



USER'S GUIDE



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Introduction

ResponseTemplates for Microsoft Outlook is an intuitive addin that allows you to store frequently used responses (including text snippets, sentences, paragraphs, URLs, attachments, etc.) in an easy to retrieve folder storage system, enabling you to easily find and insert the items you need into your emails. Using drag-and-drop or by simply double-clicking on the stored item, it will automatically be pasted into the active e-mail window. Moreover, ResponseTemplates can also be used when sending new messages or for adding information to forwarded emails.

Think of it as a company knowledge base of answers to all your asked questions...

Since ResponseTemplates stores all frequently used response text, URLs, and attachments think of it as a complete source of up-to-date information on your company, products and/or services that employees can reference for composing emails (or even when responding to telephone inquiries).

System Requirements for Running ResponseTemplates

The primary requirement for running ResponseTemplates for Microsoft Outlook is that you have a copy of Microsoft Outlook 2003, 2007, 2010 and/or 2013 installed on your computer. ResponseTemplates is a Microsoft Outlook addin and cannot run without Outlook installed on your computer. ResponseTemplates also requires the Microsoft .NET Framework to be installed on your computer. However, upon installation, ResponseTemplates will detect if a compatible version of the .NET Framework is installed or not. If not, it will install it for you with your permission.

You'll need the following to run ResponseTemplates for Microsoft Outlook:

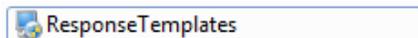
- Microsoft Outlook 2003, 2007, 2010 and 2013 (works best with Outlook 2007 2010 and/or 2013)
- Microsoft .NET Framework 3.5



Installing ResponseTemplates for Microsoft Outlook

Installing ResponseTemplates is both quick and easy. To install ResponseTemplates:

1. If you have not done so already, download the trial version installer of Response Templates to your computer's hard drive from the ResponseTemplates website at <http://www.responsetemplates.com>.
2. If running, please exit Microsoft Outlook.
3. Double-click on the installation icon (example shown below); and follow the on-screen prompts until the installation is finished.



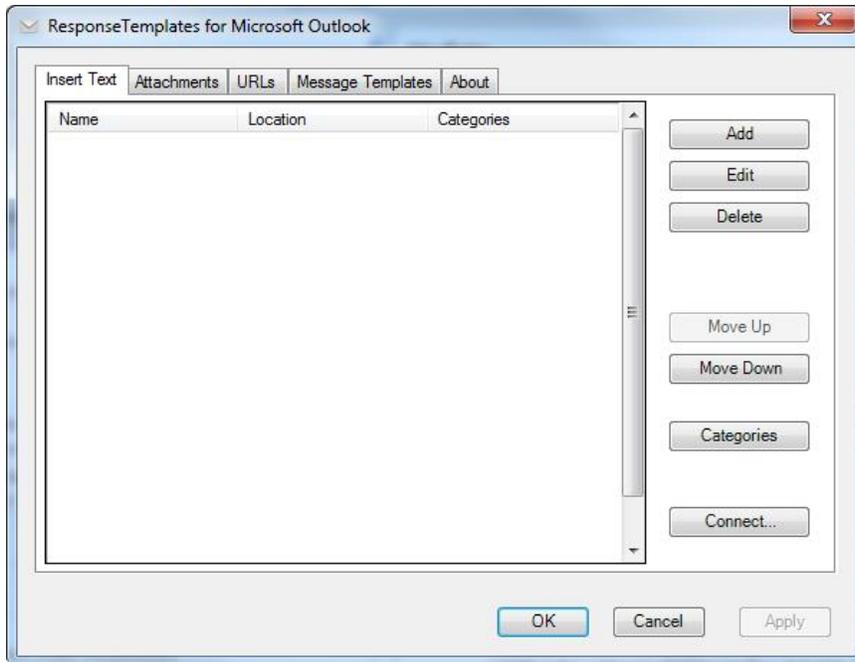
Getting Started - ResponseTemplates Basics

When installed, ResponseTemplates becomes an integral part of your Microsoft Outlook installation. Thus, in order to access all ResponseTemplates screens you must have Outlook open.

Accessing Templates Manager

The first thing you'll want to do is create some stored response templates (text, images, attachments, URLs, etc.). Creating and/or editing stored responses is done by opening the ResponseTemplates Management dialog box. The easiest way to open this dialog box is to hold the **Ctrl+Win+T** keys simultaneously (work with Outlook 2003, 2007 2010 and/or 2013)...

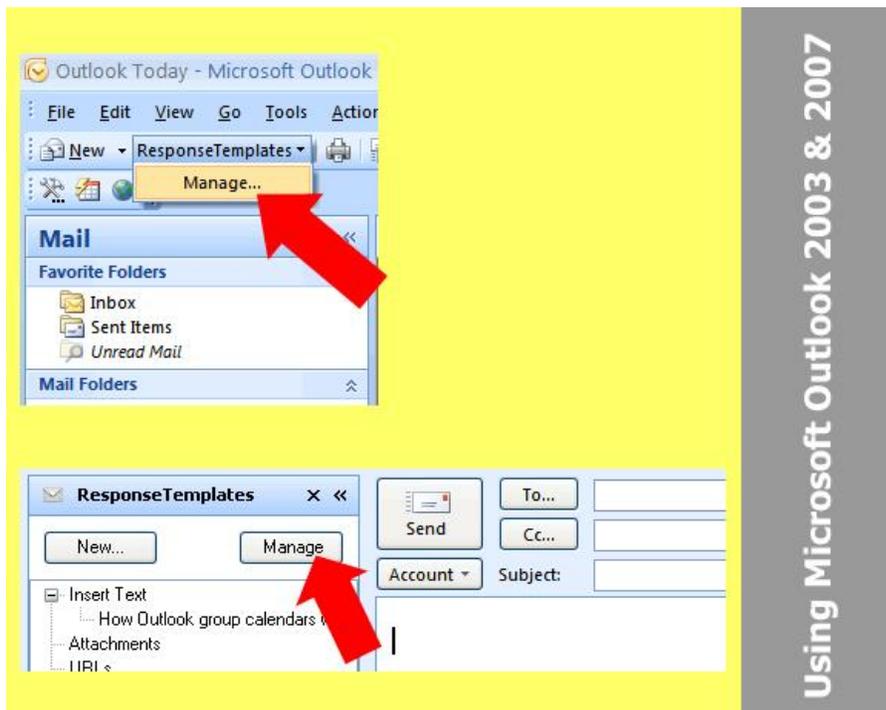




Other ways to access the Templates Manager...

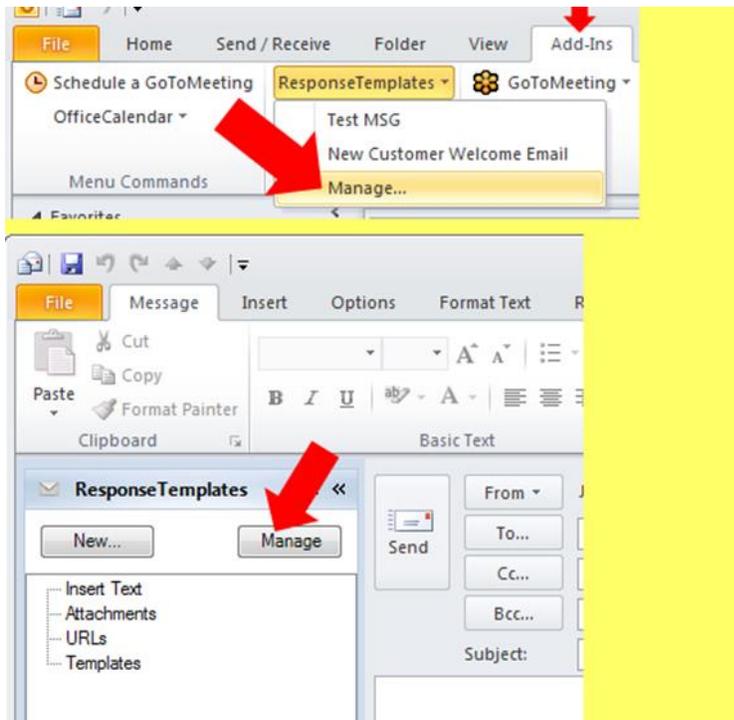
If you are using Microsoft Outlook 2003 or 2007 click on the **New by Template** drop in your Outlook toolbar (this only appears when Mail is the active view); and choose the **Manage...** option.

Or click the **Manage** button from the expanded *ResponseTemplates* task pane which is visible from any message composition window (New, Reply, or Forward).



If you are using Outlook 2010 or 2013 navigate to the *Add-Ins* tab; click on the *ResponseTemplates* drop down option in the *Toolbar Commands* ribbon group; and click **Manage...**

Or click the **Manage** button from the expanded *ResponseTemplates* task pane which is visible from any message composition window (New, Reply, or Forward).



Creating and Managing Response Templates

There are 3 primary types of templates you can create to insert in the Outlook email body (when creating a new email, replying to an email or forwarding an email). The 3 primary insert template types are:

- **Insert Text** – can include a combination of formatted text, URLs, images and/or attachments. Because Insert Text can include all of these things it is the most versatile insert template type.
- **Attachments** – frequently used files/documents (product brochures, forms, etc.).
- **URLs** – frequently used web URLs.

A fourth insert template type, **Message Templates** can be created as well (under the Templates tab). However, this is considered an advanced feature and is detailed in the **Advanced Features** section of this document.

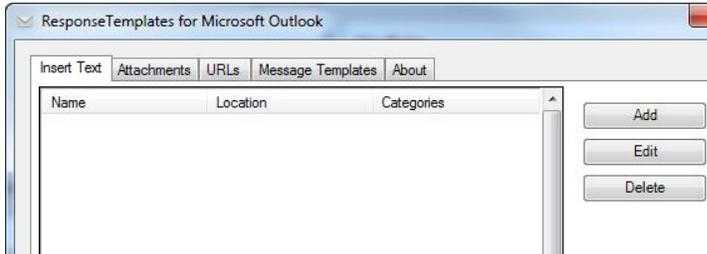
Creating and Managing Insert Text

As explained above, Insert Text templates can include a combination of formatted text, URLs, images



and/or attachments. Because Insert Text can include all of these things it the most versatile insert template type.

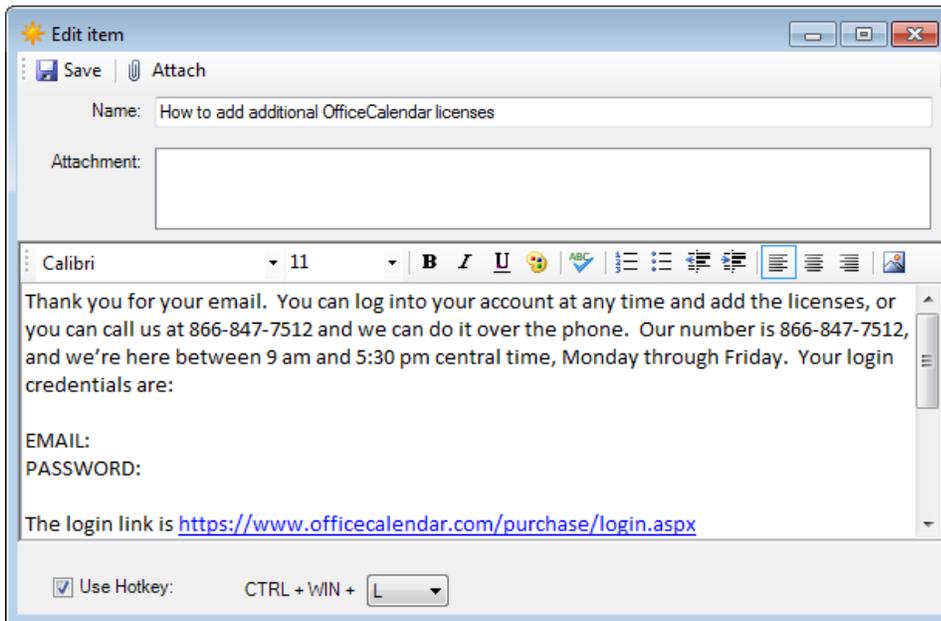
To create and manage *Insert Text* templates navigate to the Response Templates management console and click on the **Insert Text** tab...



Creating a new Insert Text template

To add a new **Insert Text** template simply click the **Add** button from the *Insert Text* tab of the Response Templates Management Console; fill in the form for the template:

1. Give your template a name (entered in the **Name** field).
2. [Optional] Choose one or more file attachments to accompany the template (using the **Attach** button).
3. Type or copy and paste in formatted text and images for your template in the text body.
4. Create a hotkey for your template if you wish.
5. Click the **Save** button to save the template.

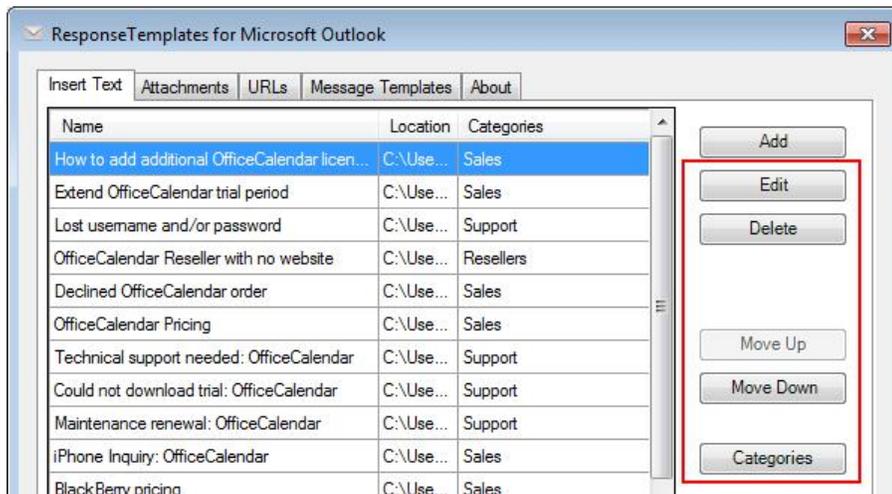


Managing Insert Text templates



To manage *Insert Text* templates navigate to the Response Templates management console and click on the **Insert Text** tab...

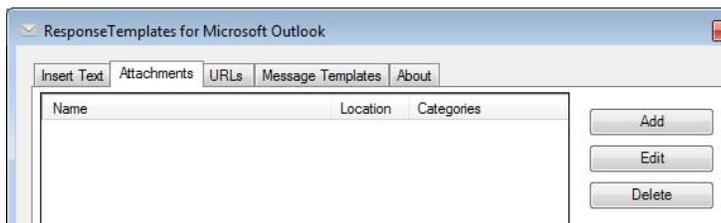
1. Click on the Insert Text template with your mouse (highlighting the selected message); and use one of the following options:
 - a. **Edit** – opens the *Edit Items* dialog box (shown above). Simply make the changes you desire and click the **Save** button.
 - b. **Delete** – clicking this button will delete the selected template.
 - c. **Move Up / Move Down** – allows you move the selected template up or down in the template list order.
 - d. **Categories** – allows you to select one or more categories for the selected template. Categories are explained in more depth in the *Organizing your templates with categories* topic below.
2. Exit from the Response Templates Management console when you are finished.



Creating and Managing Attachments

As explained above, *Attachments* insert templates are frequently used files/documents (product brochures, forms, etc.) that you may need to reference and/or attach to your email responses.

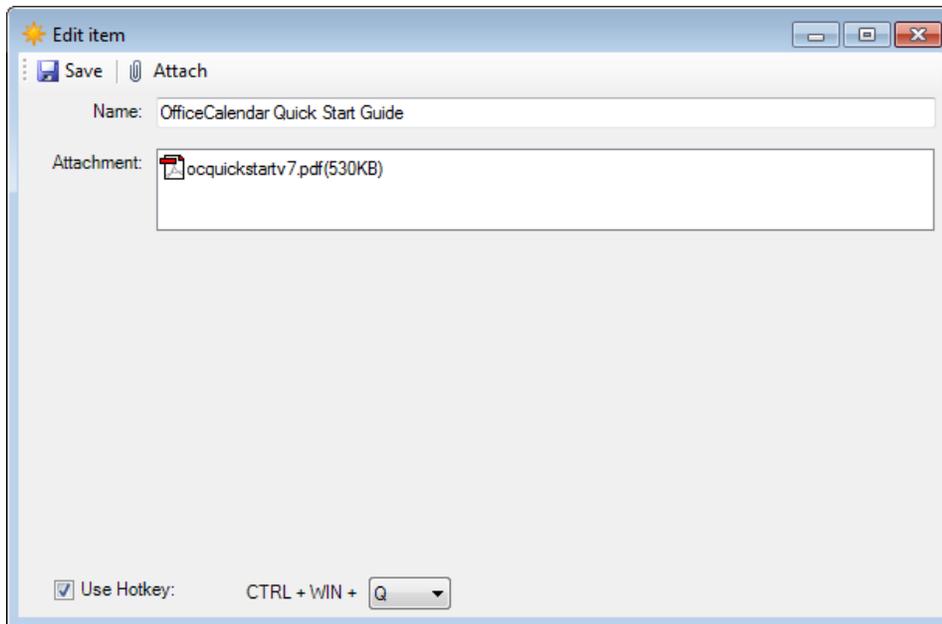
To create and manage *Attachment* insert templates navigate to the Response Templates management console and click on the **Attachments** tab...



Creating a new Attachment insert templates

To add a new *Attachment* insert template simply click the **Add** button from the **Attachments** tab of the Response Templates management console; and fill in the form for the template:

1. Give your template a name (entered in the **Name** field).
2. Choose one or more file attachments (using the **Attach** button).
3. Create a hotkey for your template if you wish.
4. Click the **Save** button to save the template.

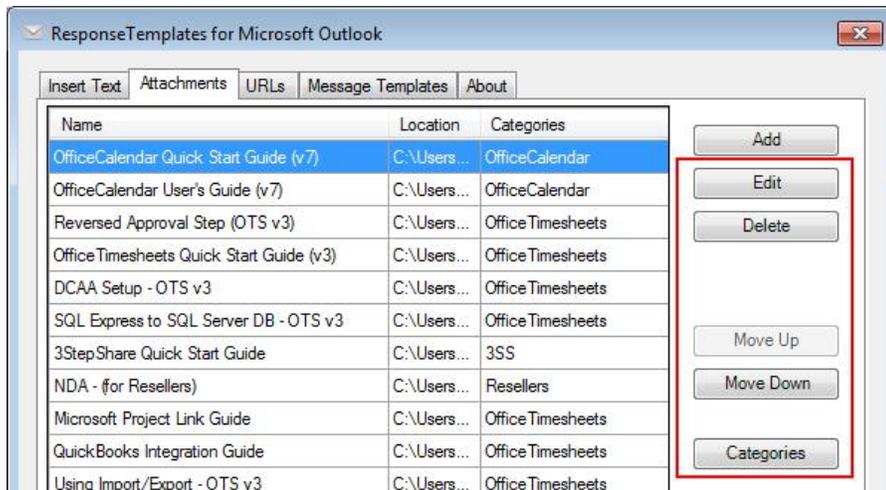


Managing Attachment insert templates

To manage Attachment insert templates navigate to the Response Templates management console and click on the **Attachments** tab...

1. Click on the *Attachment* insert template with your mouse (highlighting the selected template); and use one of the following options:
 - e. **Edit** – opens the *Edit Items* dialog box (shown above). Simply make the changes you desire and click the **Save** button.
 - f. **Delete** – clicking this button will delete the selected template.
 - g. **Move Up / Move Down** – allows you move the selected template up or down in the template list order.
 - h. **Categories** – allows you to select one or more categories for the selected template. Categories are explained in more depth in the *Organizing your templates with categories* topic below.
2. Exit from the Response Templates Management console when you are finished.

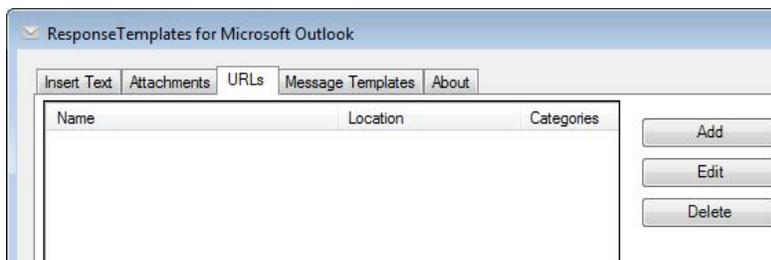




Creating and Managing URLs

As explained above, *URLs* insert templates are frequently used web URLs that you may need to reference and/or insert to your email messages.

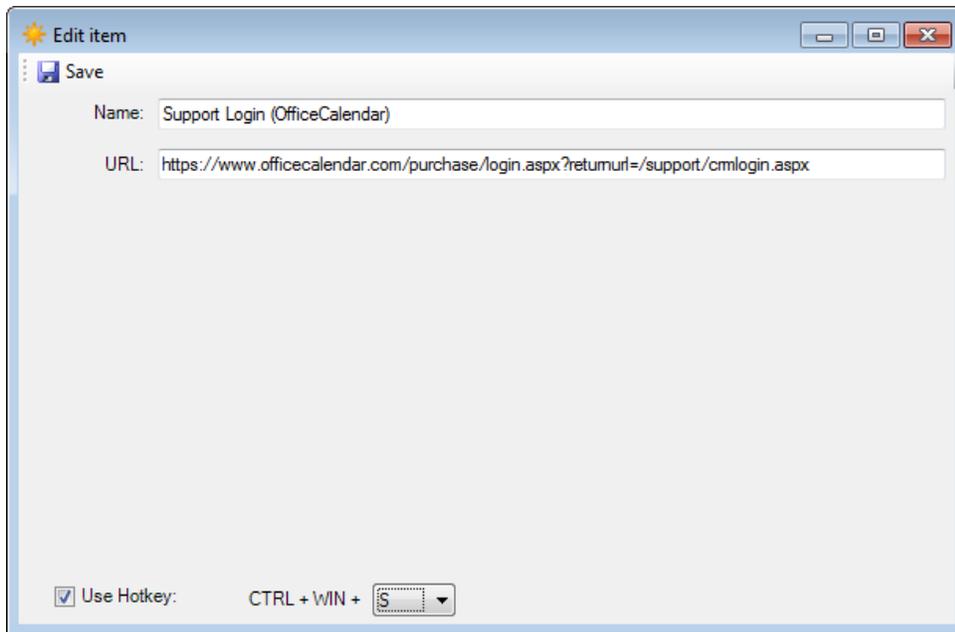
To create and manage *URL* insert templates navigate to the Response Templates management console and click on the **URLs** tab...



Creating a new URL insert templates

To add a new *URL* insert template simply click the **Add** button from the **Attachments** tab of the Response Templates management console; and fill in the form for the template:

1. Give your template a name (entered in the **Name** field).
2. Choose one or more file attachments (using the **Attach** button).
3. Create a hotkey for your template if you wish.
4. Click the **Save** button to save the template.

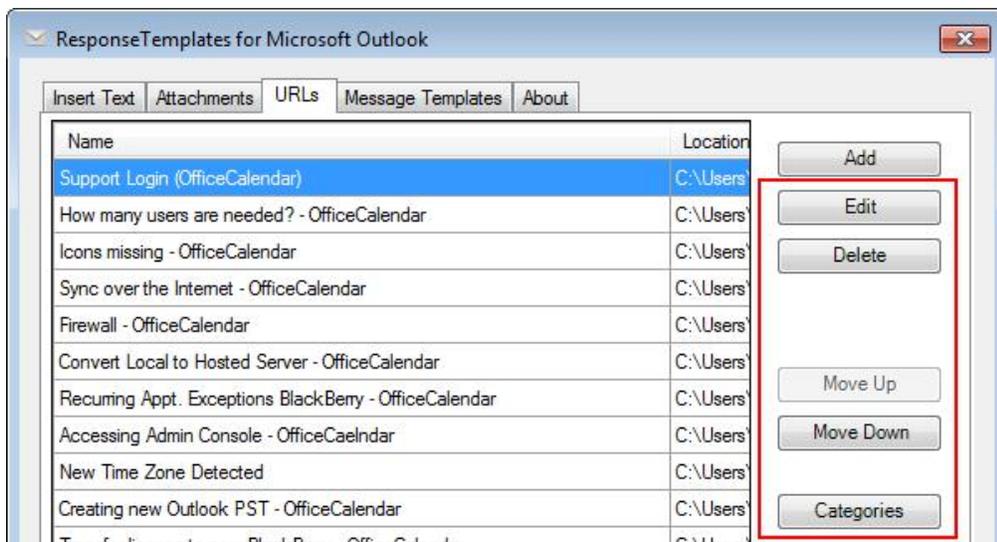


Managing URL insert templates

To manage URLs insert templates navigate to the Response Templates management console and click on the **URLs** tab...

1. Click on the *URLs* insert template with your mouse (highlighting the selected template); and use one of the following options:
 - i. **Edit** – opens the *Edit Items* dialog box (shown above). Simply make the changes you desire and click the **Save** button.
 - j. **Delete** – clicking this button will delete the selected template.
 - k. **Move Up / Move Down** – allows you move the selected template up or down in the template list order.
 - l. **Categories** – allows you to select one or more categories for the selected template. Categories are explained in more depth in the *Organizing your templates with categories* topic below.
2. Exit from the Response Templates Management console when you are finished.





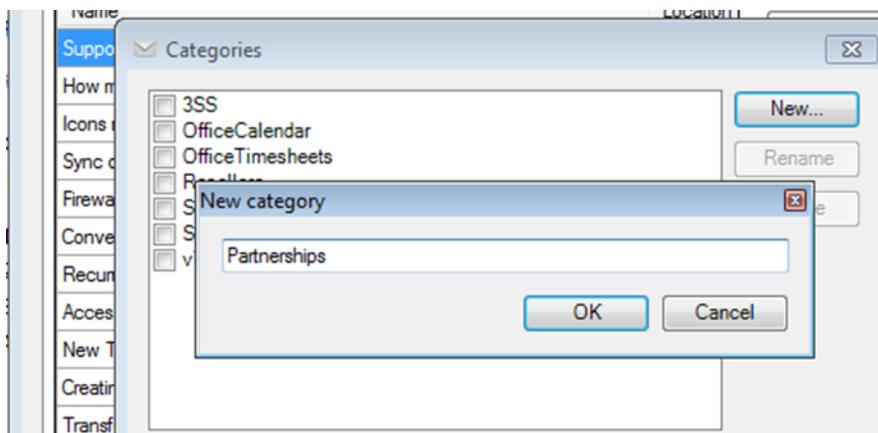
Organizing Your Response Templates with Categories

Response Templates allows you create categories, which enable you to easily identify and group your templates. More than one category can be assigned to a given template.

Adding new template categories

To add a new template category simply click the **Categories** button from any tab of the Response Templates management console:

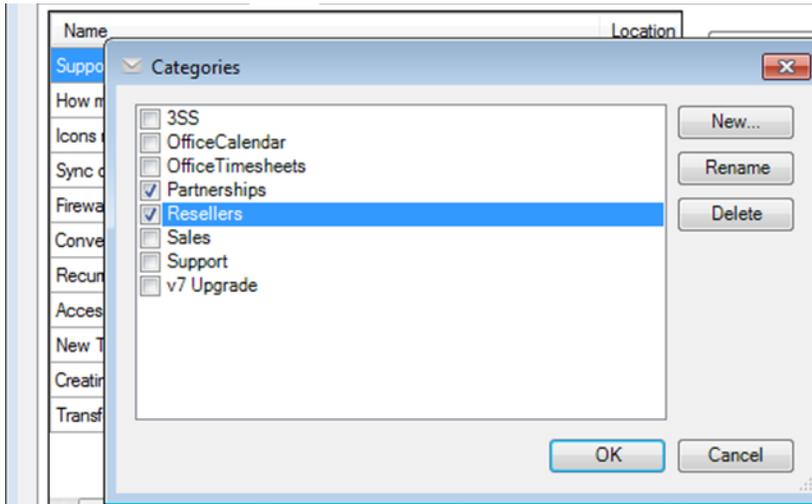
1. From the *Categories* dialog box click the **New** button
2. From the New Category dialog box type in a name for the new category and click **OK**.



Assigning one or more categories to a selected template

To select one more categories to a selected template click on the template name you wish to assign one more categories, and click on the **Categories** button:

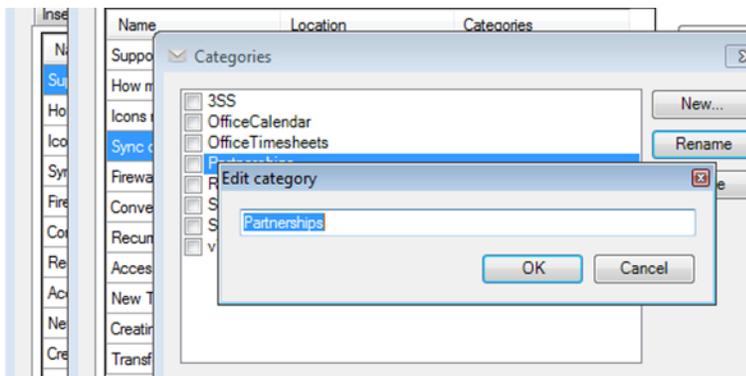
1. From the Categories dialog box check choose the categories you wish to assign marking the associated checkbox.
2. Click **OK** when you are finish selecting categories for the selected template.



Renaming template categories

To rename a template category simply click the **Categories** button from any tab of the Response Templates management console:

1. From the **Categories** dialog box click the **Rename** button.
2. From the **Edit Category** dialog box rename the selected category; and click **OK**.

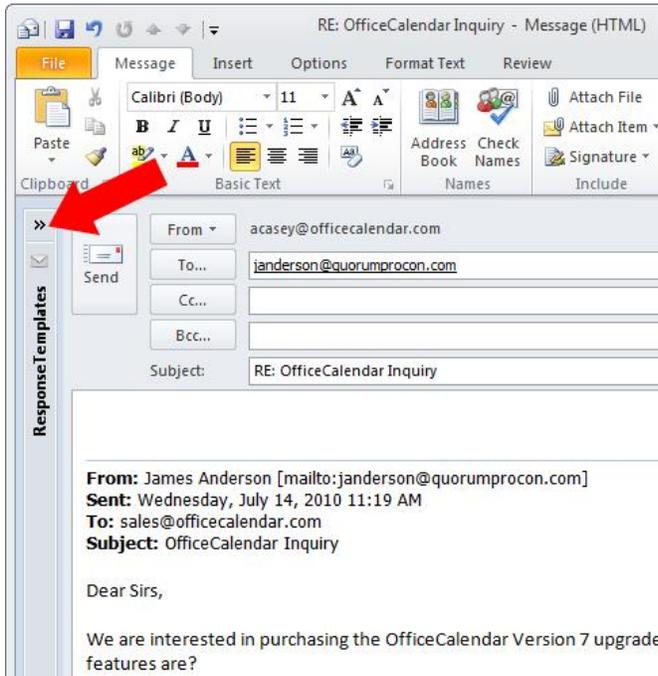


Using Response Templates: Inserting your templates into emails

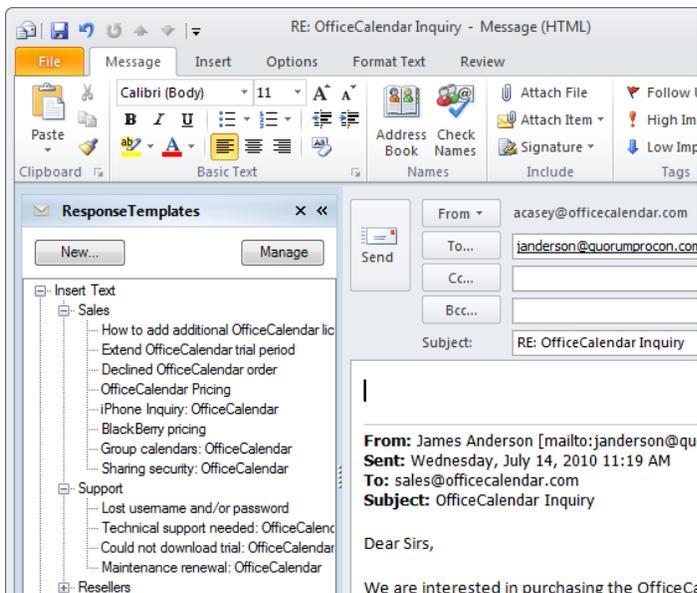
Once the Response Templates addin is installed you will see the ResponseTemplate task pane next to the email body of any email view that is in composition mode (New message, Reply and/or Forward). The ResponseTemplates task pane can be expanded or collapsed as illustrated below.



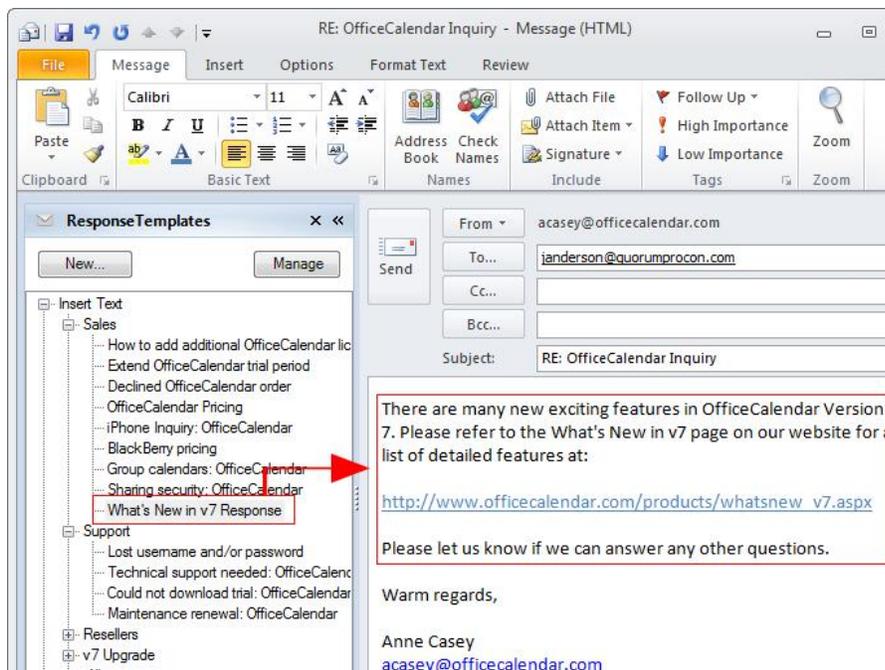
ResponseTemplates Pane Collapsed...



ResponseTemplates Pane expanded...



When the ResponseTemplates task pane is expanded you will see your email response templates, organized by category (if you've assigned templates to categories). To insert one or more of your email response templates simply drag and drop (or double-click on the template) the desire template you wish to insert into the email body (*see illustration below*)...



You can also assign hot keys to specified email response templates. To insert a template using a hot key combination simply position your cursor in the email message body and press the hot key combination on your keyboard and the template will be pasted in the email's body.

Advanced Features

Adding and Managing Outlook Message Templates

Outlook Message Templates are primarily used for composing new email messages. Outlook Message Templates are email messages created using Microsoft Outlook and saved in the .MSG or .OFT file format. This type of template would typically be used for sending highly graphical emails like new product announcements, customer newsletters, monthly sales promotions, etc.

When using this type of template it's important to note that the actual MSG or OFT file must be created first using the Microsoft Outlook message editor and saved in .MSG or .OFT file format.

Adding new Outlook Message Templates to list of Outlook Message Templates

To add a new *Outlook Message* insert template simply click the **Add** button from the **Message Templates** tab of the Response Templates management console:

1. Give your template a name (entered in the **Name** field).
2. [Optional] Choose one or more file attachments (using the **Attach** button).
3. Click the browse button and select the MSG or OFT you wish to use for Outlook Message template.
4. Create a hotkey combination for your template if you wish.

5. Click the **Save** button to save the template.

Sharing templates with other users

Some multi-user sites may only want to create email response templates from one computer and have all other users connect to a central repository of shared email response templates. For this type of situation, ResponseTemplates will allow you to connect to templates created by other users assuming they've shared and given you access permissions to the folders where their templates are stored.

The default folder locations for Response Templates files by type are as follows:

- **Insert Text** - C:\Users\{User Name}\App Data\Local\Lookout\Response Templates\Text Data
- **Attachments** - C:\Users\{User Name}\App Data\Local\Lookout\Response Templates\Attachment Data
- **URLs** - C:\Users\{User Name}\App Data\Local\Lookout\Response Templates\URLData
- **RTF Templates** - C:\Users\{User Name}\App Data\Local\Lookout\Response Templates\TemplateData

To add templates from a shared folder navigate to the Response Templates management console and click on the templates type tab (Insert Text, Attachments, URLs, or Message Templates):

1. Click on the **Connect** button; browse to the shared folder where the template you want to connect to is stored; double-click the file you wish to add to the template list.



2. From the Response Templates management console click OK to close the Response Templates management console when you finished.



How to purchase ResponseTemplates

To purchase Response Templates for Microsoft Outlook visit our website at <http://www.responsetemplates.com> and click on the purchase link.