

## 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 desktop and web-based versions of Microsoft Outlook for Microsoft 365, but the steps described may be helpful in creating client folders in other email programs.

### Create a Template

Desktop-based Outlook:

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**.

Web-based Outlook:

1. With Microsoft Outlook open, click the **Home** tab.
2. Click **New Email**.
3. Click the **More Options** icon, which is represented by three dots, then select **My Templates**. If this is your first time using templates in Web-based Outlook, you may be prompted to approve an add-in.
4. Under **My Templates**, select **+Template**.
5. Name your template, and then type the text and information for the body of the message. At present, it is not possible to create a template that includes a subject line or signature.
6. Click **Save**.

### Use the Template

Desktop-based Outlook:

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**.

## SETTING UP TEMPLATES IN OUTLOOK

Web-based Outlook:

1. With Microsoft Outlook open, click the **Home** tab.
2. Click **New Email**.
3. Click the **More Options** icon, which is represented by three dots, then select **My Templates**.
4. Select from the menu of saved templates. The body of the email will populate.
5. Customize the message as needed.
  - a. Enter a recipient in the **To** field.
  - b. Type an appropriate subject line.
  - c. Edit the body of the message, as needed.
6. Click **Send**.

### IMPORTANT NOTICES

This material is provided for informational purposes only and does not establish, report, or create the standard of care for attorneys in Oregon, nor does it represent a complete analysis of the topics presented. Readers should conduct their own appropriate legal research. The information presented does not represent legal advice. This information may not be republished, sold, or used in any other form without the written consent of the Oregon State Bar Professional Liability Fund, except that permission is granted for Oregon lawyers to use and modify these materials for use in their own practices. © 2023 OSB Professional Liability Fund