

Managing Institution Email Templates in Connect25

Super administrators use the Email Template Settings page to create and manage email templates for your institution. Organization officers then use these templates when they email members from an organization record.



Security Note

Only users with the super administrator role can see the **Email Template Settings** page in the left navigation.

Accessing Email Template Settings

Go to *Settings > Email Template Settings* in the left navigation to open the page. The page lists every institution-level email template, both enabled and disabled.

Creating an Institution Email Template

1. Open the Create Template Form

Select the **Create template** button on the Email Template Settings page.

2. Complete the Template Details and Save

← Back to template list

New template

Template name *

Subject

☒ Enabled

Body

File Insert Table View Format Tools Help

↶ ↷ Paragraph B I U A ▼ █ ▼ ☰ ☷ ...

Press ⌘0 for help

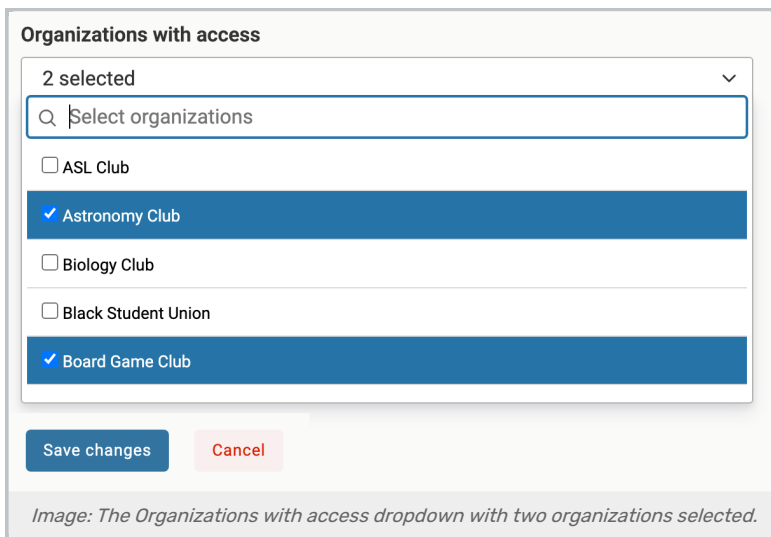
Save the template first, then edit it to set organization access.

Create template Cancel

Image: Complete the Create Template form.

Enter the template details, including the subject and message that fill the **Email Members** form when an organization officer selects the template, then use the **Save** button.

3. Choose Which Organizations Can Use the Template



The screenshot shows a dropdown menu titled "Organizations with access". At the top, it says "2 selected" with a downward arrow. Below this is a search bar with the placeholder text "Select organizations". The dropdown list contains five items, each with a checkbox: "ASL Club" (unchecked), "Astronomy Club" (checked), "Biology Club" (unchecked), "Black Student Union" (unchecked), and "Board Game Club" (checked). The "Astronomy Club" and "Board Game Club" items are highlighted in blue. At the bottom of the dropdown are two buttons: "Save changes" (blue) and "Cancel" (red). Below the dropdown, a caption reads: "Image: The Organizations with access dropdown with two organizations selected."

After you save a template for the first time, the **Organizations with access** dropdown appears. Select one or more organizations, then select **Save** again.

- Selected organizations can use the template. An organization sees only the templates assigned to it.
- You can save a template without selecting any organizations. No organization can use that template until you assign one.



Note: Enabled and Disabled Templates

The template list shows both enabled and disabled templates. Organization officers can select only enabled templates.

How Organization Officers Use Institution Templates

An institution template appears in the **Email template** dropdown on an organization record only when the template is enabled and assigned to that organization. Organization officers cannot edit or delete institution templates. See [Using Email Templates on an Organization Record in Connect25](#) for the officer view.