

TRAINING NOTES

Create Outlook E-mail Templates for Regular one-off Emails

Issue:

You send the same, or very similar, email response to an individual client or prospect regularly. Some of these include attachments. If you use mail merge to email for a standard document, selecting “merge to selected record” only, you have to remember to include these attachments. It’s a time consuming task.

Resolution:

In Outlook, you can create templates that contain text that you send on a regular basis. You can compose and save a message as a template, and then use that template whenever you need it. Just add any new or personalised text before you send the message. You can also include attachments which are saved with the email template.

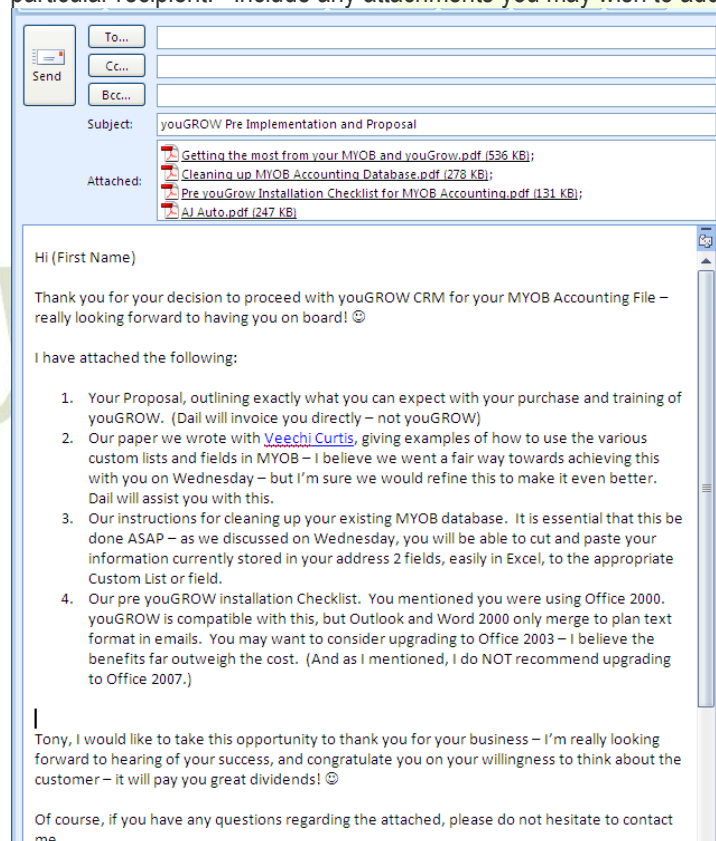
(Important: You cannot create an Outlook template if you are using Microsoft Office Word as your e-mail editor. To make sure you are not using Word as your e-mail editor, click the Tools menu in Outlook, click Options, and then click the Mail Format tab. Clear the check box next to Use Microsoft Office Word 2003 to edit e-mail messages, and then change the settings back after you have created the template.)

Instructions:

Create a mail template

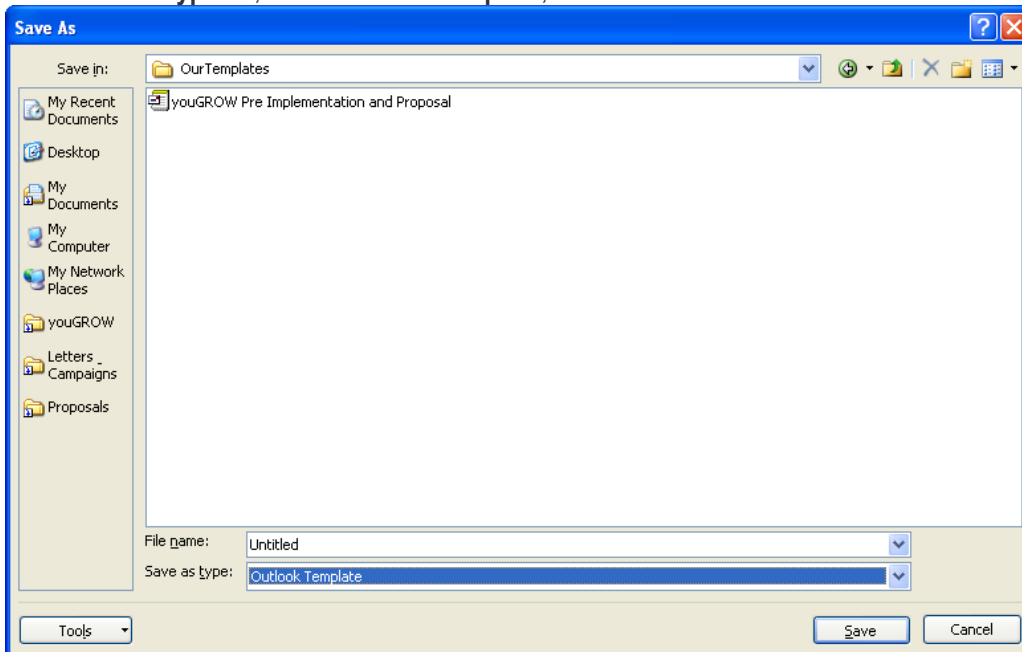
1. In Outlook, on the **File** menu, point to **New**, and then click **Mail Message**.

When the new message opens, give it an appropriate subject and compose your content (an example is shown below). Leave space for personalised information that you’ll add when you send the message to a particular recipient. Include any attachments you may wish to add.



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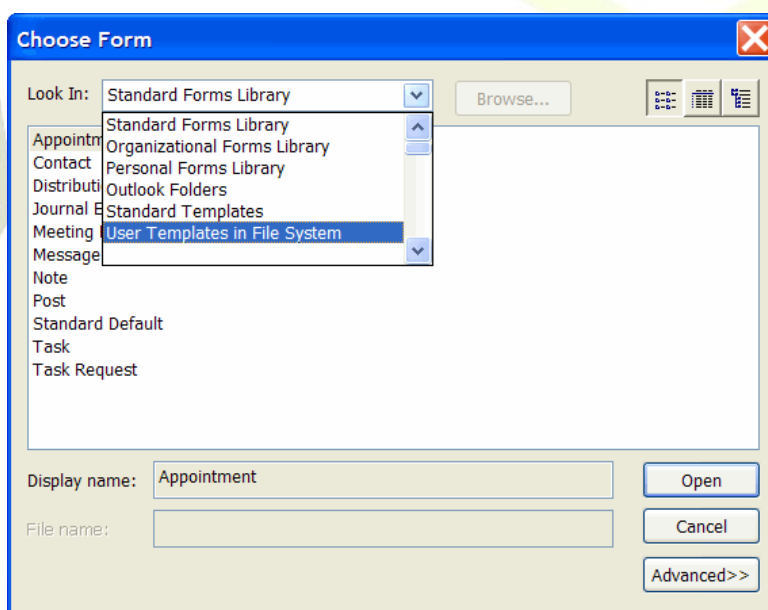
2. On the **File** menu, click **Save As**.
3. In the **Save as type** list, select **Outlook Template**, and then click **Save**.



4. Close the message that you used to create your template. If prompted to save the message, click **No**.

To Send a message using your template

- 1 From the Outlook Inbox, click the **Tools** menu, click **Forms**, and then click **Choose Form**.
- 2 Click the **Look In** box, and select **User Templates in File System** from the drop-down list.





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3. Select the template that you created in Step 1, and then click **Open**.
4. Personalise the message, add the recipient's e-mail address to the To line, and then click **Send**.

NB: You can also use this same process to create templates for Tasks and Calendar Appointments in Outlook. Task templates in particular are a great tool – especially when you have a number of tasks which must be completed say for one order or project, and these are all recurring, and very much the same. You can simply create the list of things to do in a normal task item, save it as a template, and then assign the task to others responsible within your organisation – nifty! 😊

