Using Email Templates on an Organization Record in Connect25

Email templates save the subject and message you send to organization members, so you can reuse them without retyping. When you email members from an organization record, you choose a template and, if your role allows it, you can create and manage templates for your own organization.

Security Note

The **Organization email templates** permission on your role controls what you see on an organization record:

- **No permission** - The **Email** tab does not appear on the organization record.
- **Read** - The **Email** tab appears. You can view and select templates, but you can't create, edit, or delete them.
- **Full control** - The **Email** tab appears. You can create, edit, and delete templates for your organization.

Emailing Members With a Template

1. Open the Email Members Form

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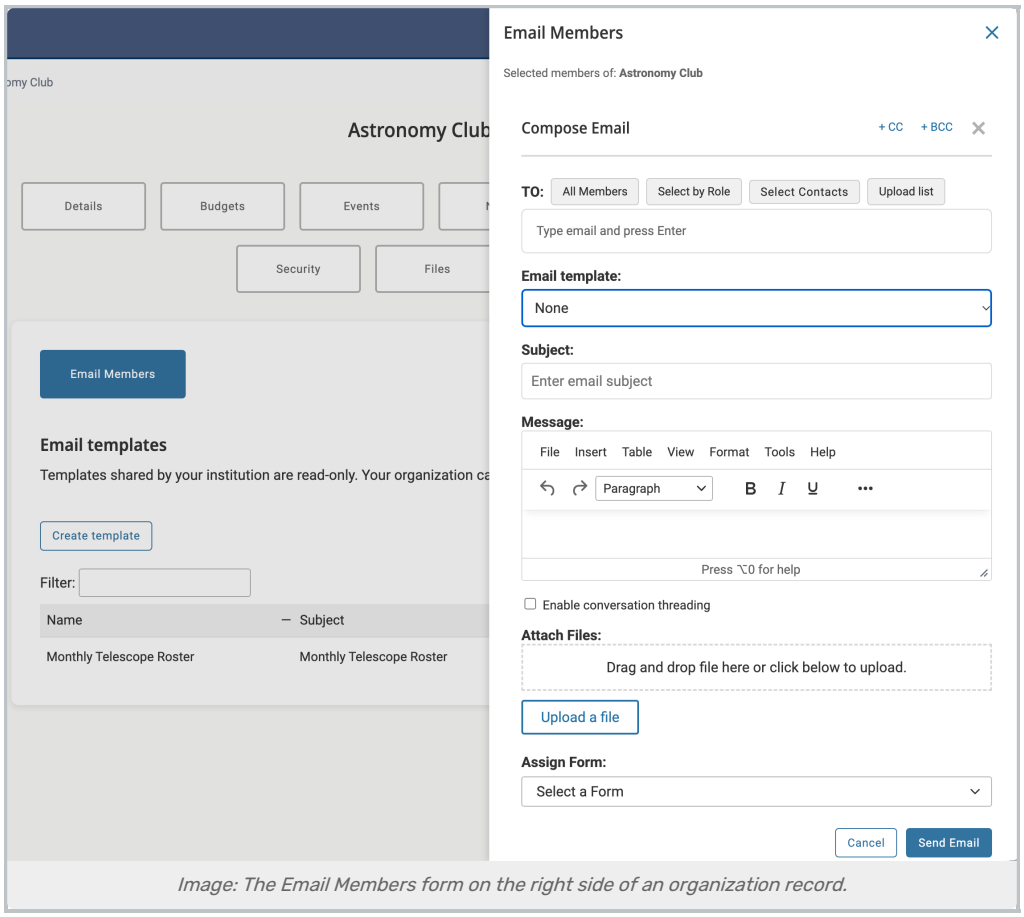


Image: The Email Members form on the right side of an organization record.

Open the organization record, and then open the **Members** section. Use the **Email Members** button (also available in the **Email** tab). The new view slides open from the right side of the page.

2. Select a Template

Select a template from the **Email template** dropdown. The subject and message fields fill with the template content. Edit the content if you need to, then send the email.

- The dropdown lists templates that are enabled and assigned to your organization. These include institution templates your super administrator assigned to the organization and templates your organization created.
- If no templates are assigned to your organization, the **Email template** dropdown does not appear.

> **Note: Templates and Compose Email**
>
> The **Email template** dropdown is available when you select **Email Members** from the **Email** tab or the **Members** tab. It is not available from the **Compose Email** page.

Managing Organization Templates

This section applies to roles with **Full control** of **Organization email templates**. Roles with **Read** can view templates but cannot make changes.

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1. Open the Email Tab

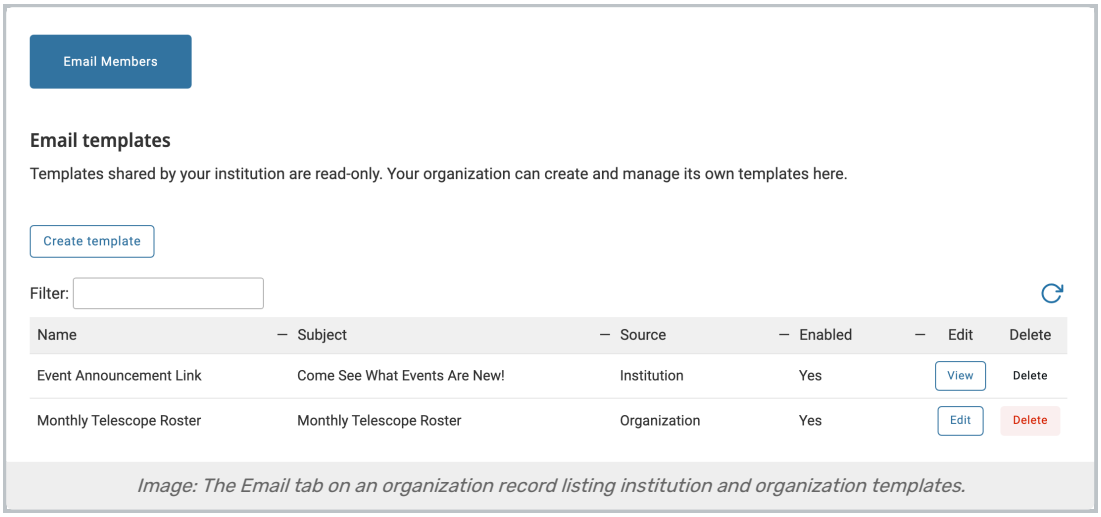


Image: The Email tab on an organization record listing institution and organization templates.

Open the organization record and select the **Email** tab. The tab lists the templates available to your organization.

2. Create a Template

Use the **Create template** button, enter the template details, and save. Your organization can reuse the template for future emails. Only your organization can see the templates you create.

3. Edit or Delete a Template

- **Organization templates** - Select a template to edit it, or use its **Delete** button to remove it.
- **Institution templates** - Select **View** to read the template.
  - The **Delete** button is disabled because your super administrator manages institution templates.
  - See Managing Institution Email Templates in Connect25.

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