

Get Organized: How to Set Up Email Templates



BY JILL DUFFY SEPTEMBER 17, 2012 4 COMMENTS

If you regularly copy and paste the same old email into a new message, you could be introducing more errors than you realize. Learn how to set up Outlook and Gmail to do the same job, only more efficiently.

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In both the workplace and in our personal lives, many of us send what is essentially the same email over and over again. It might say something like, "Here are the weekly sales numbers..." or "Honey, please remember to mail the rent on or before..."

If you're a reasonably organized and efficient person, you might copy and paste the previous email into a new message whenever it's time to send that regularly sent email. It's not a bad method, but it does leave you open to introducing errors. You might forget to update the subject line, date, a financial figure, a data point, and so on.

 **GET ORGANIZED**  When I first started my career in media and publishing, I was essentially a line editor for some academic journals, working with typesetters who typed in the changes that I marked up on the files. The most important rule I learned in how to mark up articles for typesetters was this: The fewer keystrokes they have to make, the fewer chances they have of introducing errors. In other words, my job was to correct any typos and get the authors' changes onto the page while also minimizing how much typing the typesetters had to do.

Along the same lines, when you reuse an old email, you have to input a lot of unnecessary keystrokes, like deleting and then updating the subject line, changing key pieces of information, and so forth.

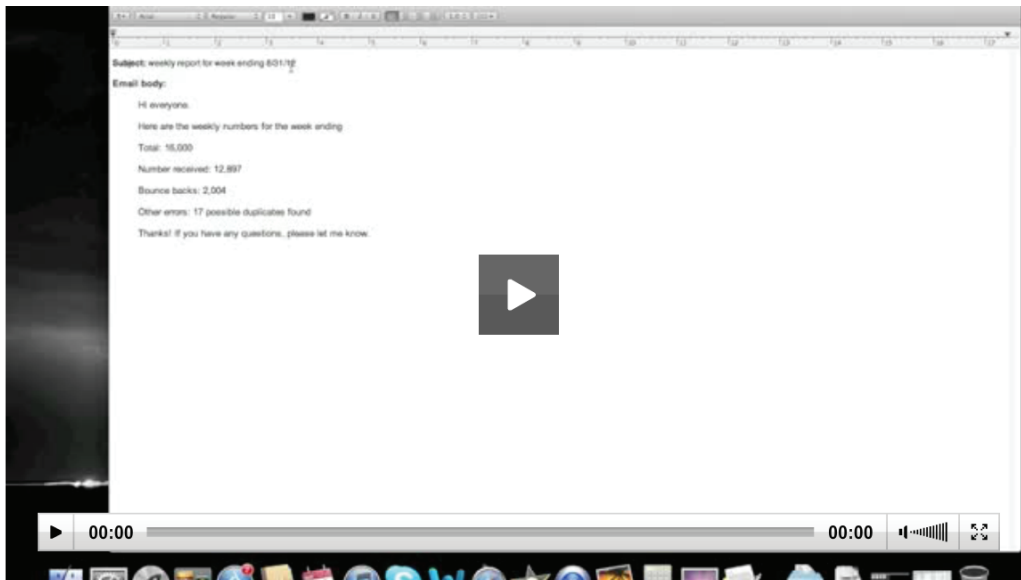
Along the same lines, when you reuse an old email, you have to input a lot of unnecessary keystrokes, like deleting and then updating the subject line, changing key pieces of information, and so forth.

A better system is to set up emails that you can reuse over and over more efficiently, an "email template" (Microsoft Outlook's term) or "canned response" (Google's term)

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An email template is exactly what you'd expect it to be, an outline of an email with blank space where updated information will appear. When you provide yourself with a blank space instead of a number or piece of data to update, you're making fewer keystrokes, and thus reducing the number of errors you might introduce. You'll never accidentally sent last week's report numbers; the worst thing that could happen is you leave something blank, in which case, the recipients will immediately notice and ask you for the missing data. If you send the wrong information, though, the recipients may never know it.

Here's how to set up email templates in two of the most often used email programs: Outlook and Gmail.

How to Set Up an Email Template in Outlook

Outlook refers to these kinds of regularly sent messages as "email templates." The feature is available in the desktop program of Outlook, but it's not available in Outlook.com.

In Outlook 2007. Start a new email message. Type in the body of the email and subject line as much information as you will need to reuse, being sure to leave yourself a clear and visible blank space wherever you are going to enter new information each time you send the message. Here is an example:

Subject line: Weekly Pageview Report for week ending
Here is the weekly pageviews report for the website.

Date:

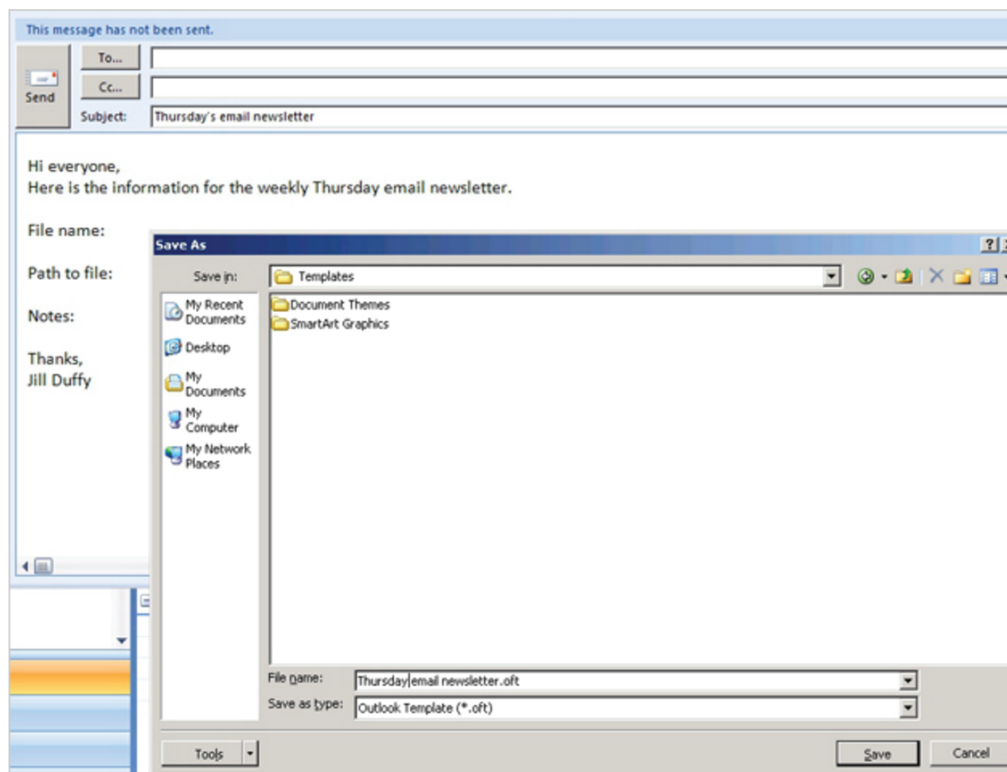
Body:

Pageviews:

Thanks everyone! Please let me know if you have any questions.

In the upper left corner of the message box, go to the File > Save As.

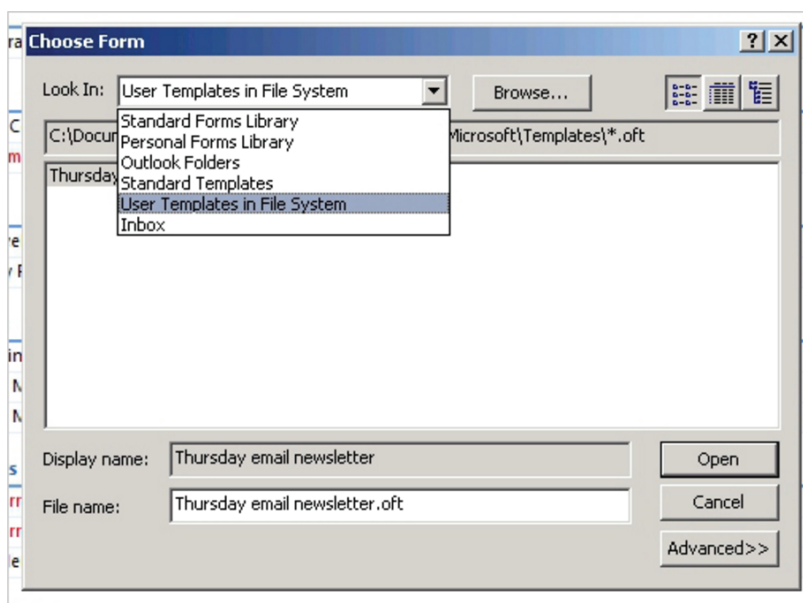
In the dialog box that appears, you have to change the file type to Outlook Template (*.oft). You can then name your template whatever you'd like.



When you're ready to compose a new message using the template, the process for getting to the template is actually a little bit inefficient, unfortunately.

Go to New > Choose Form

and in the top drop-down selection box, pick User Templates in File System. Any templates you've saved should be there. Pick the one you want, and it will open as a new email message, which you can update as appropriate.

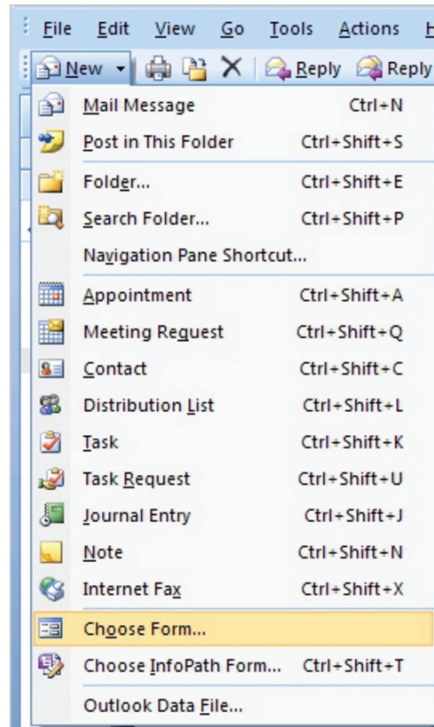


In Microsoft Outlook 2010. Start a new email message. Type in the body of the email and subject line as much information as you will need to reuse, being sure to leave yourself a clear and visible blank space wherever you are going to enter new information each time you send the message. (See the sample above.)

When you've finished designing your template, go to the File tab and choose Save As.

In the dialog box that appears, you have to change the file type to Outlook Template (*.oft). You can then name your template whatever you'd like. Hit Save.

When you're ready to use the template, go to New Items > More Items > Choose Form



and in the top drop-down selection box, pick User Templates in File System. Any templates you've saved should be there. Pick the one you want, and it will open as a new email message, which you can update as appropriate.

Distribution list. You'll probably want to pair an email template with a distribution list so that you can send the message to a group of people in one shot.

Go to the Contacts section of Outlook. Choose New > Distribution List.

If you're using corporate or business email, you're best bet is to Select Members rather than use the function called Add New. Select Members will probably bring up the list of users available on your business's email system. On the other hand, Add New lets you type in an email address manually.

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Gmail doesn't have a pre-installed templates feature, but there is one in the Labs section of Gmail. Labs is an experimental side of Gmail, and Google gives you fair warning that any features you find in Labs could disappear or change or stop being supported at any time. Despite those words of warning, the "Canned Responses" feature has been available in Gmail for a number of years. I wouldn't worry too much about it disappearing.

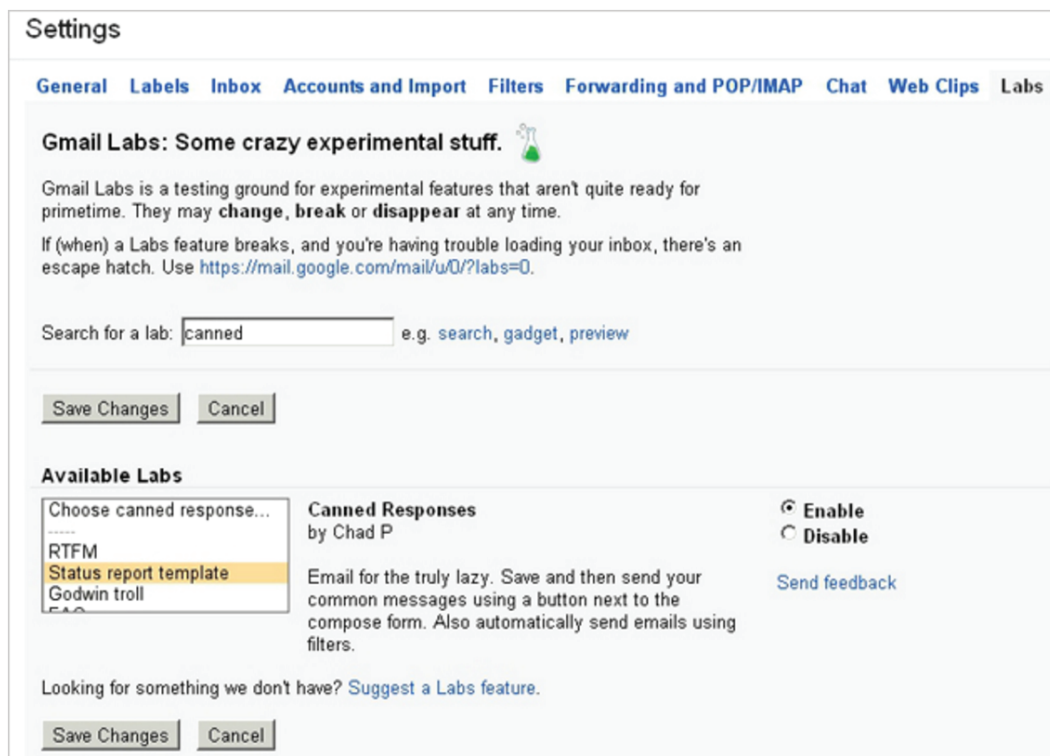
One minor issue I have with Gmail's Canned Responses: it doesn't save your subject line, only the body copy.

To use templates in Gmail, you have to first enable Canned Responses from the Labs area.

Go to your Gmail Settings (by pressing the cog icon in the upper right corner).

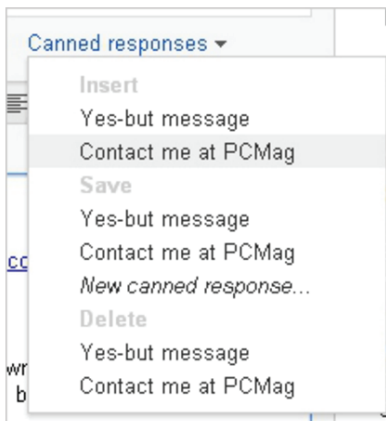
Choose Labs, and then in the box called "Search for a lab," type, "Canned Responses."

Select Enable.



The screenshot shows the Gmail Settings page for the 'Labs' section. At the top, there are tabs for 'General', 'Labels', 'Inbox', 'Accounts and Import', 'Filters', 'Forwarding and POP/IMAP', 'Chat', 'Web Clips', and 'Labs'. The 'Labs' tab is selected. Below the tabs, the heading reads 'Gmail Labs: Some crazy experimental stuff.' followed by a warning icon. The text explains that Gmail Labs is a testing ground for experimental features that aren't quite ready for primetime and may change, break, or disappear at any time. It also provides an escape hatch URL: <https://mail.google.com/mail/u/0/?labs=0>. Below this is a search box containing the text 'canned' and a list of suggestions: 'e.g. search, gadget, preview'. There are 'Save Changes' and 'Cancel' buttons. The 'Available Labs' section shows a list of labs with a dropdown menu open, displaying options like 'Choose canned response...', 'RTFM', 'Status report template', and 'Godwin troll'. The 'Canned Responses' lab by Chad P is selected and has its 'Enable' radio button checked. There is also a 'Send feedback' link. At the bottom, there is a link to 'Suggest a Labs feature.' and another set of 'Save Changes' and 'Cancel' buttons.

Once Canned Responses is turned on, it will appear as an option on the screen when you compose a new message.



To create a new canned response, just type into the body of the email whatever you want to be in your template. Then go to the canned responses link that appears right on the message box and choose *New canned response* (there's a "Save" label just above it). Type in the name you want for the template.

When it's time to use that canned reply, start a new message with the compose button, and go to the canned response link that appears—it's the same one you use to save a canned reply (see above). Just choose the name of the canned response that you need.

Use Email Templates for Efficiency

Using email templates and canned responses can save you time, but, more importantly, reduce the chance of introducing an error into an important message. They make sending regularly email messages much more efficient.