

Use the "Search" field at the top right to search for a help topic.

## PMail Templates

Creating a PMail starts often begins with selecting a template, an option conveniently found on the right side of the main page of the PMail function. PMail templates are organized under four (4) tabs:

- **System** – Templates that are shared across all districts using the DACdb system. These templates are created and maintained by the DACdb support team and cannot be modified by users. However, they can be accessed and then saved into other folders that users can maintain (e.g. Personal tab).
- **District** – Templates are shared across all users within a district. All users can view and use these templates; only Level-6+ users can modify and save templates into the district folder.
- **Club** – Templates are shared across all users within the club. All club users can view and use these templates. Only Level 4+ users can modify and save templates into the club folder. A Level-5 AG or Level-6 district admin can view these templates only if they emulate the club.
- **Personal** – These templates are unique to each member and can only be viewed by each member. Personal templates are unique within the district. Each time you send a message, a copy is saved as "MyLastEmail" in your Personal templates.

## Create a PMail Template

Go to Pmail in DACdb. There are numerous ways to get to Pmail, but for the purpose of this article, just click the "Pmail" icon.

Create your template in the editor window. You can add graphics, styles, etc.

Once you have your template the way you want it, save it by clicking the "Save" button at the top left of the editor's menu.



The "Save Template dialog" box will appear. Enter the following information:

Template Type. The choices here will depend on your security level. You will always have access to "Personal" (Your personal templates).

Template Name. You must provided a name for your template. Avoid using special characters (#!^@%\$\*& etc.) in the name.

Save Metadata. If set to 'yes', the template will be saved with the From Name, ReplyTo and Subject.

Replace Existing. If set to 'yes', the template will replace an existing template with the same name.

### Save Template

This function saves a custom or modified PMAIL message for re-use at a later time. Depending on your security level, the PMAIL message may be saved into folder areas that are shared by users on this system.

Template Type:	Club
Template Name:	My New Template <small>(Save default startup template using the name: <b>default.htm</b>) Special characters (~@\$%^&amp; etc.) are <b>NOT</b> allowed in the Template Name.)</small>
Save Metadata:	Yes <input type="checkbox"/> If 'yes', the template will be saved with the <i>From Name</i> , <i>ReplyTo</i> and <i>Subject</i> .
Replace Existing:	No <input type="checkbox"/> If 'yes', the template will <b>replace</b> an existing template with the same name.

Cancel Save

Click the "Save" button in the dialog box to save your template.

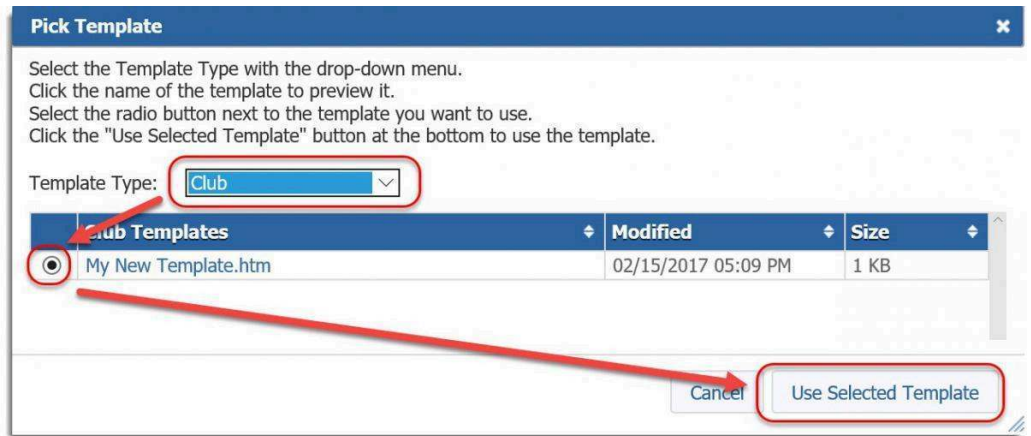
## Use a PMail Template

Go to Pmail in DACdb. There are numerous ways to get to Pmail, but for the purpose of this article, just click the "Pmail" tab.

Click the "Select Template" button in the upper right.



Select the "Template Type", then select the radio button (little circle) to the left of the template you want to use. Click the "Use Selected Template" button to load the template into the Pmail editor.



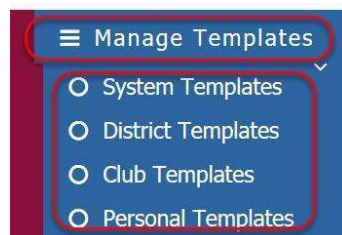
You can now alter your template or just send it to your recipients.

## Manage a PMail Template

You can **Add**, **Edit**, **Rename** and **Delete** templates from the Manage Templates page.

Go to Pmail in DACdb. There are numerous ways to get to Pmail, but for the purpose of this article, just click the "Pmail" tab.

Expand the "Manage Templates" menu section in the left navigation and select the Type of template you want to delete



Use the icons in the Action column to manage your templates.



**NOTE:** Moving your cursor over an icon will display a 'hint' for what the icon does.

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## **PMail EZ-Link Templates**

You can create a default template in Pmail to be used whenever you use Pmail. For example, if you always use the same template with a personal signature, you can save this as your default template.

**See the "Pmail Templates" help article for more information about *creating* and *saving* templates.**

### **Save a PMail Template as Your Default**

Simply save the template in your *Personal* folder named as "default.htm".

Whenever you enter the Pmail module, that template will be automatically displayed in the Editor area.