# Create and manage a company account

With a company account, managing your Shared Email Templates users, teams, and subscriptions is smooth and trouble-free. All is done in one place and can be easily controlled. After creating a company account, you'll be able to add users, edit their profiles, and assign their rights; delete users' accounts if necessary; add, manage, and close teams; buy subscriptions and assign subscription keys.

There are two ways of creating a company account in Shared Email Templates:

- Sign up with email
- · Sign up with Microsoft
- (i) Note. To create a company account by signing up with Microsoft, you must be a Global Administrator in your Microsoft 365 organization.
- Note. It won't be possible to sign up with Microsoft after signing up with email.

# Sign up with email

#### Step 1

In your Outlook, start the Shared Email Templates add-in and click **Sign up** on its pane:



Step 2 Click the Sign up with email button:



#### Step 3

In this step, you can switch between two tabs: **Company Account** and **Personal**. In line with your wishes, choose one of the two account types available. The table below shows the differences between them:

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 a personal account is exactly what you want and you need more information about it, visit this help page: How to create and manage a personal account.

To get a company account created, fill out a sign-up form on the **Company Account** tab, confirm the acceptance of the Shared Email Templates Terms of use and Privacy policy, and then click **Sign up**:

Company Account Personal
To be able to invite and manage users in your company, create a company account.
Company account name
Number of trial users
Company Administrator
First name Last name
Username
anna.hope@ablebits.com
Password
Confirm password
* All fields are required
I accept Terms of use and Privacy policy
Sign up

# Sign up with Microsoft

(for Global Administrators)

### Step 1

Start Shared Email Templates in your Outlook and click **Sign up** on the add-in pane:

ema crea	il-templates.app, a place where you can te reply email templates and share them between devices and people.
	Sign in with email
	Sign in with Microsoft for work or school accounts
	or
l	Don't have an account? Sign up <

## Step 2

Click the Sign up with Microsoft button:



## Step 3

Sign in to your Microsoft 365 global administrator account and accept permissions requested by Shared Email Templates:



#### Step 4

A sign-up form will appear on the Shared Email Templates pane. Your company account name and the number of trial users will be specified there. Check this information, accept the Shared Email Templates Terms of use and Privacy policy, and click Sign up:

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Sign up with Microsoft
To be able to invite and manage users in your company, create a company account.
Company account name
Company account name
Number of trial users (can be changed later)
Number of trial users
* All fields are required
<ul> <li>I accept Terms of use and Privacy policy</li> </ul>
Sign up

# Manage a company account

To access your company account, go to the More menu  $\rightarrow$  select Manage Company:

	8	Profile
	[]→	Sign Out
	ø	Manage Company
	ſ	View Logs
	$\square$	Ask Question
Select a temp	?	Help
	3	Cheat Sheets
	ſ	About
New Template		# <b>#</b>

In your default browser, the Shared Email Templates web app will open, and you'll see your company account details.



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ĒŦ		Add Administrator					

**1. Manage Company.** It's a starting point for a company administrator's activities.

**2.** Account Details. This section contains detailed information on your company account, including subscriptions, users, and administrators.

**3.** Users. Users' records are available here.

**4. Teams.** In this section, you can find the teams you already created, learn how many users each of them has, and check users' rights. You can also add new teams and edit the existing ones.

**5.** Rename Account. Click Rename Account to change the name of your company account.

**6.** Close Account. If you decide that you don't need your company account anymore, you'll be able to delete it after clicking Close Account.

**7. Subscription.** Here you can check your subscription plans, keys, and statuses, find out how many of purchased subscriptions have already been assigned, cancel auto-renewal, and renew your subscriptions manually if necessary.

**8.** Users. You can see how many users you have, which of them are licensed, and who needs a subscription.

**9.** Company administrators. A list of company administrators is here.

To assign admin rights to a user, click the **Add Administrator** button:

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Add	Administrato	or	J		

To revoke admin rights, select a company administrator from the list and click the **Remove admin rights** button:

윢 Anna Hope (You)	e
유 Sophie Bart	e

# Find more information

- How to manage a company account ablebits.com/docs/outlook-shared-templates-manage -company-account
- Manage users via a company account ablebits.com/docs/outlook-shared-templates-manage -company-users
- Manage teams via a company account ablebits.com/docs/outlook-shared-templates-manage -company-teams
- Manage your company's Shared Email Templates subscriptions ablebits.com/docs/outlook-shared-templates-manage -company-subscriptions

## Need more details?

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- 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

