TRAINING NOTES

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

Issue:

You send the same, or very similar, email/s to individual clients or prospects regularly. Some of these include attachments. If you use mail merge to email for a standard document, you have to remember to select "merge to selected record" only – and you cannot include attachments in a mail merge.

Resolution:

In Outlook, you can create *templates* that contain information you send on a regular basis to individual contacts. 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.

Instructions:

There are 2 ways you can create a template:

1. From an existing Sent Email – or an email in your Drafts Folder; or
2. Starting from scratch.

I find it easier to find one I have sent previously. If it's something new, then I will start from scratch.

1. From an existing Sent Email – or an email in your Drafts Folder
   a. Find the email you want to turn into a template and open it
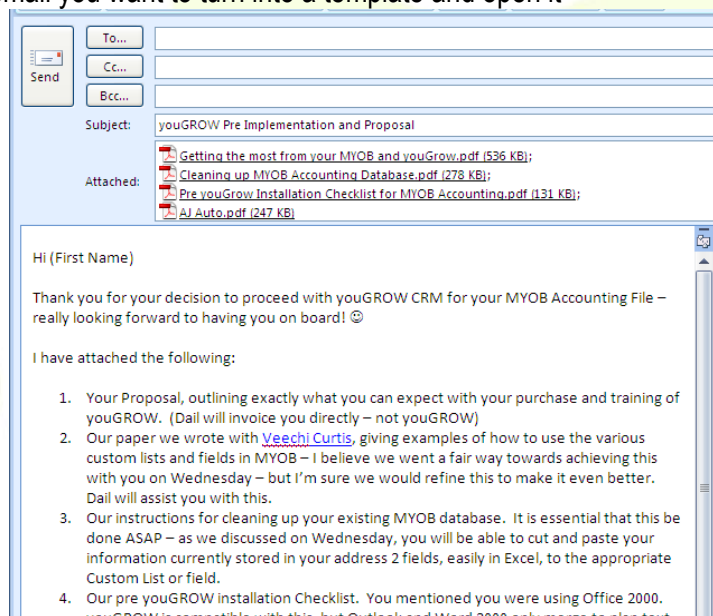
   b. Remove any email addresses in to "To" fields, and delete any Salutations or other personalisation. (You may want to highlight in red, those areas you need to personalise – or just leave blank)
   c. Add any attachments you may need
   d. Delete your automatic Outlook signature block – it will be added again when you use the template
   e. When you're happy with the email, go to File | Save As | and select "Outlook Template" from the drop down list in "Save As Type"
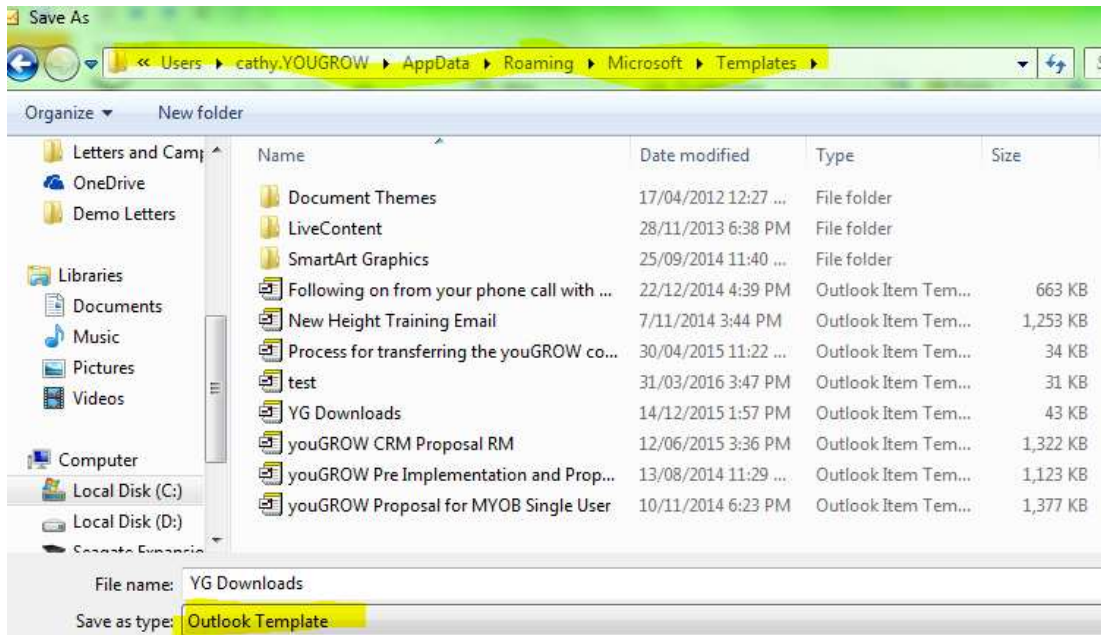
f. Give it a name which makes sense to you so you can easily find it.
g. Note the default location for Templates – C:users\username\AppData\roaming\Microsoft\Templates

2. **Starting from Scratch**
   a. Open a new email.
   b. Compose the email as you would normally – leave the To and Salutation fields blank – include any attachments you may need.
   c. Delete your automatic Outlook signature block – it will be added again when you use the template
   d. Follow the previous Steps from 1.d in this document.

To Send an Email using your template

1. Click on the down arrow next to **New Items** and select **More Items**
2. Click on **Choose Form**
3. The default location is "Standard Forms Library". Click on the down arrow next to this and select **User Templates in File System**
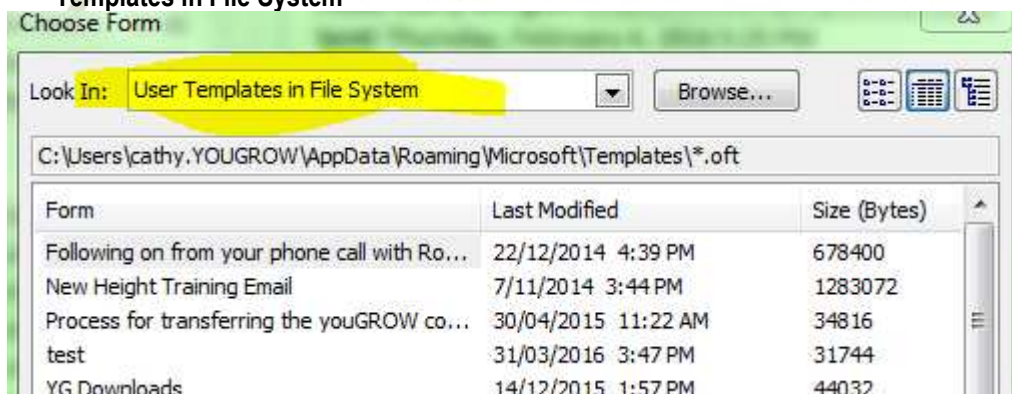
Select the template that you created in Step 1, and then click **Open**.

4. Select the template you want, personalise the message, add the recipient's e-mail address to the To line, and then click **Send**.

Creating a Short Cut to "Choose Forms"

There are 4 clicks in the above process to select a template. You can add a short cut to the Outlook menu to reduce this to 2 clicks only.

1. Right click on the down arrow on the Quick Access Toolbar and select **More Commands**
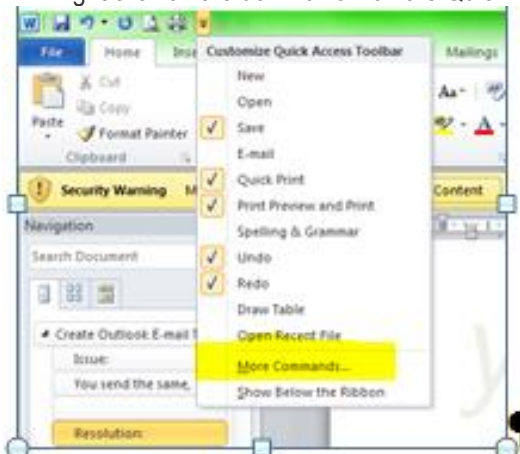
2. Click on "**All Commands**" and scroll down to "**Choose Form**" (they are in alphabetical order); select it and click "**Add**", and close.
3. Now you can just click on the shortcut to access your templates
4. Click here to see what else you can do to customise Office toolbars – can save you a lot of time.

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! ☺

Creating a Shared Outlook Template Folder for all users:

You can create templates for just individual users – or save them to a shared network drive so that all staff can access. There are ways to achieve this programmatically, but the quickest way is as below:

1. Create a new Directory Folder in a shared network drive – call it "Shared Outlook Templates"
2. Create a new template
3. Go to File | Save As | Select "User templates in File System", and click **Browse**
4. Navigate to the folder use created in Step one above and save

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Resources:

1. [Microsoft Template Training Video](#)

2. [Quick Guide to using templates](#)

3. If you're feeling adventurous, you can copy this macro to create a shortcut icon which will open a specific template - http://www.acumenitsupport.com/outlook/create-outlook-form-and-open-with-macro