

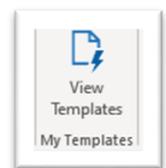


Outlook email templates are a great way to ensure consistency for messages that you regularly send to customers. They ensure your whole team is sending the same message and providing the information you want included in your business's emails.

Default templates

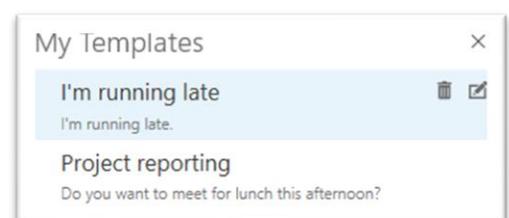
Outlook has templates available directly in the New Email window. However, these have limited functionality and are generally only useful for quick responses with little detail. In fact, there are some templates already created for quick messages regarding running late etc. You can modify these and add your own. To do this, open a New Email and you will see the templates to the far right of the menu items, where it says View Templates, My Templates.

Selecting this will display My Templates. Hover over them to delete or edit. Also, at the bottom is an Add option to create a new template for easy access.



The disadvantages of these templates are:

1. there is no functionality available other than a very basic message.
2. there is no subject line included with the message.
3. they are specific to you and cannot be used by your team.



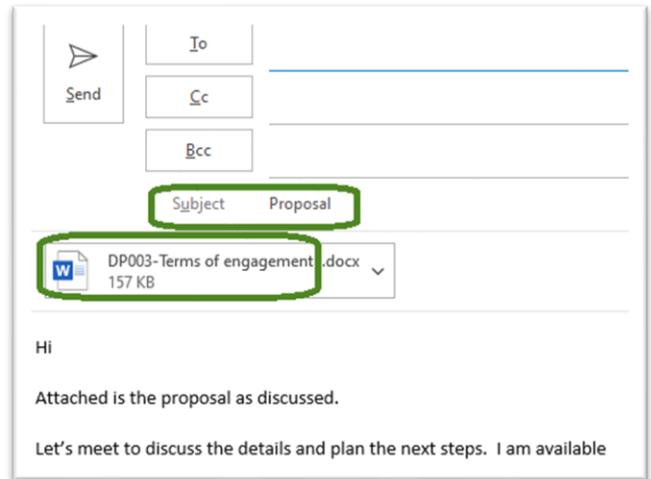
Custom templates

To create specific company templates is a little more complex but is worth the effort.

Start a New Email as usual and add the details that you want in the template, including the subject, any standard attachments for the subject of this template, and the templated content – see following example.

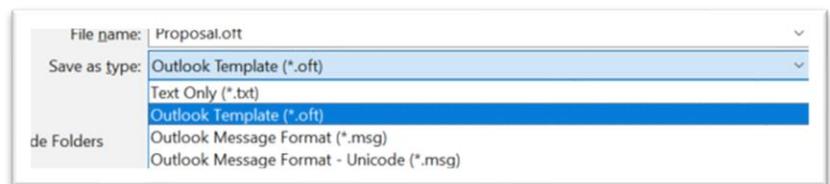
If you have Outlook set up to automatically include a signature in your emails (that is, this new email already has your signature added) **delete** your signature from this template. Each time you use the template, your New messages signature will automatically be applied to the message.

To save the template, the next steps are **critical** to its success.

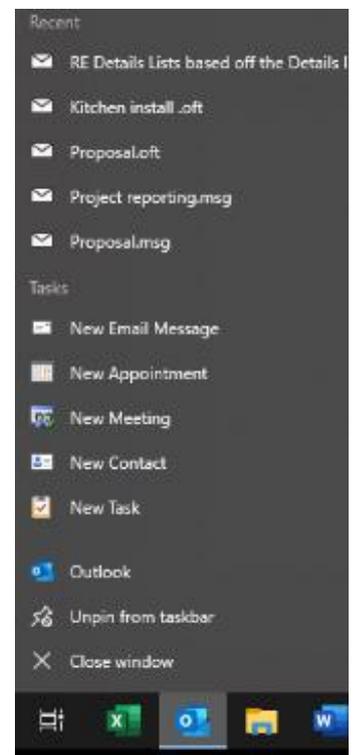


1. To ensure the templates are available for use by your team, create a folder specifically for the templates, with all other shared documents.
2. On your New Email message, select File, then Save As.
3. Locate your templates' folder.
4. Ensure the file name is relevant for the template so your team knows which template it is.

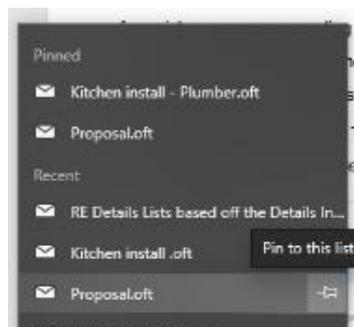
5. Ensure you select the Outlook Template (*.oft) as the Save as type to create as a template. This will be Outlook Message Format by default and needs to be changed.



6. When the template is used for the first time, it can be added to the Outlook list for easy access at any time, including when Outlook is not open. Right click on your Outlook icon (ideally this is pinned to your taskbar at the bottom of your screen) to display your Outlook list.
7. You will see that the template you have just saved is in your recent Outlook files.



8. By hovering over the specific template, you will see Pin to this list at the right of the list. Select this and your template will move to the top of the list with the pinned files. By repeating this with all your team, you can be reassured that they are all using the same messages but have the flexibility to add specifics as required.



9. To update the template, simply make the changes when you first open the template and repeat the Save As process outlined above to re save the file. Provided you are simply resaving the same file (name), your team will pick up the new template from their Pinned Outlook file when they next use it.