

Using Email Templates on an Organization Record in Connect25

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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.



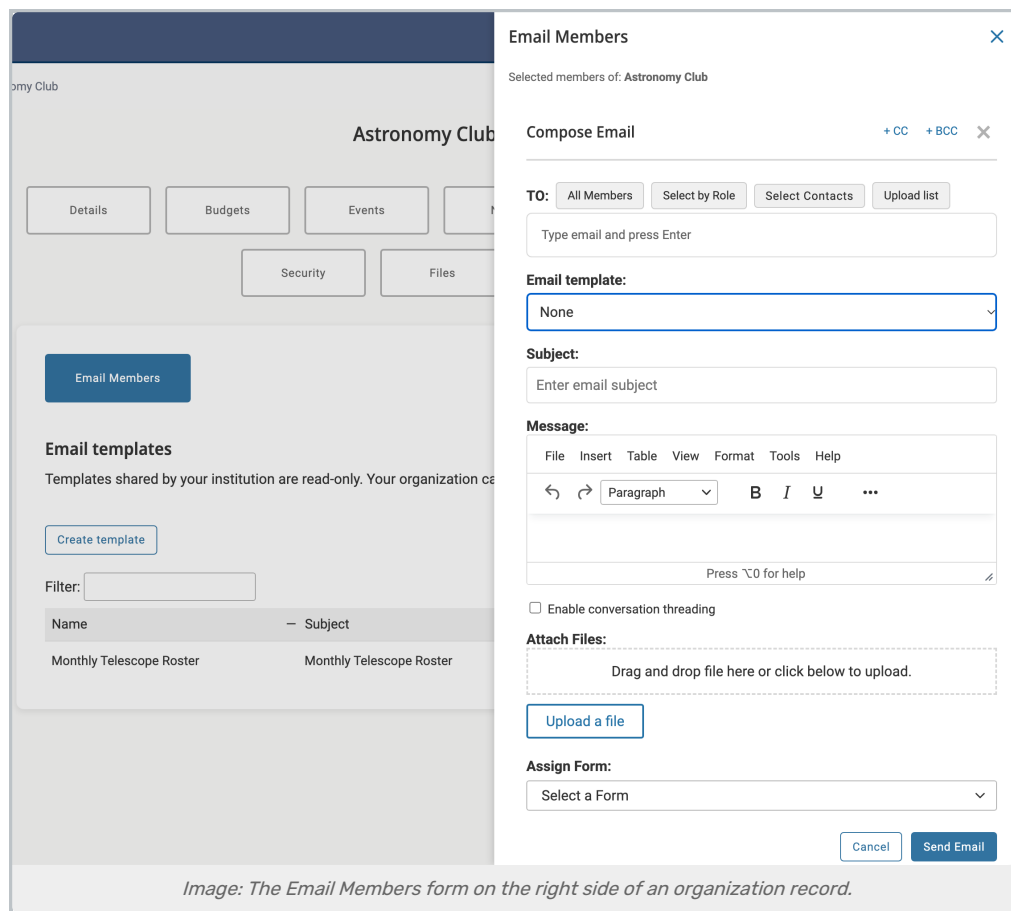
Security Note

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



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.



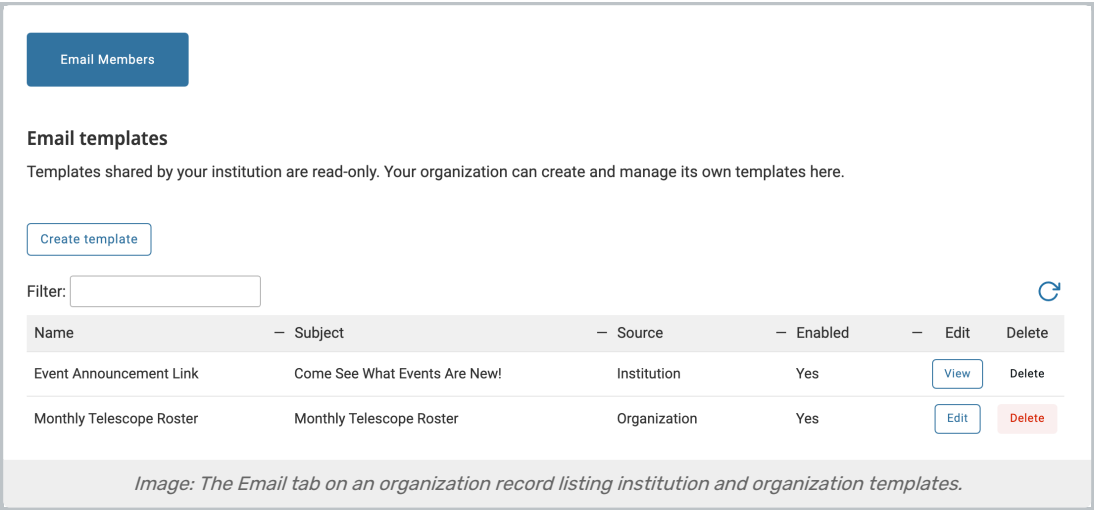
Note: Templates and Compose Email

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.

1. Open the Email Tab



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](#).