



Create and manage a personal account

To start using Shared Email Templates, you need to create an account. This cheat sheet will help you to set up a personal account. If you want to create a company account, follow this guide: [How to manage a company account](#).

When creating a personal account in Shared Email Templates, feel free to choose between the two available options:

- Sign up with email
- Sign up with Microsoft

Sign up with email vs. Sign up with Microsoft

Sign up with email means that you're going to create a Shared Email Templates account with any email account of yours.

Note. If you sign up with email, you won't be able to sign up with Microsoft later.

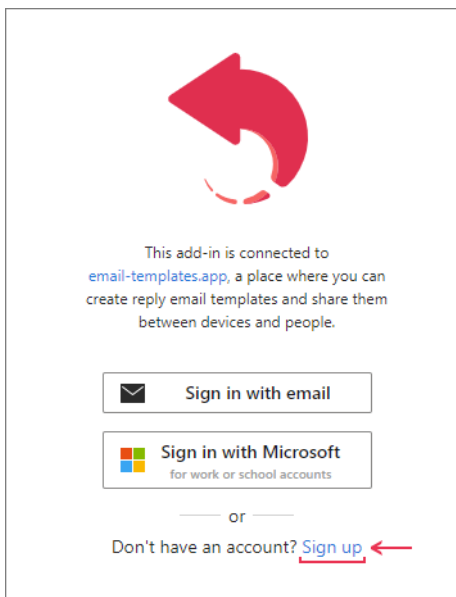
Sign up with Microsoft means that you're going to sign up for Shared Email Templates with your Microsoft work or school account credentials. Free Microsoft accounts aren't supported.

Note. We do not get access to your Microsoft password when you sign up with Microsoft.

Sign up with email

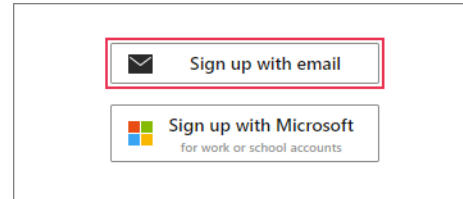
Step 1

On the Shared Email Templates pane in your Outlook, click **Sign up**:



Step 2

Click the **Sign up with email** button:



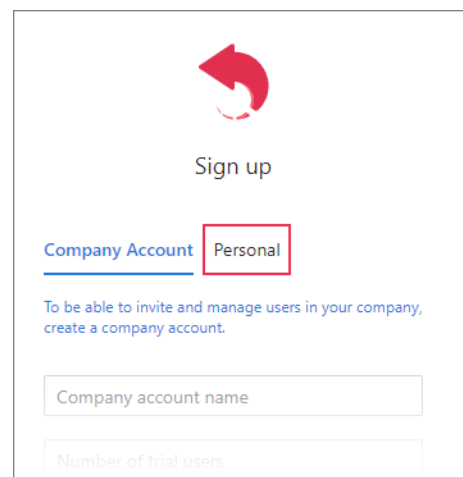
Step 3

Two tabs will appear on the Shared Email Templates pane: **Company Account** and **Personal**. It's time to decide which account type to choose. The differences between the account types are listed in the table below:

Company account	Personal account
For teams managed by company admins	For individual users or small teams
Admins create user accounts	Users create their accounts
Admins manage users and teams	Users create and manage teams
Admins activate subscriptions	Users activate subscriptions
Personal accounts cannot be invited to a company account	

If you'd like to opt for a company account and want to learn more about it, visit this help page: [How to manage a company account](#).

If you're sure that you need a personal account, go to the **Personal** tab.





Step 4

Enter the required data into the sign-up form that you'll see on the **Personal** tab. After accepting the Shared Email Templates [Terms of use](#) and [Privacy policy](#), click the **Sign up** button:

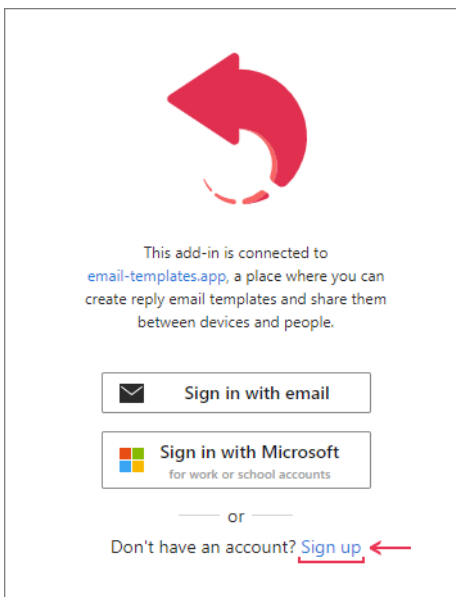
A screenshot of a sign-up form. It contains the following fields: 'First name' and 'Last name' (split into two boxes), 'Username', 'Email' (with the value 'amy.morris@ablebits.com'), 'Password', and 'Confirm password'. Below the fields is a note: '* All fields are required'. There is a checkbox labeled 'I accept Terms of use and Privacy policy' which is checked. At the bottom, there is a blue 'Sign up' button with a red border.

Note. You'll have to verify the email account you want to sign up with if it differs from the email account under which you're currently running Outlook. Check your inbox and junk email for the corresponding confirmation message.

Sign up with Microsoft

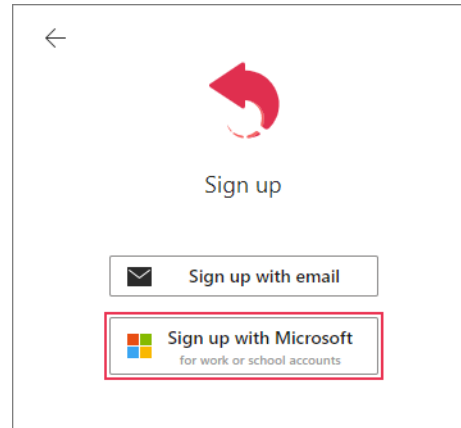
Step 1

On the Shared Email Templates pane in your Outlook, click **Sign up**:



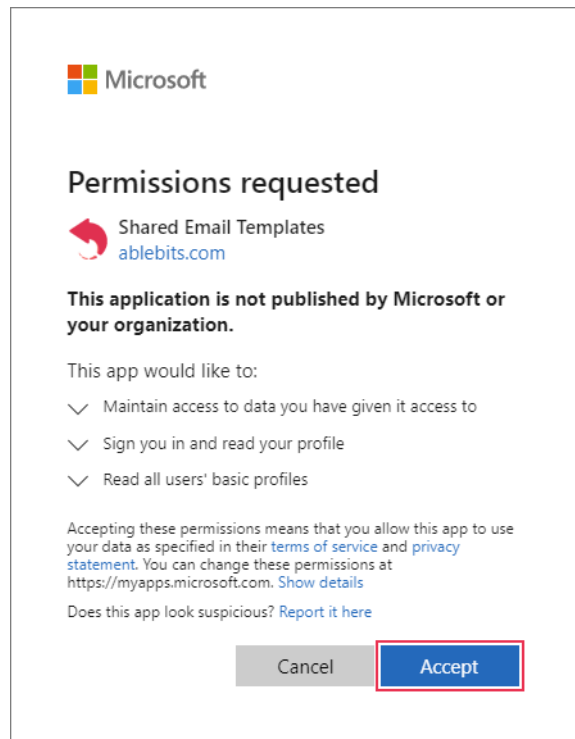
Step 2

Click the **Sign up with Microsoft** button:



Step 3

You'll see a Microsoft dialog asking you to choose an account you're going to sign up with. When you sign in to your Microsoft work or school account, another Microsoft dialog will appear telling you what permissions are requested by Shared Email Templates. To grant the requested permissions, click the **Accept** button:





Step 4

On the Shared Email Templates pane, a sign-up form will appear. Check up on your first and last name. Confirm that you accept the Shared Email Templates [Terms of use](#) and [Privacy policy](#) by selecting the corresponding checkbox. Then click the **Sign up** button:

Your personal Shared Email Templates account is ready to use.

Sign in with email

Step 1

On the Shared Email Templates pane in your Outlook, click **Sign in with email**:

Step 2

Enter your username (or email address) and password, and then click **Sign in**:

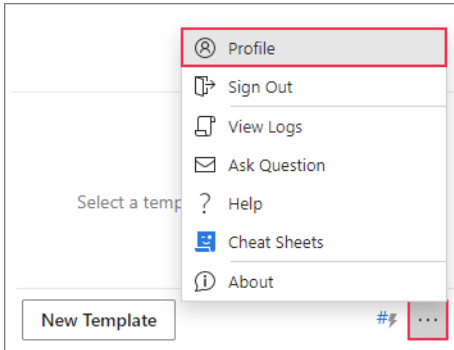
Sign in with Microsoft

On the Shared Email Templates pane in your Outlook, click **Sign in with Microsoft**:



Manage your account

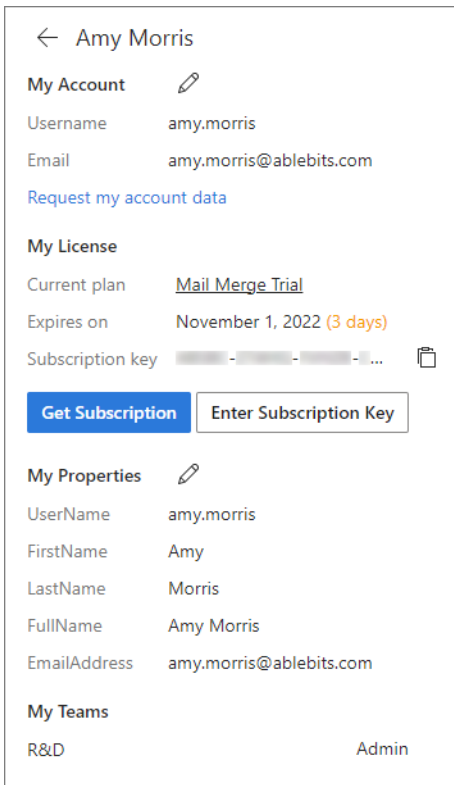
To manage your personal Shared Email Templates account, go to the **More** menu → select **Profile**:



Your profile structure

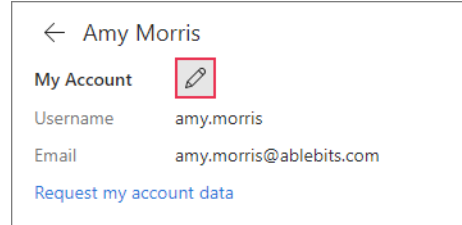
Your Shared Email Templates profile consists of the following sections:

- **My Account.** Your username and/or email address are specified here.
- **My License.** Check this section for your current subscription plan, its expiration date, and subscription key.
- **My Properties.** These are your profile properties.
- **My Teams.** Here you can see a list of the teams you've joined or created and check your permissions.

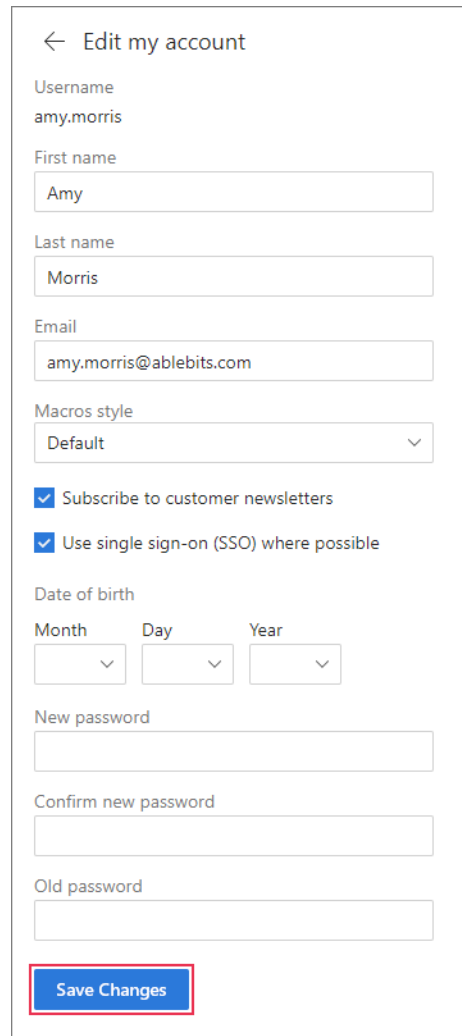


Edit your account

If you'd like to make changes to your Shared Email Templates account, go to the **More** menu → select **Profile** → click **Edit Account**:



When editing your account, you can correct your first and last name, change your email address, choose a macros style, unsubscribe from customer newsletters, decide whether to use single sign-on or not, specify your date of birth, and change your password. When you're done, click **Save Changes**:



Note. Fields for changing a password are absent from the Shared Email Templates profile in personal accounts created by signing up with Microsoft credentials.



Request your account data

If you want to get an email message with detailed information on your Shared Email Templates account data (excluding passwords), go to the **More** menu → select **Profile** → click **Request my account data** under **My account**:

← Amy Morris

My Account

Username amy.morris

Email amy.morris@ablebits.com

Request my account data

My License

Current plan [Mail Merge Trial](#)

Expires on November 1, 2022 (3 days)

Subscription key

[Get Subscription](#) [Enter Subscription Key](#)

Delete your account

If you decide to delete your Shared Email Templates account, go to the **More** menu → select **Profile** → click **Edit Account** → click **Delete account and all my details** at the very bottom of the Shared Email Templates pane:

amy.morris@ablebits.com

Macros style
Default

Subscribe to customer newsletters

Use single sign-on (SSO) where possible

Date of birth

Month Day Year

New password

Confirm new password

Old password

[Save Changes](#)

Delete account and all my details

Find more information

- How to create and manage a personal account <https://www.ablebits.com/docs/outlook-shared-templates-account>
- How to activate a subscription key <https://www.ablebits.com/docs/outlook-shared-templates-activation/>
- How to create and manage a company account <https://www.ablebits.com/docs/outlook-shared-templates-manage-company-account/>



Need more details?

- Shared Email Templates for Outlook documentation ablebits.com/docs/#shared-email-templates-outlook
- More Shared Email Templates features and benefits ablebits.com/outlook-shared-email-templates
- Shared Email Templates tips and tricks ablebits.com/office-addins-blog/tag/shared-email-templates
- All Shared Email Templates cheat sheets ablebits.com/docs/outlook-shared-templates-cheat-sheets

