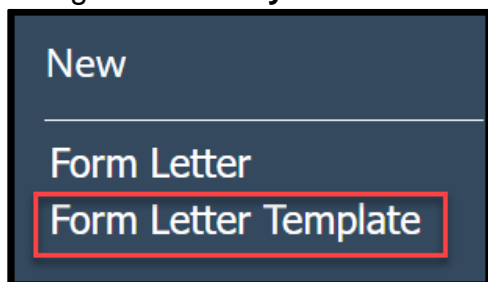


## Creating a Form Letter Template

**Market:** Federal/State/Local, House, Senate

1. Navigate to **Library** → **New** → **Form Letter Template**.



2. Enter the title for your new **Form Letter Template**. Confirm that **Type** is set to **Format**. Select the library directory location to store the **Form Letter Template**.

 A screenshot of a dialog box titled 'Add Form Letter'. It contains three fields: 'New Form Letter Name' with the text 'New Form Letter Template Example', 'Type' with a dropdown menu set to 'Format', and 'Directory' with a dropdown menu set to 'Templates'.

3. Select a previously created **Form Letter Template** to start with and click **Add**.

 A screenshot of the 'Add Form Letter' dialog box. The 'New Form Letter Name' field contains 'New Form Letter Template Example'. The 'Type' dropdown is set to 'Format' and the 'Directory' dropdown is set to 'Templates'. Below these fields is a list of templates under the heading 'Select Format to use:'. The template 'Default Template - 12pt 1in v.1' is selected and highlighted with a red box. To the right of the list is a preview of the selected template, which shows the header of the 'Congress of the United States House of Representatives' and placeholder text for a salutation and content.

4. Click **Edit Content** to open the content editor. What you type here will be placeholder text for the eventual Form Letters created using this template.




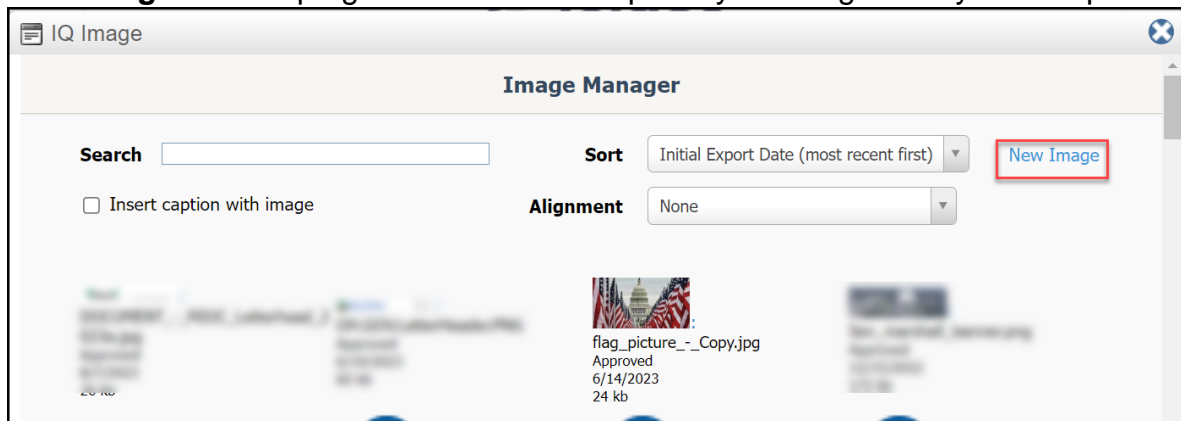
Congress of the United States  
House of Representatives  
Washington, DC 20515

MAIL.AIDE\_FULLNAME.MERGE  
MAIL.AIDE\_PREFERREDADDRESS TITLE.MERGE

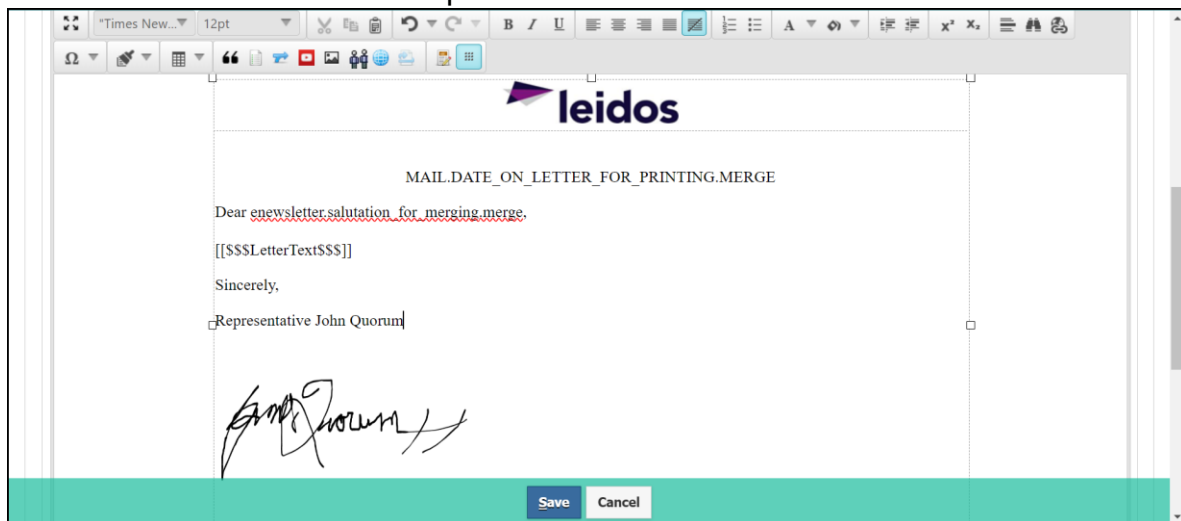
- 6.** Click the **Format** tab at the top, then click **Edit Email Format** to add in your letter head, signature, and any other text that you want to be part of the template.

Dear newsletter.salutation for merging.merge,

7. To add in the letter head and/or signature images, click where you want the images to go and then click the  icon.
8. If your image is already available, click on the image to add it. If it is not available, click on **New Image** in the top right hand corner to upload your image from your computer.



9. Click **Save** when edits are complete



10. Note that you can make similar changes for how the template will look if it were printed by clicking on the **Print Format** button next to **Type**.



11. Click back to the **General Tab**.

**12.** Change the **Status** of the Form Letter Template from **Draft** to **Approved**. Once the **Form Letter Template** is approved, you will be able to create new **Form Letters** using this template.

The screenshot shows the 'Form Letter Template' interface. The 'Status' dropdown menu is open, showing options: Draft, **Approved**, Inactive, Request Approval, and Denied Approval. The 'Approved' option is highlighted. The interface includes fields for Name, Type, Issues, and Attachments, as well as a 'Detail' panel on the right showing metadata like Parent ID, Created By, Version, Size, Created Date, Revised Date, Directory, Assigned To, Track Change, and Report Duplicates.