

How to create and use email templates

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Email templates save time and keep messaging consistent.

Creating a template

1. Go to the **Communications** or **Email Templates** section.
2. Click **New Template**.
3. Give the template a clear, descriptive name (example: "Donation Thank You - Standard" or "Event Reminder - 1 Week").
4. Write the subject line and body.
5. Insert merge fields (such as First Name, Donation Amount, Event Name, Campaign Name) so each message is personalized automatically.
6. Save the template.

Using a template

When sending acknowledgments, event messages, or other outreach, select the saved template. Review the merge fields in a preview before sending to the full list.

Well-named templates make it easy for the whole team to find and use the right message.
