

SETTING UP TEMPLATES IN OUTLOOK

Lawyers can create templates for email messages they send frequently (i.e., confirmation of appointments to clients, etc.). These instructions are for Microsoft Outlook 2016, but the steps described may be helpful in creating templates in other email programs.

Create a Template

1. With Microsoft Outlook open, click the **Home** tab.
2. Click **New Email**.
3. Type an appropriate subject line for the template (i.e., Appointment Confirmation). Then type the text and information in the body of the message (i.e., a greeting, appointment date and time, etc.). Add your signature, as needed.
4. Click the **File** tab. Select **Save As**. The Save As dialog box will appear.
5. In the **Save as type** field, select **Outlook Template**.
6. In the **File name** field, type a name for your template. (Before you click Save, confirm the folder location of your template.)
7. Click **Save**.

Use the Template

1. With Microsoft Outlook open, click the **Home** tab.
2. Click **New Items**. A dialog box will appear.
3. Select **More Items**. Another dialog box will appear.
4. Select **Choose Form....** The Choose Form dialog box will appear.
5. In the **Look In:** box, select **User Templates in File System**. (**Browse** and select the appropriate folder, if needed.)
6. Select the appropriate template. Click **Open**. Your template will open as a new email message.
7. Customize the message as needed.
 - a. Enter a recipient in the **To...** field.
 - b. Edit the **Subject**, as needed.
 - c. Edit the body of the message, as needed.
8. Click **Send**.

IMPORTANT NOTICES

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