Save time with templates in Outlook

Quick Reference Card

The logic for creating templates

You create a template when:

- You constantly recreate or customize a message, appointment, task, or other Outlook item.
- You repeatedly enter the same data, such as multiple contacts for a single organization.

You don't need templates for things that you set to recur automatically, such as a weekly meeting or that pesky reminder to clean out your Inbox every Tuesday morning.

Create a template

1. Create a new email message, meeting, task, or other item that you want to save as a template.
   For example, in Mail view, go to the **Home** tab and click **New E-mail**. In Calendar view, click **New Meeting**, in Task view, click **New Task**, and so on.
2. In that new item, add any information that you want to include in the template. Typically, this is information that doesn't change, or that you'd have to enter repeatedly.
   For example, you might add a list of recipients to an email message, a meeting location to an invite, a company name and mailing address in a contact, or anything else you find yourself repeating.
3. When you finish the message or other item, click the **File** tab for that open item, and then click **Save As**.
   The **Save As** dialog box appears.
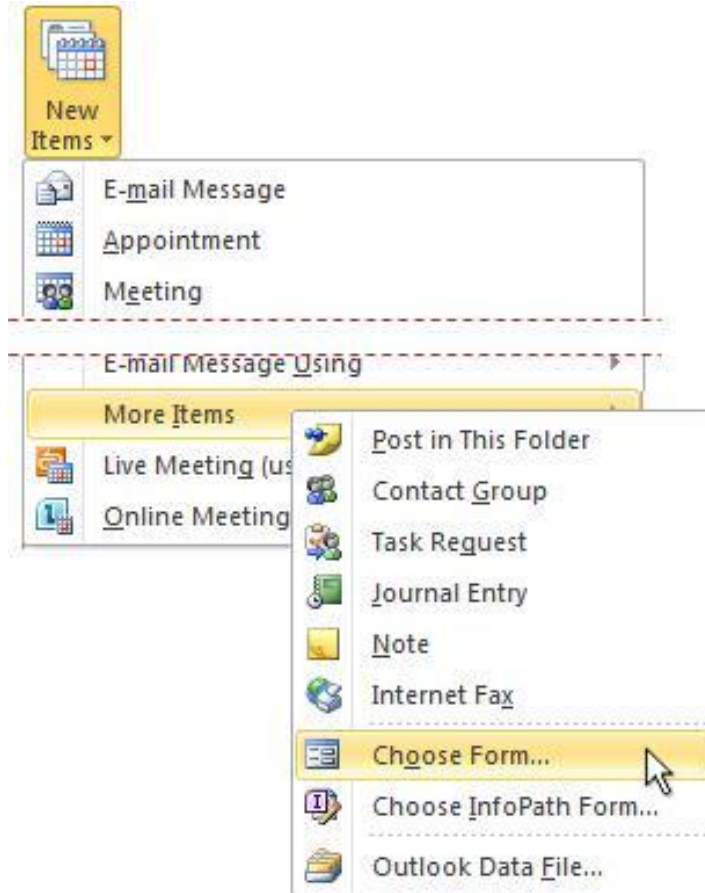4. Open the **Save as Type** list and select **Outlook Template**.
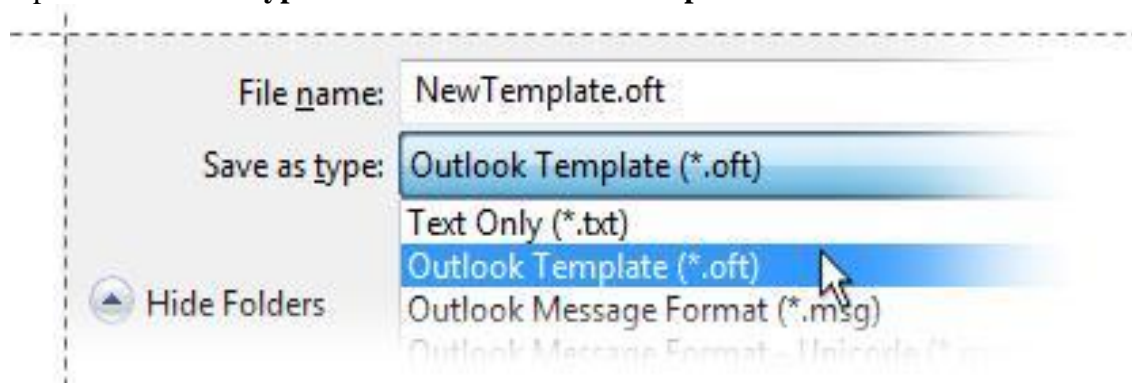
5. Enter a name for the template and click **Save**.
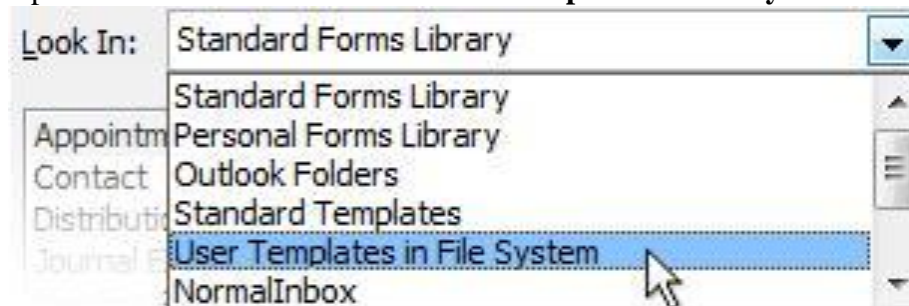
Your template is now ready to use.

Use a template

You follow these steps when you're working in mail, your calendar, your contacts, and so on.

1. On the **Home** tab, in the **New** group, click **New Items**, point to **More Items**, and then click **Choose Form**.

2. Open the **Look In** list and select **User Templates in File System**.

   Important   You must select **User Templates in File System**. If you don't, you won't see your template.

3. Click the template you want to use and click **Open**.

4. Fill in any new or missing information, such as dates or new recipients, and then send the message or meeting invitation, save the new contact or task, and so on.

Share a template

1. On the **Home** tab, in the **New** group, click **New Items**, point to **More Items**, and then click **Choose Form**.
Open the **Look In** list and select **User Templates in File System**.
Important You must select **User Templates in File System**. If you don't, you won't see your template.
2. Click the template you want to share and click **Open**.
3. In the open template, click the **File** tab, and then click **Save As**.
The **Save As** dialog box appears.
4. Open the **Save As Type** list and select **Outlook Template**. Do this step now, or Outlook will save the template to your local drive.
5. Navigate to your network location, such as a mapped network drive. If you need help doing this, contact your IT department, or the knowledgeable guy down the hall.
6. In the **File name** box, enter a name for your template, and then click **Save**.
7. Send an email to your coworkers about the new template.

Suggested email message for shared templates

Here's a suggested message you can copy and paste. Feel free to adapt this to your own needs.

Hi, all:

You'll find a handy new <insert type of template here> template that should save time.

To save the file to your drive:

1. Go to <network location> and double-click <template name>. That opens the file.
2. In the open template, click the **File** tab and then click **Save As**.
3. Open the **Save As Type** list and select **Outlook Template**.
4. Give the file a name and click **Save**.

To use the template:

1. On the **Home** tab in whatever view you're using (Mail, Calendar, and so on), click **New Items**, click **More Items**, and then click **Choose Form**.
2. Open the **Look In** list and click **User Templates in File System**. **This is a critical step. You won't see your template if you don't do this**.
3. Click the template, and then click **Open**.
4. Fill in the necessary stuff, and go.