

# Email Templates

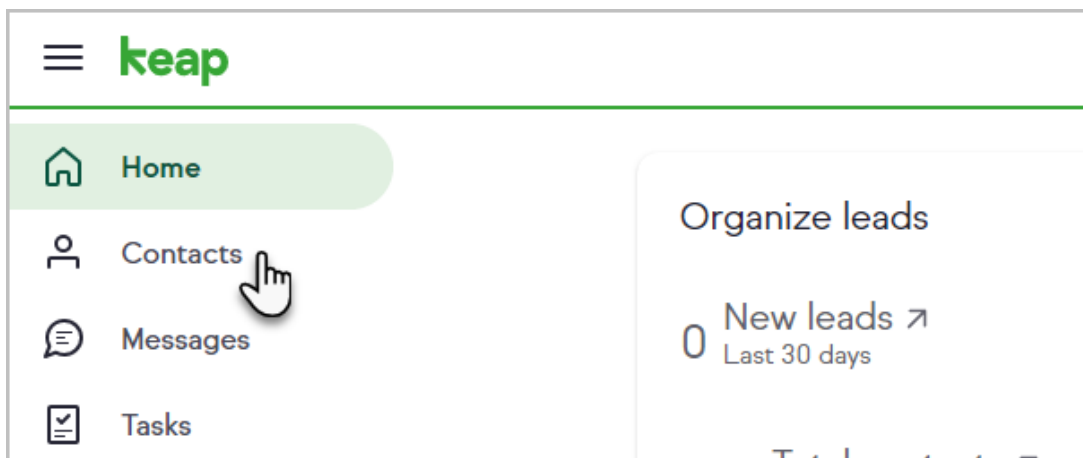
This article applies to:

Spending too much time finding, copying, and pasting the same email over and over? Now, you can edit, save, and easily insert your preferred templates whenever you need them. Find them wherever you can send individual emails in your app.

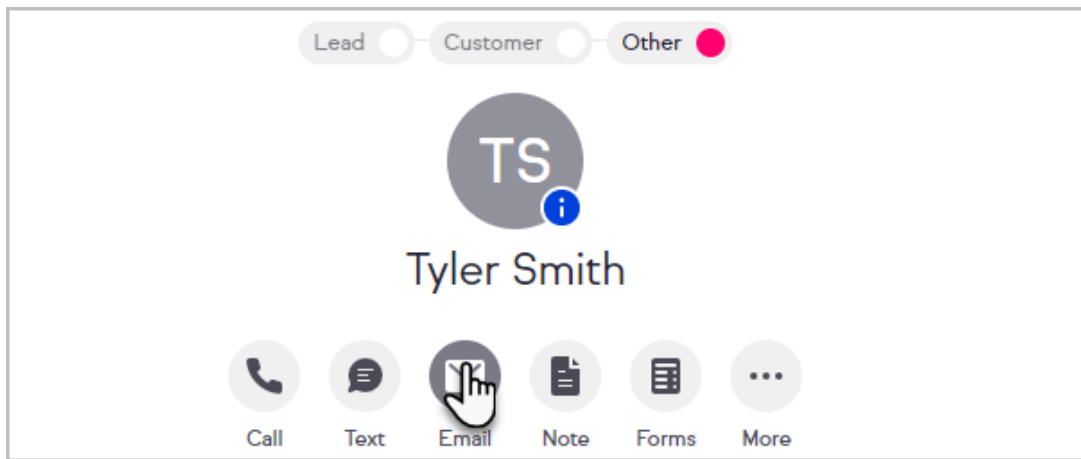
Email Templates are stored separately from your [Text Message Templates](#).

## Access Email Templates

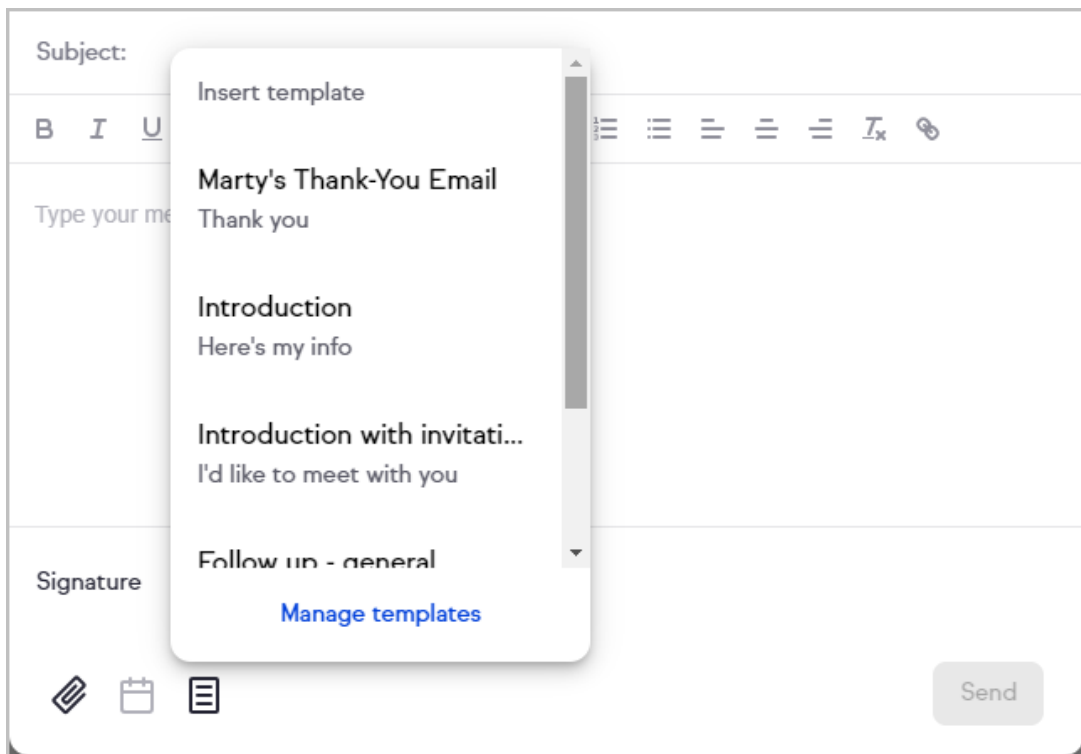
1. Navigate to your Contacts



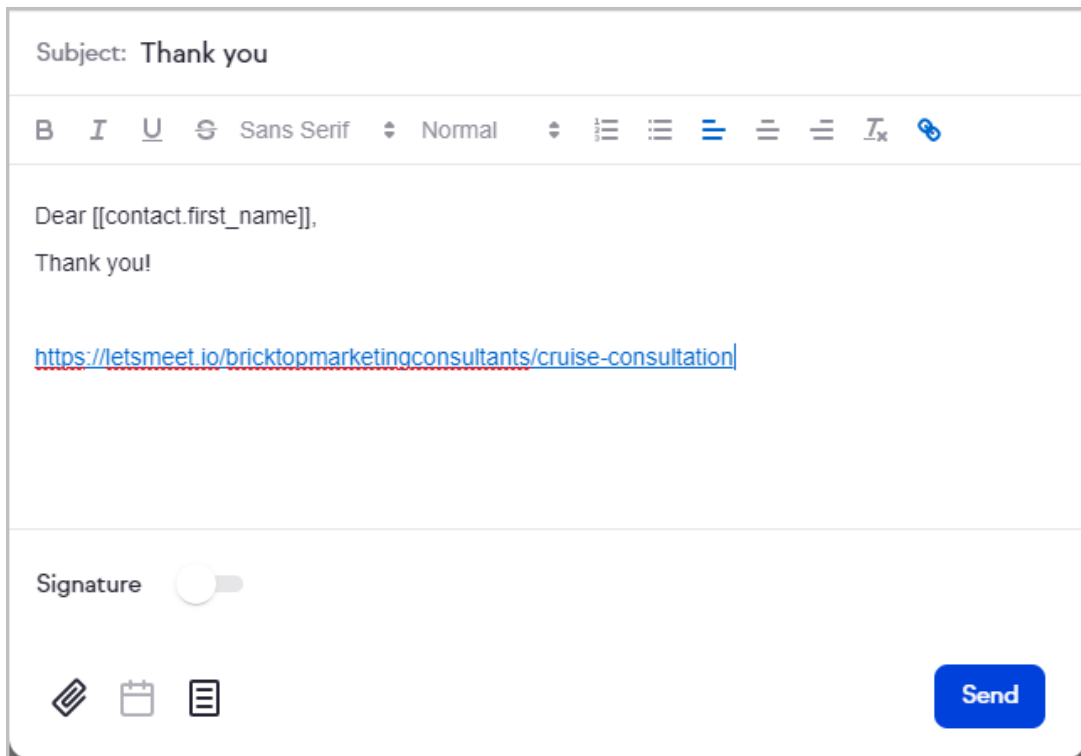
2. Select a contact
3. Click the **Email** button



4. Click the **Template** button at the bottom of the email form
5. Select one of your email templates from the list or click **Manage templates** to create, delete or update templates.

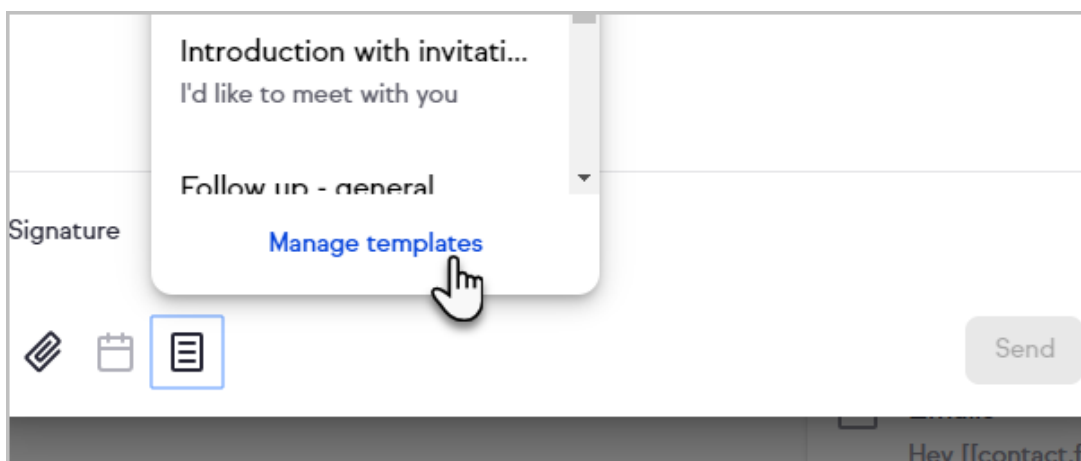


6. When you click on a template, it will be inserted into the email form. You can then customize the email as needed and click send.



## Manage Email Templates

1. Navigate to your Contacts
2. Select a contact
3. Click the **Email** button
4. Click the **Template** button at the bottom of the email form
5. Select **Manage templates** to access the email template manager

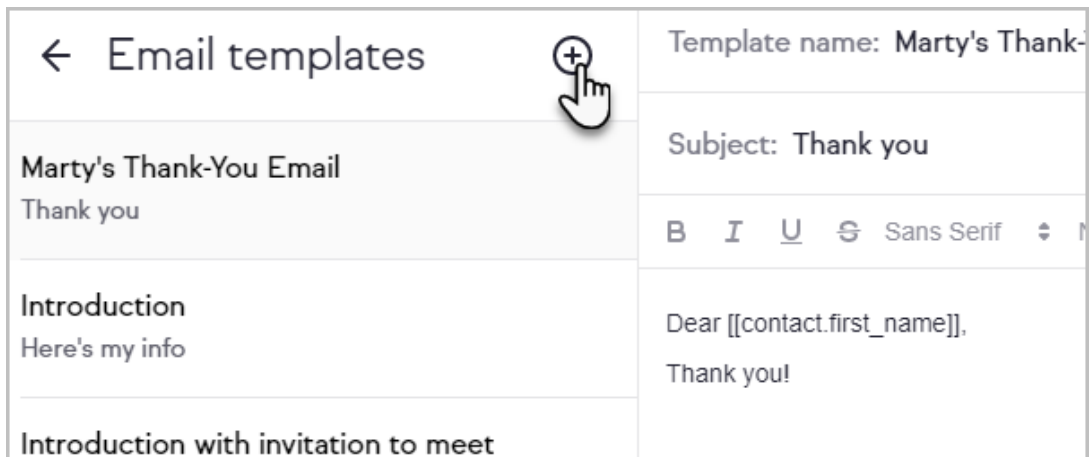


## Create a New Email Template

1. Access the email template manager with the steps under Manage

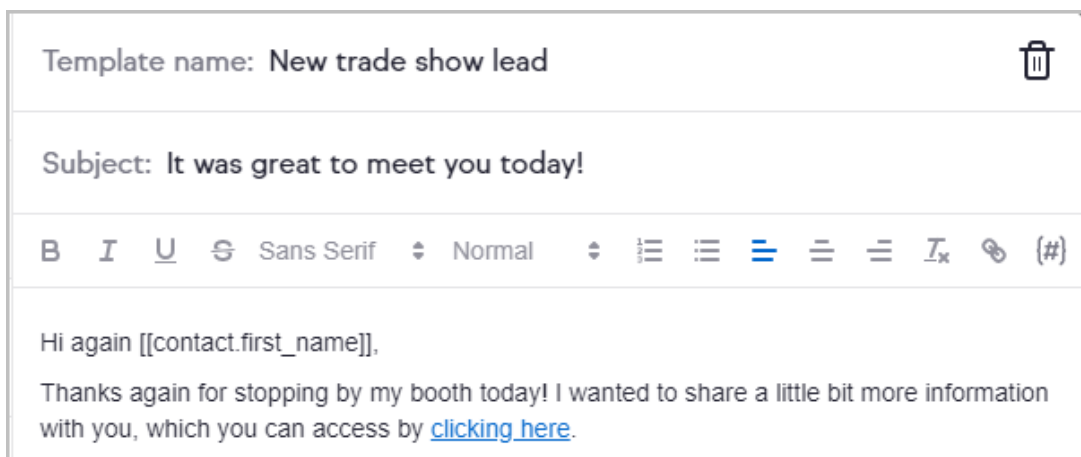
## Email Templates

2. Click the plus sign button



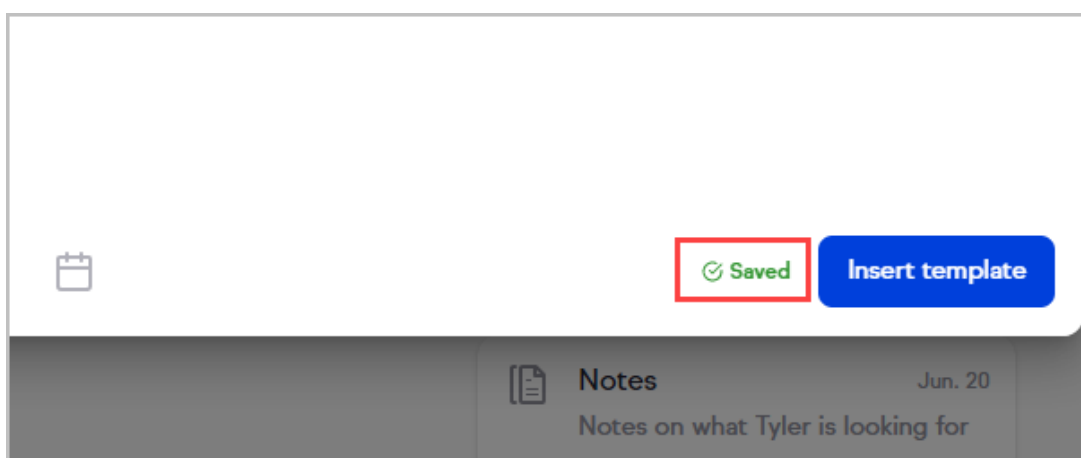
The screenshot shows the 'Email templates' interface. At the top left, there is a back arrow and the text 'Email templates'. To the right of this header is a plus sign button with a hand cursor over it, indicating it is being clicked. Below the header, there is a list of templates. The first template is 'Marty's Thank-You Email' with the subject 'Thank you'. The second template is 'Introduction' with the body text 'Here's my info'. The third template is 'Introduction with invitation to meet'. On the right side of the interface, there are fields for 'Template name: Marty's Thank-' and 'Subject: Thank you'. Below these fields is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), font color (A), font size (Sans Serif), and a dropdown arrow. The body text in the editor reads: 'Dear [[contact.first\_name]], Thank you!'.

3. Enter a Template Name, Subject, and Body for your new email template



The screenshot shows the 'Email templates' interface with a new template being created. The 'Template name' field contains 'New trade show lead' and has a trash icon to its right. The 'Subject' field contains 'It was great to meet you today!'. Below the subject field is a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), font color (A), font size (Normal), bulleted list, numbered list, link, unlink, and a hash symbol (#). The body text in the editor reads: 'Hi again [[contact.first\_name]], Thanks again for stopping by my booth today! I wanted to share a little bit more information with you, which you can access by [clicking here](#).'

4. When you're finished, click the **Insert template** button to use the new email template or the back arrow at the top of the email template manager to return to your email. Your template will save automatically, indicated next to the **Insert template** button.



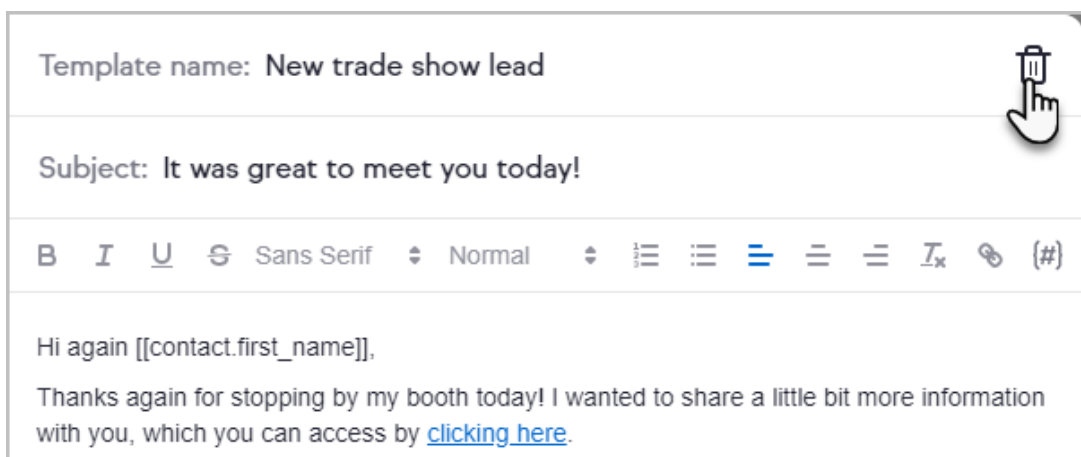
The screenshot shows the 'Email templates' interface with the 'Insert template' button highlighted in blue. To the left of the button is a green checkmark and the text 'Saved'. Below the button is a dark grey footer area containing a document icon, the text 'Notes', the date 'Jun. 20', and the text 'Notes on what Tyler is looking for'.

## Update an Existing Email Template

1. Access the email template manager with the steps under Manage Email Templates
2. Select the desired email template
3. Edit the template name, subject, or email body
4. When you're finished, click the **Insert template** button to use the updated email template or the back arrow at the top of the email template manager to return to your email. Your template will save automatically, indicated next to the **Insert template** button.









## Delete an Existing Email Template

1. Access the email template manager with the steps under Manage Email Templates
2. Select the desired email template
3. Click the trash bin button at the top of the email template manager



Template name: New trade show lead

Subject: It was great to meet you today!

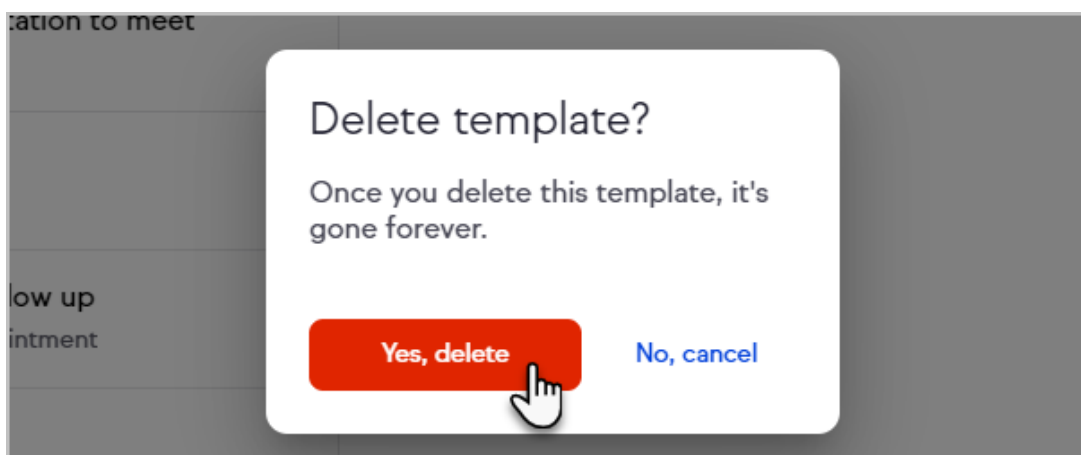
**B** *I* U  Sans Serif  Normal       (#)

Hi again [[contact.first\_name]],

Thanks again for stopping by my booth today! I wanted to share a little bit more information with you, which you can access by [clicking here](#).

4. Confirm that you would like to delete the template

**Note:** You will not be able to delete the default email templates provided by Keap



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Delete template?

Once you delete this template, it's gone forever.

Yes, delete No, cancel

5. Click the back arrow at the top of the email template manager to return to your email

## FAQs

### How can I access my email templates besides going to a contact record?

You can access your email templates and the email template manager from any area of the Keap app where you are creating an email. Just look for the email templates button at the bottom of the email window.

### Can I use merge fields, links, and text options in my email templates?

Yes, you can insert merge fields by clicking on the (#) button in the email toolbar. You can also style the email body text, including links, by using the toolbar in template manager.

