

How to Clone a DMS Mail Template

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Donor Management System

The DMS has a built-in DMS Mail (bulk email tool) that can be used for your newsletters, announcements, and any mass communications with your Contacts and donors.

—> Start by learning [how to craft and send a Bulk Email](#).

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Re-Using Your DMS Mailing

Once you've successfully created and sent your DMS Mail, if applicable, you can save time on future mailings by re-using it.

1. Visit your **Administrative Settings**.
2. Under **DMS Mail**, select **Draft, Schedule, and Manage DMS Mails**

Wellness Avenue

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Settings Help

DMSCA DMSCA

Administer CanadaHelps DMS

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DMS Mail

Headers, Footers, and Automated Messages DMS Templates

From Email Addresses Draft, Schedule, and Manage DMS Mails

Mailchimp Settings

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Draft, Schedule, and Manage DMS Mails

3. On the next page, you will see a list of all of your previously sent Mailings. Select **Copy** button to start crafting a duplicated version of your desired Mailing.

The screenshot shows the 'Draft, Schedule, and Manage DMS Mails' interface. At the top, there is a navigation bar with 'Wellness Avenue' logo and menu items: Dashboard, Contacts, Contributions, Campaigns, Opportunities, Reports, and DMS Mail. A 'Settings | Help' link and a 'DMSCA DMSCA' dropdown are also present.

The main content area includes a 'New Mailing' button and several form fields:

- Mailing Name: [Text Input]
- Mailing Date: [Dropdown Menu] (Currently set to 'Amy')
- Created or Sent by: [Text Input]
- Mailing Status: [List of checkboxes] (Options: Scheduled, Running, Complete, Paused, Canceled, Draft / Unscheduled)
- Is Mailing Archived?: [Radio Buttons] (Options: Yes, No)
- Language: [Dropdown Menu] (Currently set to '- all languages -')
- Campaign Groups: [Dropdown Menu]

Below the form is a 'Search' button and a pagination bar showing 'Page 1' and '1 - 50 of 1102'. A table lists the mailings:

Mailing Name	Language	Status	Created By	Created Date	Sent By	Scheduled	Started	Completed	Campaign Group	Action
March Madness Campaign	English (Canada)	Complete	DMSCA DMSCA	Mar 2nd, 2023 1:23 PM	DMSCA DMSCA	Mar 2nd, 2023 1:47 PM	Mar 2nd, 2023 1:54 PM	Mar 2nd, 2023 1:54 PM		Report Copy More
Valentine's Day 50/50 Raffle	English (Canada)	Complete	DMSCA DMSCA	Feb 24th, 2023 2:52 PM	DMSCA DMSCA	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM	Feb 24th, 2023 2:53 PM		Report Copy More

At the bottom of the interface, there is a 'Copy template' button.

4. This will duplicate the entire Mailing (i.e., Stages 1-3). However, you will be able to update the Subject, Name, Group recipients, and [content/design of this Bulk Email](#).

---> [Learn more about sending your Bulk Email here.](#)

Copying a DMS Mail Template

You can also clone an existing DMS Mail Template and make modifications to it for future use.

1. Visit your **Settings**.
2. Under **DMS Mail**, select **DMS Templates**

The screenshot displays the 'Administer CanadaHelps DMS' settings page in the Wellness Avenue system. The page is organized into several sections:

- Customize Data and Screens:** Includes links for Website Forms, Activity Types, Contact Types, and Tags (Categories).
- Communications:** Includes links for Organization Address and Contact Info, Message Templates, and Print Page (PDF) Formats.
- Localization:** Includes Date Formats.
- System Settings:** Includes Payment Processor Settings, Misc (Undelete, PDFs, Limits, Logging, etc.), Import/Export Mappings, and Receipt Settings.
- CanadaHelps Contribute:** Includes Manage Campaigns, Funds, GL Accounts, and Manage Groups.
- CanadaHelps Campaign Group:** Includes Campaign Groups.
- DMS Mail:** This section is highlighted with a red box and includes links for Headers, Footers, and Automated Messages; From Email Addresses; Mailchimp Settings; and DMS Templates.
- DMS Templates:** This link is also highlighted with a red box and is associated with the action 'Draft, Schedule, and Manage DMS Mails'.

The footer of the page contains the text: *Draft, Schedule, and Manage DMS Mails*

2. Next, select **Copy** on the template you want to copy; this will open the copied template in the editor and you can proceed to modify the design.

DMS Templates

[NEW TEMPLATE](#)

Title

basic

^ Title

Basic - Email No Gallery	EDIT	COPY	DELETE
Basic - Email With Gallery	EDIT	COPY	DELETE
Basic - Email With Gallery (copy)	EDIT	COPY	DELETE
Basic - Email With Gallery (copy)	EDIT	COPY	DELETE
Basic - Email With Gallery (copy)	EDIT	COPY	DELETE


Base Template and Configured Templates

3. [Follow our Design Guide to modify this Bulk Email Template.](#) Then, select **Save** for future use and re-use. This new template will be available for selection when [sending your next Bulk Email \(DMS Mail\).](#)

UNDO (0) REDO GALLERY [SAVE](#)

[View in your browser](#)

URGENT HELP NEEDED!



Save your New Template