

TechRepublic Create easy-to-use Outlook e-mail templates?

Do you find yourself typing the same text over and over again in certain types of Outlook e-mail messages? You might change some of the content based on the situation, but for the most part the text is basically the same. For example, you may regularly send technical notifications to network users that provide new information along with a series of precautionary steps that almost never change.

The typical way to handle this type of boilerplate text is with a copy and paste operation. A more sophisticated approach is to use Word as your e-mail editor and drop in AutoText entries for the standard text. But perhaps the most efficient approach is to design templates you can use to create standard e-mail messages. You can even create a menu containing your templates so you can instantly open a new message based on the template you want. Here's a look at how this works.

Before you start: Enable the Outlook e-mail editor

If you've configured Outlook to use Word as your e-mail editor, you'll need to temporarily switch to using the Outlook e-mail editor before creating templates. When you're finished, you can switch back to using Word and the templates will work just fine.

To make Outlook your e-mail editor, follow these steps:

1. Go to Tools | Options and click the Mail Format tab.
2. Deselect the Use Microsoft Word To Edit E-mail Messages check box (**Figure A**) and click OK.

To switch back to using Word as your editor, just go back to the Mail Format tab and reselect that option.



Figure A

Creating a template

When you're ready to create a template, open a new message window as you normally would. Enter the boilerplate text into the body of the message. If the message template will contain the same words in the subject line, you can fill in the Subject field as well. You can also fill in the To, Cc, and Bcc fields with addresses if you will always be sending the message to some of the same people (the Cc and Bcc fields are the most likely candidates for this).

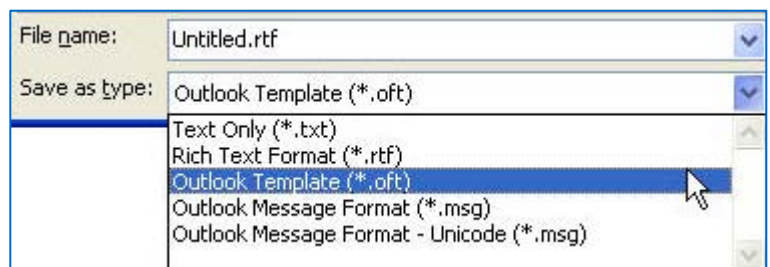


Figure B

Now, go to File | Save As to open the Save As dialog box and choose Outlook Template (*.oft) from the Save As Type drop-down list, as shown in **Figure B**.

Give the template a filename and take note of the folder in which the template is being saved. Initially, Outlook will use the default template folder, but you can change the location if you want. Just make sure you remember where you put it so you can link to it later.

After you save the template, the new message window will stay open. You don't need it anymore, so you can close it and click No when asked if you want to save changes.

Note

If you have Outlook configured to AutoSave unsent messages, you'll find a copy of the message in the Outbox. You can simply open the Outbox and delete the message.

The standard way to use an Outlook template isn't much quicker than using the copy and paste operation. You have to go to Tools | Forms | Choose Form. Then, you use the Look In drop-down list to locate and select the template. To streamline the process, we'll create a menu with options to open a template-based message.

Creating the menu

To create the menu, right-click on an Outlook toolbar and choose Customize from the shortcut menu to open the dialog box shown in **Figure C**. Then, click on the Commands tab, scroll to the bottom of the Categories list box, and choose New Menu. The New Menu item will appear in the Commands list box, as shown in **Figure D**.

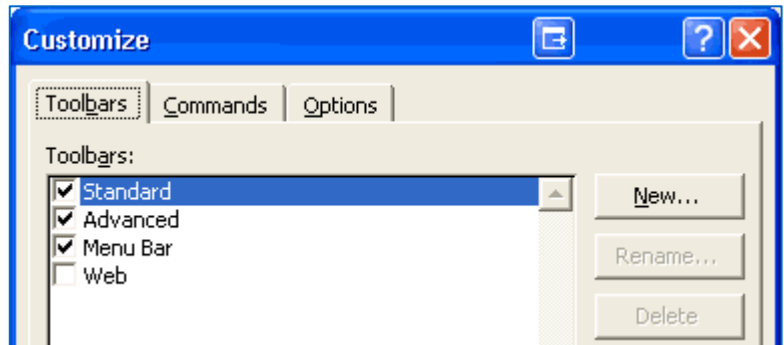


Figure C

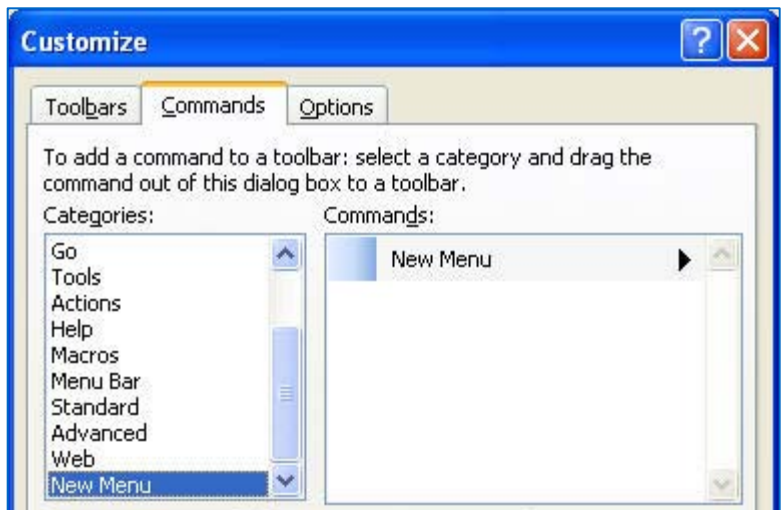


Figure D

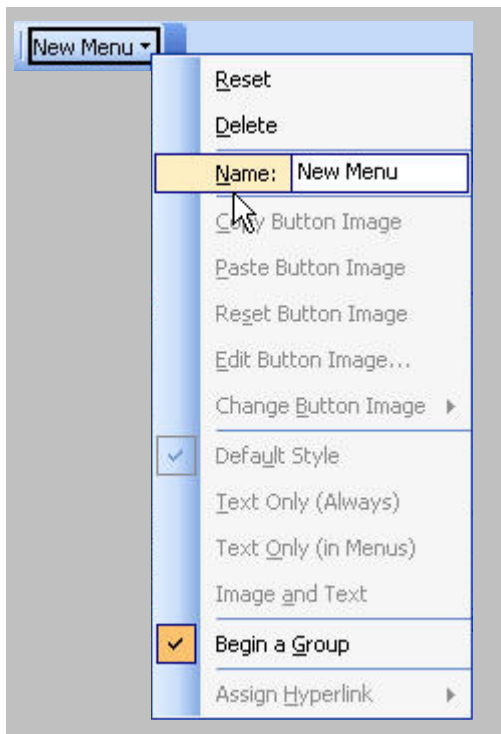


Figure E

Drag the New Menu item to the toolbar where you want your menu to appear. For this example, we'll place it at the end of the Standard toolbar. Once the New Menu item appears on the toolbar, right-click on the item to access the options shown in **Figure E**. Replace the default name in the Name field with *E-mail Templates* and press [Enter].

Adding templates to the menu

With the drop-down menu in place, all that's left to do is add buttons that link to your templates. In the Customize dialog box, choose File from the Categories list box. Then, select Mail Message from the Commands list box and drag it to the E-mail Templates menu. When the menu opens, drop the Mail Message item on it (**Figure F**).

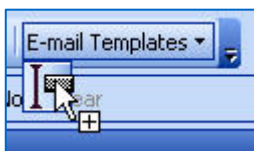


Figure F

Right-click on the item and replace the default Name field entry with the name of one of your templates (or a name that denotes the template; it doesn't have to be the actual template name). Then, click Assign Hyperlink at the bottom of the menu and select the Open command, as shown in **Figure G**. In the Assign Hyperlink: Open dialog box, locate and select your template file, as shown in **Figure H**, and click OK.

Just repeat these steps to add any other templates you want on the menu. When you're finished, close the Customize dialog box.

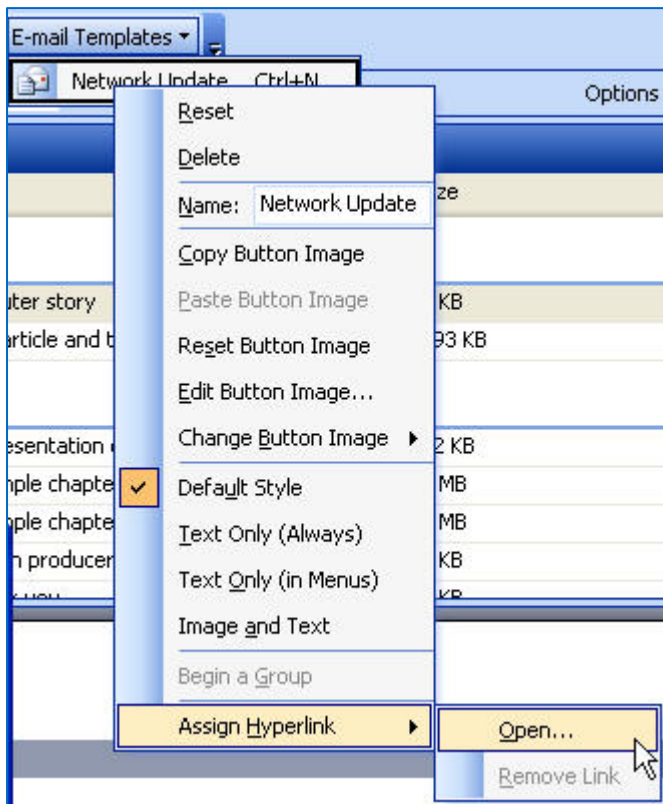


Figure G

Variation: Create a dedicated toolbar

We took the easy route and put our menu on an existing Outlook toolbar. But if you prefer, you can create a new toolbar to hold your templates menu.

To create a new toolbar, open the Customize dialog box. On the Toolbars tab, click New and enter a name in the New Toolbar dialog box, shown below. Click OK, and Outlook will create an empty toolbar. Now, you can click the Commands tab and follow the steps outlined earlier to create a menu and add buttons for your templates.

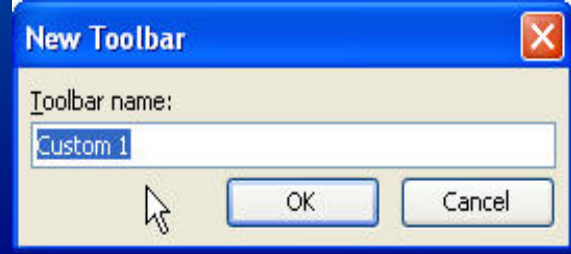
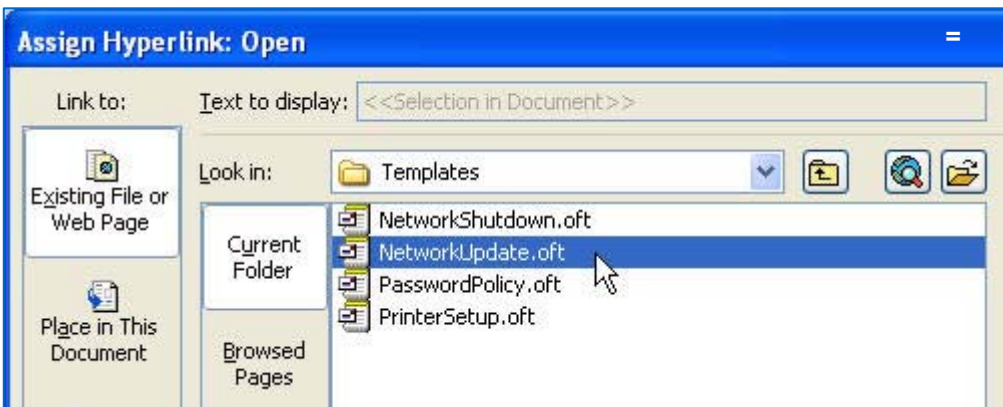
A screenshot of the 'New Toolbar' dialog box in Outlook. The dialog has a title bar with 'New Toolbar' and a close button. It contains a 'Toolbar name:' label and a text box with 'Custom 1' entered. There are 'OK' and 'Cancel' buttons at the bottom.

Figure H

Now, anytime you need to compose an e-mail message that will include specific version of boilerplate text, pull down the E-mail Templates list and select the appropriate template, as shown in Figure I.

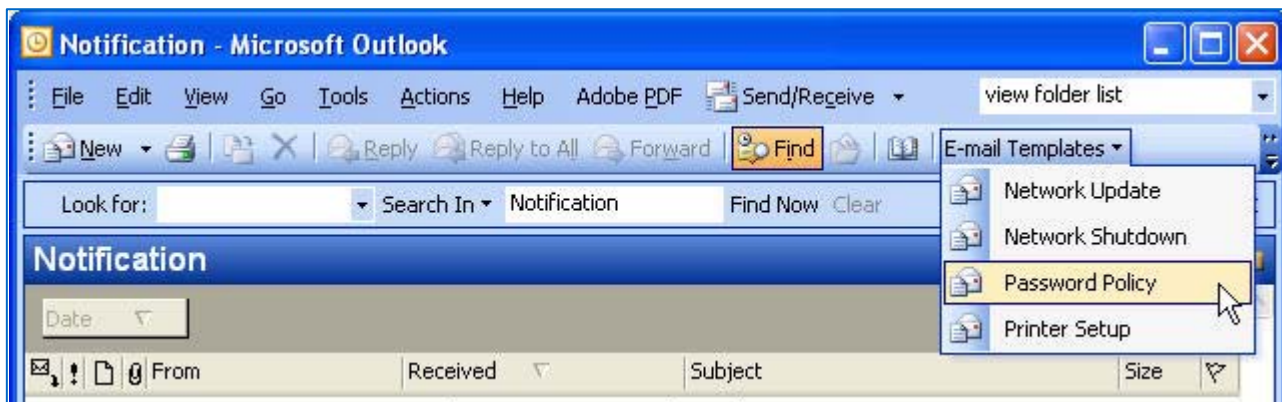


Figure I

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Version history

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