Creating & Managing DMS Mail Templates

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Donor Management System

The DMS Mail feature (also known as the Bulk Email Tool) in the DMS can be used to send newsletters, campaign information, and announcements to your Contacts and donors. DMS Mail Templates allow you to save a specific email design so you can **re-use** it when sending out future bulk emails.

—> Learn more about how to send a Bulk DMS Mail and **how to effectively design your templates**

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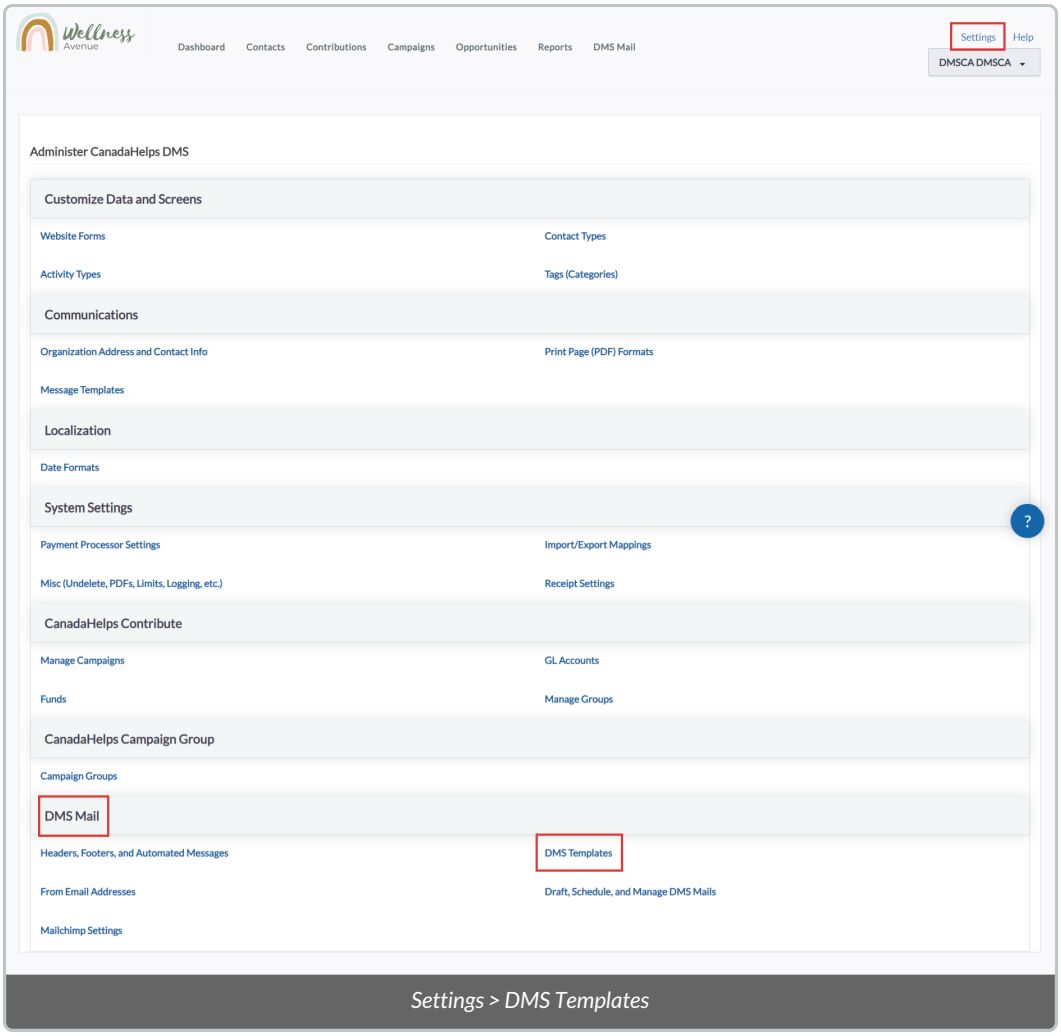
 Prefer to watch a **guided walk-through** of the DMS Mail tool? Check out our **Communicating with your Donors Webinar**!

Creating a DMS Mail Template

1. Go to your **Settings**.

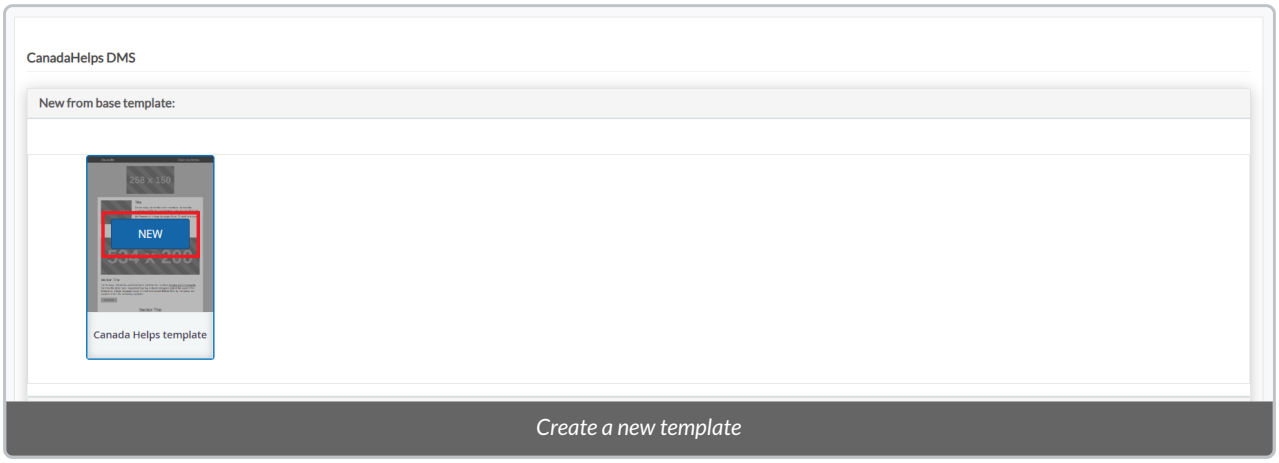
2. Under ***DMS Mail*** *section*, select ***DMS Templates***



Settings > DMS Templates

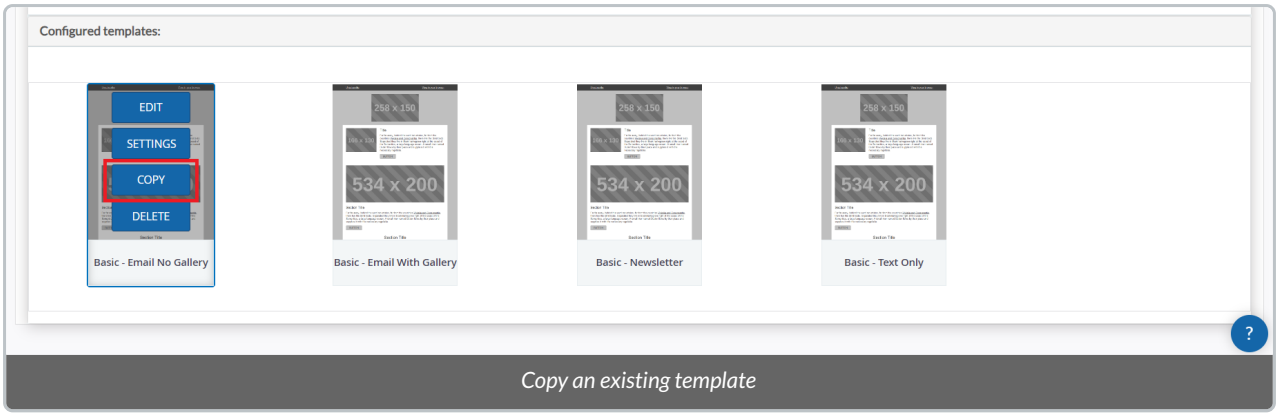
3. You will see a list of your bulk mail templates; we have added a few basic template designs to get you started. To create a new template, you can either:

- Make a ***New Template*** from scratch or;

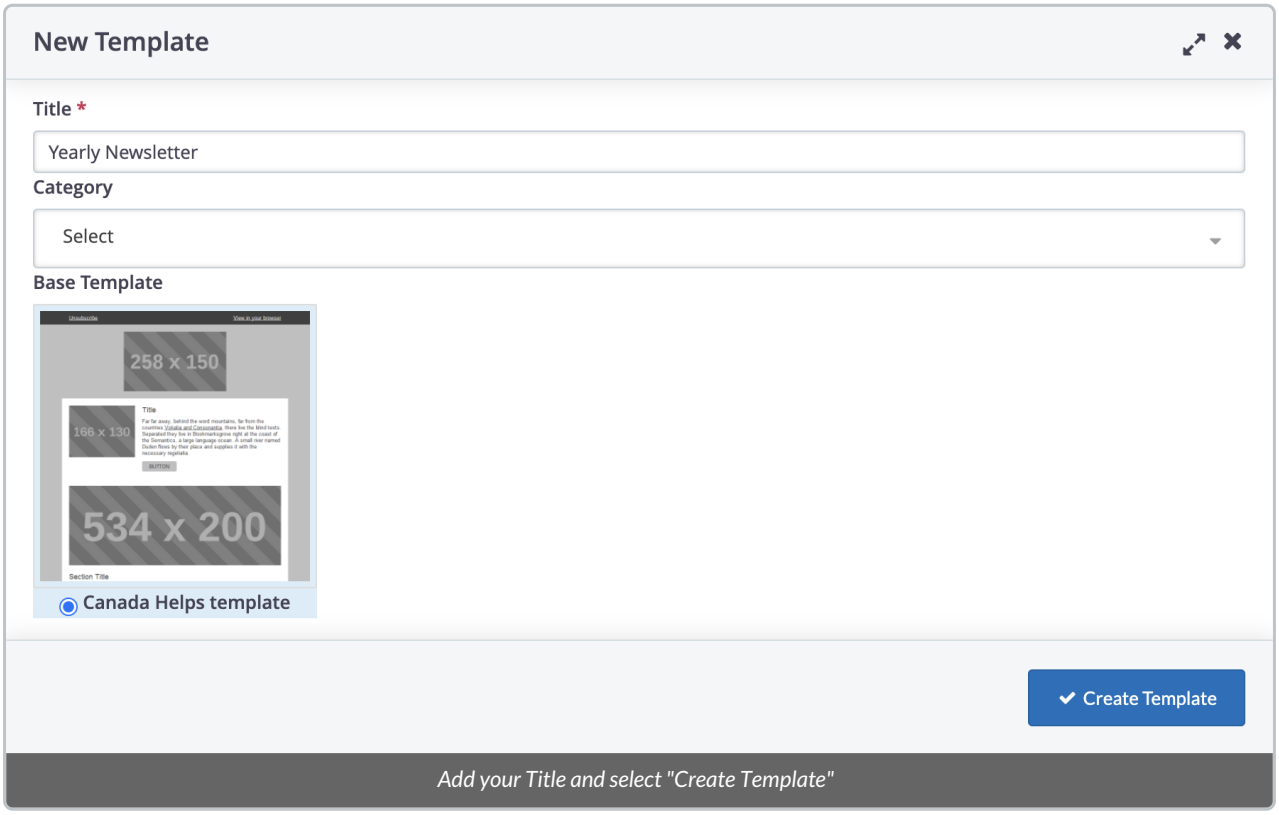


Create a new template

- ***Copy*** an existing Configured template, *Learn more about Cloning your existing DMS Mail Templates here*



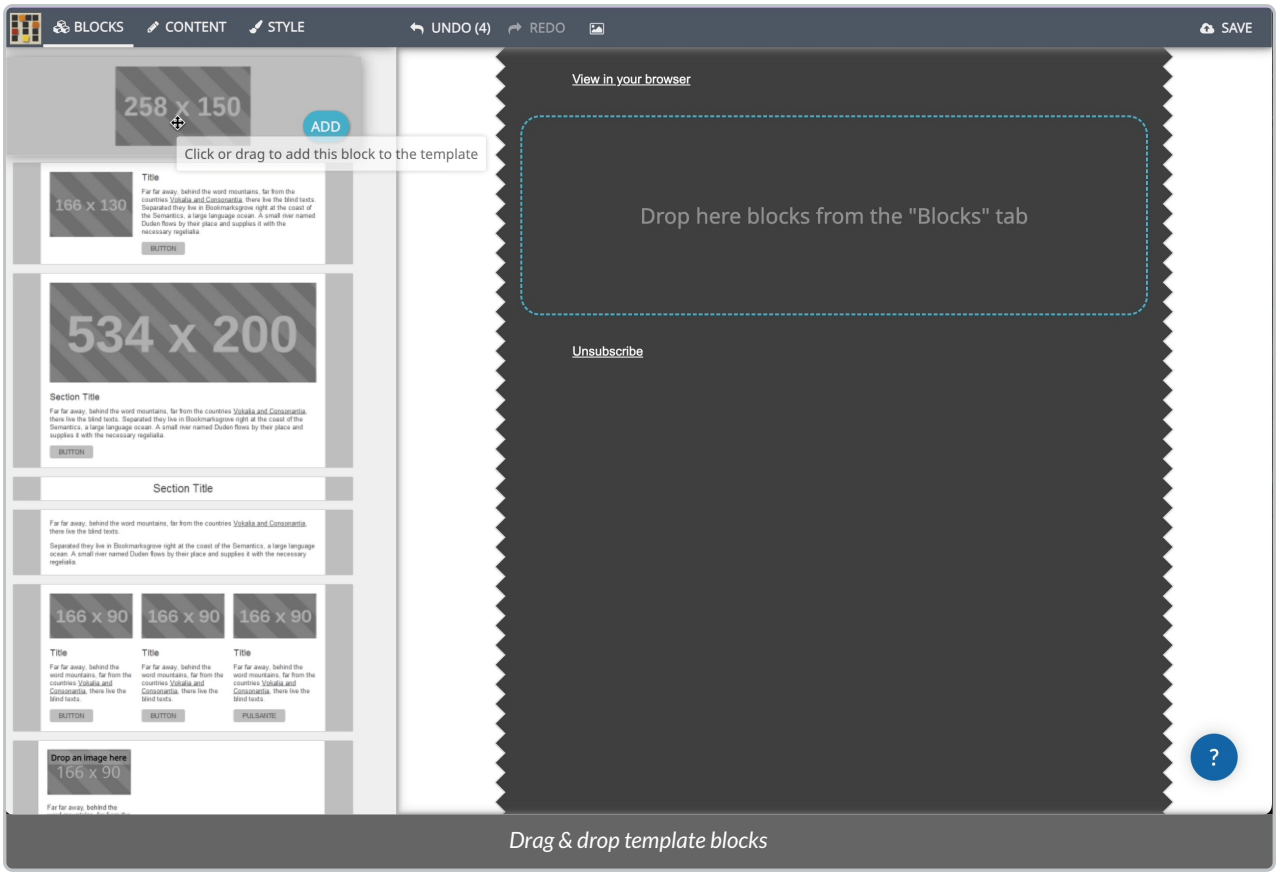
4. If you select ***New Template***, a pop-up modal will appear with next steps; add your Title and select ***Create Template*** to complete.



Customizing your bulk email templates

On completing creating your template either by copying an existing template or creating a new one, you will arrive in the template editor where you can build or modify your template suit your style.

1. Click **Add** or drag Template **Blocks** to customize your DMS Mail *(You can duplicate a block using the **copy icon** or remove a block with the **trash icon** as shown below)*

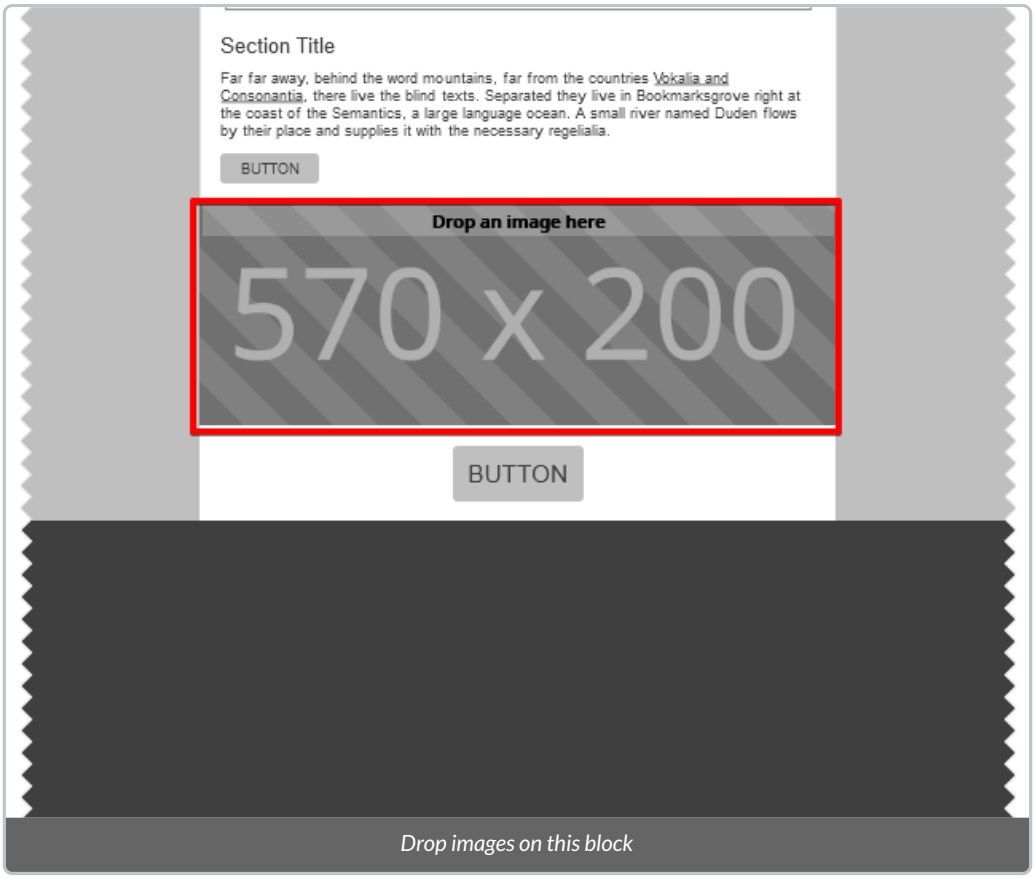


Drag & drop template blocks

Note: Blocks (i.e. images, text templates), Content (i.e. links), and Style (i.e. colour, font) of your template can be edited at any time by selecting the Blocks, Content, or Style headings in the top left corner.

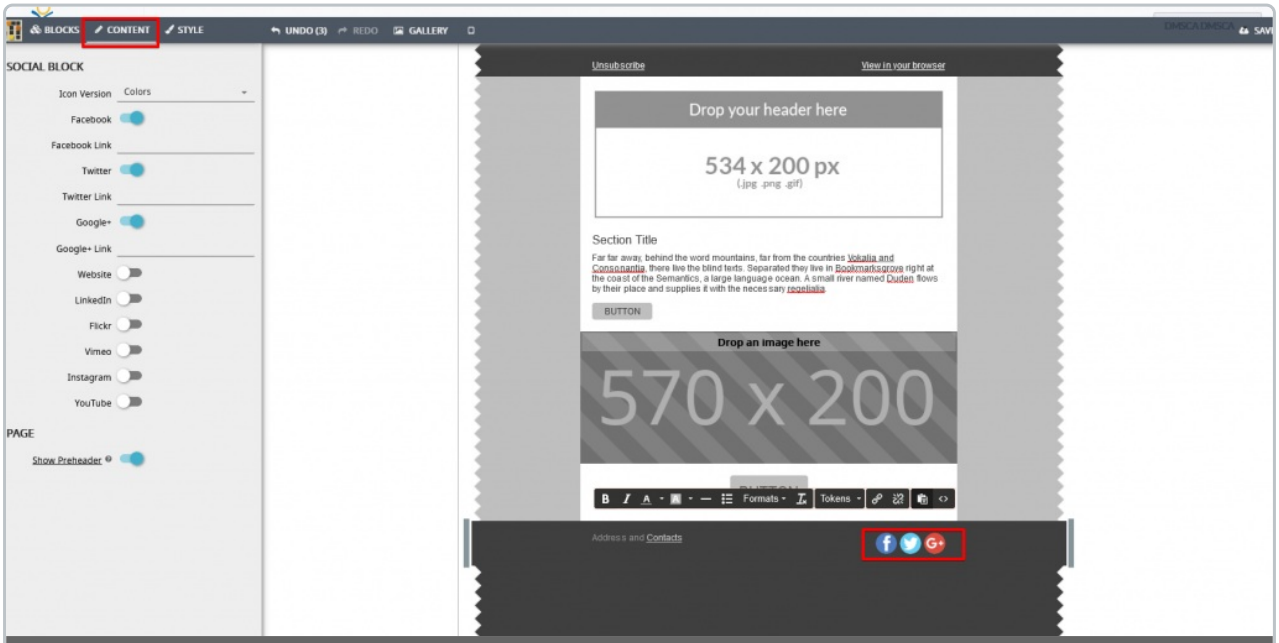
2. **Organize the Blocks** to your liking:

- Sections that are greyed out will allow you to drag and drop an image into your Bulk DMS Mail Template.
- You may also prefer to select the ***Upload New Image*** button on the bottom left corner.
- We recommend that you follow the suggested dimensions indicated in each image block.



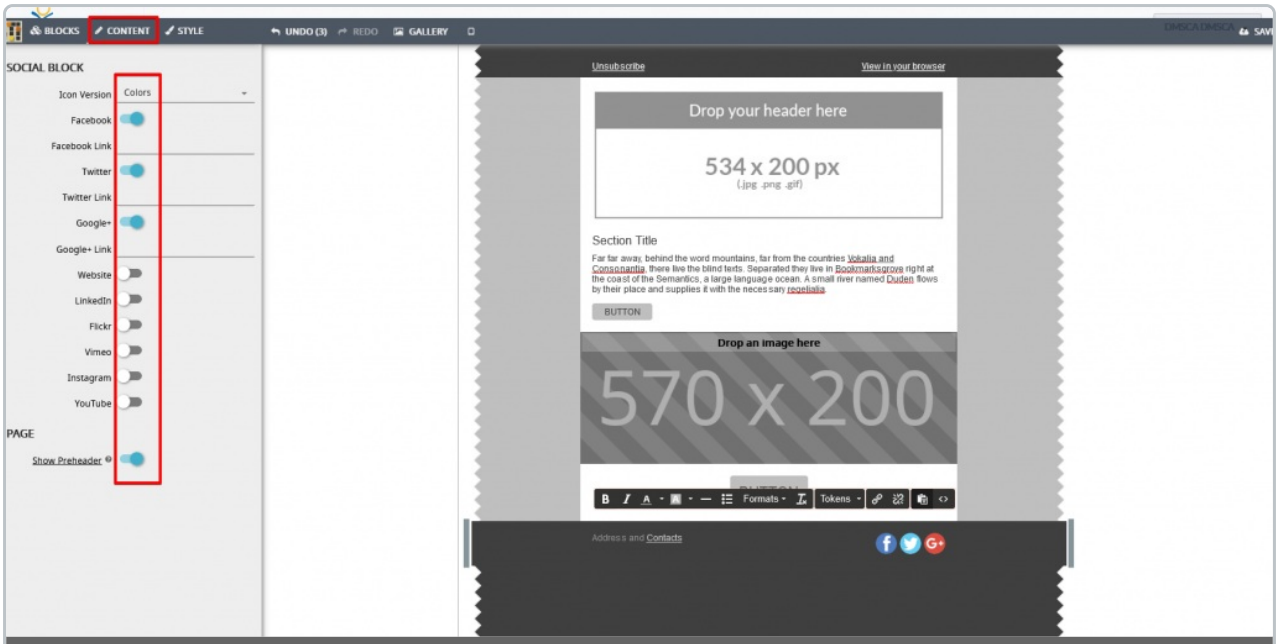
Drop images on this block

3. You may choose to **add a Social Media Block** to the bottom of your DMS Mail.



You can add a Social Media block

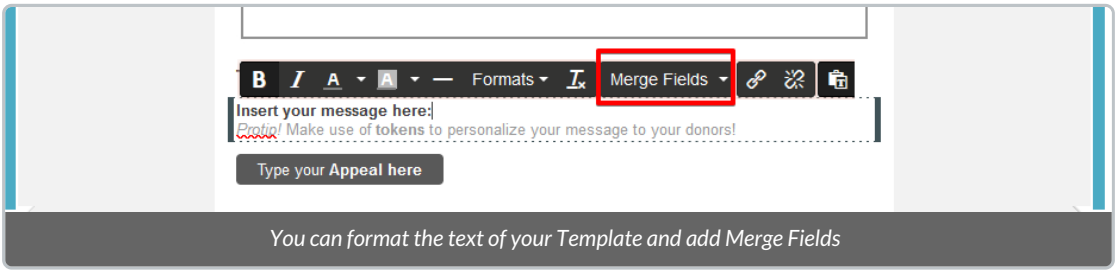
4. Select ***Content*** to customize the Social Media icons and colours or add your Social Media links.



*Customize your Social Media icons on the **Content** section*

5. Craft the body of your email by:

- Selecting the text within your chosen Blocks.
- You will have options to edit the Content of the Block and format the text (i.e. bold, italicize, colour, bulleted list).
- You can also add Merge Fields to this feature.



You can format the text of your Template and add Merge Fields

6. When ready, select ***Save*** to finish.

> **Tip:** Check out our in-depth guide on designing DMS Mails.

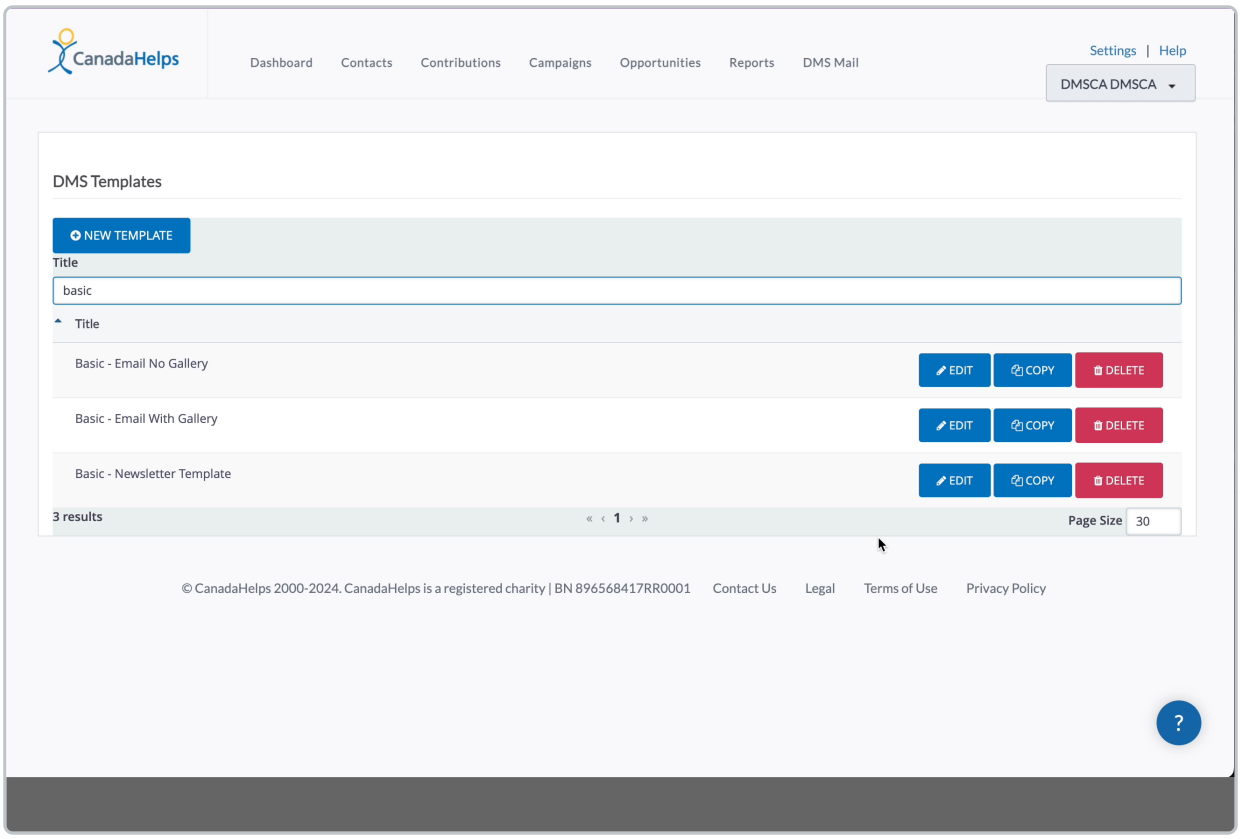
Managing your DMS Mail Templates

- Visit your **Settings**.
- Under ***DMS Mail*** section, select ***DMS Templates***

Delete a Template

To delete a template, select the ***Delete*** button; a confirmation pop-up will appear where you can choose to proceed

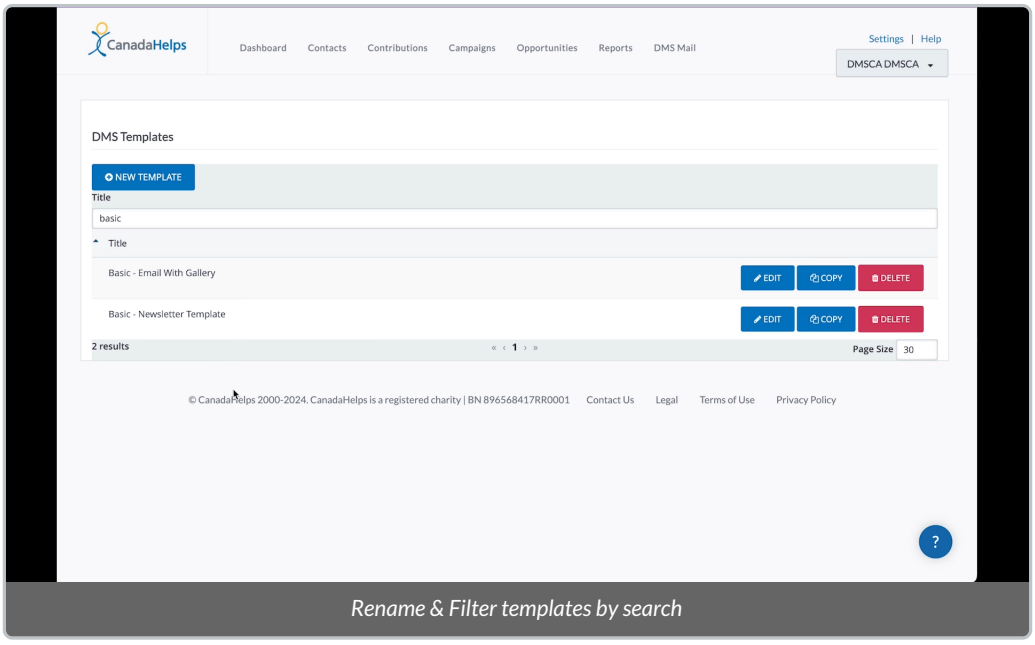
to delete or cancel.



*Under **Configured templates**, select your desired Template*

Rename, Search and Sort Templates

- ***Rename your template*** at any time by hovering on the ***Title*** of your template.
- **Filter** your templates by ***search*** using the ***search bar***.
- Sort your templates alphabetically by title (a to z / z to a) by clicking on the **'Title'** column header.



Rename & Filter templates by search