How to use an email template

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By using an Email Template, it allows you to save time by using a pre-designed email which can be applied to outgoing emails or notifications.

Communication Center

Use the steps below to learn how to select an Email Template while sending an email from the Communication Center:

1. Click **Communication** or the **Envelope icon** in the left menu, then click **Email**.
2. Click the **Compose New Message** button.
3. On the **Create Email** page, in the **Templates** tab, click the **View** button beside the Email Template you wish to use.
4. The Email Template Preview pop-up will display with a preview of the template. Click the **Insert Template** button to insert the template.
5. It will ask you “Are you sure you want to use this template?”, click **Yes** to insert the template.

After clicking Yes, the Custom Email Template’s content will replace the existing content in the drafted email.

Listings

Use the steps below to learn how to select an Email Template while sending an email from certain listings.

1. While on the listing, checkmark the people or records you want to email.
2. Click the **Email** button.
3. In the Template section, you can select one of two groups:
    - **System** - This will display the system email templates.
    - **Custom** - This will display the custom email templates.
4. Click on the template you want to use and click **Insert**.
5. It will ask you “Are you sure you want to insert this template? This will replace your current email content.”, click **OK** to insert the template.