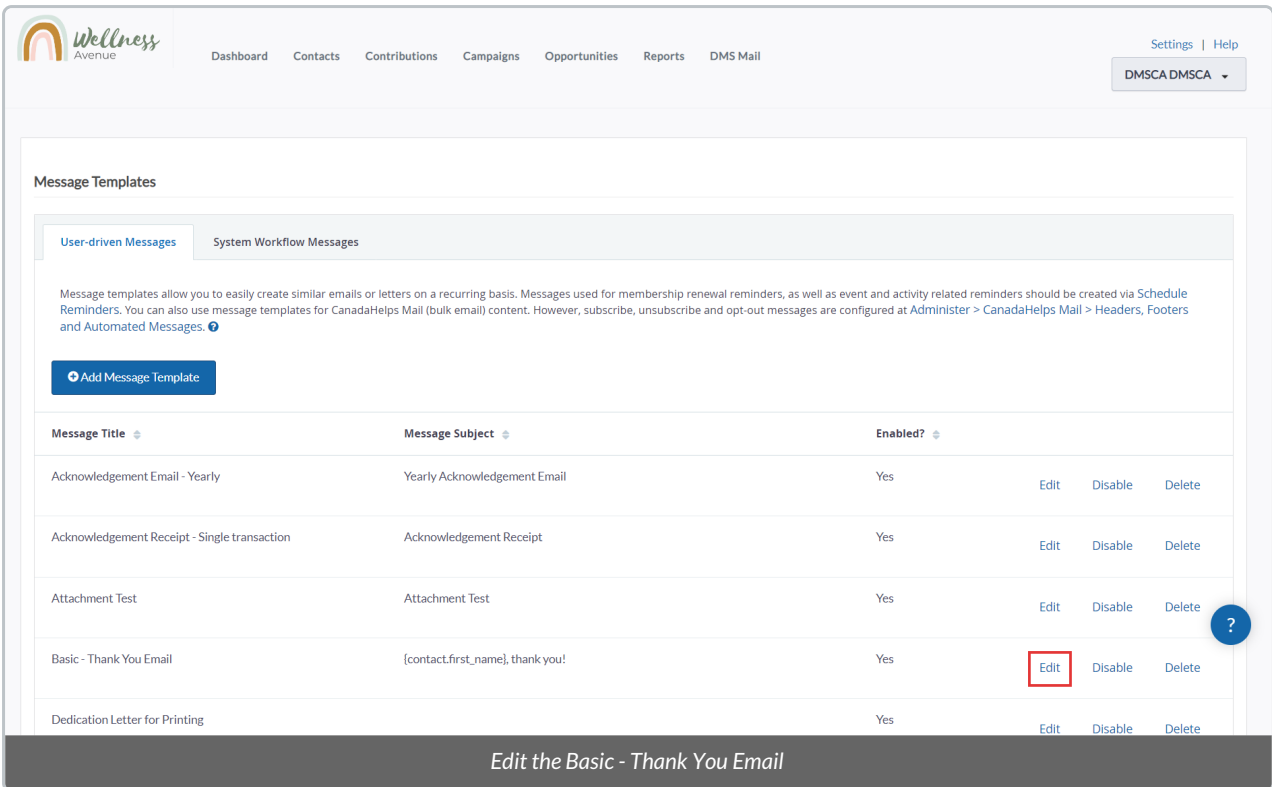
From Email Addresses

Draft, Schedule, and Manage DMS Mails

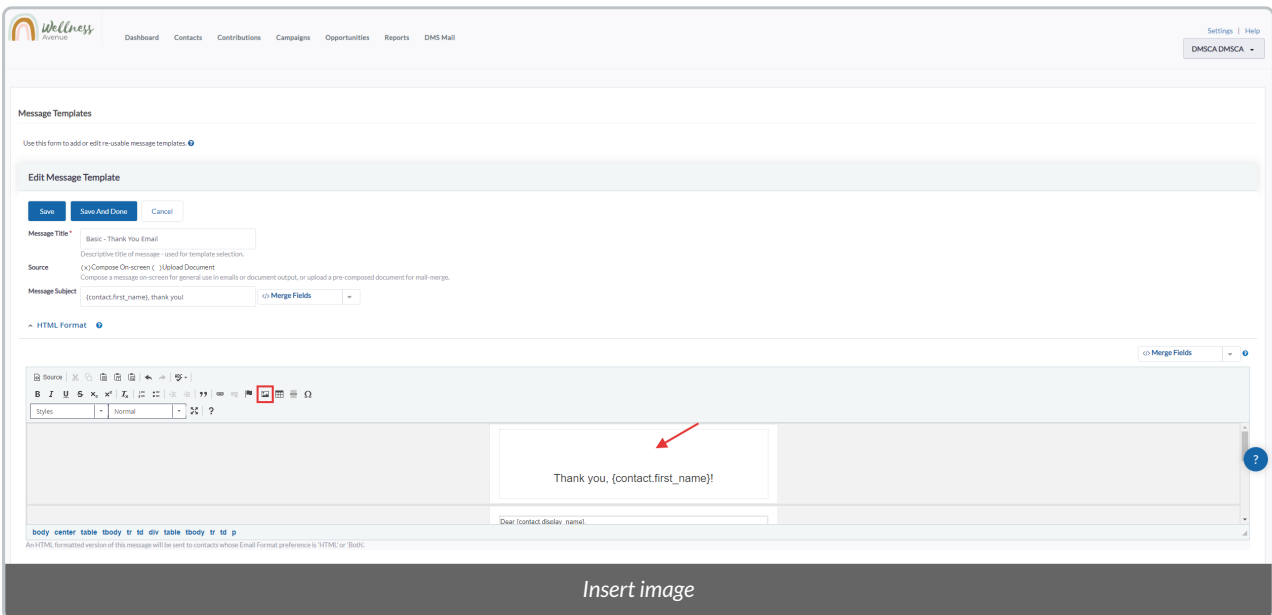
Mailchimp Settings



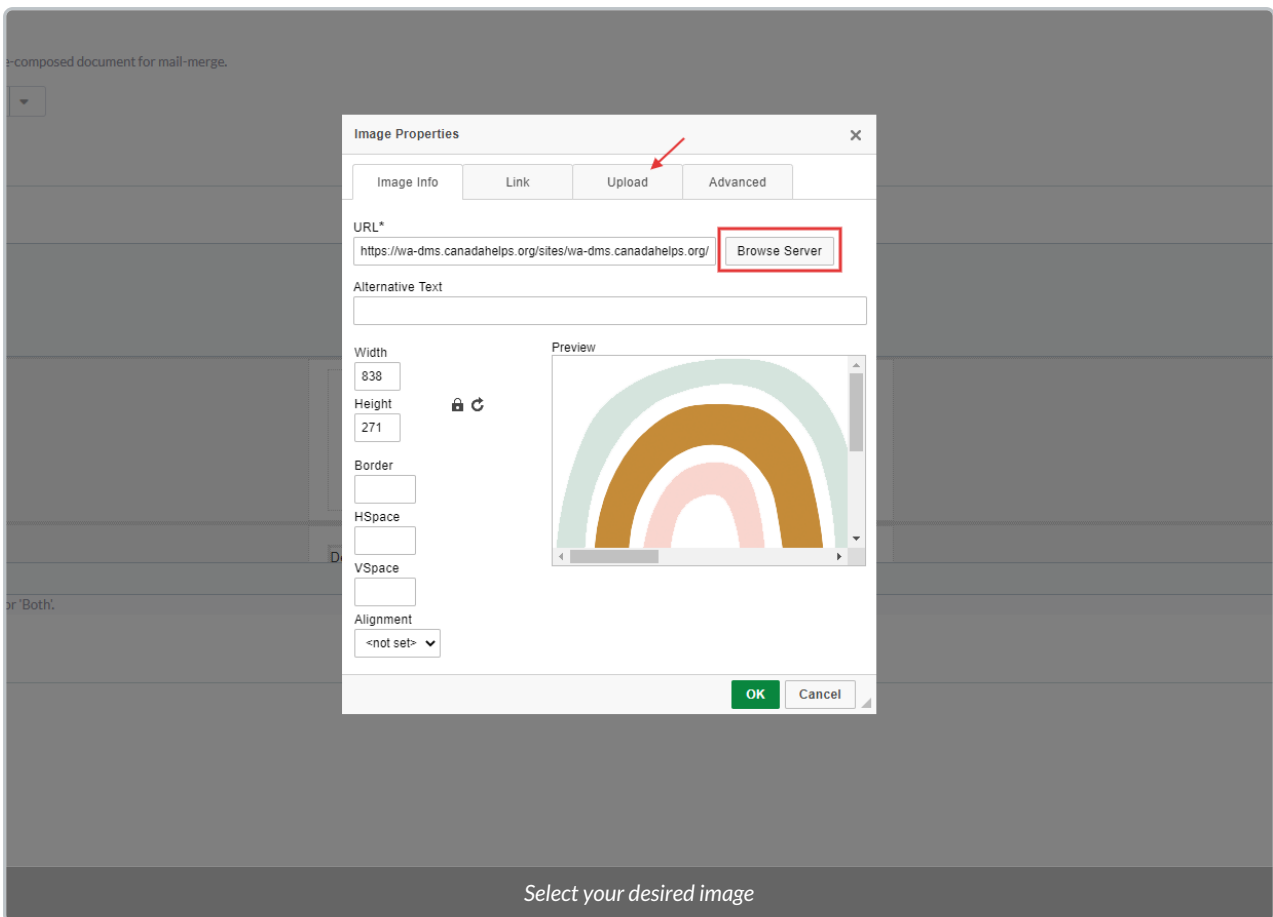
3. Select **Edit** on the pre-built Message Template of your choosing (or select **Add Message Template** if creating a template from scratch; see [below](#) for more details).



4. Click into your Template and select the **Add Image** icon.



5. If you've previously uploaded your desired image to your DMS gallery, select **Browse Server** to select it. Otherwise, select the **Upload** tab to upload it to your server first.



6. Once selected, you can **resize, align, and space** your image within your text as needed:

(a) **Width:** adjust the width of your image.

(b) **Height:** adjust the height of your image.

Tip: You can select the **padlock icon** to lock/unlock the aspect ratio. When *locked*, changing either height or width will automatically adjust the other value. When *unlocked*, changing only one value won't affect the other (e.g., make an image wider without adjusting the height).

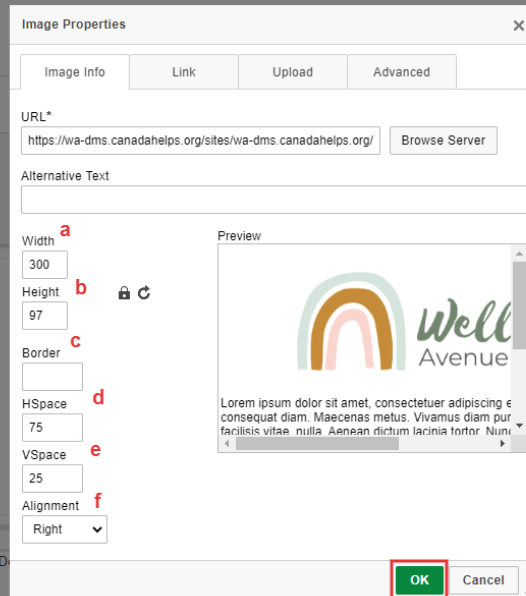
(c) **Border:** apply a border of your desired thickness around your image

(d) **HSpace:** increase or decrease the amount of horizontal spacing around your image.

(e) **VSpace:** increase or decrease the amount of vertical spacing around your image.

(f) **Alignment:** align your image to the right or left of your desired area.

d a pre-composed document for mail-merge.



The 'Image Properties' dialog box is shown with the 'Image Info' tab selected. It contains the following fields and options:

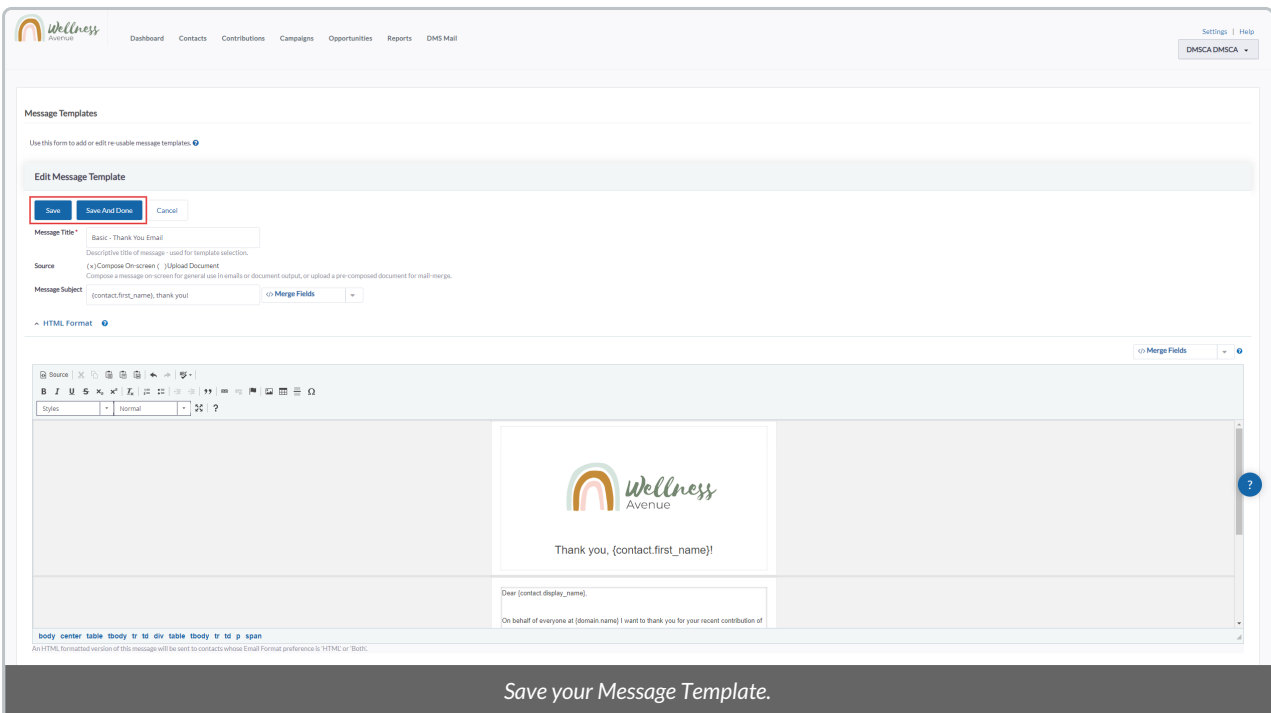
- URL***:
- Alternative Text**:
- Width**: (labeled 'a')
- Height**: (labeled 'b'), with a lock icon and a refresh icon.
- Border**: (labeled 'c')
- HSpace**: (labeled 'd')
- VSpace**: (labeled 'e')
- Alignment**: (labeled 'f')
- Preview**: A small window showing a logo with a rainbow and the text 'Wellness Avenue' above a block of placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas metus. Vivamus diam purus. Nulla aenean dictum lacinia tortor. Nunc...'
- Buttons**: (highlighted with a red box) and

On behalf of everyone at {domain.name} I want to thank you for your recent contribution of {contribution.total_amount} on {contribution.receive_date}. With your generous support

HTML or 'Both'.

Resize, align, and space your image as needed. You can select **OK** to see a larger preview of your changes.

7. When you're satisfied with your image/s, you can select **Save** or **Save and Done** to save your Message Template.



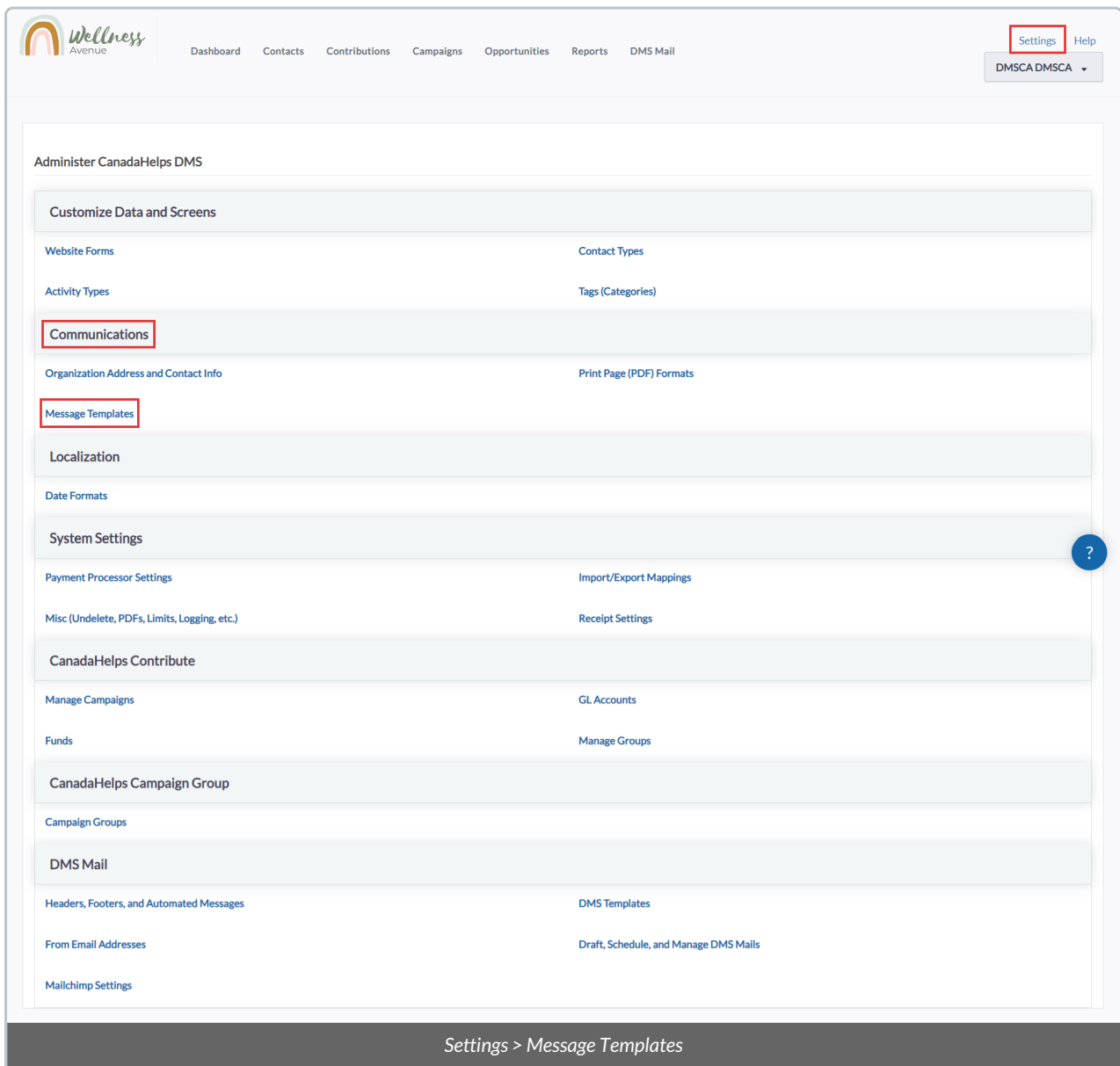
The screenshot shows the 'Wellness Avenue' Message Templates interface. At the top, there is a navigation bar with 'Dashboard', 'Contacts', 'Contributions', 'Campaigns', 'Opportunities', 'Reports', and 'DMS Mail'. The main content area is titled 'Message Templates' and includes an 'Edit Message Template' section. In this section, the 'Save' and 'Save And Done' buttons are highlighted with red boxes. Below the buttons, there are fields for 'Message Title*' (Basic - Thank You Email), 'Source' (Compose On-Screen / Upload Document), and 'Message Subject' ({{contact.first_name}}, thank you). The 'HTML Format' section is expanded, showing a rich text editor with a toolbar and a preview area. The preview area displays the 'Wellness Avenue' logo and the text 'Thank you, {{contact.first_name}}!'. Below the preview, there is a 'Dear {{contact.display_name}},' salutation and the start of the main message body: 'On behalf of everyone at {domain.name} I want to thank you for your recent contribution of...'. At the bottom of the interface, there is a footer with technical HTML tags and a note: 'An HTML formatted version of this message will be sent to contacts whose Email Format preference is HTML or 'Both'.'

Save your Message Template.

Cloning an Existing Template

You can build multiple Message Templates based off of the pre-built Templates that come with your DMS. The following example uses the pre-built **Basic - Thank You Template**.

1. Visit your **administrative Settings**.
2. Under **Communications**, select **Message Templates**



3. Select **Edit** on the pre-built Message Template of your choosing

Wellness Avenue | Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail | Settings | Help | DMSCA DMSCA

Message Templates

User-driven Messages | System Workflow Messages

Message templates allow you to easily create similar emails or letters on a recurring basis. Messages used for membership renewal reminders, as well as event and activity related reminders should be created via Schedule Reminders. You can also use message templates for CanadaHelps Mail (bulk email) content. However, subscribe, unsubscribe and opt-out messages are configured at Administrator > CanadaHelps Mail > Headers, Footers and Automated Messages.

[+ Add Message Template](#)

Message Title	Message Subject	Enabled?			
Acknowledgement Email - Yearly	Yearly Acknowledgement Email	Yes	Edit	Disable	Delete
Acknowledgement Receipt - Single transaction	Acknowledgement Receipt	Yes	Edit	Disable	Delete
Attachment Test	Attachment Test	Yes	Edit	Disable	Delete
Basic - Thank You Email	{contact.first_name}, thank you!	Yes	Edit	Disable	Delete
Dedication Letter for Printing		Yes	Edit	Disable	Delete

Edit the Basic - Thank You Email

4. Click into the text editing box of the Template. Highlight the entire Template (or select **CTRL + A/COMMAND + A** on your keyboard) to select all, and then **right click** to **Copy** the Template (or select **CTRL + C/COMMAND + C**).

HTML Format | Merge Fields

Source | B I U S x x² Z_x | Styles | Format

Thank you, {contact.first_name}!

Dear {contact.display_name},

On behalf of everyone at {domain name} I want to thank you for your recent contribution of {contribution.total amount} on {contributions} X Cut | Copy | Paste

we're better able to achieve our important goals. Thank you for your generous support.

With gratitude,

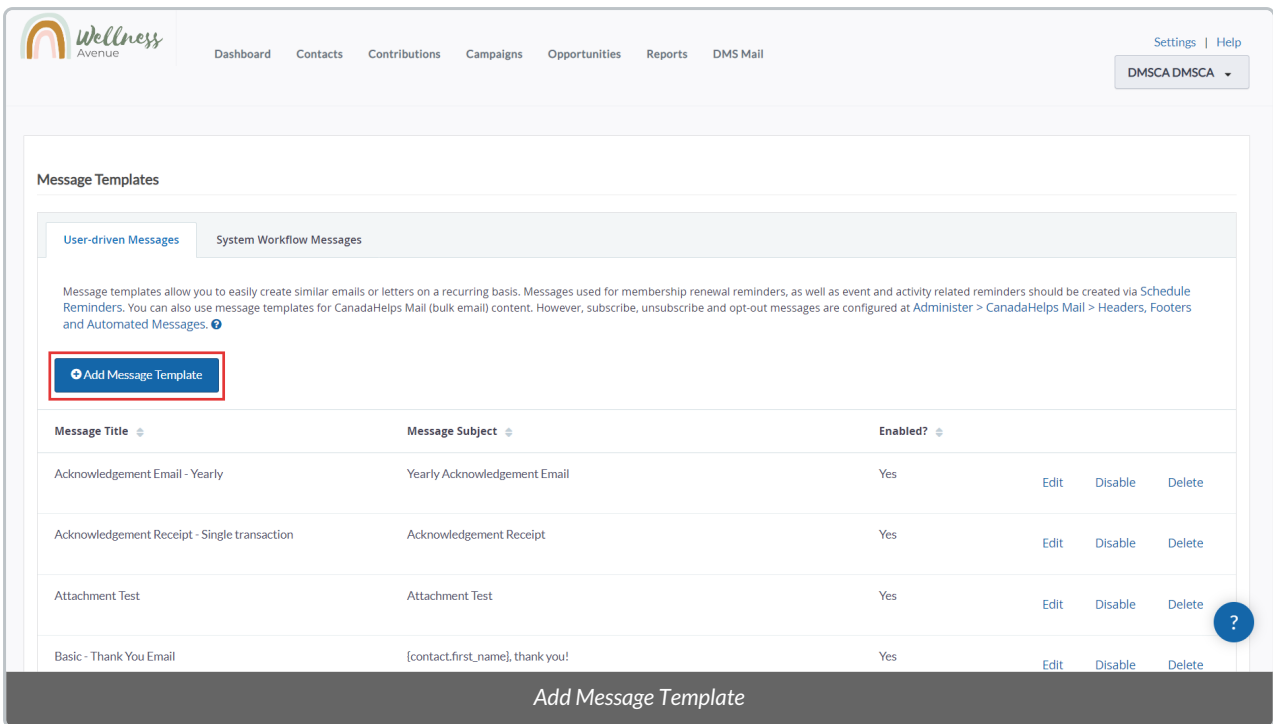
{domain address}
 {domain email}
 {domain phone}

body

An HTML formatted version of this message will be sent to contacts whose Email Format preference is 'HTML' or 'Both'. Tokens may be included (token documentation).

Copy the existing Message Template

5. Once copied, exit out of this Template by selecting **Save** or **Cancel**. Then, back on the **User-Driven Messages** page, select **Add Message Template**.



6. Paste the copied Template into the text editor of the new Message by selecting **CTRL + V**/**COMMAND + V** on your keyboard or by **right clicking** and selecting **Paste**.



8. Make your desired modifications to this new Template and select **Save** when done.

Creating a Message Template from Scratch

Creating a Message Template from scratch is recommended when drafting a letter for printing, or if you have the HTML code of a previously-built email message.

---> Learn more about [drafting a thank-you letter for printing](#).

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[Mailchimp Settings](#)



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Add Message Template

Message Title	Message Subject	Enabled?			
Acknowledgement Email - Yearly	Yearly Acknowledgement Email	Yes	Edit	Disable	Delete
Acknowledgement Receipt - Single transaction	Acknowledgement Receipt	Yes	Edit	Disable	Delete
Attachment Test	Attachment Test	Yes	Edit	Disable	Delete
Basic - Thank You Email	{contact.first_name}, thank you!	Yes	Edit	Disable	Delete

Select Add Message Template

4. On the next page, add all the necessary information, including:

- **Message Title:** internal name to help you manage your Templates. This name won't show up to Contacts.
- **Source:** select *Compose-On-screen*
- **Message Subject:** Subject title, if sending this Template via email, that will appear to your Contacts.
- **Merge Fields:** cycle through a list of merge fields to help you when sending emails / merging letters (e.g. "Hi *contact.first.name*") on **Message Subject, HTML Format & Plain-Text Format**. Merge Fields are not available within the Email Message subject when **Thanking Your Donor** at this time
- **HTML Format:** craft your Template using rich-text + HTML by selecting **Source**.
- **Plain-Text Format:** craft your Template using basic text formatting.
- **PDF Page Format:** leave *default* selected for better PDF merge.
- **Enabled?:** leave this checked to enable this Template in the DMS.

Use the following Rich Text options to enhance your Letter or Email:



Bold

Italicize

Underline

~~Strikethrough~~

Subscript/Superscript



186 Spadina Avenue
Toronto, ON M5T 3B2
Canada

kirsten@wellness.org
111-555-5555

Dear Adam Anderson,

On behalf of everyone at Wellness Avenue I want to thank you for your recent contribution of \$ 100.00 on Mar 2nd, 2022 9:50 AM in memory of James Smith.

With your generous support we're better able to achieve our important charitable mission.

With gratitude.

Wellness Avenue
186 Spadina Avenue
Toronto, ON M5T 3B2
Canada

kirsten@wellness.org
111-555-5555

Example Thank You Letter generated for printing