



# **Shared Email Templates User Manual**



# About this guide

This manual gives an overview of the main functionality of [Shared Email Templates](#) for Outlook.

Do you work in corporate Microsoft 365 environment and use Outlook for business aims? Or do you have a free Outlook account for personal needs? This step-to-step guide will help you to find out how to improve your everyday emailing routine.

**Disclaimer:** All characters and company names in this guide are fictitious. Any resemblance to real persons or companies is purely coincidental.

## What does Shared Email Templates do?

Shared Email Templates is an add-in for Microsoft Outlook. It helps you to create email templates and send them in seconds. No more typing one-size-fits-all emails. You read a new email and reply to it with the click of a button.

## Getting further assistance

If you have not found any answers to your questions about Shared Email Templates in this document, please check out our [website](#) with answers to FAQs, tutorials, instructions on troubleshooting and other information.

Our support team is always ready to answer your technical questions, listen to feedback and evolution wishes via [support@ablebits.com](mailto:support@ablebits.com). You are welcome to drop in for a conversation via live chat at our [support service home page](#).



## 5 reasons to use Shared Email Templates



### **Free up time for more important things**

Easily create email templates for universal occasions. Use your own design, add pictures, attachments, hyperlinks. Spend several minutes once and save hours forever.



### **Collaborate with other team members**

Share your email templates with other members of the team in real time and make use of your team templates. Give permission only to certain colleagues or share the templates with everyone. With Shared Email Templates it is easy to help each other.



### **Show individual approach**

Personalize your replies by automatically filling the To, Cc, Bcc, Subject fields and recipients' info in an email body with the help of macros.



### **Stay connected wherever you are**

Access your templates from any place and any device (PC, Mac or Windows tablets) thanks to a cloud-based sharing service.



### **Enjoy security**

Feel confident about the safety of your templates, files, documents, and personal data. For extra security, use your own secret keys for data encryption. We have no access to any kind of your personal information.



# Table of contents

Initial setup .....	10
Minimum system requirements .....	10
Outlook app versions .....	10
Browser versions for Outlook online.....	10
Microsoft Exchange versions.....	11
Shared Email Templates installation .....	11
Outlook desktop for Windows.....	11
New Outlook for Mac .....	12
Outlook online .....	14
Shared Email Templates account .....	16
Create a Shared Email Templates account .....	16
Sign in .....	18
Your Shared Email Templates profile .....	19
Edit your account .....	20
Manage license and subscription .....	20
Profile properties.....	22
My teams .....	22
Deactivate your license key .....	23
Delete your account .....	23
Remove Shared Email Templates from Outlook.....	24
Outlook desktop for Windows.....	25
New Outlook for Mac .....	26
Outlook online .....	26
User interface overview.....	28
Shared Email Templates pane in the add-in.....	28



Shared Email Templates pane in the web app.....	31
Context pop-up menu for templates .....	32
Context pop-up menu for folders.....	33
Context pop-up menu for teams .....	34
Ellipsis pop-up menu .....	35
Simple templates .....	36
Create a simple template .....	36
Create a template from selection .....	37
Templates action bar .....	37
Edit templates.....	38
Insert your template into an email .....	39
Back up templates.....	39
Export templates .....	40
Import templates.....	40
Create rich-formatted templates.....	42
Editor toolbar.....	42
Use tables.....	44
Create a table .....	44
Edit a table.....	44
HTML-based templates.....	48
Template shortcuts .....	50
Create a template shortcut .....	51
Edit template shortcuts .....	52
Use template shortcuts in your emails .....	52
Use template shortcuts in templates .....	53
Remove template shortcuts .....	54
Shortcuts view .....	55



Simple macros.....	56
Insert recipient and sender into an email body.....	56
Remove a macro.....	59
Add other information to email body .....	59
Add addresses from To, CC, Bcc fields .....	59
Add subject, date, time .....	60
Fill in email fields: To, Cc, Bcc, subject .....	61
Use ~%FillTo, ~%FillCc, ~%FillBcc macros .....	62
Use ~%FillSubject macro .....	62
Use ~%AddTo, ~%AddCc, ~%AddBcc macros .....	63
Use ~%AddSubject macro.....	65
Service macros.....	67
Use ~%ClearBody macro.....	67
Use ~%FromAccount macro .....	68
Use ~%Note macro .....	69
Full list of macros .....	70
Insert pictures into templates.....	71
Insert pictures from OneDrive .....	71
Insert pictures from SharePoint .....	74
Insert pictures from a URL .....	76
Single sign-on for OneDrive and SharePoint macros.....	78
Enable and disable single sign-on .....	78
Attach files to templates.....	79
Attach files from OneDrive .....	79
Attach files from SharePoint .....	81
Attach files from a URL .....	83
Add file attaching prompt.....	84



Use mailbox and profile properties .....	87
Mailbox properties .....	87
Insert mailbox properties into your templates .....	87
Profile properties .....	89
Add profile properties .....	89
Edit profile properties .....	90
Insert profile properties.....	91
Delete profile properties.....	92
DateFormat property .....	92
DateLocale property .....	94
HTML as a property.....	96
Create templates for your Outlook calendar .....	97
Create appointments .....	97
Create meetings .....	98
Use calendar-related macros .....	99
Create a meeting/appointment template from selection .....	101
Add fillable fields with ~%WhatToEnter macro .....	102
Text field: text input .....	102
Drop-down list .....	103
Pop-up calendar .....	105
Customize date .....	107
Datasets .....	108
Create and edit a simple dataset.....	108
Use simple datasets in templates.....	110
Add modifiable values.....	111
Add fixed values.....	112
Fill tables with datasets.....	113



Use default rows.....	117
Import datasets from .csv files.....	118
Dynamic datasets from Excel files.....	119
Use Outlook drafts.....	122
Link Outlook folders.....	122
Outlook drafts limitations.....	123
Organize templates.....	124
Use folders.....	124
Create a folder.....	124
Edit a folder.....	125
Copy a folder.....	125
Move a folder.....	125
Search a folder.....	125
Delete a folder.....	126
Use favorites.....	126
Actions with single templates.....	127
Copy single templates.....	127
Move single templates.....	127
Delete single templates.....	128
Search a template.....	128
Actions with a group of templates/folders.....	128
Copy a group of templates.....	129
Move a group of templates.....	129
Delete a group of templates.....	129
Templates sharing with teams.....	130
Create a team.....	130
Encrypt a team.....	131





Invite team members.....	133
Accept invitation to join a team .....	135
Manage team members .....	136
Team properties .....	137
Add team properties .....	139
Edit team properties.....	140
Insert team properties .....	141
Remove team properties .....	143
Close a team .....	143
Additional resources.....	145
How to get support.....	146



# Initial setup

## Minimum system requirements

To use Shared Email Templates, [connect](#) Outlook with any of the following accounts:

- Microsoft/Office 365
- Outlook.com
- Microsoft Exchange

## Outlook app versions

Shared Email Templates is compatible with the Outlook versions below:

- Outlook on Windows connected to Microsoft/Office 365
- Outlook on Mac connected to Microsoft/Office 365
- Outlook on Windows 2016
- Outlook on Windows 2019
- Outlook on Mac 2019
- Outlook on Mac 2016

## Browser versions for Outlook online

Outlook online is supported by the following versions of browsers:



Google Chrome - 78 and higher



Microsoft Edge - 44 and higher



Microsoft Edge (Chromium-based) - beta support 79 and higher



Safari - 12 and higher (limited support)



Firefox - 69 and higher



## Microsoft Exchange versions

If you have a work/school email address at Microsoft Exchange account, make sure that your school/company uses Microsoft Exchange Server 2016 or higher.

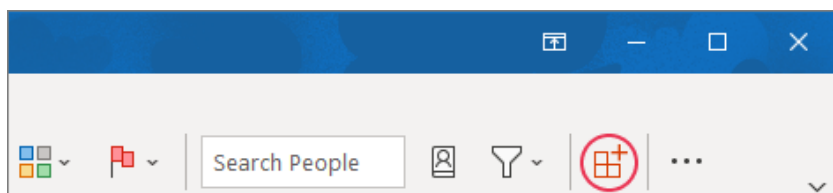
## Shared Email Templates installation

To see installation instructions, click the version of Outlook you need in the list:

- [Outlook Desktop for Windows](#)
- [New Outlook for Mac](#)
- [Outlook online](#)

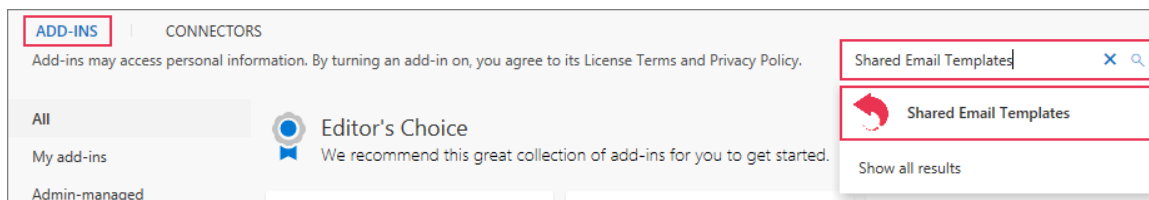
### Outlook desktop for Windows

1. Open the Outlook app on your computer, go to the **Home** tab and click the **Browse add-ins** icon in the ribbon.

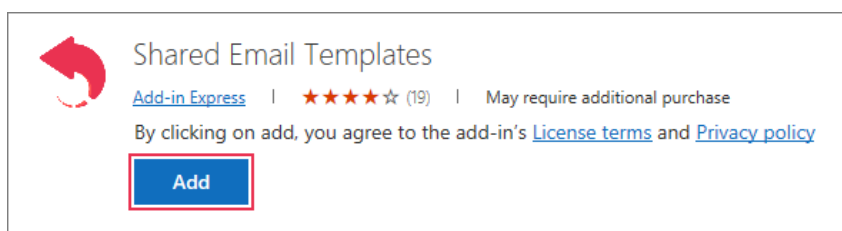


**Note.** If the **Browse add-ins** icon is greyed out, it might mean that your organization admin has disabled it for you. Contact your system administrator to enable it. If this doesn't help, contact [Microsoft office support service](#).

2. The window with the add-ins for Outlook will open. Go to the **Add-ins** tab, type Shared Email Templates in the search bar and click its name in the list.



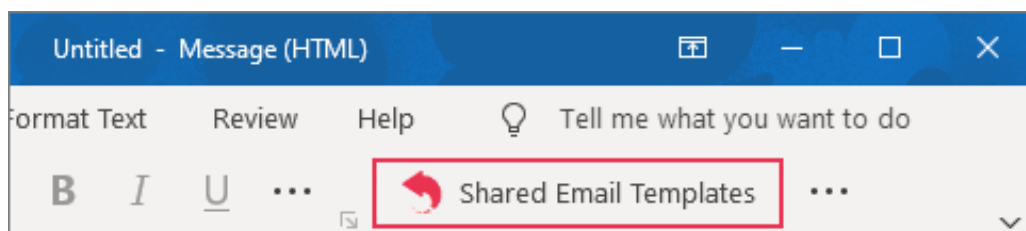
3. Click the **Add** button.



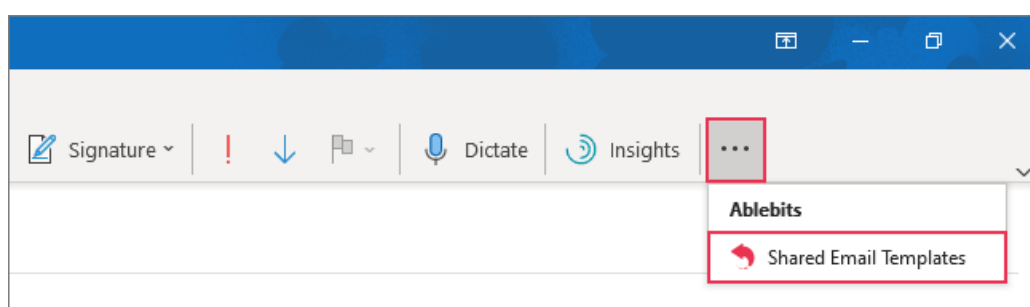


4. Restart the Outlook app for the applied changes to take effect.

You will always find the add-in directly in the ribbon of the new email window.



**Tip.** If you don't see the icon in the ribbon, check the **More commands** pop-up menu.

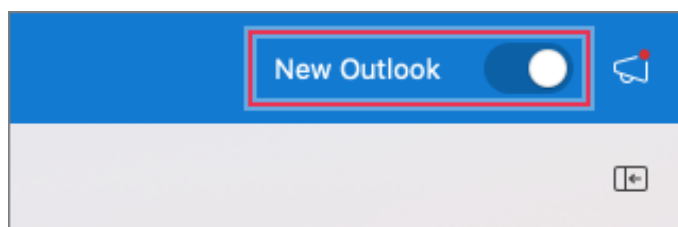


**Tip.** It's possible to remove the add-in from the ribbon or pin it to the ribbon. Just right-click the icon and tick **Pin to Ribbon** or **Remove from Ribbon**.

**Note.** To force Shared Email Templates update, start the add-in, click somewhere on its pane and press **Ctrl+5**. The add-in will be updated.

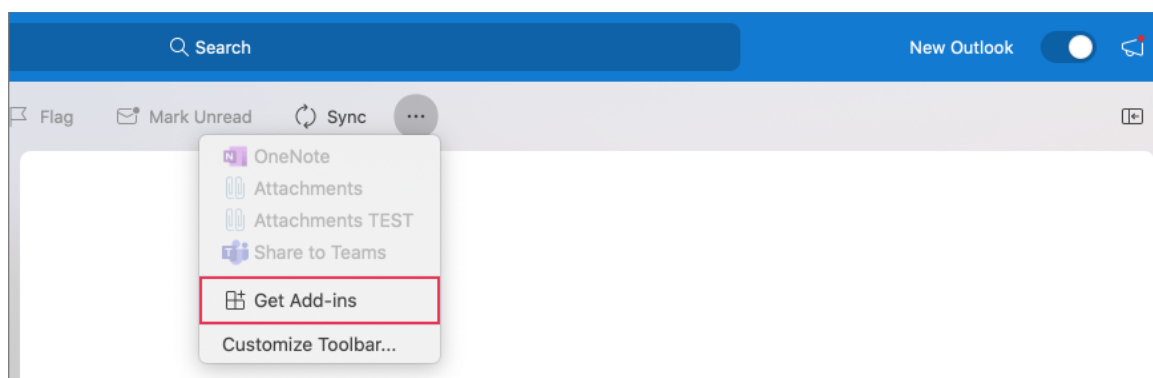
## New Outlook for Mac

When you open the New Outlook for Mac app, check that you switched to the new version of the app in the ribbon first.

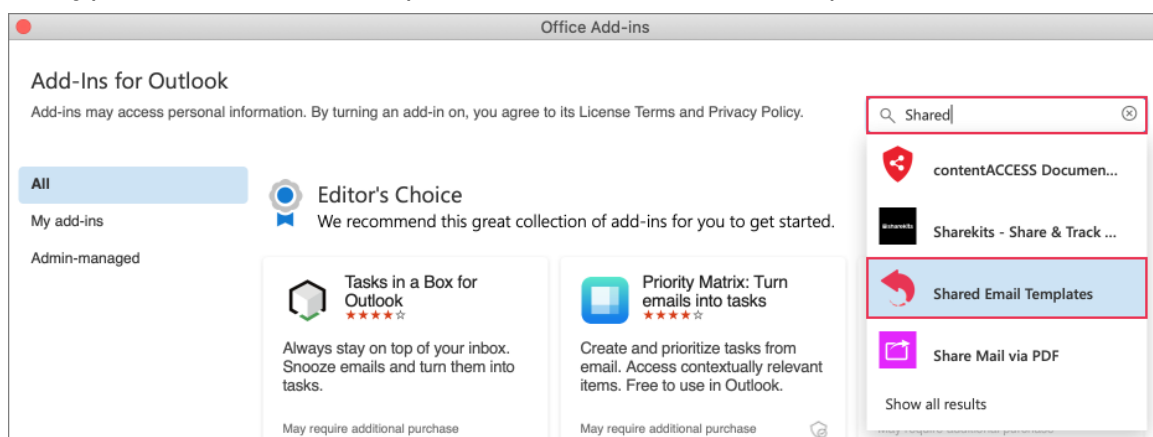




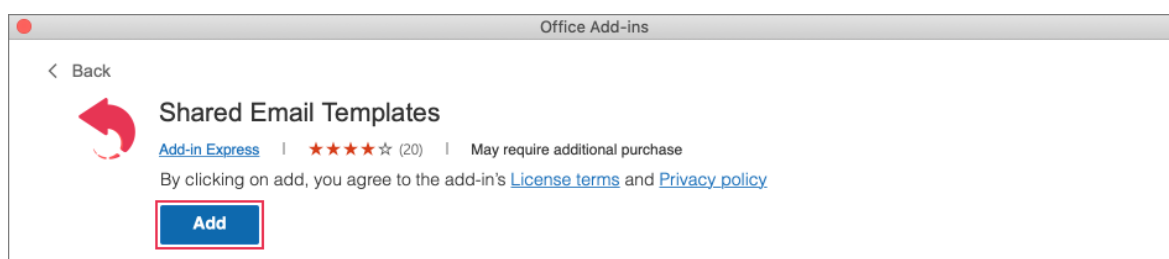
1. Click the three dots in the ribbon and select **Get Add-ins**.



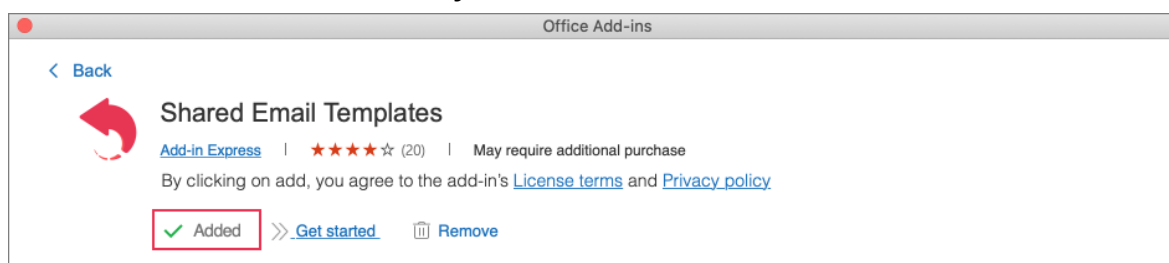
2. Type Shared Email Templates in the search bar and pick the add-in.



3. Click the **Add** button.



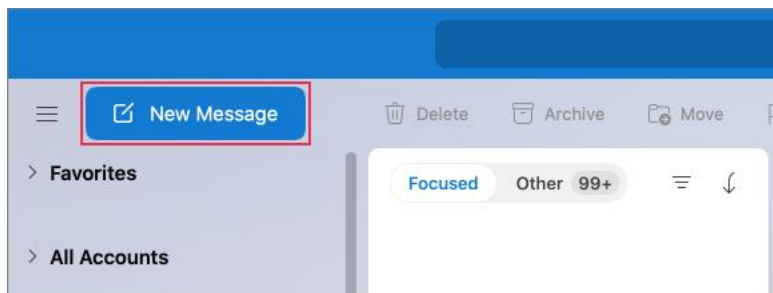
4. When the add-in is added, you will see a tick and the word "Added".



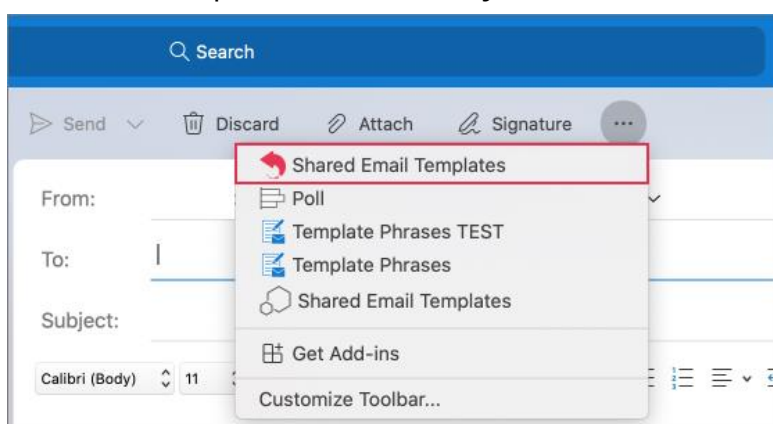
Congratulations! You have Shared Email Templates installed. Now let's find the add-in.



1. Click the **New Message** icon and then select **New Message** in the drop-down list.



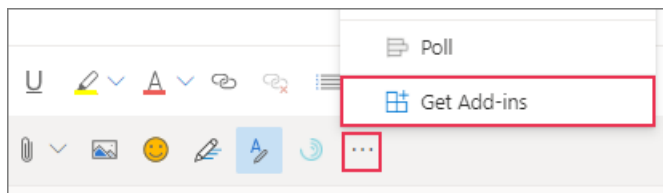
2. Click the three dots in the ribbon and you will see Shared Email Templates. This is the place from where you start the add-in.




## Outlook online

[Sign in to Outlook](#) with your credentials for Microsoft/Office 365, outlook.com or Microsoft Exchange. Use normal browsing mode (not a private one) and allow third-party cookies. In Firefox, the add-in won't work if you turned on "never remember history" option.

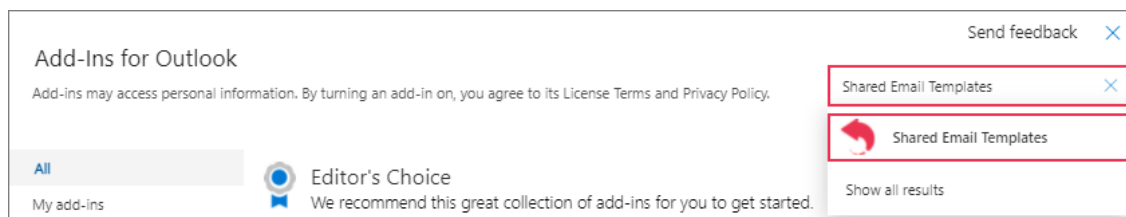
1. Click **New Message**, open the **More commands** pop-up menu and click **Get Add-ins**.



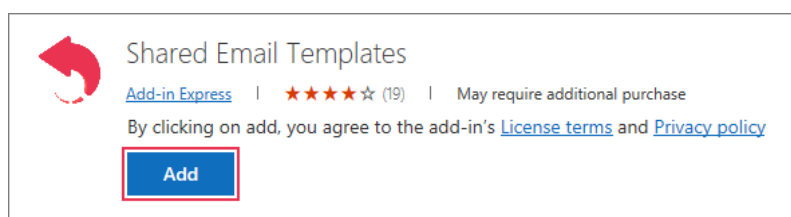
 **Note.** Greyed out **Get Add-ins** button might mean that the admin of your organization has disabled it for you. Contact your system administrator and ask to enable it. If it doesn't help, contact [Microsoft office support service](#).



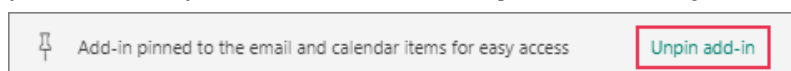
When the window with add-ins opens, find Shared Email Templates in the search bar and click it.



2. Then click the **Add** button.

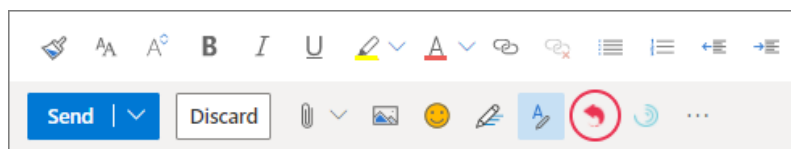


A new window will open to inform you that the add-in will automatically be pinned for quick access. Click **Unpin add-in** if you don't agree.

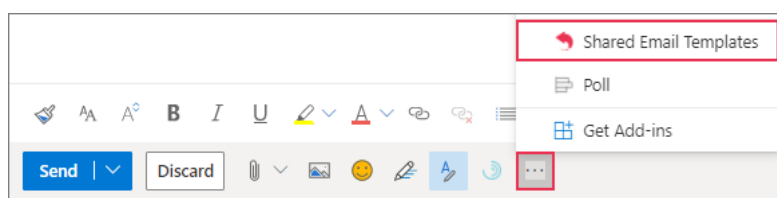


3. Close the add-ins window and reload the page.

If you pinned the add-in, you will always find it in the toolbar.



If you chose to unpin the add-in, you will find the icon in the **More commands** pop-up menu.



Remember this place. This is the place from where you always start Shared Email Templates.



## Shared Email Templates account

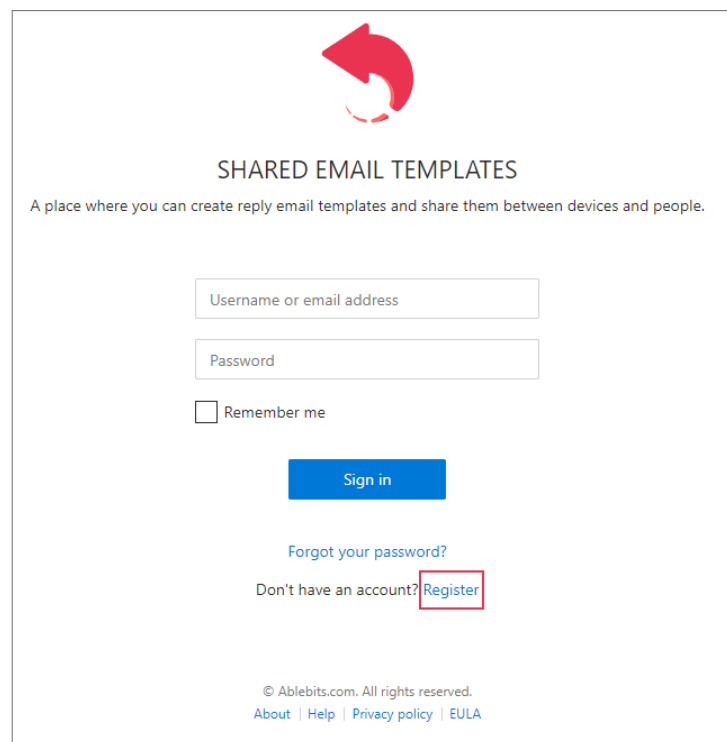
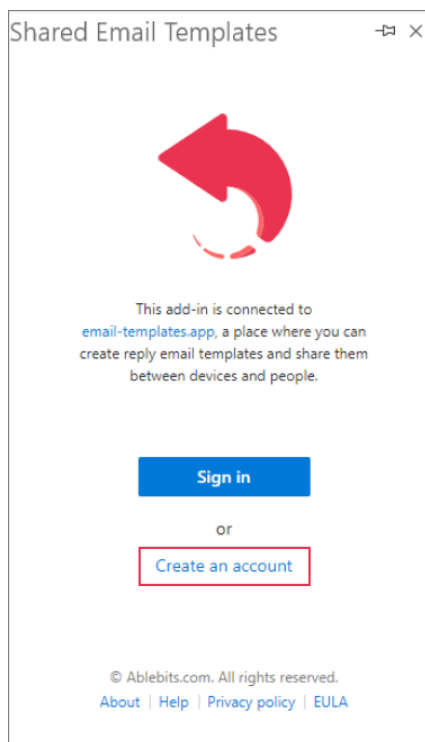
Before getting down to work with Shared Email Templates, you need to create a separate Shared Email Templates account.

Microsoft requires installing the add-in for each of your Outlook accounts separately. If you have several Outlook accounts, you won't be able to use templates in all of them. The solution is to create a Shared Email Templates account that will let you use templates from any of your Outlook accounts.

### Create a Shared Email Templates account

Once you installed the add-in, you are ready to create an account. You can do it from the add-in as well as from our [web app](#).


1. Start Shared Email Templates. Click **Create an account** in the add-in or **Register** in the web app.



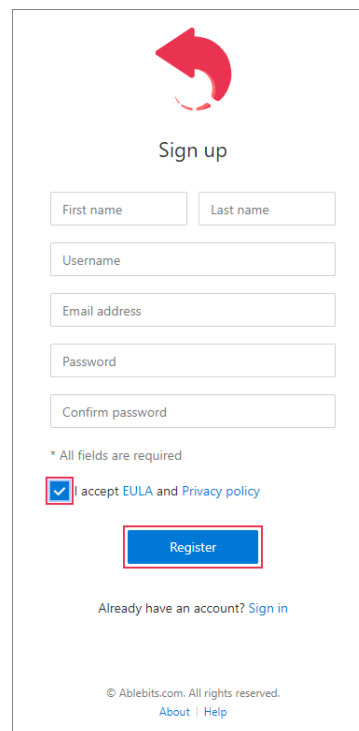




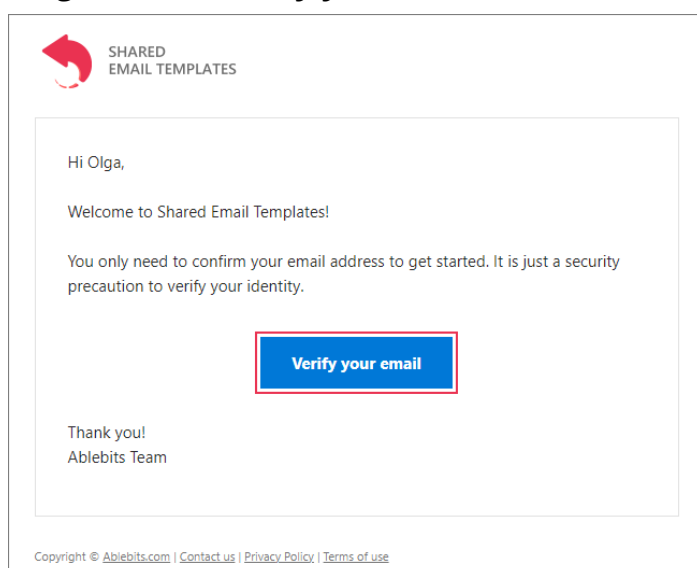
2. Fill in the form with your first and last name, username, email address and password. All fields are required. After reading the privacy policy and the end-user license agreement, tick the box and click **Register**.

 **Note.** The system won't allow you to use a weak password. Uppercase/lowercase letters, numbers and symbols is your rescue team. And remember: the longer your password is, the better.


3. Check your inbox for a confirmation email. If you haven't received it within an hour, please check the spam folder. Failing this, click **Resend** and a new confirmation email will be sent to you. When you get it, click **Verify your email**.



The registration form is titled "Sign up" and features the Ablebits logo at the top. It contains several input fields: "First name", "Last name", "Username", "Email address", "Password", and "Confirm password". Below these fields, a note states "\* All fields are required". A checkbox labeled "I accept EULA and Privacy policy" is checked. A blue "Register" button is prominently displayed. At the bottom, there is a link "Already have an account? Sign in" and a footer with "© Ablebits.com. All rights reserved." and links for "About" and "Help".



After that, you will be redirected to our web app and see a message about successful verification.

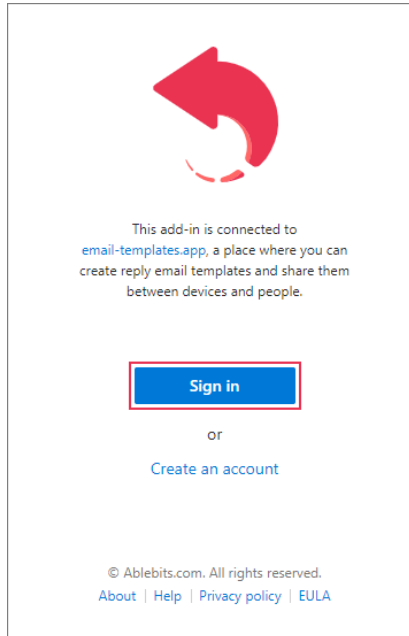
 **Note.** If you've registered using your current Outlook account, your email address will be verified automatically and you will immediately get in.

Now it is time to [sign in](#).




## Sign in

1. Start Shared Email Templates in Outlook and click **Sign in**.



2. Enter your username or email address as well as password and click **Sign in**.

Shared Email Templates ✕



Sign in

☒ Remember me


[Forgot your password?](#)

Don't have an account? [Register](#)

© Ablebits.com. All rights reserved.  
[About](#) | [Help](#) | [Privacy policy](#) | [EULA](#)

 **Note.** To sign in to our [web app](#) start from step 2.

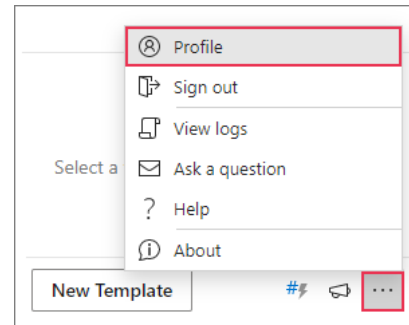


 **Note.** There's instant synchronization between the add-in and the web app, so you can use them simultaneously. Just make sure that you used the same credentials (username/email address and password) to sign into the add-in and the web app.

## Your Shared Email Templates profile

You can access your profile from the ellipsis pop-up menu.

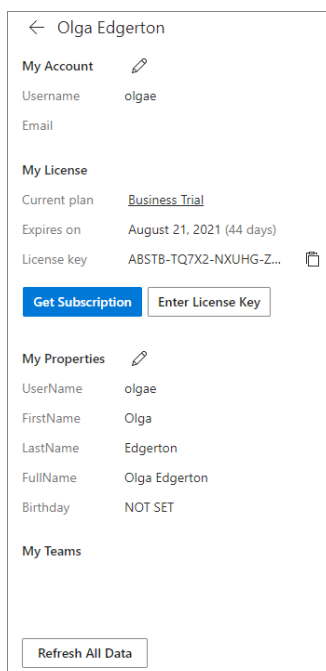
Click the tree dots in the lower-right corner (lower-left corner in the web app) and select **Profile**.



The profile pane consists of 4 sections:

- My Account
- My License
- My Properties
- My Teams

From here you can [edit account info](#), [edit profile properties](#), [manage license](#) and see the list of your [teams](#).

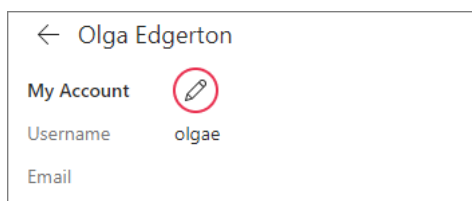




## Edit your account

In **My Account** section of your profile you'll see your username and email.

1. Click the **Edit Account** icon.



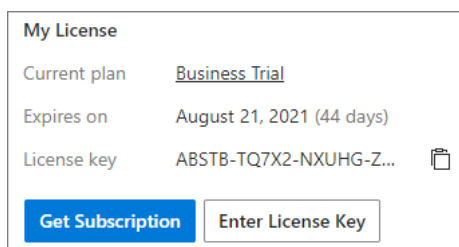
From the new pane you can do the following:

- Edit your first and last names
- Change your email
- Set or change your date of birth
- Update your password
- Subscribe to customer newsletters
- Choose to use the old version of the editor
- Agree to use [single sign-on](#), where possible

When you are done editing, do not forget to click **Save changes**.

## Manage license and subscription

Your current subscription plan (its expiry date and license key) is visible in the **My License** section of your profile.



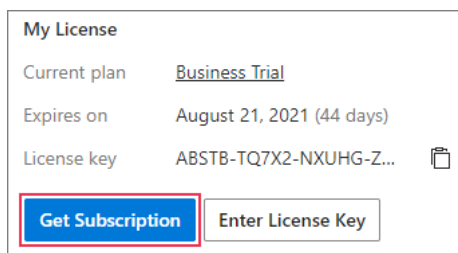
At the moment, we offer several subscription plans. To choose the one that suits you best, check out [this page](#).



**Tip.** If you are not sure which plan to choose, feel free to take advantage of a trial period. During this period, you can try out all the features of Shared Email Templates.

As soon as you make up your mind, visit this [web page](#) to subscribe or follow the steps below.


1. Click **Get Subscription**. You will be redirected to checkout to provide billing and card details. After payment, a license key will be sent to your email address.



My License

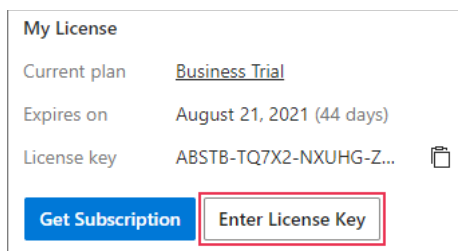
Current plan [Business Trial](#)

Expires on August 21, 2021 (44 days)

License key ABSTB-TQ7X2-NXUHG-Z... 

**Get Subscription** Enter License Key


2. Copy the key, go to **My License** again and click **Enter License Key**.



My License

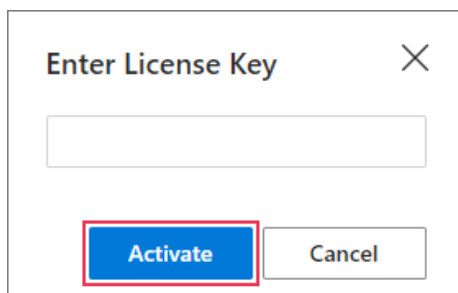
Current plan [Business Trial](#)


Expires on August 21, 2021 (44 days)

License key ABSTB-TQ7X2-NXUHG-Z... 

Get Subscription **Enter License Key**

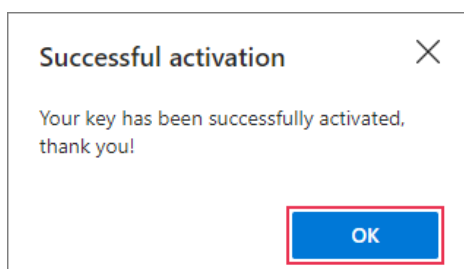
3. Paste the key into the field and click **Activate**.




Enter License Key 

**Activate** Cancel

4. If everything is okay, a dialog window with a message about successful activation will appear. Click **OK** to close it.




Successful activation 

Your key has been successfully activated, thank you!

**OK**



Updated info about the subscription plan and its expiry date will be immediately available in your profile.

 **Note.** Once the trial or subscription period is over, you won't be able to continue using Shared Email Templates. The only available option will be to [export templates](#) in .xml format.

To carry on using the product, you will need to renew your subscription.

## Profile properties

Profile properties may include position, working hours, cubicle address or even your customized smiley. Options are limited only by your imagination and 32 properties per profile.

A list of your properties is available in **My Properties**. Properties can be predefined (retrieved from your account: username, first and last name, full name, birthday, email address, license key) and custom (the ones you create yourself).

← Profile properties	
<b>Predefined</b>	
UserName	olgae
FirstName	Olga
LastName	Edgerton
FullName	Olga Edgerton
Birthday	NOT SET
EmailAddress	
LicenseKey	ABSTB-TQ7X2-NX...
<b>Custom</b>	

## My teams

In **My Teams**, you can see the list of your teams and your user permissions (editor or admin).

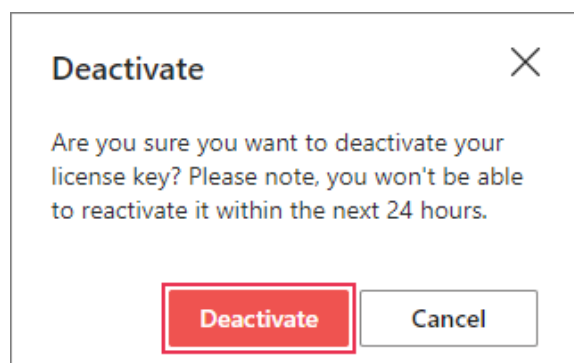
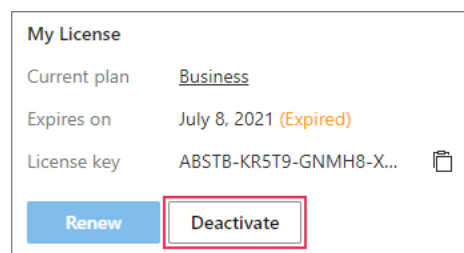
<b>My Teams</b>	
Smiley Flowers team	Admin




## Deactivate your license key

It's easy to deactivate your license key anytime.

1. Go to the profile pane.
2. In **My License** click **Deactivate**.
3. Click **Deactivate** one more time in the dialog window.



 **Note.** You won't be able to reactivate your license within the next 24 hours


## Delete your account

All templates are saved on our servers in an encrypted form and are associated with your account. So, when you delete your account, all the information inside it is deleted too.

 **Note.** Your account is deleted forever, and you won't be able to restore it.

Before deleting the account, check the following:

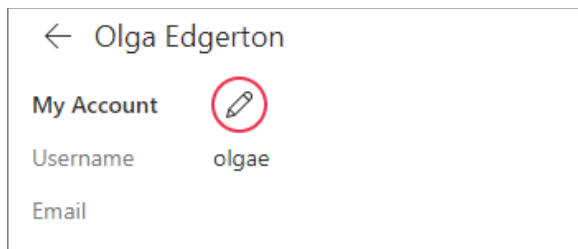
- The subscription auto-renewal is turned off. Otherwise, your account will be deleted, but the money will still be withdrawn.
- All templates that you might need are [exported](#).
- You are not an admin of a team.

 **Note.** You won't be able to delete your account if you are an admin of a team. Give admin rights to someone else first.

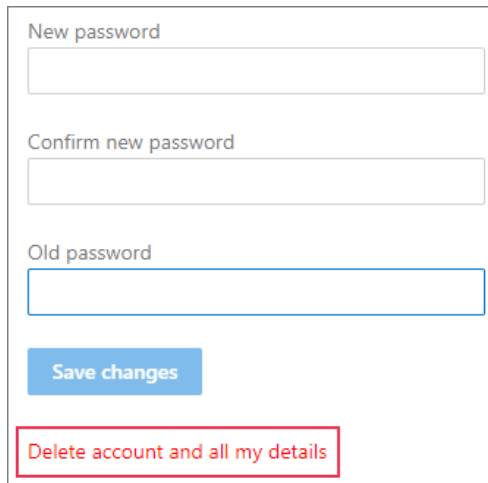
To delete your Shared Email Templates account, do the following:



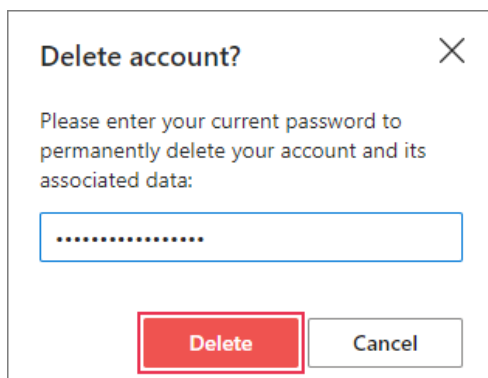
1. Click the **Edit account** icon in **My Account**.



2. Click **Delete account and all my details** at the bottom.



3. Enter your current password and click **Delete**.



## Remove Shared Email Templates from Outlook

Click the version of Outlook below.

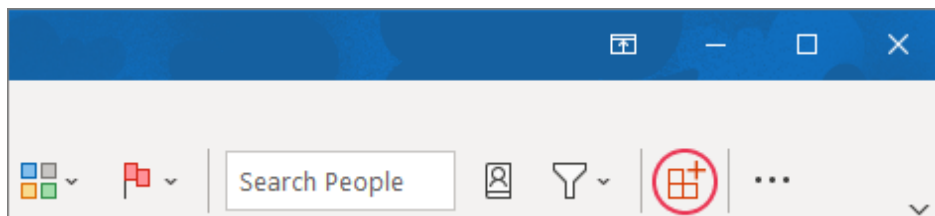
- [Outlook Desktop for Windows](#)
- [New Outlook for Mac](#)
- [Outlook Online](#)



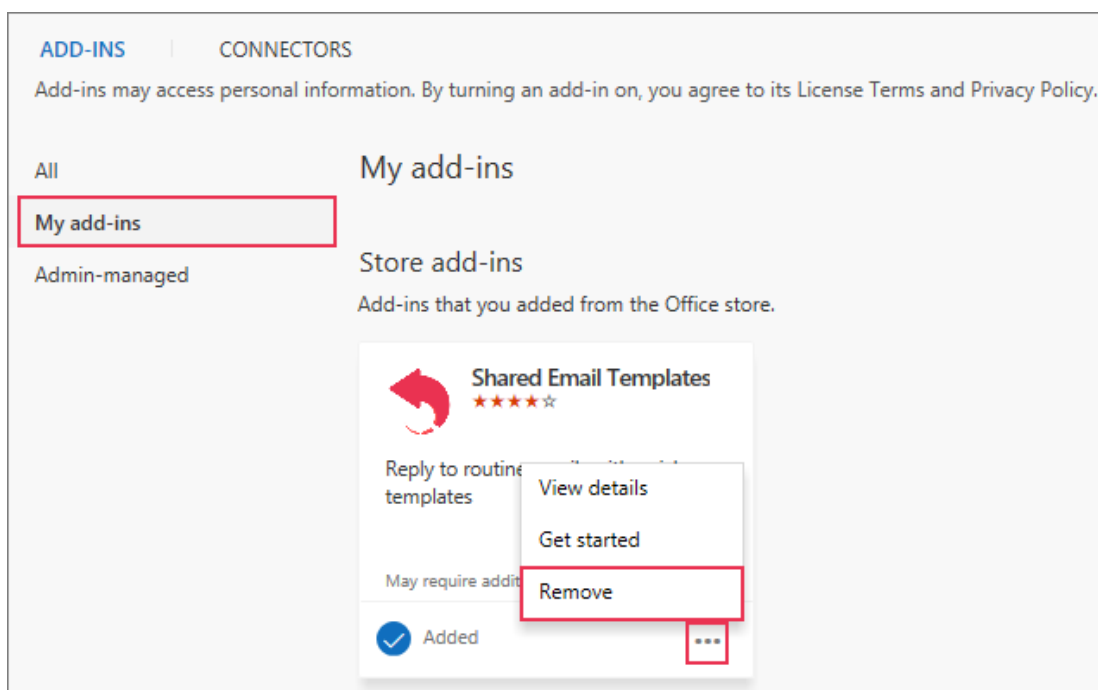


## Outlook desktop for Windows


1. Open the **Home** tab in Outlook and click the **Browse add-ins** button in the ribbon.



2. The window with add-ins will appear. Open **My add-ins**, find Shared Email Templates there, click the three dots in the lower-right corner and choose **Remove**.



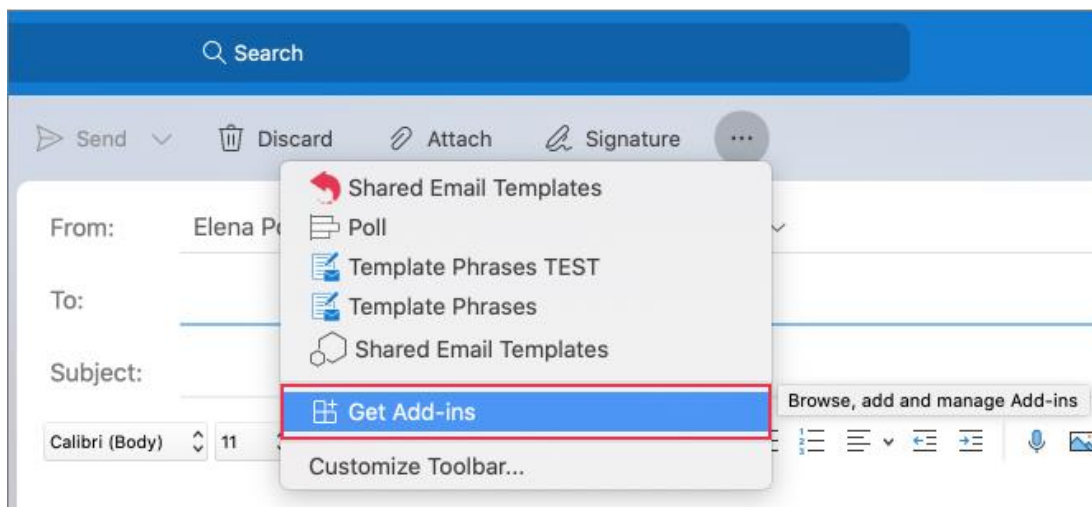
3. The add-in will be removed from Outlook.

 **Note.** If you don't see the **Remove** button, it may mean that you don't have the permission to remove the add-in. Get in touch with the admin of your organization. If it doesn't help, contact [Microsoft office support service](#).

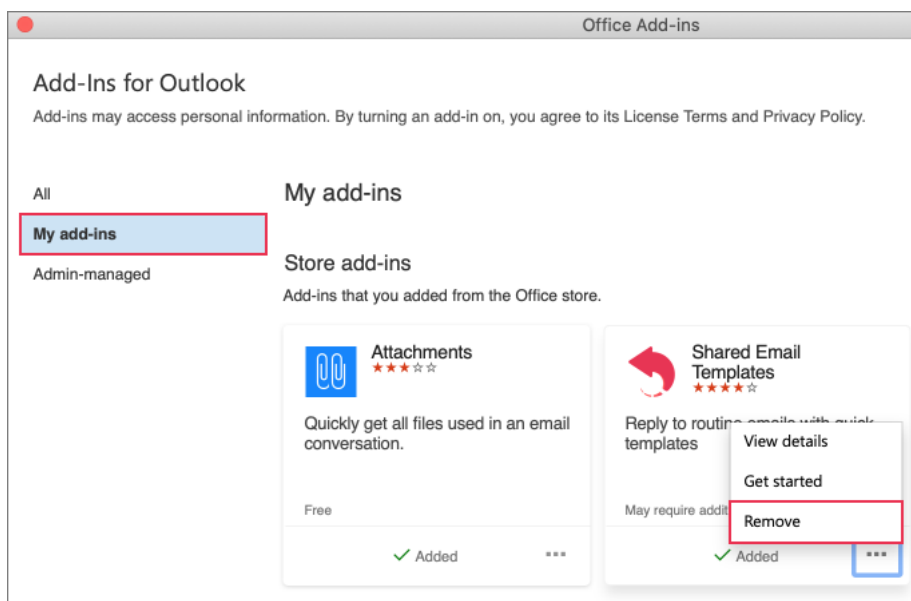


## New Outlook for Mac

1. Click the three dots in the ribbon and select **Get-Add-ins**.

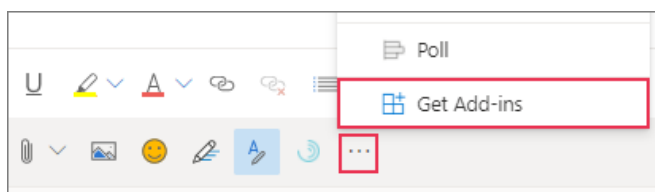


2. Go to **My add-ins**, find Shared Email Templates in the list, click the three dots in the lower-right corner and select **Remove**.



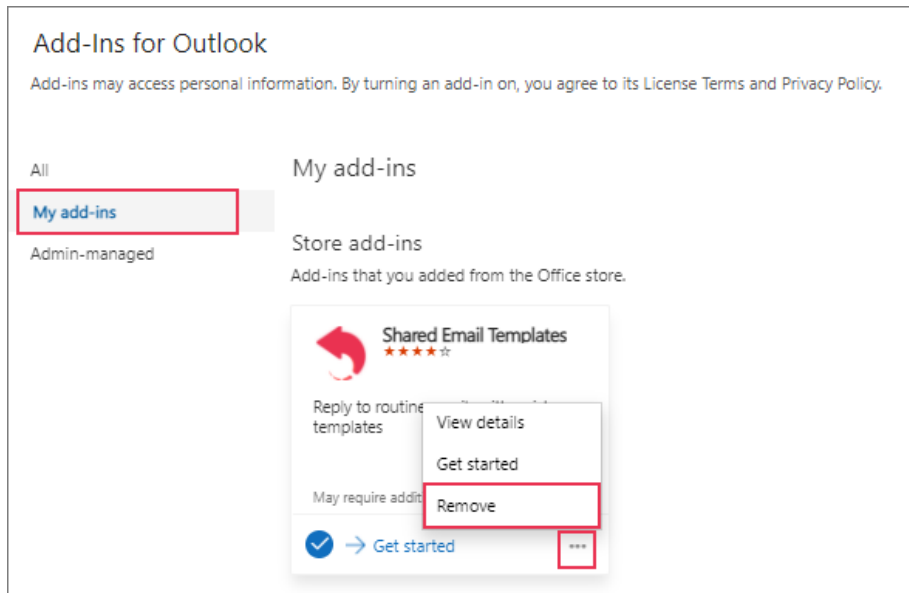
## Outlook online

1. Open the **More commands** pop-up menu and click **Get Add-ins**.





2. The add-ins window will open. Go to **My add-ins**, find Shared Email Templates, click the three dots in the lower-right corner and select **Remove**.





# User interface overview

This chapter gives a quick overview of the Shared Email Templates interface. The terms that you meet here are used throughout the whole document, so it will make reading of the next chapters easier.

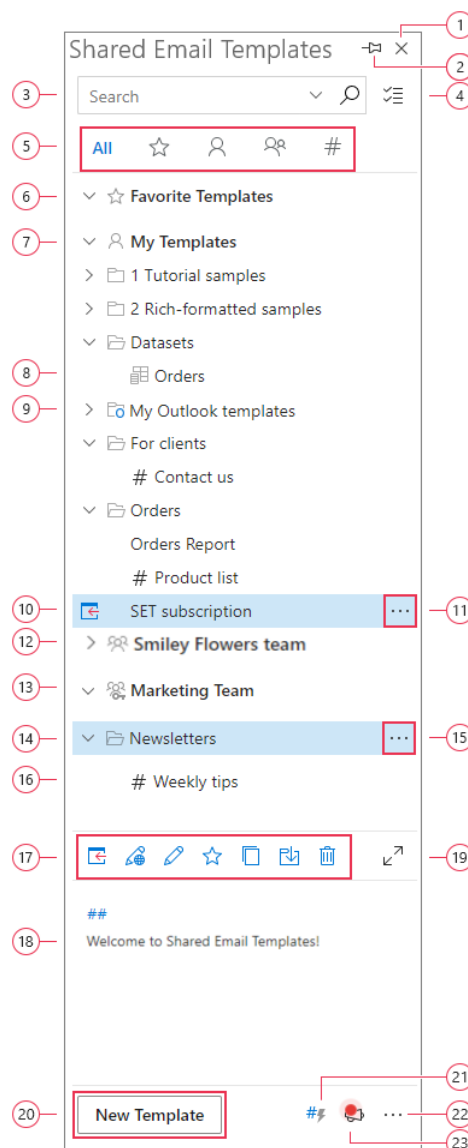
## Shared Email Templates pane in the add-in

The Shared Email Templates pane is the place where all the magic happens. Here you can create, edit and organize your templates, work with teams and folders. You can do this either from the Outlook add-in itself or from our [web app](#).

**Note.** The web app is the most convenient way of creating, organizing and editing templates. But remember that you can insert templates into emails only from the add-in.

Let's have a closer look at the Shared Email Templates pane in the add-in. Find the number in the picture and see what it means.

1. The **Close** icon. Click it to hide the Shared Email Templates pane.
2. The **Pin** icon. If you pin the add-in, it will open on the right every time you open an email window. When the add-in is pinned, the sign will change into . To unpin it, click it again.
3. The search bar. It helps to find a team, a folder, a template or a text in a template. Type the name or any context word, press **Enter** or click and you will see the list of items containing that word.



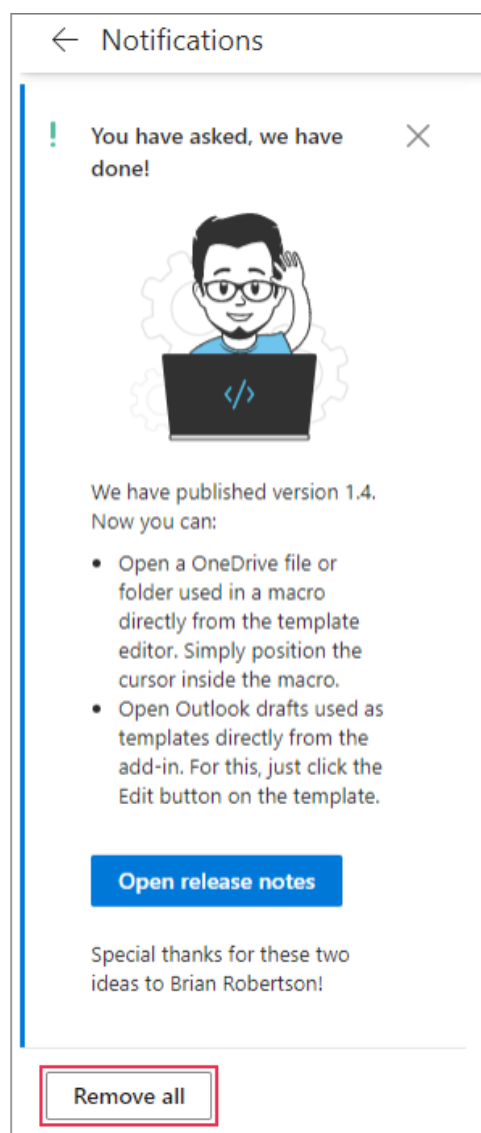
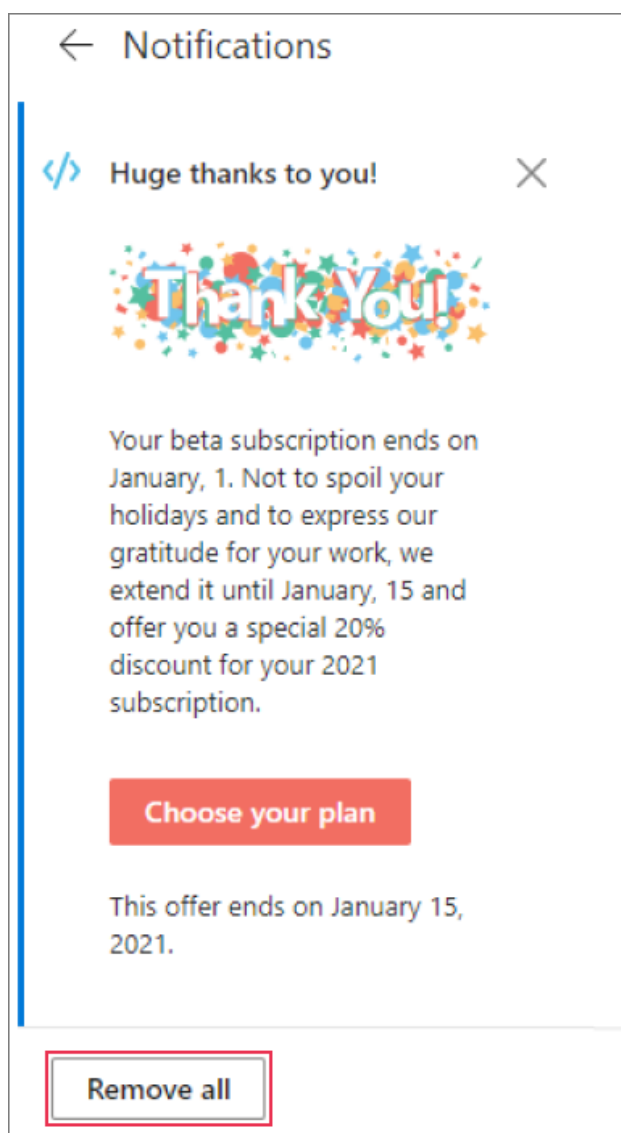


4. The **Selection Mode** icon. It allows you to perform actions with several folders, teams or templates. Click the sign, tick the necessary items and copy, move or delete them with the action icons that appear instead of the search bar.
5. The list of possible view modes: all templates, favorite templates, my templates, team templates, shortcuts.
6. The **Favorite Templates** folder. It is the first of two default folders. Here all your favorite templates are saved. Add often used templates to favorite and get quick access to them.
7. The **My Templates** folder. The second of two default folders. Inside this folder you can create new sub-folders and group templates.
8. An example of a dataset. You can create datasets and use data from them in templates. You will easily recognize the dataset by an icon with the table.
9. An example of an Outlook folder connected with Shared Email Templates. Outlook drafts can be used as templates by linking a certain Outlook folder to the add-in. Outlook folders are marked with the blue "O" sign.
10. An example of a template.
11. The button to open the [context pop-up menu for templates](#).
12. An example of a team. Add templates to a team and share them with other people. A team can be recognized by a special sign that shows a group of people.
13. An example of an [encrypted team](#). You can encrypt a team to secure your privacy. You will easily spot an encrypted team by a small key sign 🔑.
14. A folder with shared templates. The templates in this folder are shared between all the members of a team.
15. The button to open the [context pop-up menu for folders](#).
16. An example of a template with a [shortcut](#). All templates that have shortcuts can be identified by a hash sign #.
17. Templates action bar include paste, edit in browser, edit, add to favorites, copy, move and delete actions. It appears when you select a template in the tree.
18. The **Preview pane**. When you select a team or a folder in the tree, its description will be displayed in the preview pane. This is the description that



you add while creating a team or a folder. If you select a template, its content will appear in the preview pane.

19. The **Maximize** icon. You can use it to maximize the preview pane to browse longer passages of text.
20. The button to create a new template.
21. The **Handle shortcuts** button replaces the shortcuts that you type in an email with the full text of your templates.
22. The button to open the [ellipsis pop-up menu](#).
23. The **Notifications** icon. The icon blinks red when you have any unread notifications. Click it to see the notifications. If you want to delete them, just click **Remove all**.



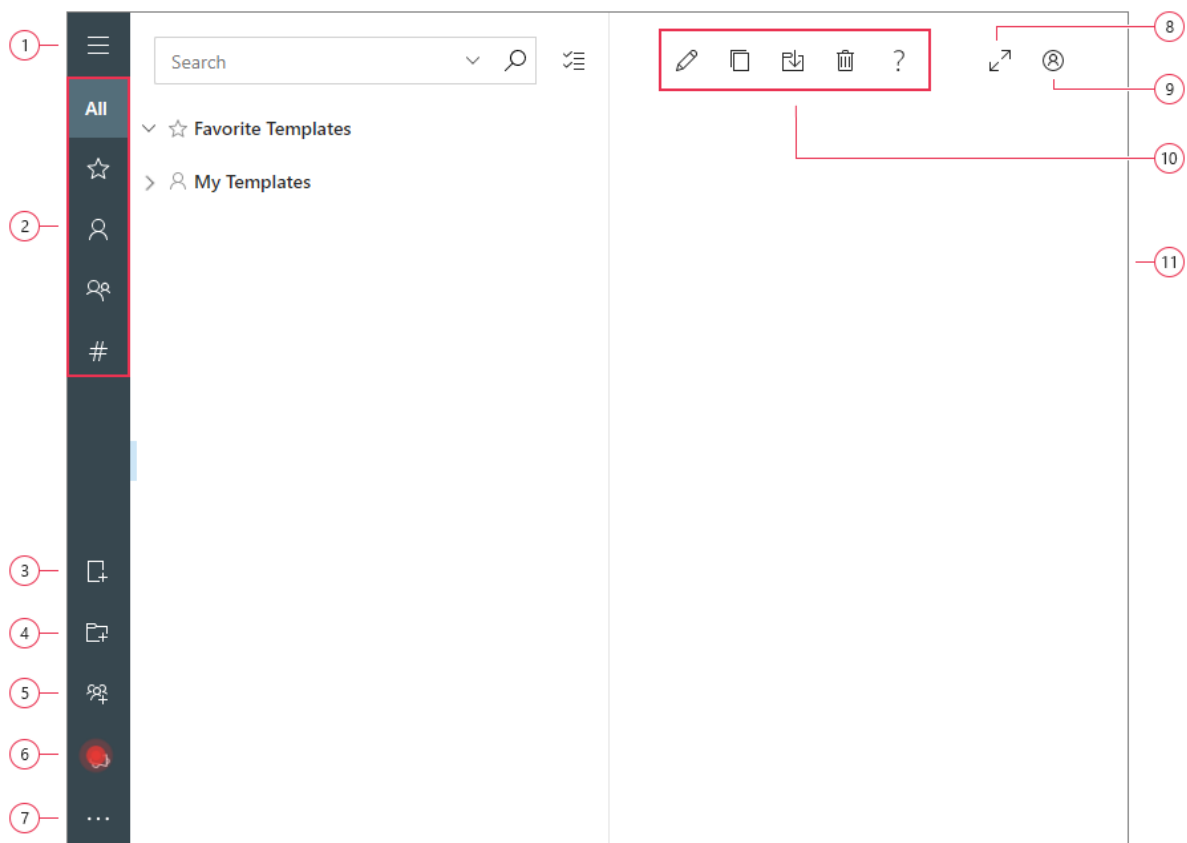


## Shared Email Templates pane in the web app

When it comes to working with templates, we recommend using the web app. Moreover, only in the web app you can create and manage datasets, export templates and manage keys.

The pane in the web app looks very similar to the one in the add-in, apart from the sidebar.


In the picture below, you can find the web app interface elements that vary from the add-in elements. Find the number of the interface element and then see what it stands for.



1. The button to collapse or expand the sidebar.
2. View modes options. Chosen items will be shown in the tree on the right.
3. The icon to create a new template.
4. The icon to create a new folder.



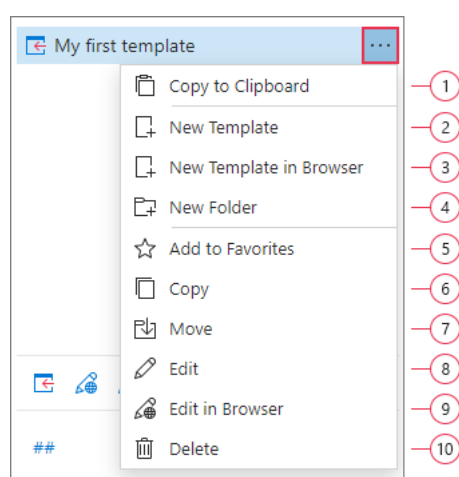
5. The icon to create a new team.
6. The **Notifications** icon. If you have any unread notifications, the icon will blink red.
7. The button to open the [ellipsis pop-up menu](#).

 **Note.** In some cases, the Manage Key option will be available here. Read [this article](#) to find out more.

8. The **Maximize** icon. It maximizes the preview pane, hides the sidebar and the tree.
9. The **Profile** icon. You can get to your profile pane with one click.
10. The action bar.
11. The preview pane. Select an element from the tree to see its content here as a whole.

## Context pop-up menu for templates

The context pop-up menu for templates is a menu that appears when you click the three dots near a template's name or simply right-click a template. It is a list of actions that can be done with the selected template or within the folder where this template is located. The menu looks similar both for the add-in and the web app. The only difference is that the add-in will suggest you performing some actions in the web app.



Using the context pop-up menu, you can do the following:

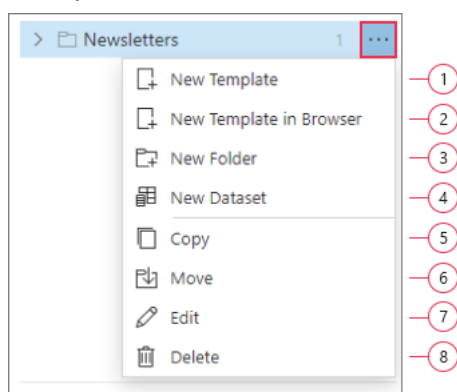




1. Copy the content of a template to the clipboard and then paste it in any other place even outside Shared Email Templates.
2. Create a new template in the selected folder.
3. Create a template in the web app.
4. Create a new folder inside the selected folder.
5. Add this template to favorites to quickly access it from favorites view mode.
6. Copy the selected template.
7. Move the selected template to another folder.
8. Edit the content of the template.
9. Go to the web app to edit the template more conveniently.
10. Delete the template permanently.

## Context pop-up menu for folders

The context pop-up menu for folders is a menu that appears when you click the three dots near a folder's name or right-click a folder. It is a list of actions that can be done with or within the selected folder. The menu looks similar for the add-in and the web app. However, the add-in contains one additional item ("New Templates in Browser") that will redirect you to the web app.



Using the context pop-up menu for folders, you can perform the actions below:

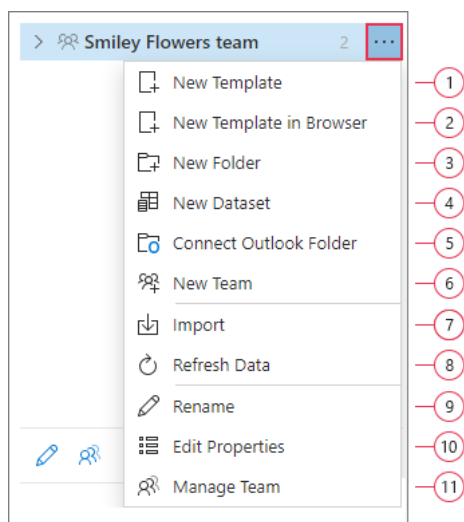
1. Create a new template within the selected folder.
2. Go to the web app to add a template to the selected folder.
3. Create a new folder within the selected folder.
4. Create a new dataset within the selected folder. Note that this action can be done only in a browser, so you will be redirected to the web app.
5. Copy the folder with its content to another place.



6. Move the folder with its content to another place.
7. Edit the name of a folder and its description.
8. Delete the folder permanently.

## Context pop-up menu for teams

The context pop-up menu for teams opens when you right-click a team or click the three dots near a team's name.



It contains actions that can be performed with or within the team:

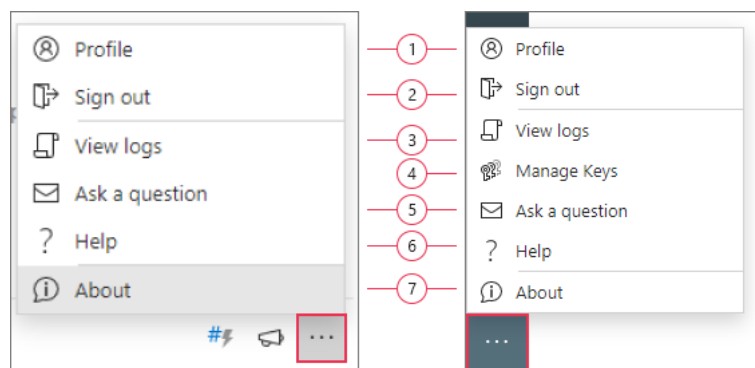
1. Create a new template inside the team.
2. Go to the web app to create a new template inside the team.
3. Create a new folder inside the team.
4. Create a new dataset in the web app.
5. Connect Outlook Folder with a team. This way Outlook drafts can be used by all members of the team.
6. Create a new team in **My Templates** folder.
7. Import previously saved templates.
8. Refresh data. Remember that the templates inside the team can be used by every member of the team. Some of the members may have permission to edit templates. That is why every time you want to use team templates, it's better to **Refresh Data** to see updated versions of templates.
9. Rename the team.



10. Open **Team properties** window. You can add, edit, and delete custom properties there.
11. Encrypt the team, invite, or delete members and manage user permissions.

## Ellipsis pop-up menu

The ellipsis pop-up menu is a menu that appears when you click the three dots in the lower-right corner (lower-left corner for the web app).



From the ellipsis pop-up menu you can do the following:

1. Access the profile pane.
2. Sign out of the account.
3. View logs. A log file is a file with technical information. If you face any issues and contact the support team, they may ask you to share logs with them. Logs help developers to understand the root of problems and resolve complicated technical issues.
4. Manage keys.
5. Ask a question concerning Shared Email Templates on our web page.
6. Study some additional documentation on Shared Email Templates on our website. You can also post a comment there and get a reply to your question.
7. Check the version of the add-in, your subscription plan, its expiry date, and license key. You can also get a subscription or enter a license key from this pane.

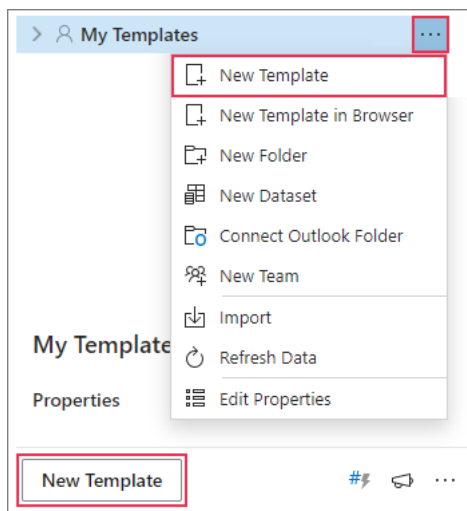


# Simple templates

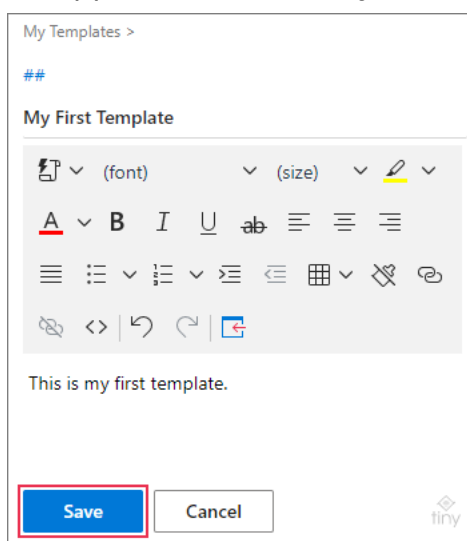
Emails can not only be quick and simple, but also eye-catching. We embedded a wide range of editing options for you. Let's go over them real quick.

## Create a simple template

1. Click **New Template** at the bottom (or the three dots near the name of a folder) and choose **New Template**. An edit window will open.



2. Think of a name for your template. A unique name is the best option. It will help you to navigate quickly in the tree.
3. Then type the content of your future email and click **Save**. The template will appear in the folder you chose.

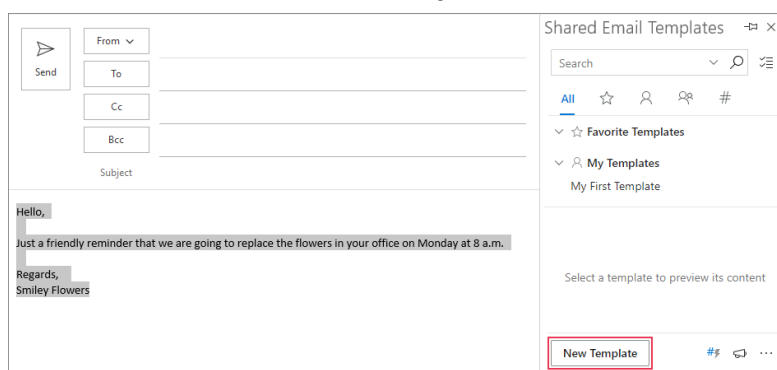




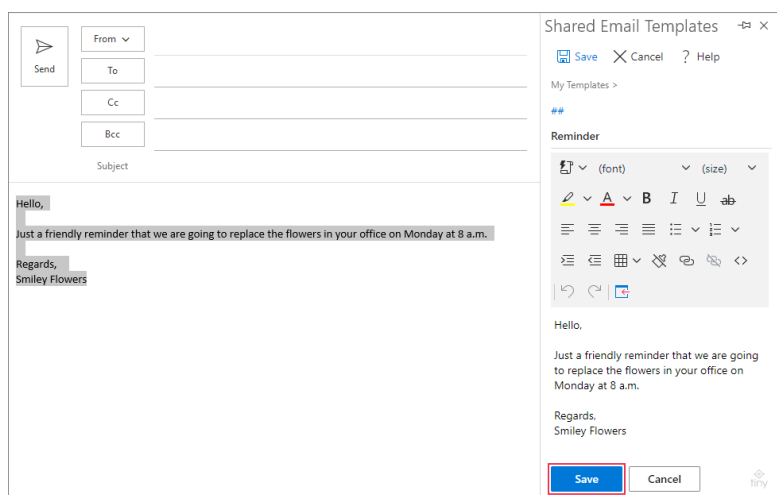
## Create a template from selection

Not to create everything from scratch, you can easily transform ready emails from Outlook folders into templates.

Open Outlook and find the email that you want to turn into a template or open a draft and select the necessary text. After that click **New Template**.



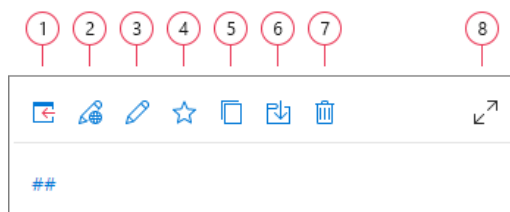
The selected text will be automatically inserted into the template body. Type the name of the template and click **Save**.



## Templates action bar


When you select a template in the tree, you will see the templates action bar above the preview pane.

The actions are the following:






1. Paste the template into an email. The template will be inserted into a place where the cursor is.

 **Tip.** Select a text in the email and replace it with the text from the template by clicking the **Paste** icon.

2. Open the template in the web app and continue editing in a browser.
3. Edit a template in the add-in.
4. Add a selected template to favorites. The template will be available both from the **Favorite Templates** and the **My Templates** folders.
5. Copy a selected template to another folder.
6. Move a selected template to another folder. Note that the template will disappear from the original folder.
7. Delete a selected template.

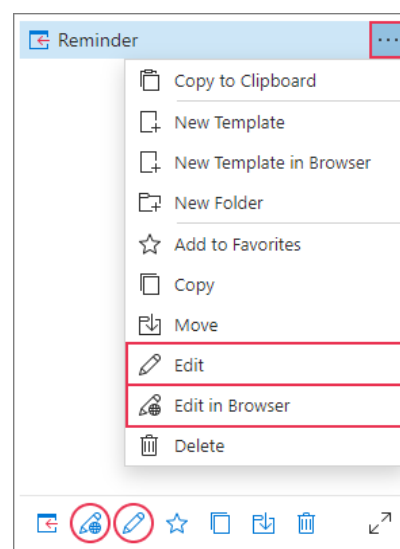
 **Note.** Templates are deleted permanently and there is no way to restore them.

8. Maximize the preview pane. To get back, click the same icon (in the upper-right corner).

## Edit templates

You can edit templates in the add-in or the web app. Consider using the web app, as it's more convenient.

1. Go to the edit window from the context pop-up menu for templates (or the action bar) by clicking **Edit** or **Edit in Browser**.
2. When you are done with editing, don't forget to click **Save** or the changes won't be applied.

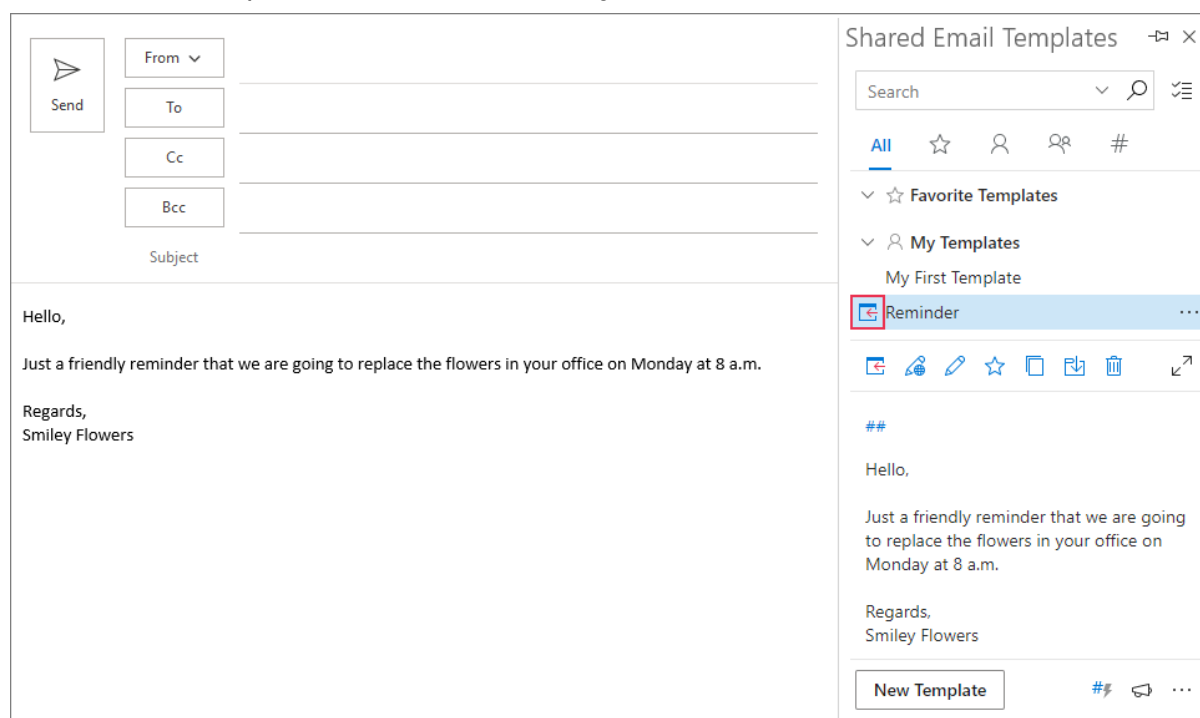




## Insert your template into an email

Let's insert our first template into an email! Remember that the add-in is the right place to do it.

1. Find the template you need in the tree and click the **Paste** button (or double-click the template). The email is ready! Time to send it.



**Tip.** If you click a wrong template or insert a template two times by mistake, just click the **Undo** button in the **New Email** window.

**Tip.** You can copy the template to the clipboard from the context pop-up menu for templates and insert its content in any place even beyond Shared Email Templates.

## Back up templates


All your templates are stored in a cloud-based database hosted by Amazon Web Services. The database is backed up automatically once a day.


But you can also backup templates yourself and save them to your local storage with the possibility to import them back later.



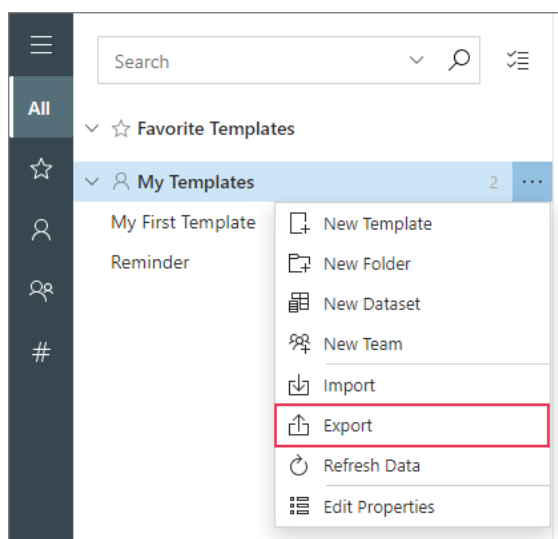
## Export templates

Both personal and team templates can be exported.


 **Note.** This function is available even after the license key expiration (when you cannot see and use templates due to limitations).

 **Note.** You can export templates only in the Shared Email Templates web app.

1. Right-click **My Templates** or a team's name and select **Export**.



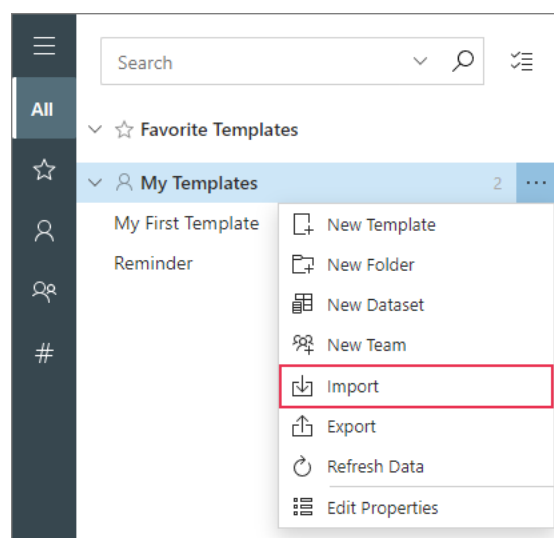
2. Find the exported .xml file in Downloads. The name of the file is made up of the date and time of the backup.

 **Tip.** You can open .xml file in Notepad.

## Import templates

Templates can be imported in .xml or .ptd formats. A .ptd file is used while [migrating from Template Phrases for Outlook Online](#).

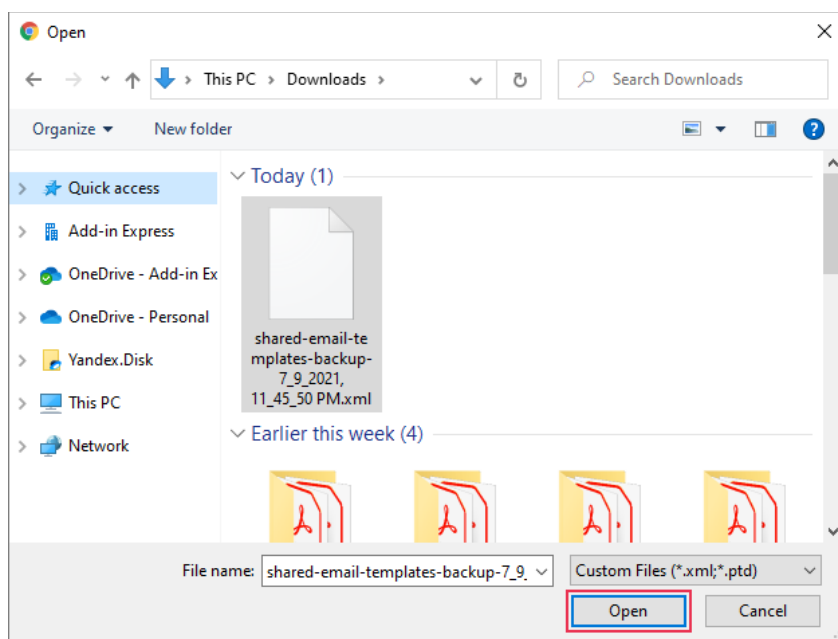
1. Right-click **My Templates** or a team's name and select **Import**.









2. Select an .xml or .ptd file and click **Open**.



All templates and folders from the file will be imported to **My Templates** or a team.

 **Note.** You must have editor or admin permissions to be able to import templates into a team.

 **Note.** None of your current templates and folders will be affected. If the names of templates or folders coincide with the names of existing folders, both items will be saved.



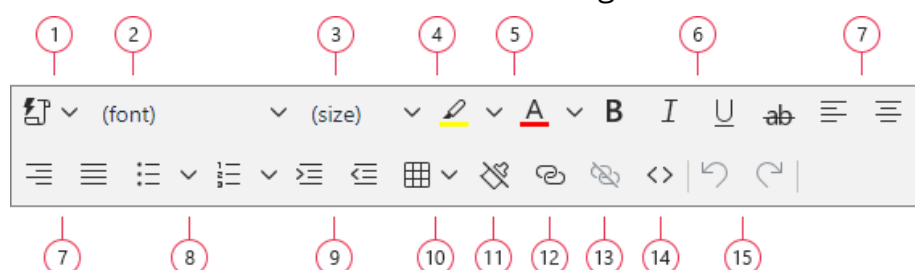
# Create rich-formatted templates

The simplest template is a template that contains plain text. In most cases it is enough for routine emails. But if you want to diversify the emails with rich formatting, use the toolbar.

**Note.** It's better to create, edit and collect rich-formatted templates in Outlook. To use them in your emails, just [connect an Outlook folder](#) with Shared Email Templates.

## Editor toolbar

The editor toolbar contains the following.




1. The **Insert Macro** Icon. After clicking it, you will see a drop-down menu that lists all our macros. Find out how to use them [here](#).
2. The list of available fonts. Select a part of your template and pick any font you like from the drop-down list. The text will be immediately modified.

**Note.** Web-safe and email-safe fonts are preferable. Otherwise, you may face transformation issues. Imagine that you created a template with a sophisticated font and pasted it into an email. Outlook for Mac may transform it into one font and Outlook for Windows into another font. Unfortunately, on our side we cannot solve the issues or somehow influence this process, as it depends on Microsoft.

3. The list of available font sizes. Select a piece of text and then click the preferred font size in the drop-down list.
4. The **Background color** icon. Select the fragment to be highlighted, click the icon and choose the color you need.



5. The **Font color** icon. Select a piece of text, click the icon and pick the color you like.
6. The **Bold**, **Italics**, **Underlined**, or **Strikethrough formatting** icons. Select the text to modify and click the icon you need.
7. The **Align** icon. Note that the selected piece of text is aligned. Select the text and click the icon of preferred alignment.
8. The **Bullet list** and **Numbered list** icons. Use this option to add bullets or numbers to existing lines of text.
9. The **Adjust indents** icon. You can increase or decrease indent. Put the cursor before the text and click one of the two icons.
10. The **Table** icon. Add a table to your template.
11. The **Clear formatting** icon.

 **Note.** Remember, above we talked about text transformation problems in different Outlook versions? Copying/pasting data from external sources increases the risk of such problems. To avoid this, be sure to clear formatting every time you insert text from other places.

12. The **Insert and edit hyperlinks** icon. Select the text you want to use as a hyperlink, click this icon, enter a URL and a title (a phrase that will appear when you hover the hyperlink).
13. The **Remove hyperlink button**.
14. The **HTML view** button. It lets you create [HTML-based templates](#).
15. The buttons to undo or redo changes.

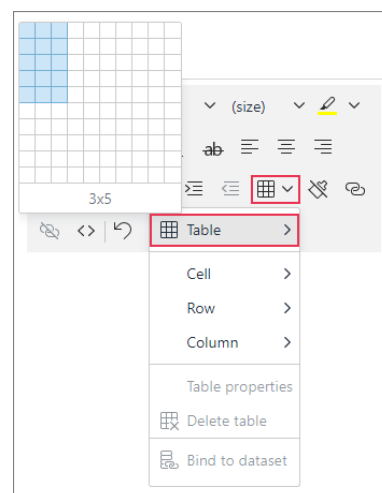


## Use tables

Using tables in Shared Email Templates differs from your experience in other apps. Make sure you are aware of all the tricks that you can do with the tables.

### Create a table

1. Put the cursor in the place where you want to insert the table and click the **Table** icon. Using the mouse pointer, select the range of interest and left-click.



### Edit a table

When you click any place in the table, you will see a pop-up toolbar. From the toolbar you can do the following actions:



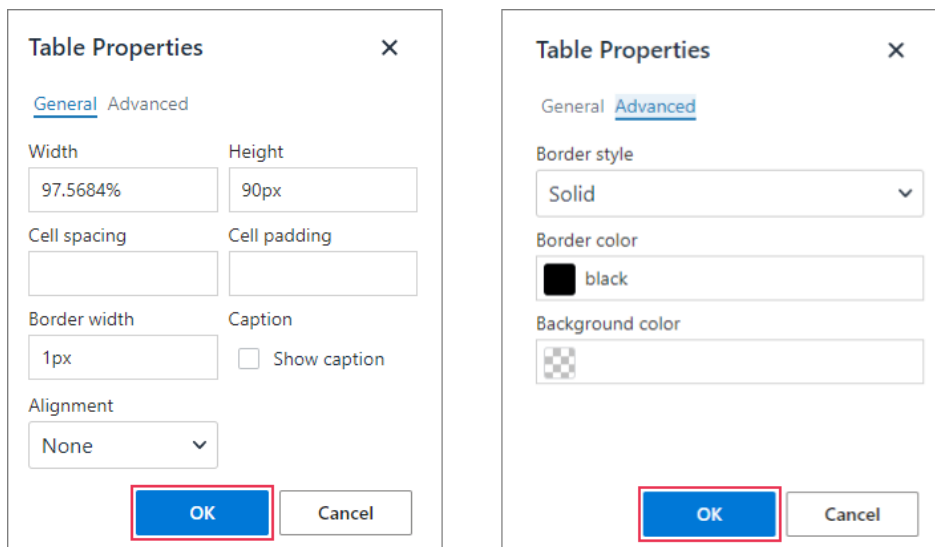
1. Open table properties. They contain two tabs: general properties and advanced properties.

On the **General** tab, you can edit the width, height of the table, cell spacing, cell padding, border width and alignment. Also, you can choose to show a caption.

On the **Advanced** tab, you can choose the border style and color, as well as the background color of cells.



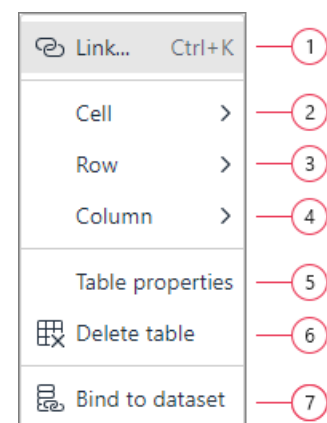
Don't forget to click **OK** to save the changes.



2. Delete the table by clicking this icon.
3. Insert a row before the row with the cursor.
4. Insert a row after the row with the cursor.
5. Delete the row where your cursor is.
6. Insert a column before the column with the cursor.
7. Insert a column after the column with the cursor.
8. Delete the column where your cursor is.

You can get access to more actions by right-clicking any place in the table. The actions are as follows:

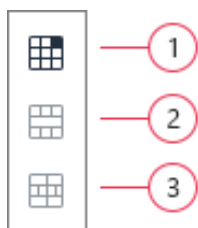
1. Add a link to a cell. By clicking this icon, you will see a dialog window where you need to insert a URL, type the text to which the URL will be added and add a title that will appear when you hover the link.
2. Open a drop-down list of actions with cells.
3. Open a drop-down list of actions with rows.
4. Open a drop-down list of actions with columns.
5. Open table properties.
6. Delete the table.
7. The **Bind to dataset** icon. With the help of it you can link your table to a dataset. When you paste the template, values from a dataset will be





automatically inserted into the table. Find out more about it in [Fill Tables with Datasets](#) sub-chapter.

Let's have a closer look at the drop-down lists of actions with cells, rows and columns.



There are several actions:

1. Open **Cell properties**. They are divided into general properties and advanced properties and located in different tabs.

On the **General** tab, you can edit the width and the height of a cell where your cursor is, choose a cell type (normal cell or header cell), manage scope, horizontal and vertical alignment.

On the **Advanced** tab, you can edit the border width, style or color and change the background color of a cell. If you made some changes, don't forget to click **OK** to save them.



2. The **Merge cells** icon. Select several cells that you want to merge and click the icon.
3. The **Split cells** icon. Select the cells that were previously merged and click the icon to split the cells again.

And here are the actions for rows.



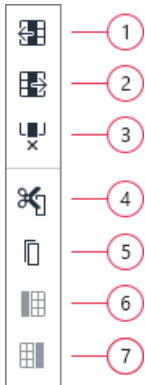
1. Insert a row before the row with the cursor.
2. Insert a row after the row with the cursor.
3. Delete the row where the cursor is.
4. Open **Row properties**. There are general and advanced row properties.  
On the **General** tab, you can choose a row type (header, body or footer), alignment and row height.  
On the **Advanced** tab, you can choose the border style and color and change the background color of a selected cell.

The 'Row Properties' dialog box is shown with the 'General' tab selected. It contains three settings: 'Row type' set to 'Body', 'Alignment' set to 'None', and 'Height' set to '18px'. At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangle.

The 'Row Properties' dialog box is shown with the 'Advanced' tab selected. It contains three settings: 'Border style' set to 'Select...', 'Border color' with a color picker, and 'Background color' with a color picker. At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red rectangle.



5. Cut a selected row.
6. Copy a selected row.
7. Insert the previously cut or copied row before the row with the cursor.
8. Insert the previously cut or copied row after the row with the cursor.



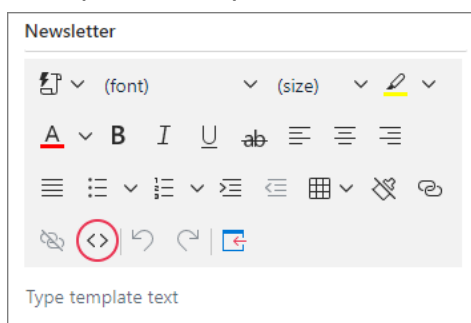
Available actions with columns are as follows:

1. Insert a column before the column with the cursor.
2. Insert a column after the column with the cursor.
3. Delete the column.
4. Cut the column.
5. Copy the column.
6. Insert the previously cut or copied column before the column with the cursor.
7. Insert the previously cut or copied column after the column with the cursor.

## HTML-based templates

There is an opportunity to create HTML-based templates to customize the emails even more.


1. Open a template and click the **View HTML** button.

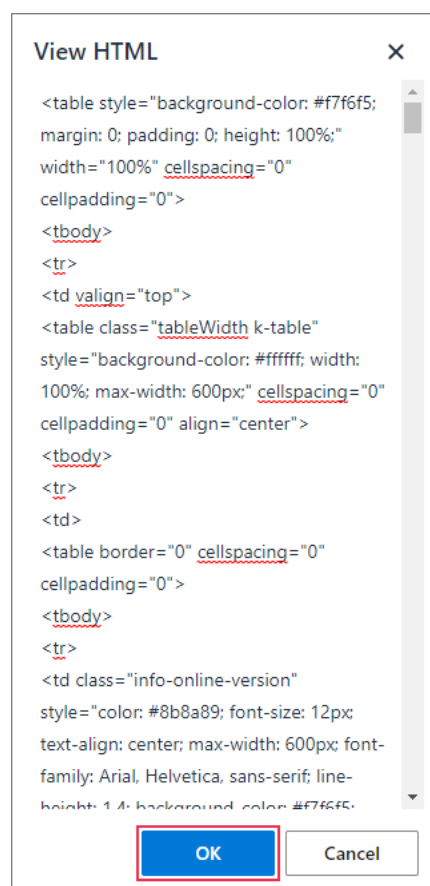






2. Type your HTML code and click **OK**.
3. In the preview pane, you will see how the template looks.
4. Save the template.

 **Note.** Be aware of HTML/CSS limitations you may face in different email client apps including Outlook for Windows, Outlook for Macs, Gmail, Samsung Mail, Yahoo Mail, etc. Please try out all your templates in different environments before using them as intended. Simply send an email with the template to your email address and see whether it looks correct.





# Template shortcuts

A template shortcut is a short name of a template. A shortcuts starts with `##`. It replaces the whole template. It is a so-called template for a template.


If you want to insert a template into an email, another template, a dataset, a profile or a team property, but don't want to copy and paste the whole body all the time, you can create a template shortcut for the template and insert it.

Moreover, you can use a combination of shortcuts.

 Send	From ▾	
	To	
	Cc	
	Bcc	
	Subject	

##hello1  
##mondayreminder  
##regards

As a result, when you click the **Handle shortcuts** button, the template shortcut will be replaced with the text of the template.

 Send	From ▾	
	To	
	Cc	
	Bcc	
	Subject	

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,

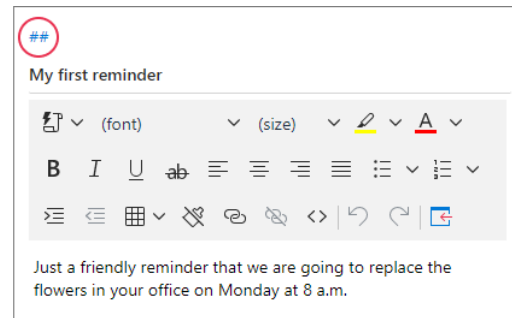
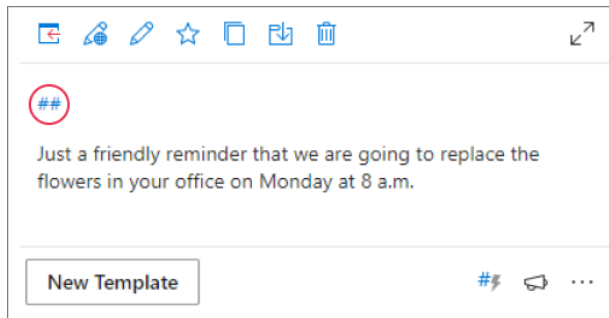
Let's take a closer look.



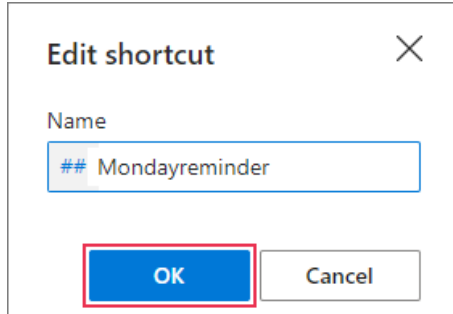
## Create a template shortcut

Template shortcuts can be created while editing/creating a template or browsing it in the preview pane.

1. When you create/edit a template, find two hash symbols above the name of a template and click them.

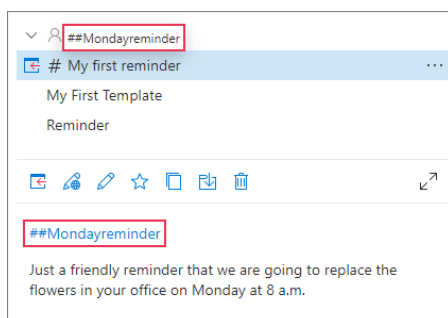


2. A new window will open. Type the name of the template shortcut.  
Short and unambiguous names are the best option. Allowed characters are as follows: a...z, A...Z, 0...9.
3. When you've typed the name, click **OK** and name of the template shortcut will appear above the name of a template.



4. Save the template. Templates with shortcuts are marked with a hash symbol in the tree.

Moreover, you can see the template shortcut's name in the preview pane when you select the template or when you hover it.

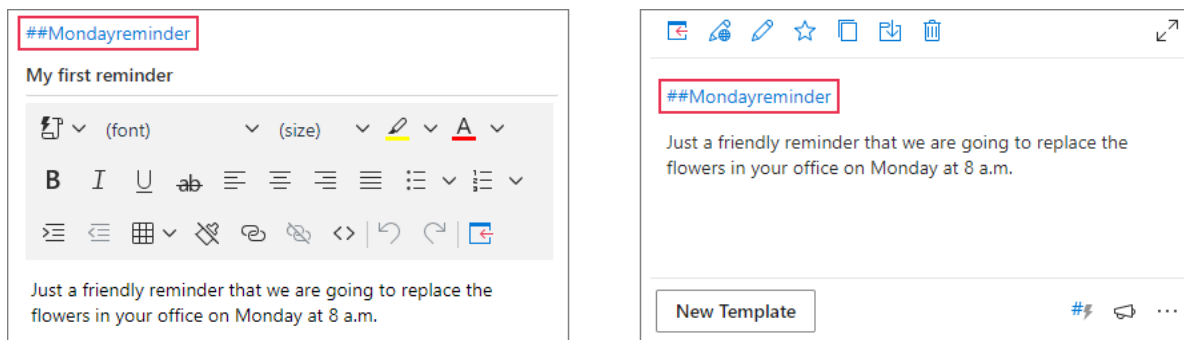




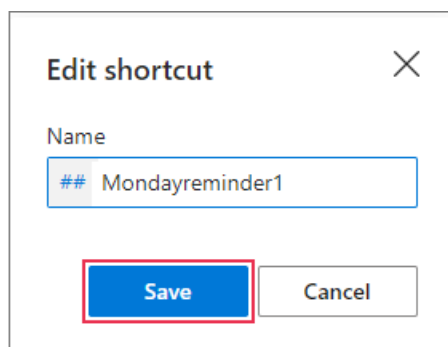
## Edit template shortcuts

A template shortcut can be added or edited from 2 places: the preview pane and the edit template pane.

1. Click a shortcut's name in the edit template pane or the preview pane.



2. Delete or change the name in the dialog window and click **Save**.

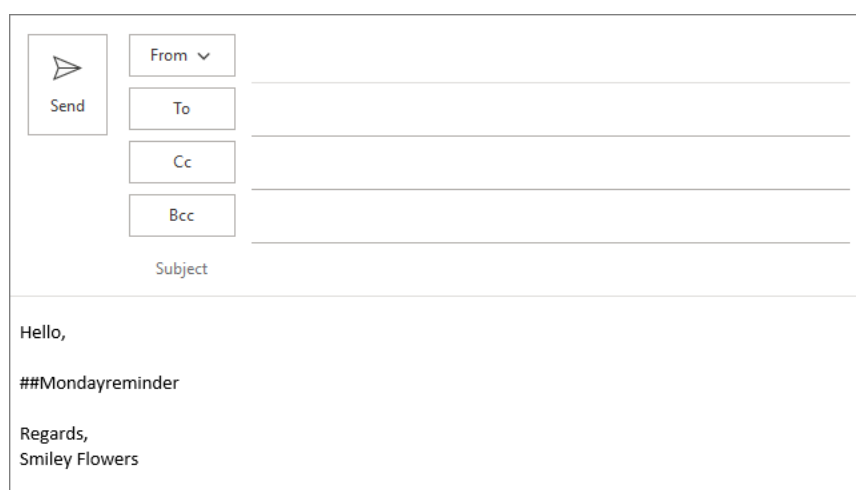


Do not forget to save the template, otherwise the changes won't be made.

## Use template shortcuts in your emails

As you remember, a shortcut can replace the whole template.

1. Type one or several shortcut names into an email body (start with ##) in the order you want the templates to appear in your message.

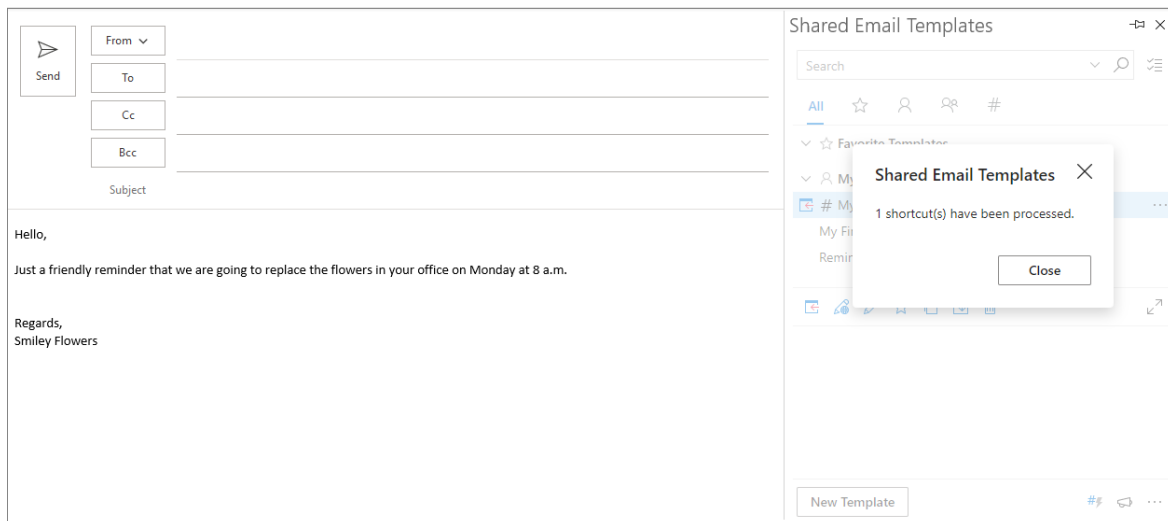




2. Click **Handle Shortcuts** in the lower-right corner and see how shortcuts turn into text.



3. On the right you will see a dialog window with information about how many shortcuts were processed.

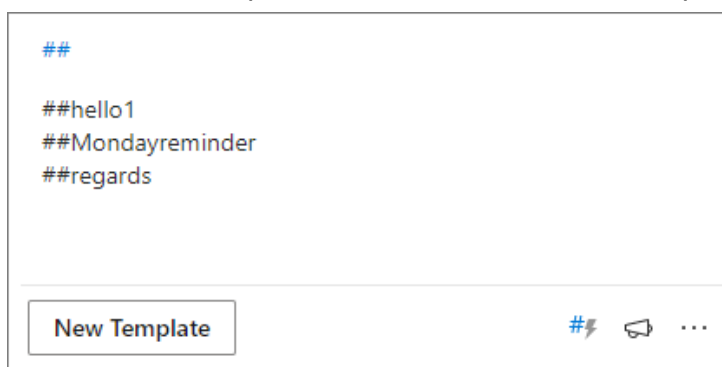


**Tip.** If any of your shortcuts haven't been processed, make sure you wrote their names correctly.

## Use template shortcuts in templates

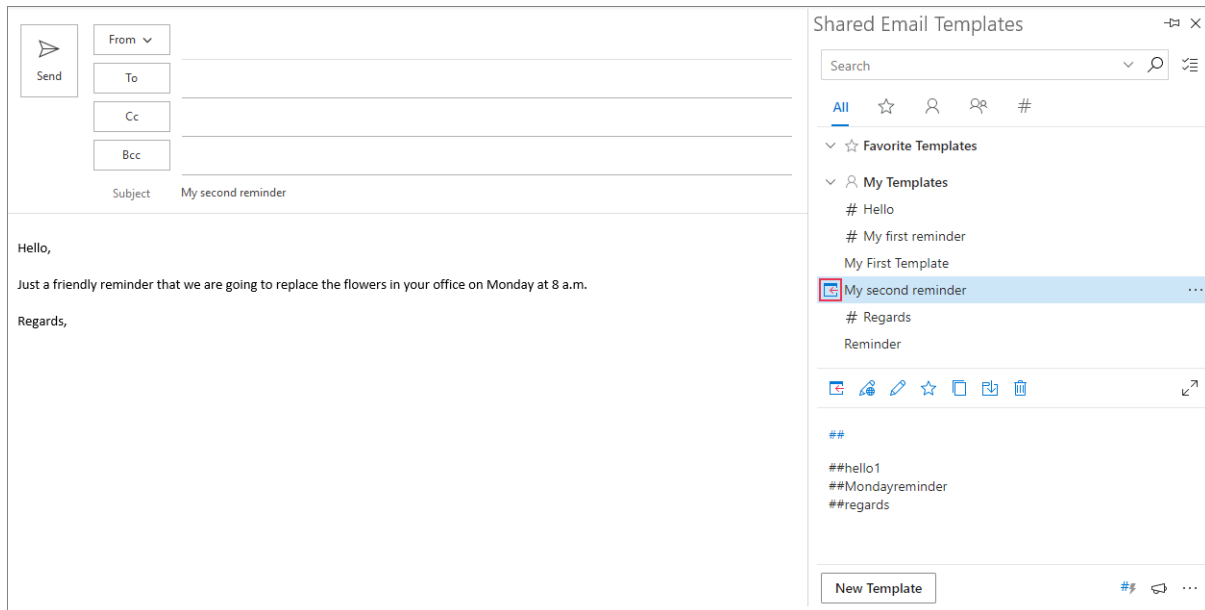
Template shortcuts can also be used to compose other templates. In this case template shortcuts act as building blocks for your template. A template used within another template is called nested.


1. Create a template with one or several template shortcuts in its body.





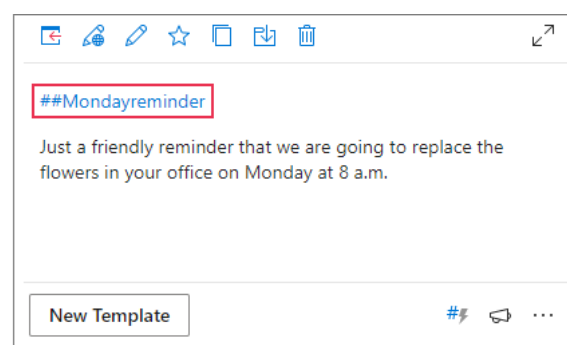
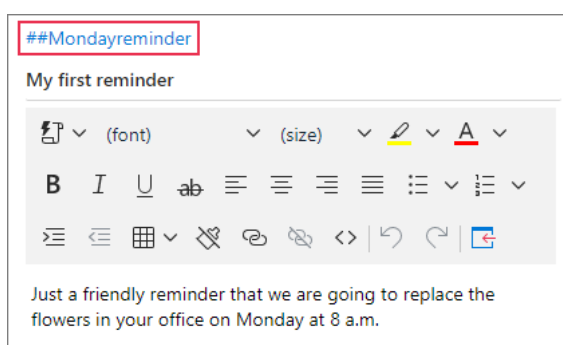
2. **Paste** the template into an email. You will see that shortcuts will be replaced with the text.



 **Note.** If you have several template shortcuts with the same name (either in **My Templates** or in teams) and use this name in an email body, the text of the “oldest” shortcut - the one that was created first - will be pasted.

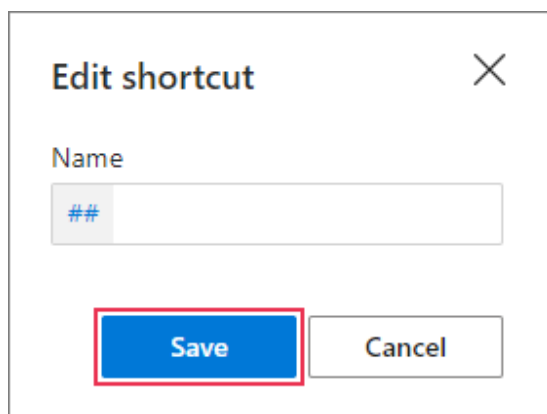
## Remove template shortcuts

1. Click the name of a shortcut either in the edit template pane or the preview pane.





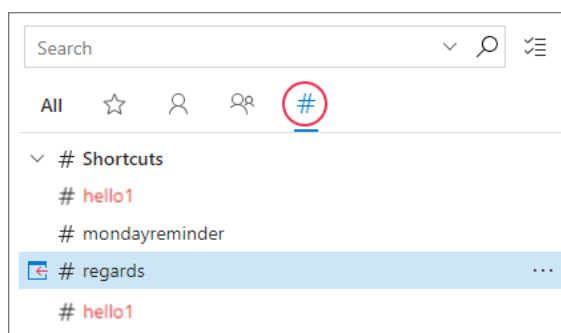
2. Delete the name of the template shortcut in the dialog window and click **Save**.



## Shortcuts view

The list of all your template shortcuts can be found in the shortcuts view mode.

1. To get there, click the hash symbol in the list of view modes.



**Note.** In the shortcuts view, only the templates that have shortcuts are presented.

**Note.** If you have several shortcuts with the same name, their names will be colored red in the list.




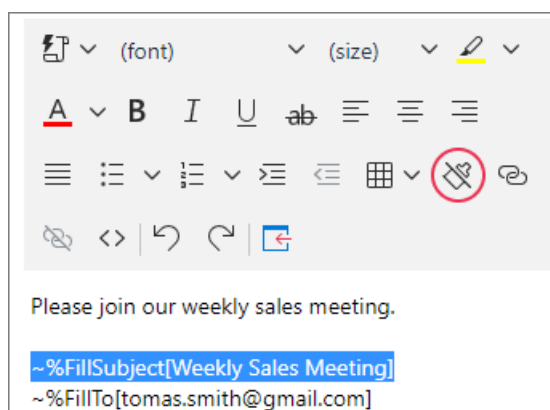
## Simple macros


A macro is a set of instructions that tells a template what to do: fill in the Bcc, Cc, Subject fields, add a picture, link, date, etc. Macros help to get rid of additional actions and automate routine work, as instructions are executed with a click.

Macros are added to a template body to do the following:

- To fill in an email or appointment fields
- To add information to a message or appointment body
- To add recipient and sender information
- To populate the fields while creating Outlook appointments and meetings

 **Note.** All the macros should be consistently formatted, otherwise they won't work. If a macro has inconsistent formatting, select the whole macro and click the **Clear formatting** icon.



 **Note.** You can use nested macros with one nested level. It means that you can insert one macro into another macro. So, your macro will look like ~%Macro1[~%Macro2]. For example, you can insert the date into the subject field with the help of a nested macro: ~%FillSubject[~%Date]. Remember that two nested levels are not supported.

## Insert recipient and sender into an email body


Let's try to automatically insert the info from the From and To fields into an email body.






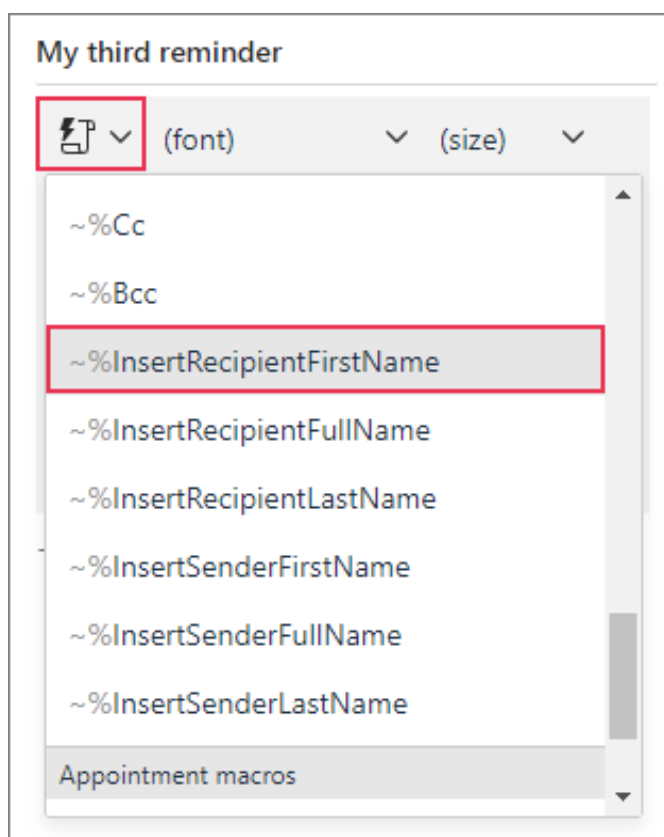
The following macros will help us:

- ~%InsertRecipientFirstName – inserts the recipient's first name.
- ~%InsertRecipientFullName – inserts the recipient's full name.
- ~%InsertRecipientLastName – inserts the recipient's last name.
- ~%InsertSenderFirstName – inserts the sender's first name.
- ~%InsertSenderFullName – inserts the sender's full name.
- ~%InsertSenderLastName – inserts the sender's last name.

 **Note.** For these macros to work, you need to have the recipient's info in your [Outlook Address Book](#). Otherwise, the email address will be inserted.

 **Note.** Don't forget to type an email in the From/To fields before pasting the template with the macros.

1. Open a template. Put the cursor in the place where you want the recipient's info to appear. Click the **Insert Marco** icon and choose the macro you need from the drop-down list.





2. You can add several macros to one template. When you are ready, save the template.

##

My third reminder

Font (font) (size)

Color (A) Bold (B) Italic (I) Underline (U) Strikethrough (ab) Bulleted list (≡) Numbered list (≡) Indent (≡) Outdent (≡)

Table (grid) Link (chain) Unlink (chain) Source code (<>) Undo (↶) Redo (↷) Insert link (link)

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,  
~%InsertSenderFullName

**Save** Cancel

tiny

3. Fill in the To and From fields. **Paste** the template. See the result below.

Send

From olga.edgerton@smiley-flowers.com

To Tomas Smithy

Cc

Bcc

Subject My third reminder

Hello Tomas,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,  
Olga Edgerton

Shared Email Templates

Search

All ☆ 👤 🔍 #

My second reminder

My third reminder

# Regards

Reminder

##

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,  
~%InsertSenderFullName

New Template # ↵ ...

**Note.** If the Subject field is empty, the name of the template will appear there.

**Note.** These macros may not work from time to time because of Outlook bugs.

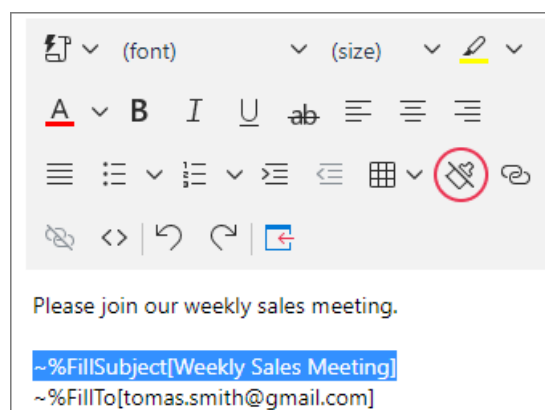


## Remove a macro

Sometimes it may happen that you insert a wrong macro. This is easy to fix.

1. Select the macro.
2. Press **Delete**.

Now you can insert another macro.




## Add other information to email body

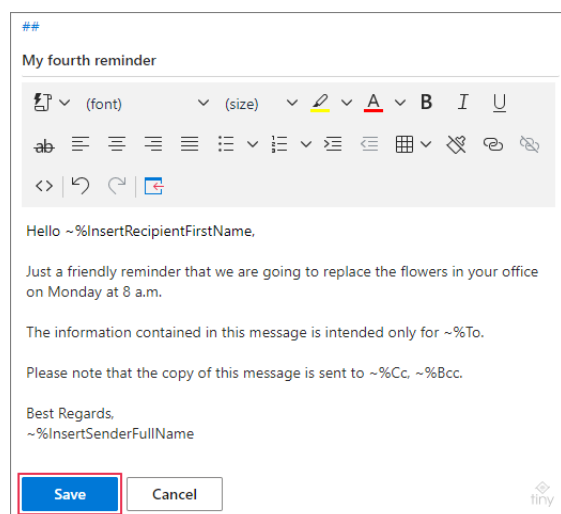
### Add addresses from To, CC, Bcc fields

The macros that add information from email fields to an email body are in the **Add recipient and sender information** category. They include the following macros:

- ~%To - inserts the content of the To field.
- ~%Cc - inserts the content of the Cc field.
- ~%Bcc - inserts the content of the Bcc field.

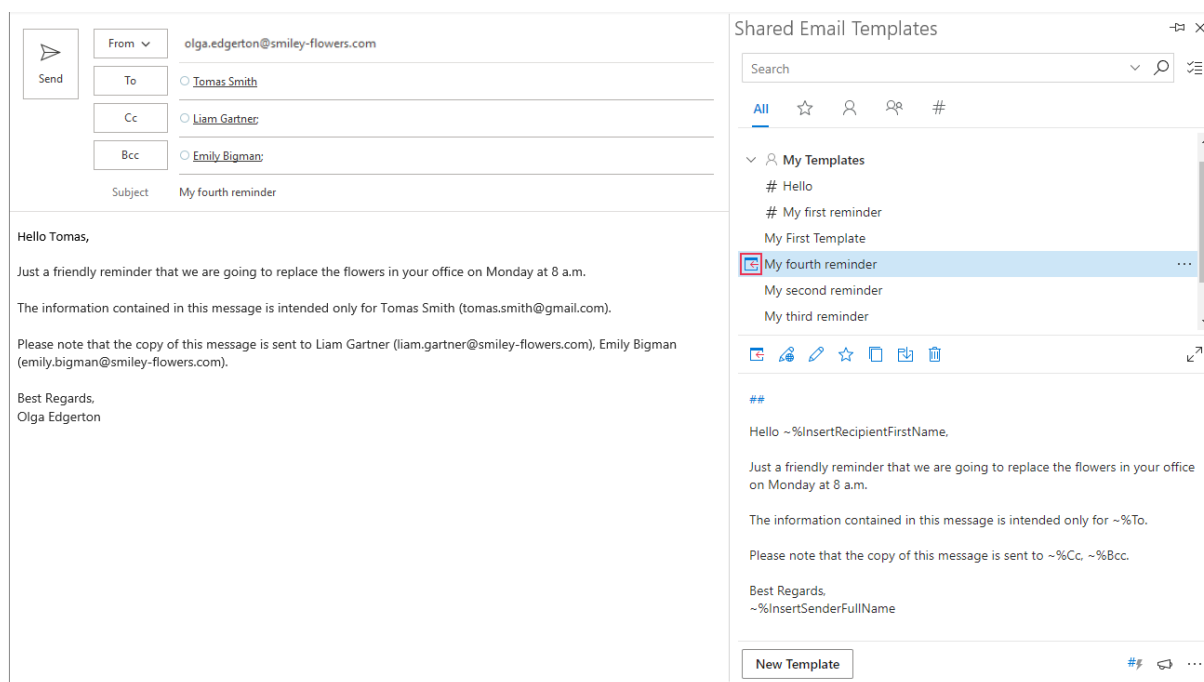
 **Note.** Before inserting a template with the macros above, fill in the To, Cc and Bcc fields.

1. In a template put the cursor right in the place where you want to see the information. Insert the ~%To, ~%Cc or ~%Bcc macros. Save the template.





## 2. Fill in the To, Cc and Bcc fields of an email and **Paste** the template.



### Add subject, date, time

To insert the current date, time or subject into an email body, use the following macros:

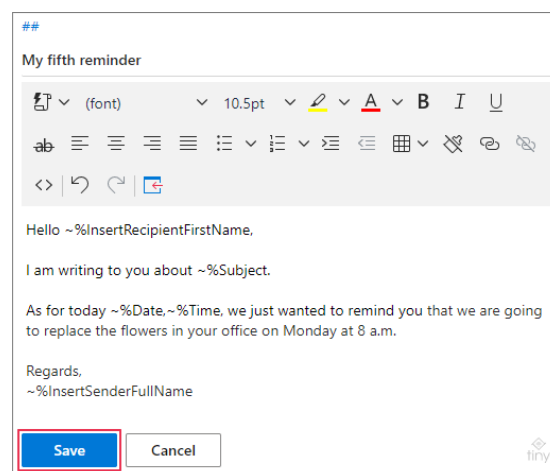
- ~%Subject - inserts the content of the Subject field.
- ~%Date - inserts the current date.
- ~%Time - inserts the current time.

To add a macro, follow the steps below:

1. In a template click **Insert Macro** and add the ~%Subject, ~%Date or ~%Time macros from the macros list.
2. Save the template.

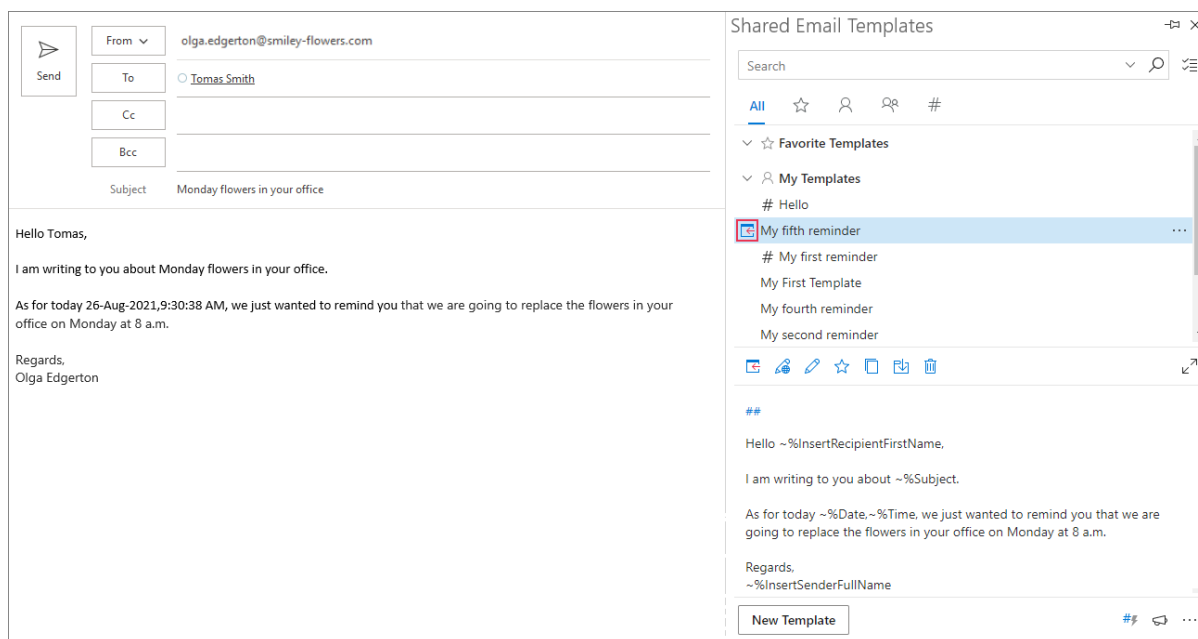


**Note.** Make sure that you put these macros right in the place where you want the information to appear.





### 3. Paste the template.





 **Tip.** Find out how to insert location in [calendar-related macros](#).

### Fill in email fields: To, Cc, Bcc, subject


You can fill in the To, Cc, Bcc and Subject fields automatically with the following macros from the **Fill in email or appointment fields** category:

- ~%FillTo, ~%FillCc, ~%FillBcc - insert the specified email address(es) into the To, Cc, Bcc email fields.
- ~%FillSubject - inserts the specified text into the Subject field of an email.
- ~%AddTo, ~%AddCc, ~%AddBcc - add the specified email address(es) to the To, Cc, Bcc email fields.
- ~%AddSubject - adds the topic to the Subject email field.

 **Note.** It doesn't matter in which place in a template body you insert these macros. They put information into email fields and won't be seen in a message body.


 **Note.** The macros that begin with ~%Add put information to the email fields keeping the one that is already there, while the macros beginning with ~%Fill replace the data in email fields with the information from macros.

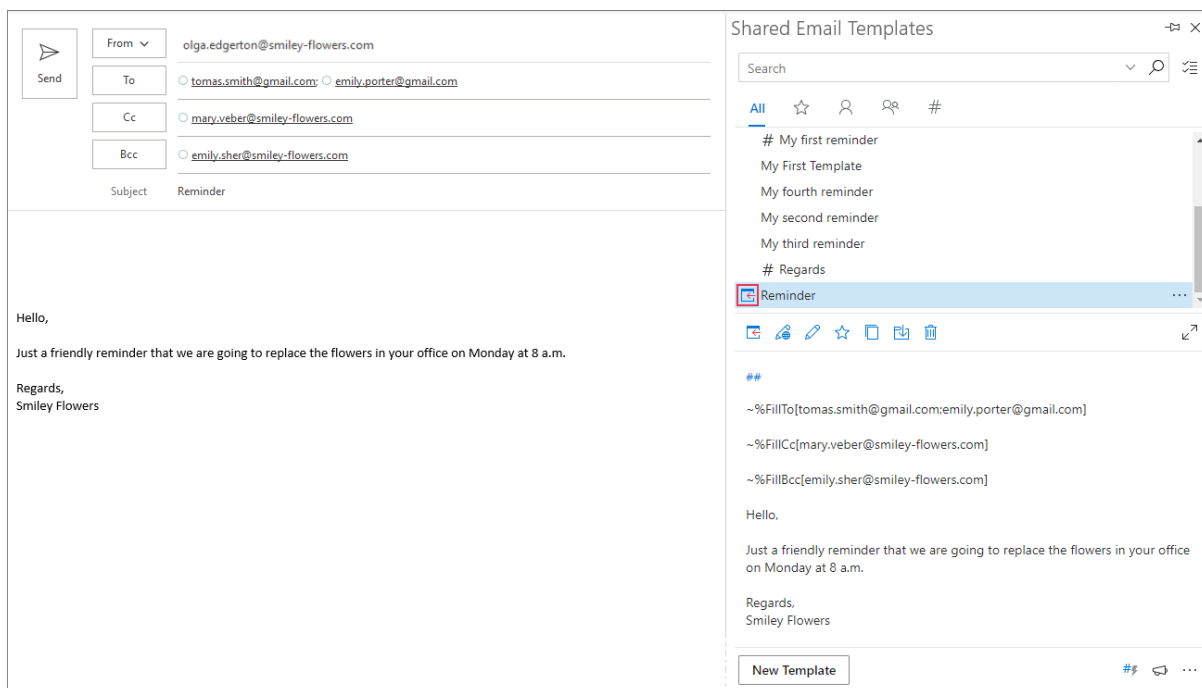


 **Note.** All the email addresses, as well as text, must be of consistent formatting or the macros won't work. To avoid problems, please make sure that you type any kind of text manually.


## Use ~%FillTo, ~%FillCc, ~%FillBcc macros

1. Click the **Insert Macro** button and choose the macro you need. Type the email address(es) in square brackets. Use a semicolon to separate email addresses inside square brackets.
2. Save the template.
3. Click **New email**.
4. **Paste** the template.

 **Note.** If the Subject line is not filled in, the name of the template will be inserted there. If the Subject field is prefilled, it won't be changed.



The screenshot shows the Outlook 'New Email' window. The 'To' field contains 'tomas.smith@gmail.com' and 'emily.porter@gmail.com'. The 'Cc' field contains 'mary.veber@smiley-flowers.com'. The 'Bcc' field contains 'emily.sher@smiley-flowers.com'. The 'Subject' field is empty. The email body contains the text: 'Hello, Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m. Regards, Smiley Flowers'. On the right, the 'Shared Email Templates' pane is open, showing a list of templates. The 'Reminder' template is selected, and its content is displayed below the list. The template content includes the subject line 'Reminder', the body text 'Hello, Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m. Regards, Smiley Flowers', and the macros '~%FillTo[tomas.smith@gmail.com;emily.porter@gmail.com]', '~%FillCc[mary.veber@smiley-flowers.com]', and '~%FillBcc[emily.sher@smiley-flowers.com]'. A 'New Template' button is visible at the bottom of the pane.

 **Tip.** If you typed a wrong email address, just select it in square brackets, delete and add a correct one.

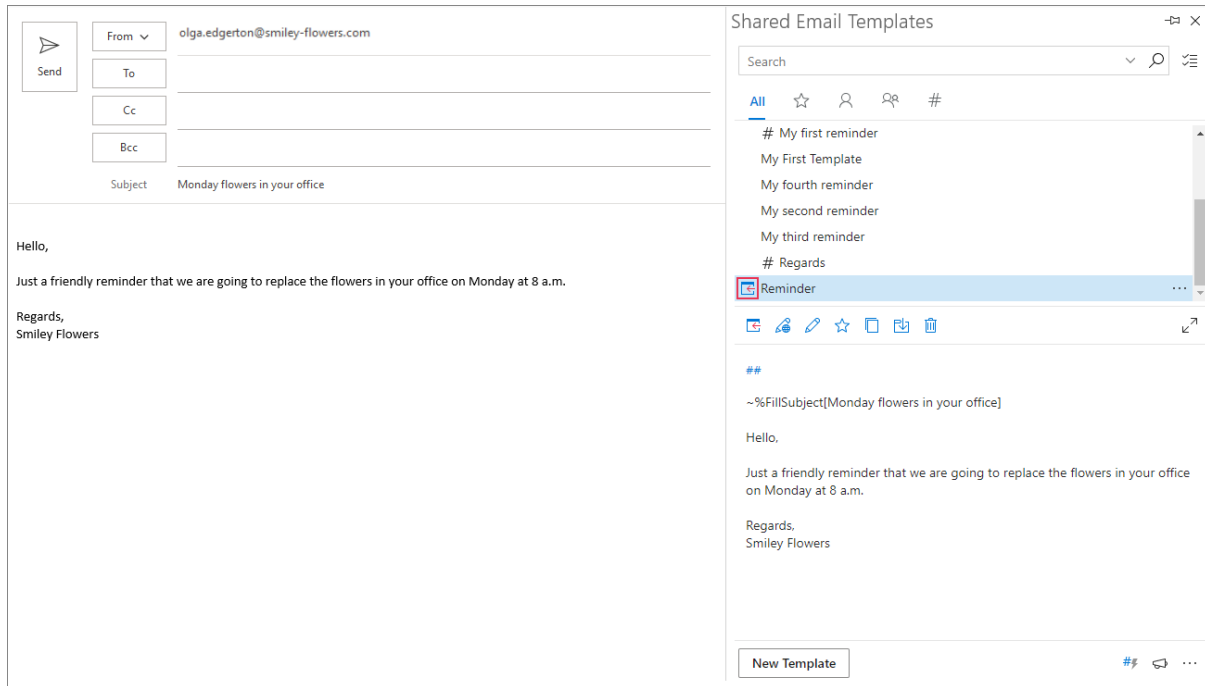
## Use ~%FillSubject macro


1. Click the **Insert Macro** button and choose the ~%FillSubject macro. In square brackets, type the text you want to see in the Subject email field.



 **Note.** The Subject field should contain no more than 255 characters.

2. Save the template.
3. Click **New Email**.
4. **Paste** the template.



 **Tip.** If you want to change the Subject text, just select previous text in square brackets, delete it and type a new one.

### Use ~%AddTo, ~%AddCc, ~%AddBcc macros

The ~%AddTo, ~%AddCc, ~%AddBcc macros add email addresses to the corresponding fields. It means that previously filled addresses will be kept.

1. Click the **Insert Macro** button and choose the ~%AddTo, the ~%AddCc or the ~%AddBcc macro. If you want to insert several emails, just separate them by a semicolon inside square brackets.
2. Save the template.



### 3. Fill in the To, CC, Bcc email fields.

The screenshot shows the Outlook interface with the 'Shared Email Templates' pane open on the right. The 'Reminder' template is selected, and its content is visible in the preview area. The email fields on the left are partially filled:

- From: olga.edgerton@smiley-flowers.com
- To: Tomas Smithy
- Cc: Liam Gartner
- Bcc: Elly Corden
- Subject: (empty)

The 'Reminder' template content includes:

- My fifth reminder
- # My first reminder
- My First Template
- My fourth reminder
- My second reminder
- My third reminder
- # Regards
- Reminder
- ##
- ~%AddTo[sarah.oh@gmail.com]
- ~%AddCc[helen.ringsy@smiley-flowers.com;melissa.mckay@smiley-flowers.com]
- ~%AddBcc[brian.graham@smiley-flowers.com]
- Hello,
- Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.
- Regards,
- Smiley Flowers

### 4. **Paste** the template and see how new email addresses appear in the corresponding fields.

The screenshot shows the Outlook interface with the 'Shared Email Templates' pane open on the right. The 'Reminder' template is selected, and its content is visible in the preview area. The email fields on the left are now fully populated with the addresses from the template:

- From: olga.edgerton@smiley-flowers.com
- To: Tomas Smithy, sarah.oh@gmail.com
- Cc: Liam Gartner, helen.ringsy@smiley-flowers.com, melissa.mckay@smiley-flowers.com
- Bcc: Elly Corden, brian.graham@smiley-flowers.com
- Subject: Reminder

The email body contains the template content:

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,

Smiley Flowers





**Tip.** To change or edit emails in square brackets, select the email and change or delete it.

## Use ~%AddSubject macro

The ~%AddSubject macro adds text to the Subject field. Previously added text is kept too.

1. In a template click the **Insert Macro** button and choose the ~%AddSubject macro. Add subject text in square brackets.

**Note.** Type a space before the text in square brackets, otherwise the new text will stick to the existing one without any white space between them.

**Note.** Remember that the Subject field has a limit of maximum 255 characters.

2. Save the template.
3. Click **New Email**. Fill in the Subject field.

The screenshot shows the 'Shared Email Templates' interface. On the left, an email form is visible with the 'From' field set to 'olga.edgerton@smiley-flowers.com' and the 'Subject' field set to 'Monday'. On the right, the 'Shared Email Templates' pane is open, displaying a list of templates. The 'Reminder' template is selected, showing its content: a subject line with the macro '~%AddSubject[ flowers for your office]', followed by 'Hello.', a reminder message, and a signature 'Regards, Smiley Flowers'. A 'New Template' button is at the bottom of the pane.



## 4. Paste the template.

Send

From olga.edgerton@smiley-flowers.com

To

Cc

Bcc

Subject Monday flowers for your office

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,  
Smiley Flowers

Shared Email Templates

Search

All ☆ 👤 🔍 #

# Hello

My fifth reminder

# My first reminder

My First Template

My fourth reminder

My second reminder

My third reminder

# Regards

**Reminder**

##

~%AddSubject[ flowers for your office]

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards.  
Smiley Flowers

New Template

## 🔍 ...

**Note.** If you want to add the text before the existing text in the Subject email field, add a macro in this format: ~%AddSubject[*your text*;{before}]. In this case, don't forget to put a space after the text.

The example is below.

Send

From olga.edgerton@smiley-flowers.com

To

Cc

Bcc

Subject Monday flowers for your office

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards,  
Smiley Flowers

Shared Email Templates

Search

All ☆ 👤 🔍 #

# Hello

My fifth reminder

# My first reminder

My First Template

My fourth reminder

My second reminder

My third reminder

# Regards

**Reminder**

##

~%AddSubject[Monday : {before}]

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Regards.  
Smiley Flowers

New Template

## 🔍 ...




## Service macros

Service macros are:

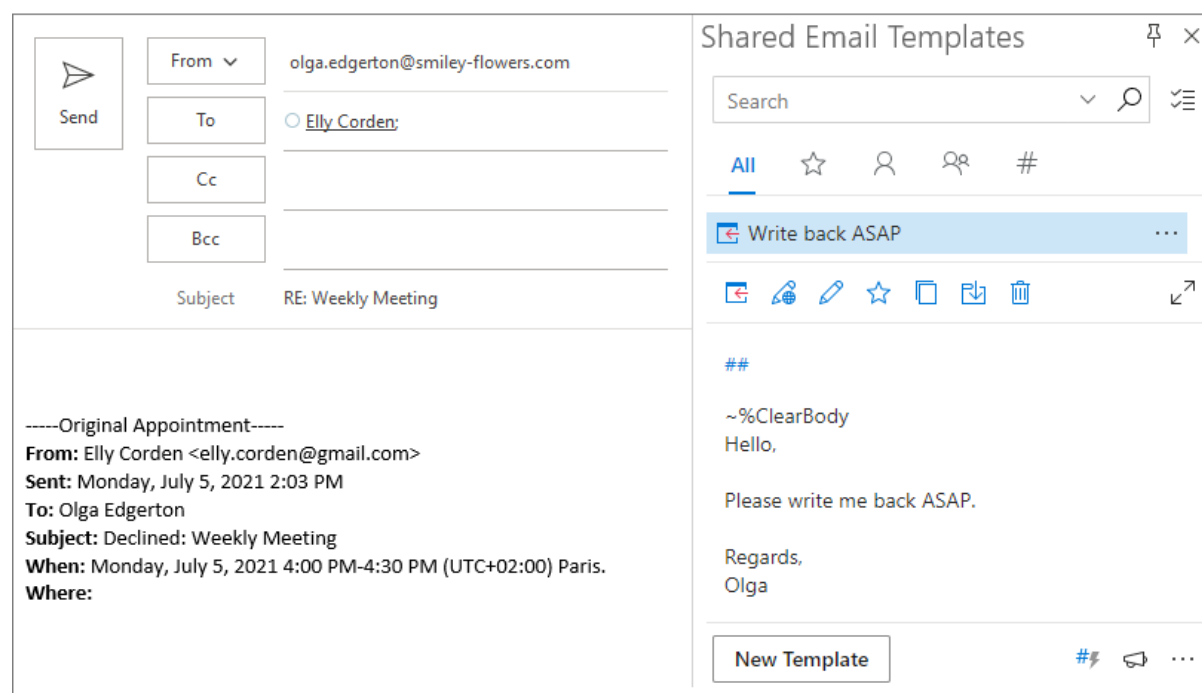
- ~%ClearBody – clears an email body before inserting a template.
- ~%FromAccount – compares the emails in square brackets and the From email field. If they differ, the template is not inserted.
- ~%Note - adds an inner note to a template.

### Use ~%ClearBody macro

This macro is of great help when you need to delete some unnecessary text from an email body before inserting the template. For example, when you reply to an email.

 **Tip.** It does not matter where you insert this macro in a template, as it won't be shown in an email body.

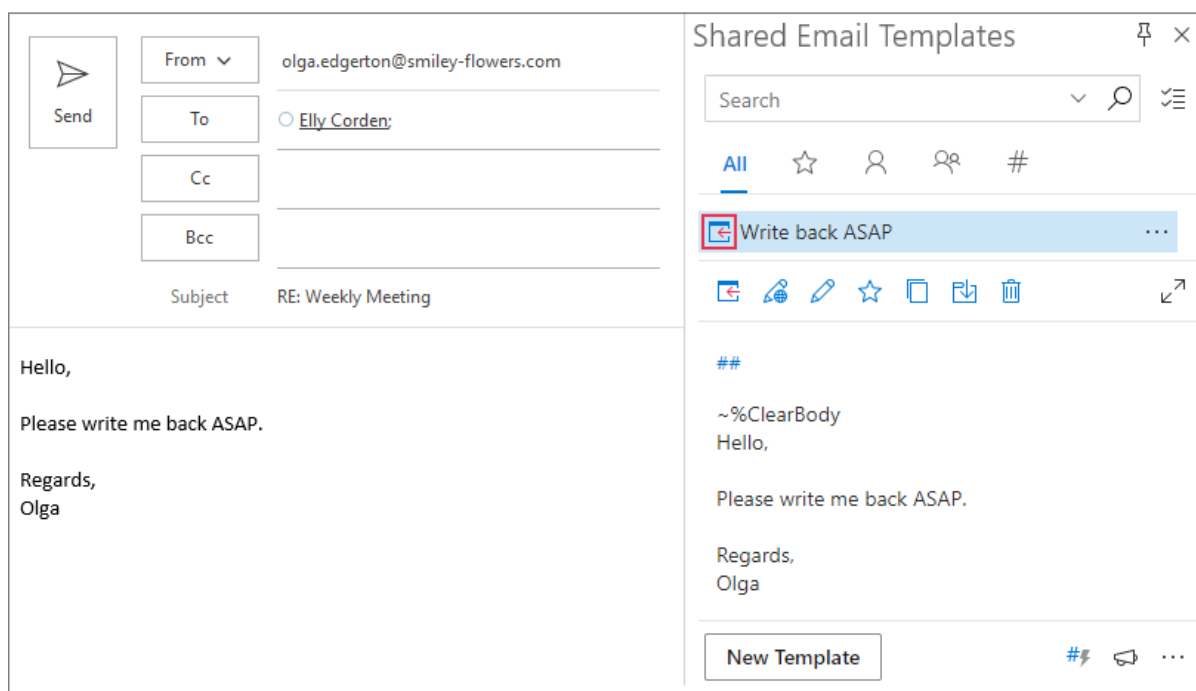
1. Click the **Insert Macro** button and insert the ~%ClearBody macro.
2. Save the template.
3. Open an email where you want to insert the template.



The screenshot shows the Outlook interface. On the left is the email composition window. The 'To' field contains 'Elly Corden'. The 'Subject' field contains 'RE: Weekly Meeting'. The email body contains a quoted message from Elly Corden. On the right is the 'Shared Email Templates' pane. It shows a search bar and a list of templates. The template 'Write back ASAP' is selected. The template content is visible, showing the ~%ClearBody macro followed by 'Hello,' and 'Please write me back ASAP.' The 'New Template' button is at the bottom of the pane.



#### 4. **Paste** the template.

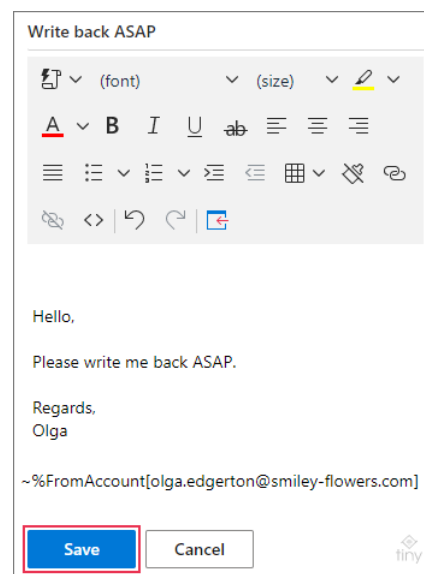


#### Use ~%FromAccount macro

The ~%FromAccount macro will help you when you use several mailboxes and want to make sure your email is sent from the correct account.

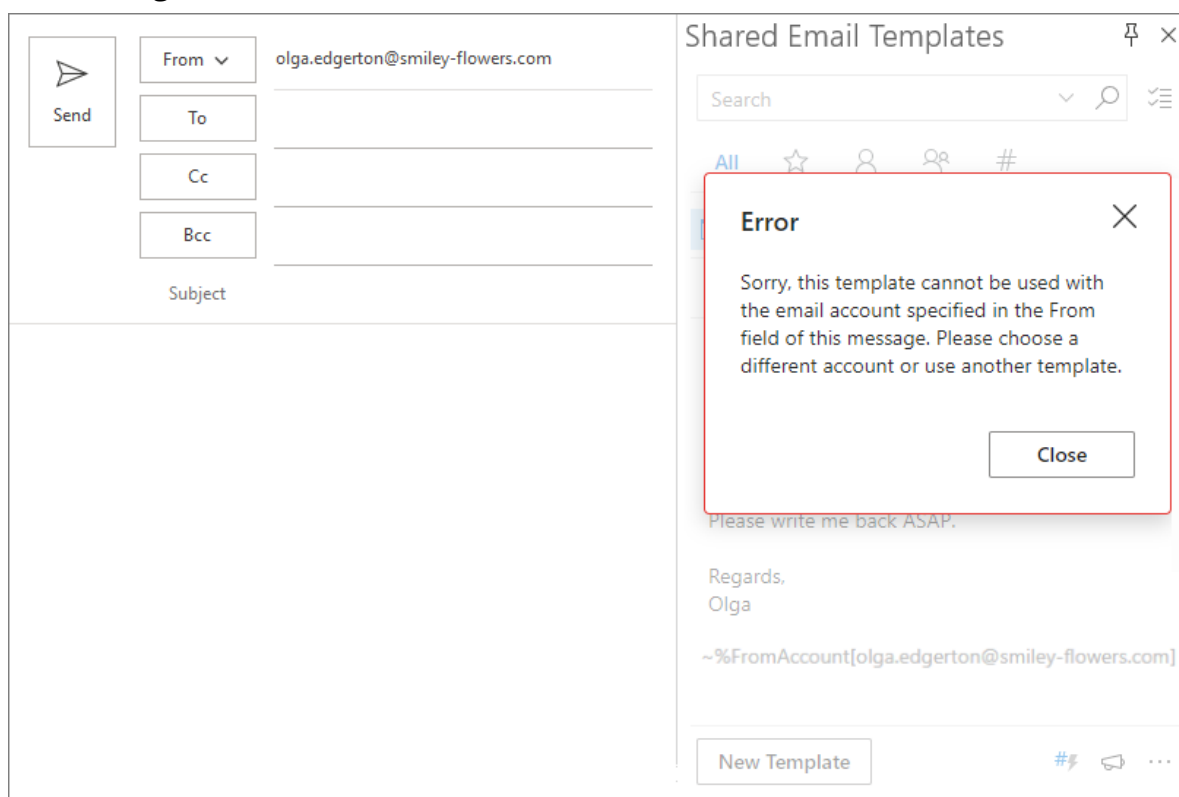
**Note.** The ~%FromAccount macro can be added to any place in a template, as it won't be displayed in an email body.

1. Click the **Insert Macro** button in a template and insert the ~% FromAccount macro. In square brackets, type the email from which you would like the email to be sent.
2. Save the template.





3. Paste the template. If the emails specified in the macro and the From field are different, the template won't be pasted and you will get an error message.

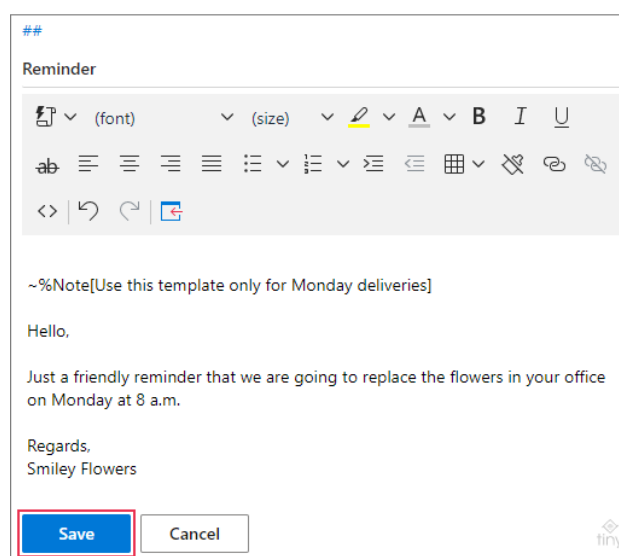


## Use ~%Note macro

The ~%Note macro can help if you want to leave an inner note in a template for yourself or your teammates.

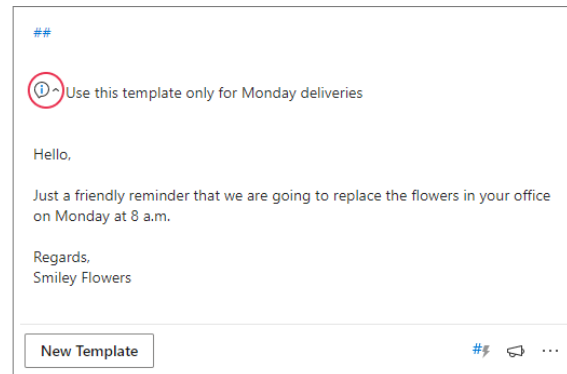
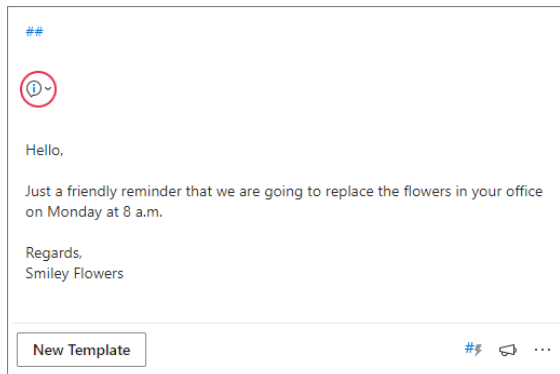
**Note.** The text will not be shown in an email body, it will be visible only in the template. You can add it to any place in a template.

1. Click the **Insert Macro** button and select the ~%Note macro. Type the note text in square brackets and save the template.





In the preview pane, all your notes are collapsed. To see the whole text, click the icon with “i” letter.



## Full list of macros


You can find a complete list of macros and their description on our [web page](#).




# Insert pictures into templates


There are several ways to insert pictures into a template body. Choose the way you prefer from the list and click it to see instructions:

- [From OneDrive](#)
- [From SharePoint](#)
- [From a URL](#)

 **Note.** If you use pictures for team templates, make sure that every team member has access to them. We recommend creating a special shared folder in OneDrive/SharePoint, share it with all team members and save all the files for templates there.

Find out how to share folders, files and images in a secure way in our [blog article](#).


 **Note.** In a template, insert the macro right where you want to see the picture.

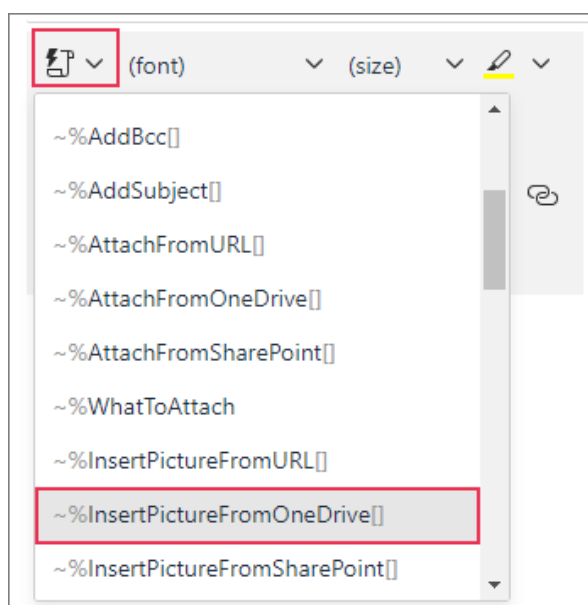
 **Note.** If the Subject field is empty when you paste the template, it will be populated with the template's name.

## Insert pictures from OneDrive

To insert pictures from OneDrive, use the ~%InsertPictureFromOneDrive macro. It downloads the image, inserts a hidden attachment and displays the image in an email body.

1. Click the **Insert Macro** button and choose the ~%InsertPictureFromOneDrive macro.

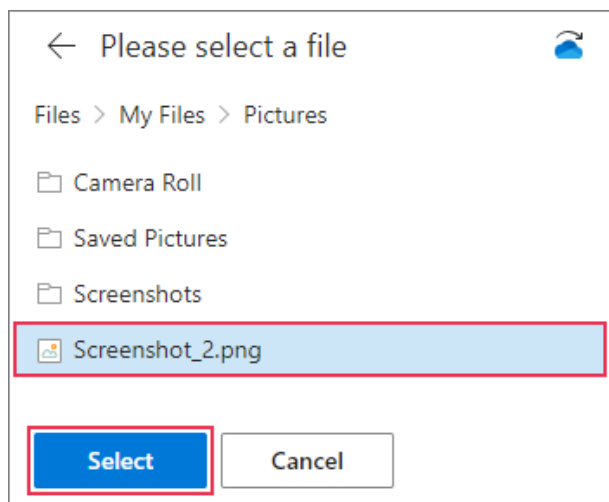
 **Note.** If single sign-on is not enabled, you'll be asked to log in to your



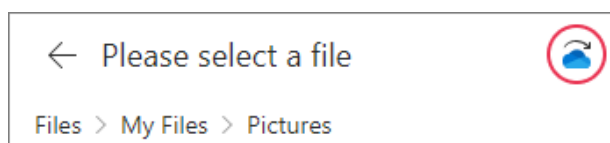


OneDrive account. See the chapter [Single Sign-on for OneDrive and SharePoint macros](#).

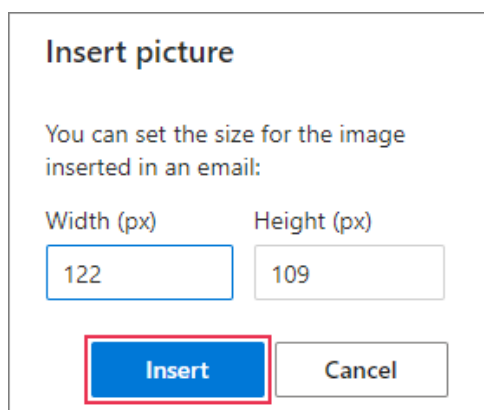
2. Find the picture you need, pick it and click **Select**.



**Tip.** You can switch to another OneDrive account by clicking the Blue Cloud icon in the upper-right corner.



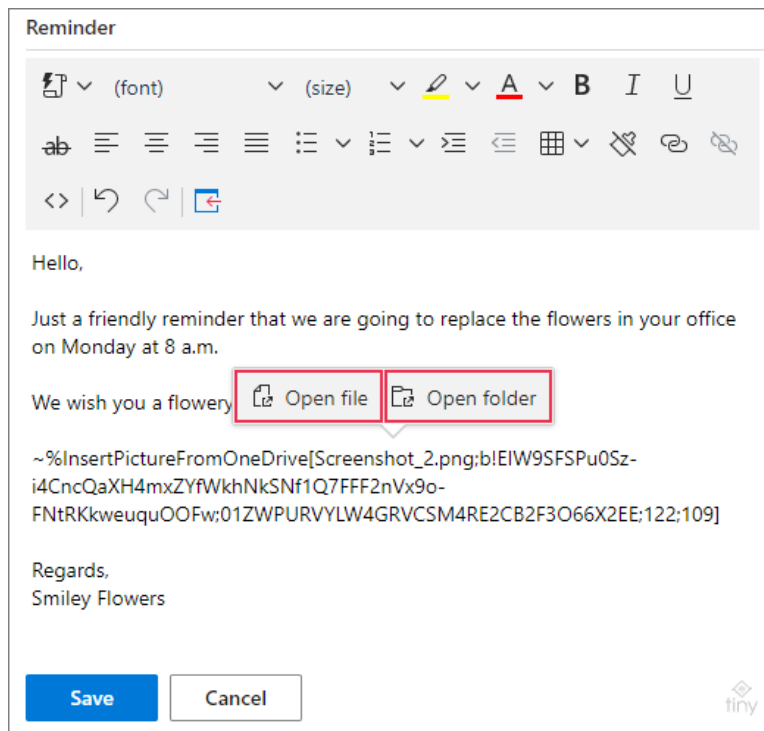
3. Optionally, set the size of the picture (in pixels) or make the fields empty (if you want the picture to be inserted in its original size) and click **Insert**.



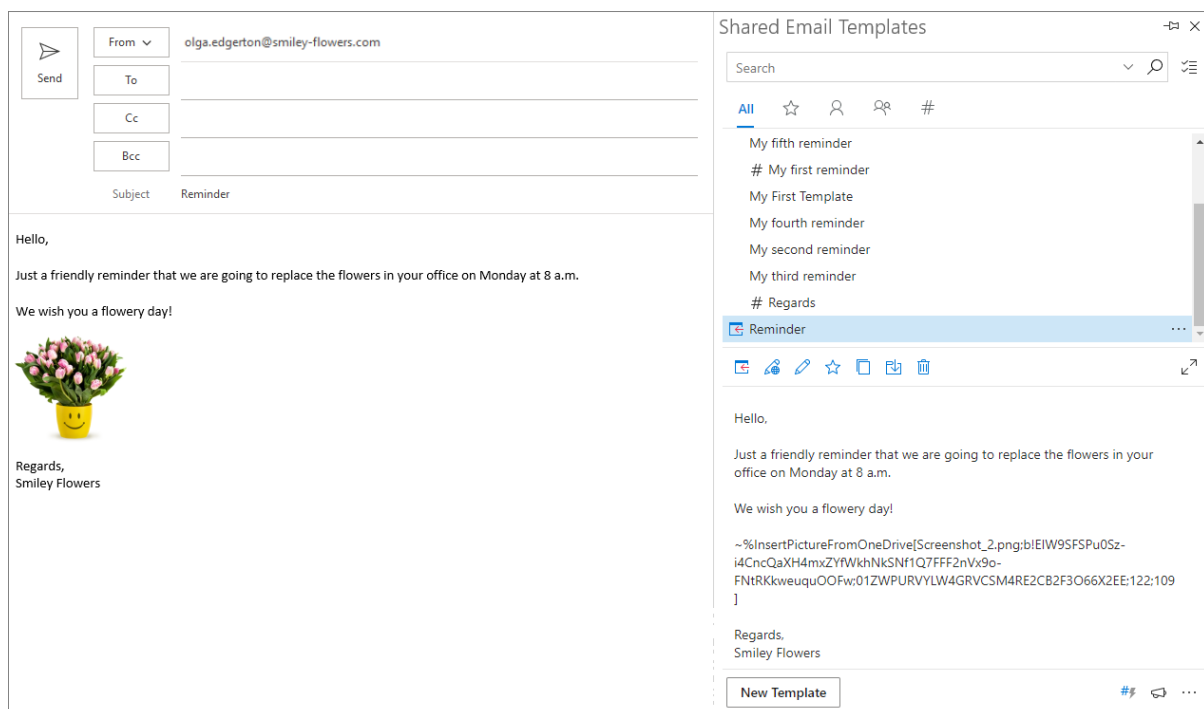




- Once the picture is added, you can click the link and **Open file** or **Open folder** to see if the picture is correct.



- Save the template.
- When you insert the template into an email, the picture will be added to the email body.



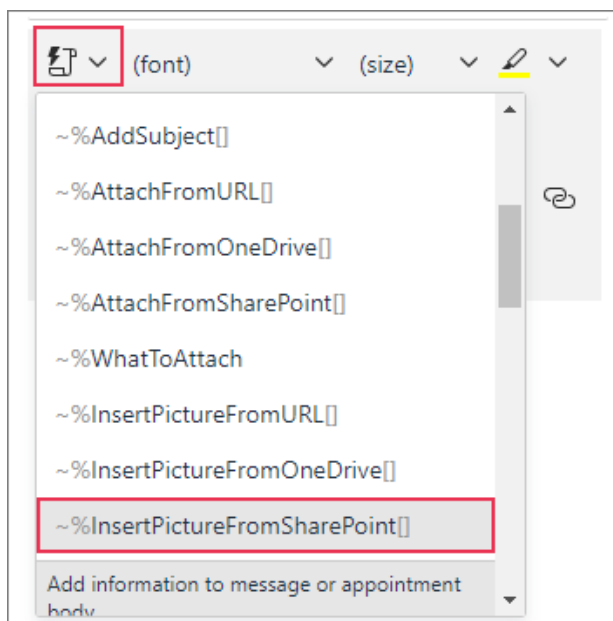


## Insert pictures from SharePoint

The ~%InsertPictureFromSharePoint macro inserts a picture from SharePoint. It inserts a hidden attachment and displays the image in an email body.

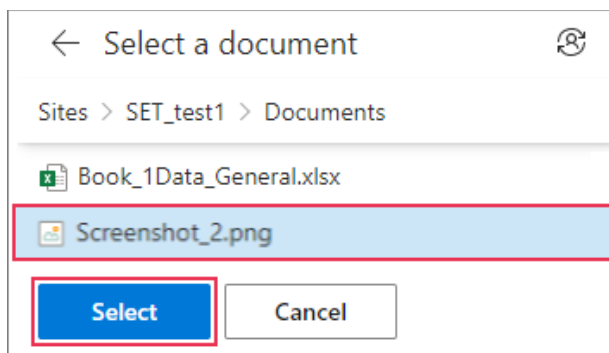
**Note.** The ~%InsertPictureFromSharePoint macro doesn't work on free accounts, such as Outlook.com, because they don't have SharePoint functionality.

1. Click the **Insert Macro** button in a template and select ~%InsertPictureFromSharePoint.



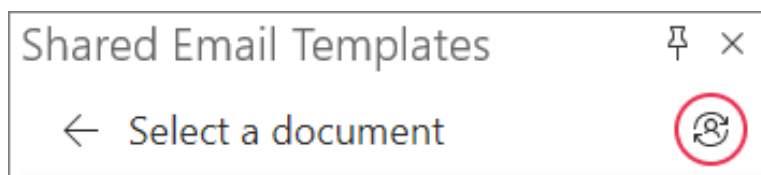
**Note.** If single sign-on is not enabled, you will be asked to log in to your SharePoint account. See the chapter [Single Sign-on for OneDrive and SharePoint macros](#).

2. Choose a necessary picture and click **Select**.

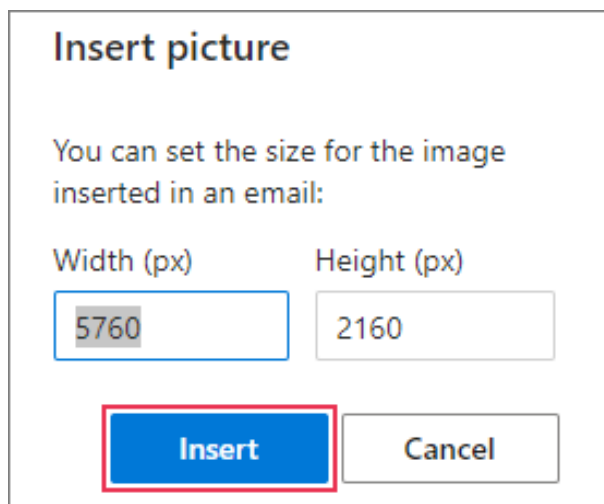




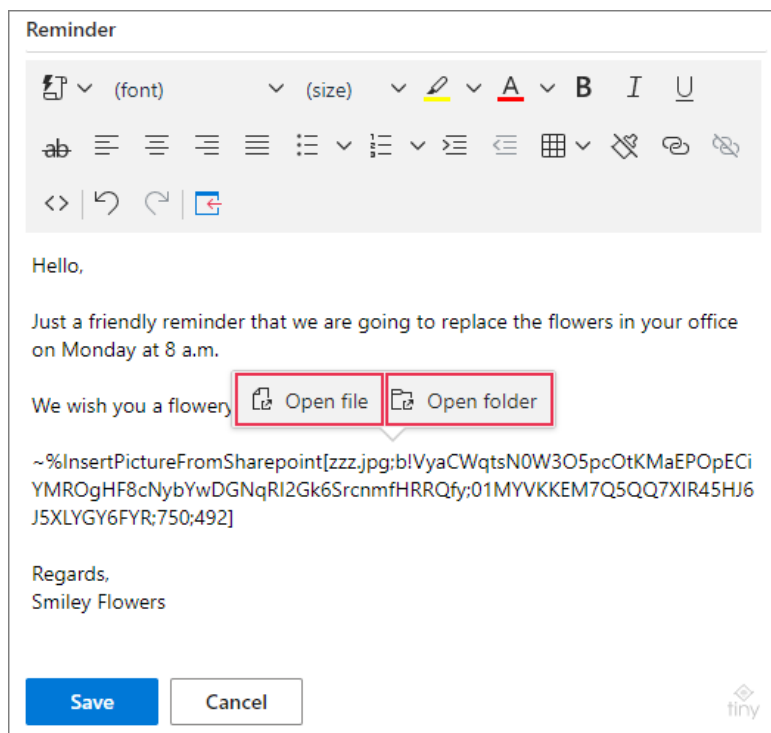
**Tip.** You can switch to another SharePoint account by clicking a special icon in the upper-right corner.



3. Optionally, set the size of the picture (in pixels) or make the fields empty (to leave the original size of the picture) and click **Insert**.



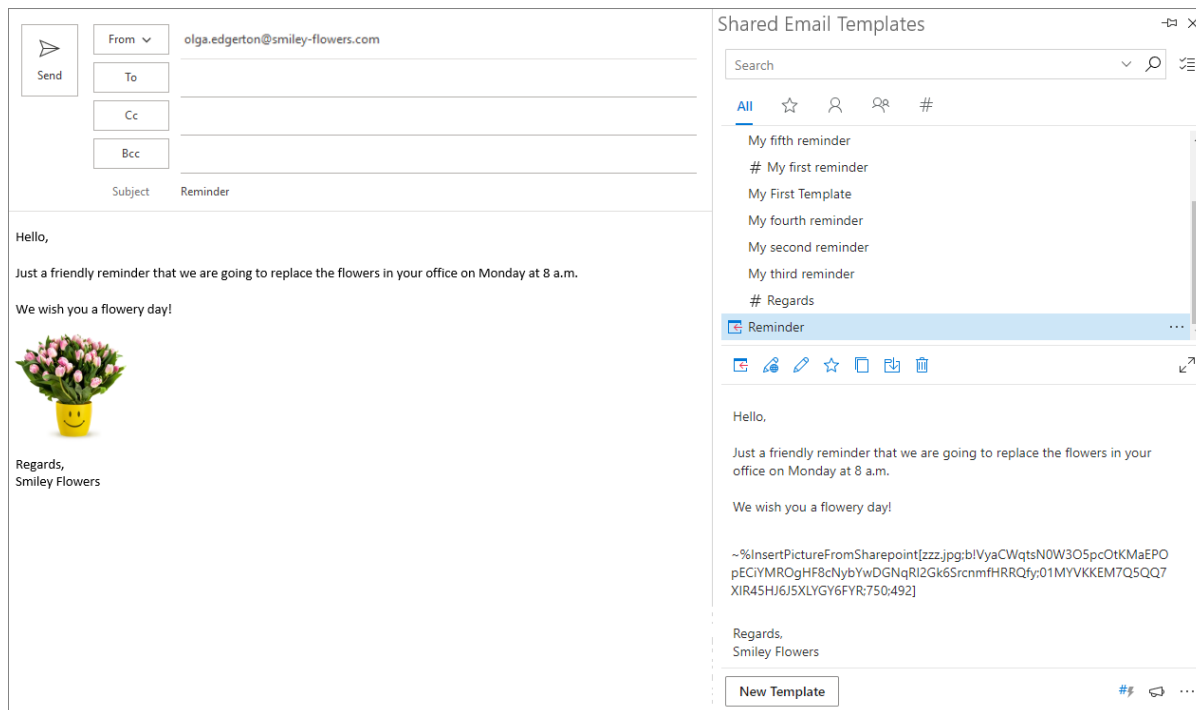
4. Click **Open file** or **Open folder** to check If you added the right picture.





## 5. Save the template.

As a result, every time you insert the template into an email, you will see the picture in an email body.



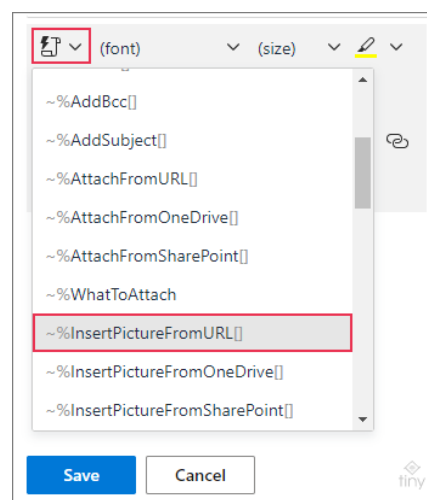
## Insert pictures from a URL

Use the `~%InsertPictureFromURL` macro to insert a picture from any location other than OneDrive and SharePoint.

**Note.** If you use `~%InsertPictureFromURL` in a shared template, make sure all members of the team have access to the URL.

**Note.** The `~%InsertPictureFromURL` macro won't work for OneDrive or SharePoint links. For these cases, use the specially designed macros: `~%InsertPictureFromOneDrive`, `~%InsertPictureFromSharePoint`.

1. Click the **Insert Macro** button in the template and select the `~%InsertPictureFromURL` macro.





2. Insert a link, set the size of the picture (optionally) or type nothing (to leave the original size), tick **As a hidden attachment** (if you don't want the picture to be seen in attachments) and click **Insert**.

### Insert picture

Web address

You can set the size for the image inserted in an email:

Width (px)

Height (px)

☒ As a hidden attachment

Insert

Cancel

3. Save the template.
4. When you paste the template, you will see the picture in an email body.

Send

From

olga.edgerton@smiley-flowers.com

To

Cc

Bcc


Subject

Reminder

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

We wish you a flowery day!



Regards,  
Smiley Flowers

Shared Email Templates

Search

All

☆

👤

🔍

#

My fifth reminder

# My first reminder

My First Template







My fourth reminder

My second reminder

My third reminder

# Regards

Reminder



Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

We wish you a flowery day!

~%InsertPictureFromURL[https://cdn.smiley-flowers.com/\_img-lp18/flowersforoffices/orders/png:250:250]

Regards.  
Smiley Flowers

New Template

# 🗨 ...


Ablebits.com

77



# Single sign-on for OneDrive and SharePoint macros

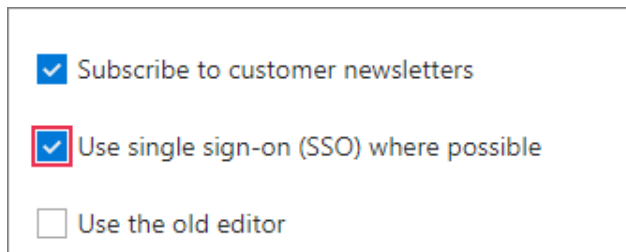
As mentioned above, you are required to log into your OneDrive/SharePoint account every time you use macros for OneDrive or SharePoint. To avoid these extra moves, you can leverage the single sign-on (SSO) feature and accept the permissions. Please note that it only works if you have one OneDrive/SharePoint account corresponding to your Microsoft 365 Outlook account (check it on the File tab of Outlook).

 **Note.** Single sign-on is available only for the Shared Email Templates add-in.

## Enable and disable single sign-on

Single sign-on is turned on by default. It's better to turn it off if you plan to use images or files from different OneDrive accounts. You can turn it on anytime.

1. Go to your Profile.
2. Click the **Edit Account** icon.
3. Untick the box to turn single sign-on off or tick it back to turn it on.



4. Do not forget to click **Save changes**.




# Attach files to templates


You can add files or images for attachments from OneDrive, SharePoint or URL to your templates. Click the source of your file in the list below to see the instructions:

- [OneDrive](#)
- [SharePoint](#)
- [URL](#)

Consider adding a macro that will remind you to attach a file every time you use a certain template.

 **Note.** When you add files and images from OneDrive/SharePoint or URLs, check that everybody has access to them. It's a nice idea to create a special shared folder in OneDrive/SharePoint and give all the team members access to it.


Find out how to share files and images in a safe way in our [blog article](#).

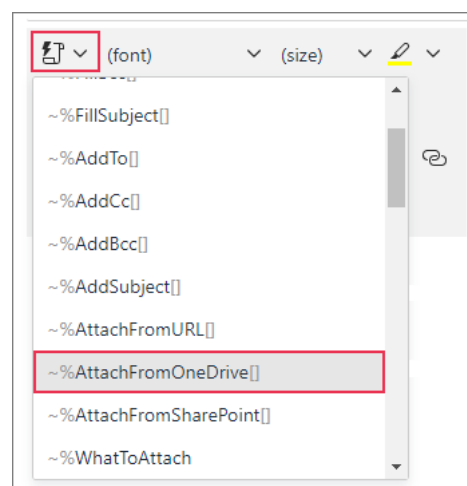
 **Note.** Office 365, Outlook.com and Exchange Server impose different limitations on the size and number of attachments.

## Attach files from OneDrive

You can attach files from OneDrive with the help of the ~%AttachFromOneDrive macro.

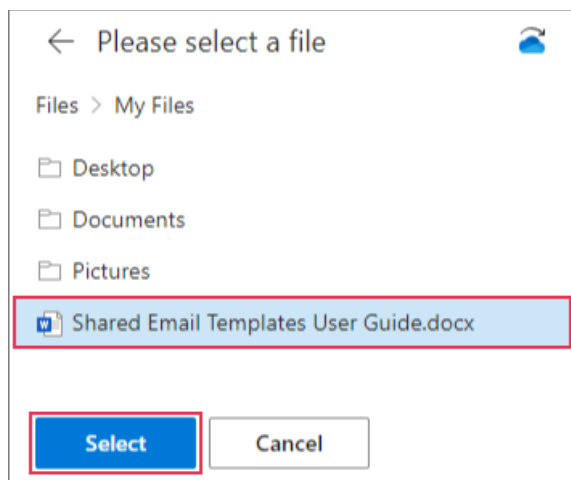
1. Choose the ~%AttachFromOneDrive macro from a drop-down list of macros.

 **Note.** If single sign-on isn't enabled, you will be asked to log in to your OneDrive account. See the chapter [Single Sign-on for OneDrive and SharePoint macros](#).

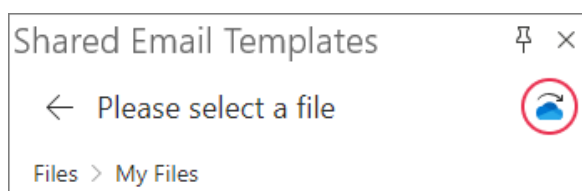




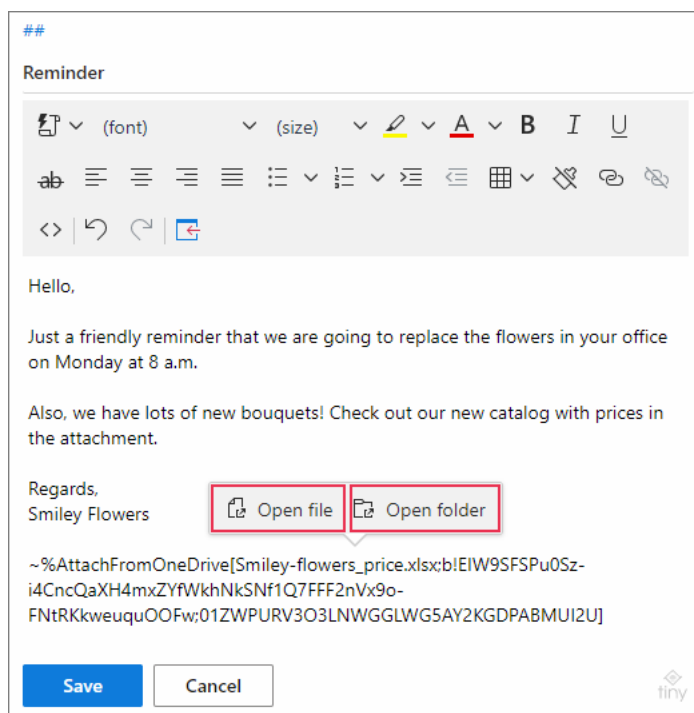
2. Pick the file and click **Select**.



**Tip.** If you need to change your OneDrive account while attaching a file, just click the icon with the Blue Cloud and sign in to another account.



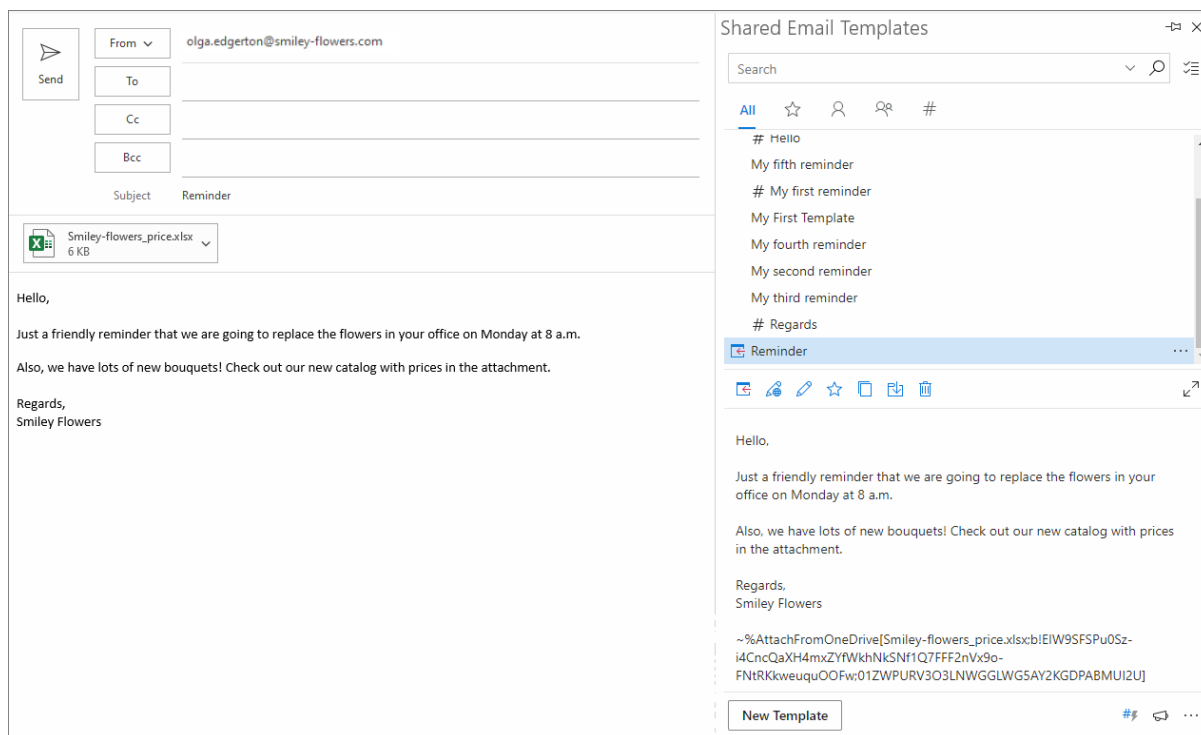
3. Once the macro is added, you can click the link and **Open File** or **Open Folder** to check if you inserted the right file.







4. Save the template.
5. Every time you paste the template, a file will be automatically attached.

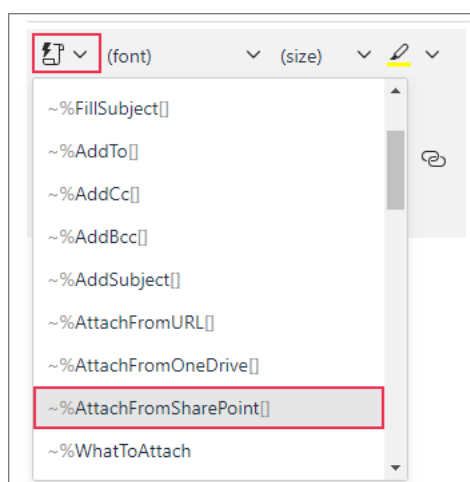


## Attach files from SharePoint


To attach files from SharePoint use the `~%AttachFromSharePoint` macro.

**Note.** `~%AttachFromSharePoint` doesn't work on free accounts such as outlook.com, because they haven't got SharePoint.

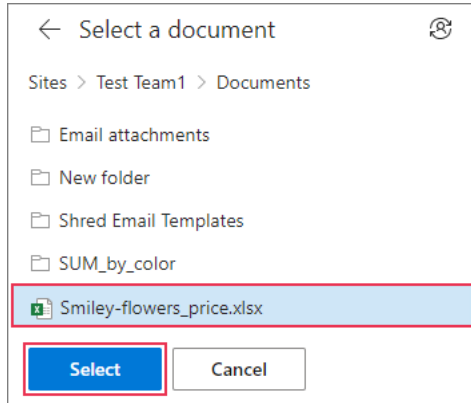
1. Click the **Insert Macro** icon and choose the `~%AttachFromSharePoint` macro.




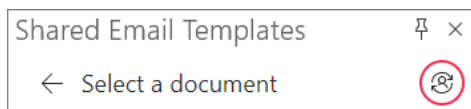


 **Note.** If single sign-on is not enabled, you will be asked to log in to your SharePoint account. See [Single Sign-on for OneDrive and SharePoint macros](#).

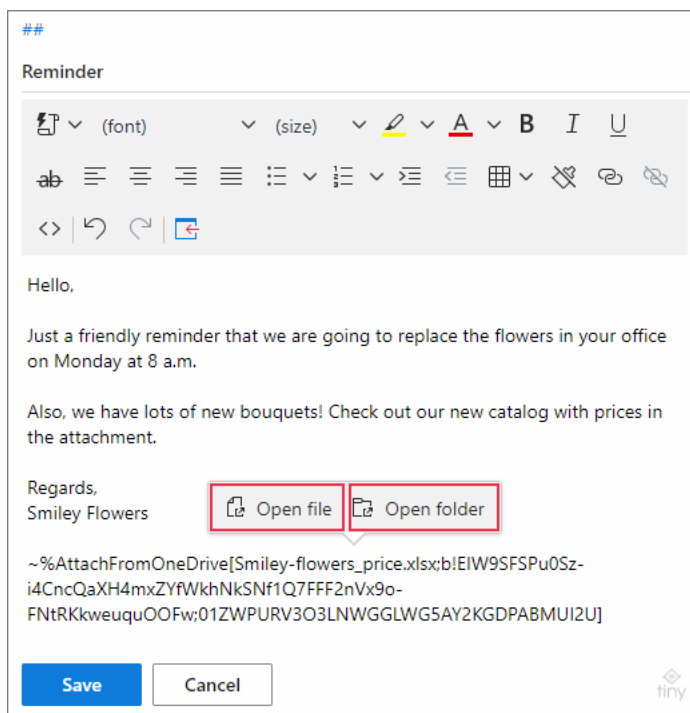
2. Choose the file you need and click **Select**.



 **Tip.** You can switch to another SharePoint account by clicking a special icon in upper-right corner.

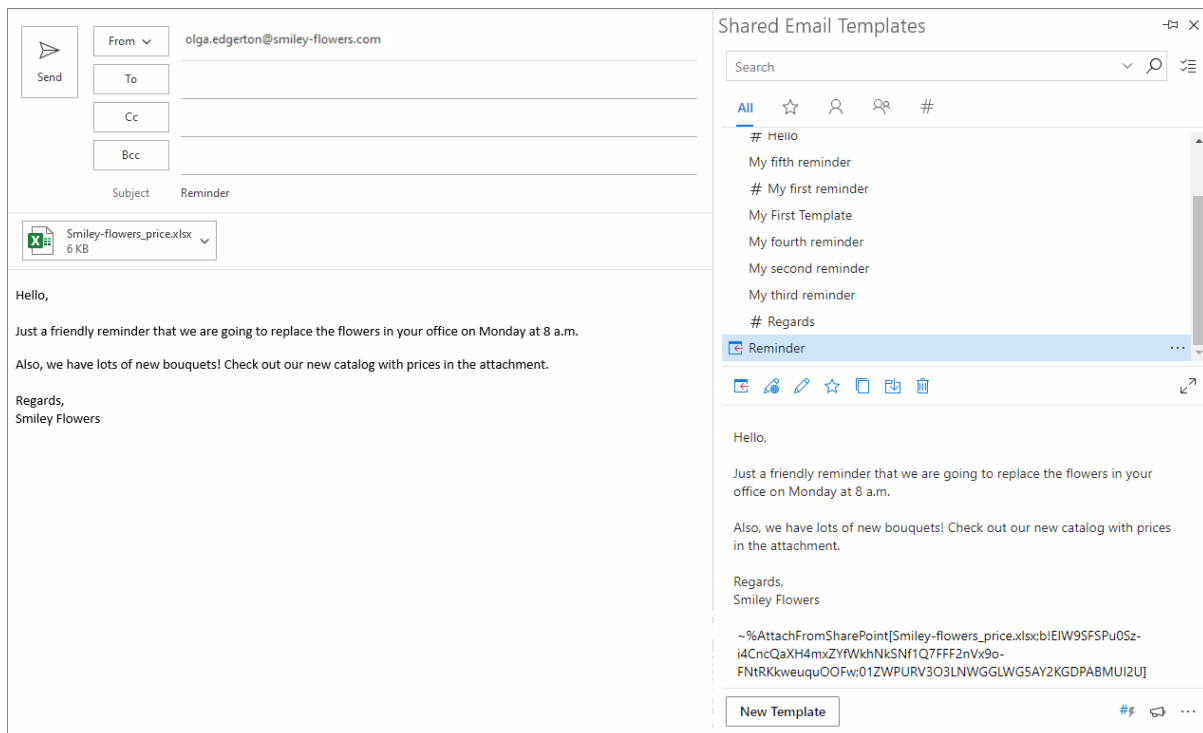


3. Check if the added file is the one you need by clicking **Open file** or **Open folder**.





4. Save the template.
5. A file will be automatically attached when you paste the template into an email.

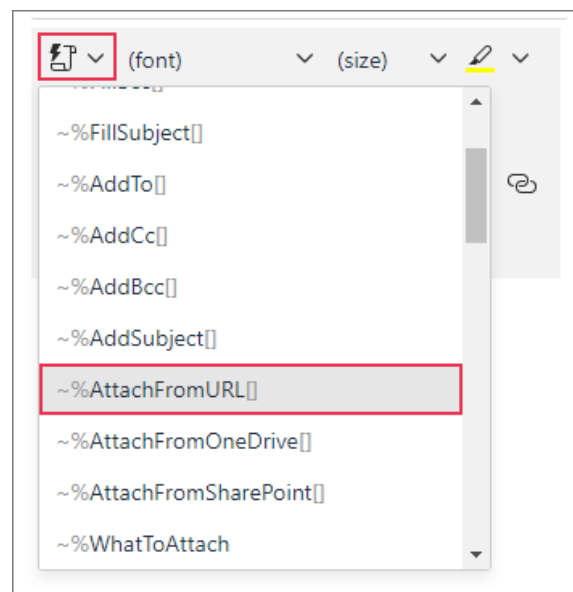


## Attach files from a URL

To attach files from URLs, apply the ~%AttachFromURL macro. Use it when a file is in a place other than OneDrive or SharePoint.

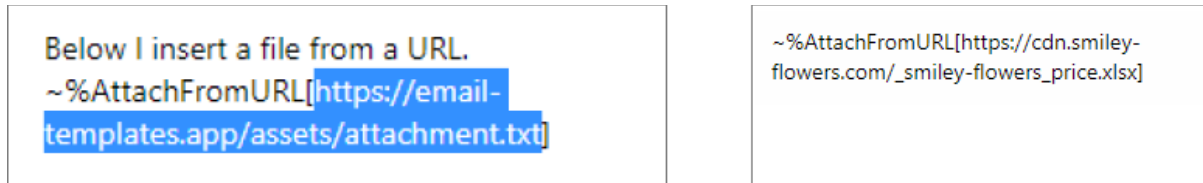
**Note.** The ~%AttachFromURL macro won't work with OneDrive or SharePoint links. For these cases use specially developed macros ([~%AttachFromOneDrive](#), [~%AttachFromSharePoint](#)).

1. Click the **Insert Macro** icon in a template and select ~%AttachFromURL from the drop-down list of macros.

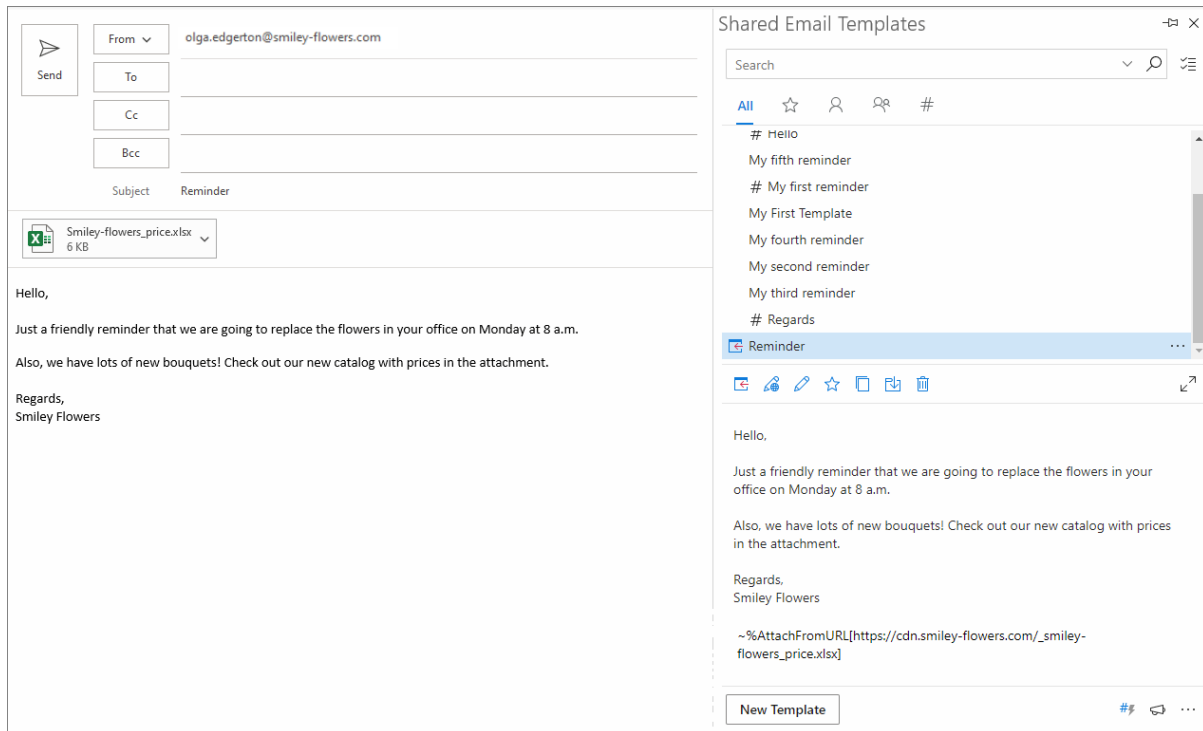




2. Delete the selected text. Copy the link and insert it (Ctrl+V).



4. Save the template.
5. The file will be attached every time you paste the template.

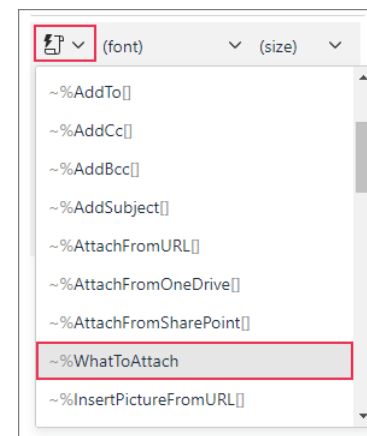


**Note.** If a URL is used in team templates, make sure that every member of a team has access to it.

## Add file attaching prompt

Use the ~%WhatToAttach macro to remind yourself to attach a file from your local storage or SSD every time you paste a template.

1. Insert the ~%WhatToAttach macro into a template.
2. A dialog window will ask you to type the window title. Window title is the name of a window that appears when you insert the template with the





macro. It prompts you to add a file. To remember what file to choose, write a hint for yourself. Then click **Insert**.

A dialog box titled "What To Attach". It has a label "Window title" above a text input field containing "New catalog with prices". At the bottom, there are two buttons: "Insert" (highlighted with a red border) and "Cancel".

3. Save the template.

A dialog box for saving a template. It contains the text "~%WhatToAttach[{{title:'New catalog with prices'}}]". At the bottom, there are two buttons: "Save" (highlighted with a red border) and "Cancel". A "tiny" logo is in the bottom right corner.

Time to check how it works.

1. Paste the template. Do you see the window with the phrase? This the window title that you added in step 2. Click the **Browse** icon.

A dialog box titled "Cheat sheet" with a close button (X) in the top right. It has a text input field and a "Browse" icon (highlighted with a red border) to its right. At the bottom, there are two buttons: "OK" and "Cancel".

2. Find the file and click **OK**.

A dialog box titled "Cheat sheet" with a close button (X) in the top right. The text input field now contains "Smiley-flowers\_price.xlsx". To the right of the input field is a "Browse" icon. At the bottom, there are two buttons: "OK" (highlighted with a red border) and "Cancel".



### 3. You will see the file added as an attachment.

The screenshot displays the Outlook interface. On the left, an email draft is being composed. The 'From' field is set to 'olga.edgerton@smiley-flowers.com'. The 'To', 'Cc', and 'Bcc' fields are empty. The 'Subject' field contains the text 'Reminder'. An attachment named 'Smiley-flowers\_price.xlsx' (6 KB) is added to the email. The body of the email contains the following text:

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

Also, we have lots of new bouquets! Check out our new catalog with prices in the attachment.

Regards,  
Smiley Flowers

On the right side, the 'Shared Email Templates' pane is open. It features a search bar and a list of templates. The templates listed are:

- # Hello
- My fifth reminder
- # My first reminder
- My First Template
- My fourth reminder
- My second reminder
- My third reminder
- # Regards
- Reminder (selected)

The 'Reminder' template is selected, and its content is displayed in the preview area below the list. The preview shows the same text as the draft email, including the attachment placeholder: '~%WhatToAttach[([title:"New catalog with prices"])]'. At the bottom of the preview area, there is a 'New Template' button and a small icon.



# Use mailbox and profile properties

Shared Email Templates work with three categories of properties:

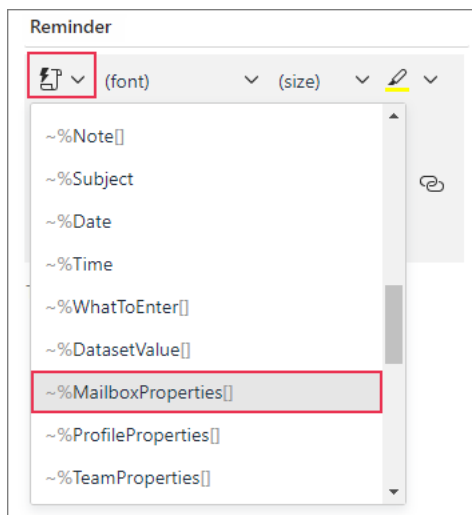
- [Mailbox properties](#)
- [Profile properties](#)
- [Team properties](#)

## Mailbox properties

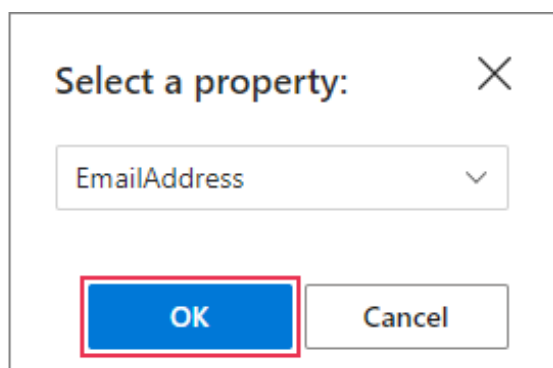
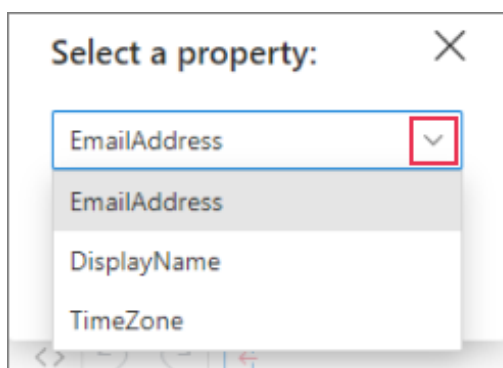
Mailbox properties are built-in properties of your Outlook account. They include the email address, the display name and the time zone of your Outlook mailbox.

### Insert mailbox properties into your templates

1. Click the **Insert Macro** icon in a template and select ~%MailboxProperties.



2. From the drop-down list in the dialog window, select one of the three properties and click **OK**.





### 3. Save the template.

##

Reminder

(font) (size) [color] [text color]

**B** *I* U ~~ab~~ [align left] [align center] [align right] [list bulleted] [list numbered] [list none]

[indent left] [indent right] [table] [link] [unlink] [code] [undo] [redo] [insert link]

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

If you have any questions, please contact  
~%MailboxProperties[EmailAddress]

Regards,  
Smiley Flowers

**Save** Cancel

tiny

### 4. When you paste the template, macros will be replaced with corresponding information.

Send

From

To

Cc

Bcc

Subject Reminder

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

If you have any questions, please contact olga.edgerton@smiley-team.com

Regards,  
Smiley Flowers

Shared Email Templates

Search

All ☆ 👤 🔍 #

My Templates

- # Hello
- My fifth reminder
- # My first reminder
- My First Template
- My fourth reminder
- My second reminder
- My third reminder
- # Regards
- Reminder**

[icon] [edit] [star] [print] [delete] [link]

##

Hello,

Just a friendly reminder that we are going to replace the flowers in your office on Monday at 8 a.m.

If you have any questions, please contact  
~%MailboxProperties[EmailAddress]

Regards,  
Smiley Flowers

New Template # 🗨 ...

**Note.** Properties are inserted from the current Outlook account.





## Profile properties

We've seen the examples of profile properties [here](#). But how to use them in templates? Check out the information below.

### Add profile properties

1. Go to the profile pane and click the **Edit Properties** icon.

My Properties	
UserName	olgae
FirstName	Olga
LastName	Edgerton
FullName	Olga Edgerton
Birthday	NOT SET

2. To add a new property, click **Add Property** in the lower-left corner.

Custom

Select a property to preview its content

Add Property

3. Fill in the fields with the name of your property and value. When you are ready, click **Save**.

Save Cancel Help

Name

Value

Save Cancel

Save Cancel Help

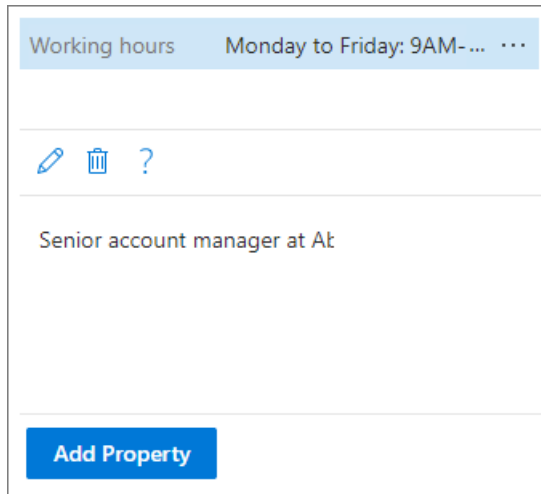
Working hours

Monday to Friday: 9AM-5PM

Save Cancel



4. Once the property is saved, it will be seen in the list of custom properties. To check the content, left-click the property and its value will appear in the preview pane.

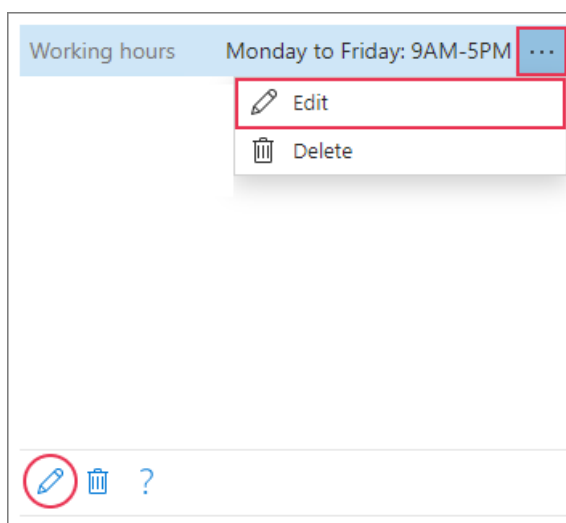


## Edit profile properties

As you may have guessed, predefined properties are adjusted in the **Account** section of your profile.

Custom properties, on the contrary, are edited from the profile pane.

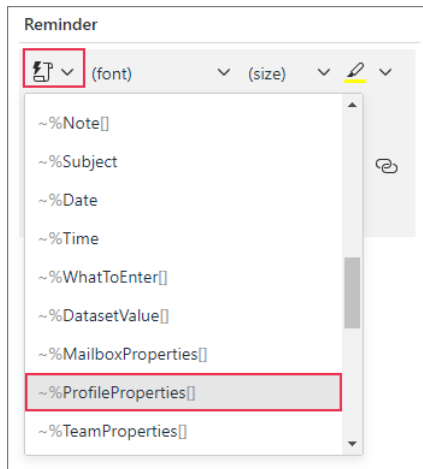
1. Go to the profile pane and click the **Edit Properties** icon. After that click **Edit** in the context pop-up menu or the **Edit** icon in the action bar.



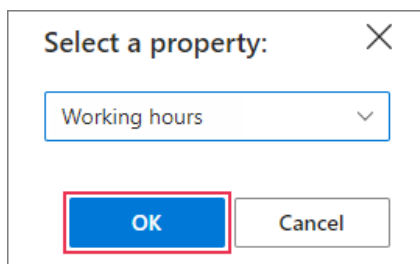


## Insert profile properties

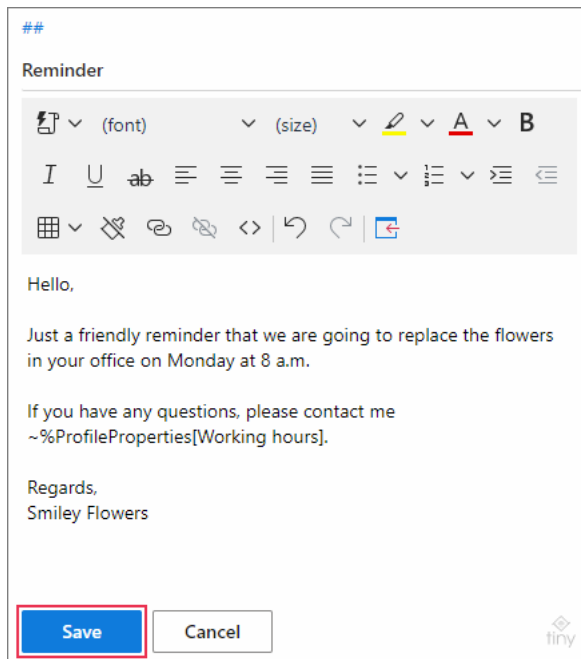
1. Insert the ~%ProfileProperties macro into your template.



2. Select a property in the dialog window and click **OK**.

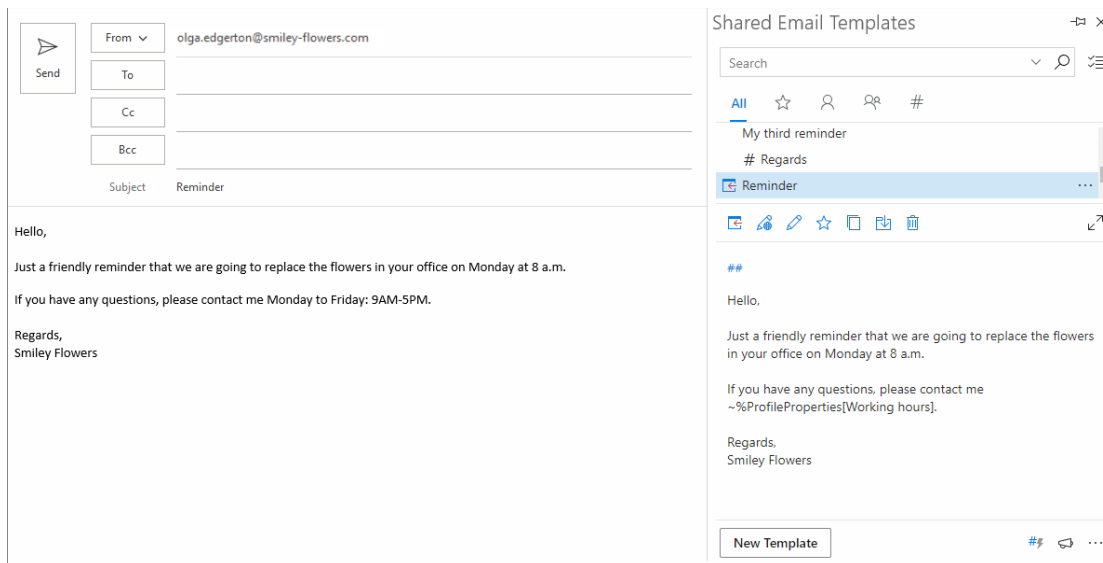


3. Save the template.



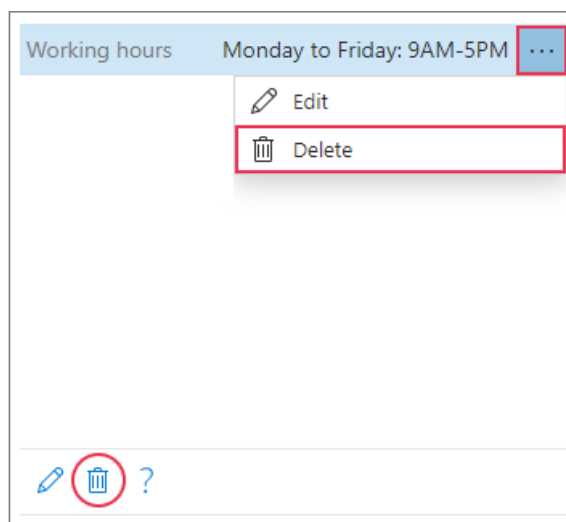


#### 4. Paste the template.



### Delete profile properties

1. To delete a property, go to the profile pane and click the **Edit Properties** icon.
2. Find a property that you don't want to have anymore and click **Delete** in the context pop-up menu or the **Delete** icon in the action bar.



### DateFormat property


DateFormat property specifies a default format for dates. In case you need to use dates in a special format, you can create a property named DateFormat and



a value – default date format. It means that when you use the ~%Date macro, the date will be inserted in a chosen format.

Available default date formats (values) are the following:

- m/d/yyyy
- m/d/yy
- dddd, mmmm d, yyyy
- mmmm d, yyyy
- mm/dd/yyyy
- mm/dd/yy
- dd/mm/yyyy
- dd/mm/yy
- dd-mmm-yyyy
- yyyy-mm-dd
- Abbreviations stand for:
  - yy—two-digit year (e.g. 21)
  - yyyy—four-digit year (e.g. 2021)
  - m—one-digit month (e.g. 4)
  - mm—two-digit month (e.g. 04)
  - mmm—three-letter abbreviation for a month (e.g. Apr)
  - mmmm—full name of a month (e.g. April)
  - d—one-digit day of a month (e.g. 2)
  - dd—two-digit day of a month (e.g. 02)
  - ddd—three-letter abbreviation for day of a week (e.g. Sat)
  - dddd—full name of a day (e.g. Saturday)


 **Note.** DateFormat property can be used for your teams as well as for your personal account.

Let's try to create a DateFormat property for your profile:

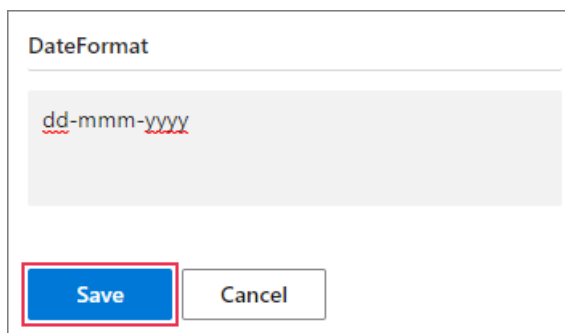
1. Go to your profile.
2. Click the **Edit Properties** icon.
3. Click **Add Property**.



4. Type the name of the property – DateFormat.

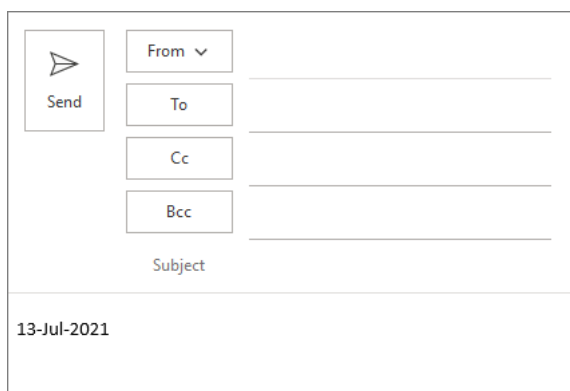
 **Note.** The correct spelling of the property is DateFormat without spaces and keeping the uppercase letters. Otherwise, it won't work.

Type one of the default date formats in the value field and click **Save**.



Now it's time to insert the DateFormat property into a template.

1. Open a template and insert the ~%Date macro from the drop-down list. Click **OK**.
2. Save the template.
3. **Paste** the template. The date will be added in the format you chose.



## DateLocale property


As you have seen in the abbreviation list, some date formats contain words (names of months and days of the week). The default language for all the formats is English (EN\_US locale). If you communicate in another language, you can create the DateLocale property. In this case, whenever you use the ~%Date macro in a template, a date will be inserted in the language you've chosen.



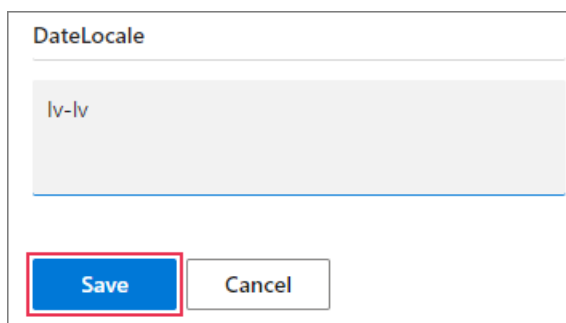
This property is especially useful as a [team property](#). In such a case you will be sure that your whole team has one standard date format in the same language.

Let's try to create a DateLocale property as a team property:

1. Go to your profile properties.
2. Click the **Edit Properties** icon.
3. Click the **Add Property** button.
4. Type the name of the property – DateLocale.

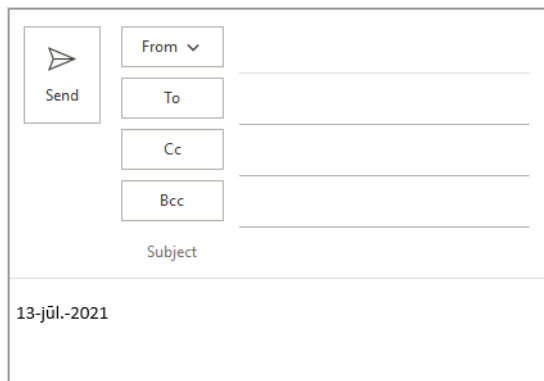
 **Note.** The property must be named DateLocale. You must keep the case and use no spaces. Otherwise, it won't work.

5. Type the value of the property, which is a language code. The full list of available languages and their codes can be found [here](#). Save the template.




Why don't we try the DateLocale property in practice?

1. Open a template in the team with a DateLocale property.
2. Add the ~%Date macro from the drop-down list of macros.
3. Save the template.
4. Paste the template. The date will be inserted considering your locale.



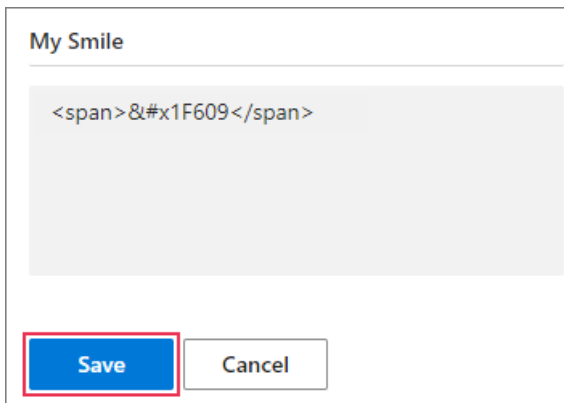


 **Note.** If you don't have a default date format set in the profile properties of your team, it'll be taken from the properties of your profile.

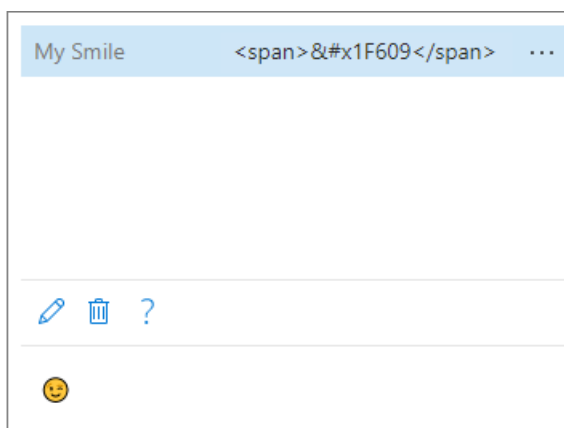
## HTML as a property

Let's go through the process of creating HTML as a profile property and inserting it into an email. The same can be done for your team.

1. Go to your profile.
2. Click the **Edit Properties** icon.
3. Click **Add Property**.
4. Type the name of a property. Insert your HTML code in the value field. Click **Save**.



5. You can preview the property in the preview pane.









# Create templates for your Outlook calendar


Shared Email Templates is equally suitable for creating appointments and meetings in Outlook Calendar. There are special macros for these aims.

## Create appointments

The ~%FillSubject or the ~%AddSubject macros are perfect for filling in the Title field or adding some information to the existing title.

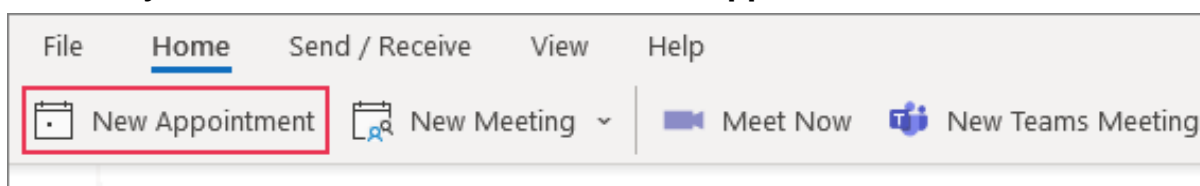
 **Note.** The ~%FillSubject macro first clears the Subject field and then populates it with the text from the macro while the ~%AddSubject macro adds the text from the macro to previously added text in the Subject field.

 **Note.** The ~%AddSubject macro adds the text without spaces, so put a space after the opening square bracket.

 **Note.** If you want to add the text before the existing text in the Title email field, add the macro in such a format: ~%AddSubject[your text ;{before}]. In this case, make sure you added a space after the text.

Also, you can add location by using [calendar-related macros](#).

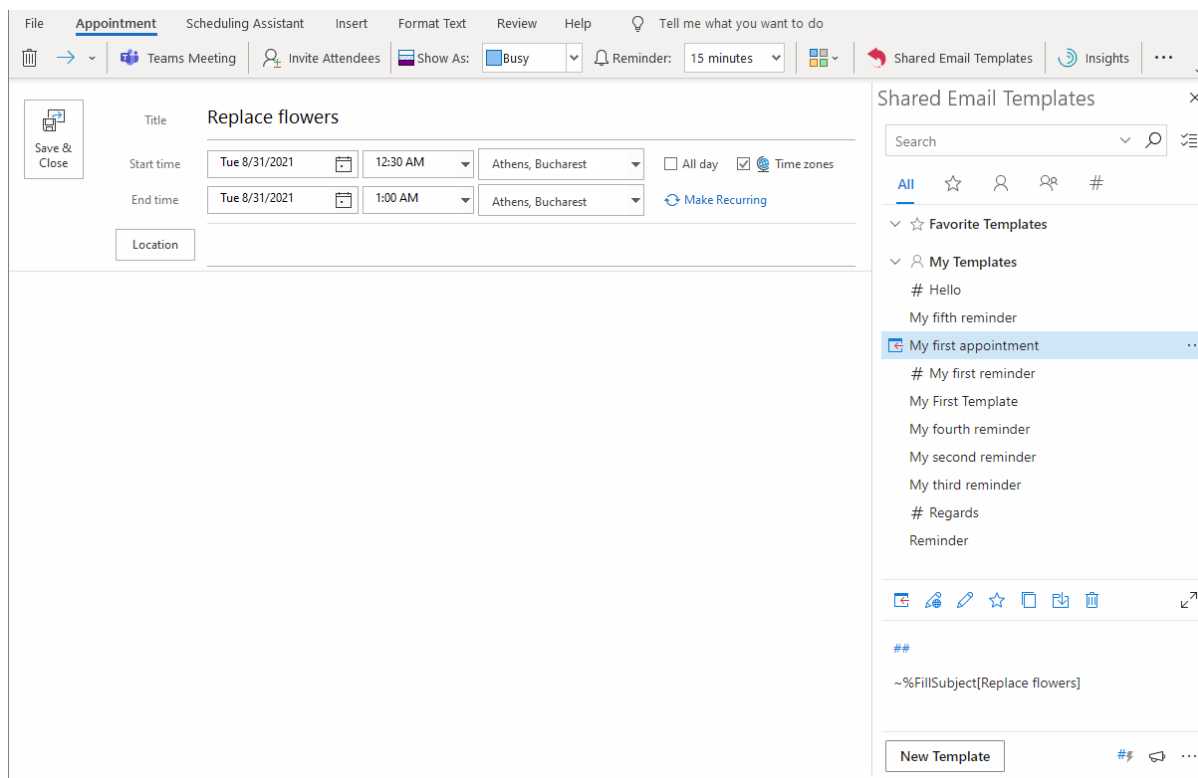
1. Go to your Outlook calendar and click **New Appointment** in the ribbon.



2. Then open Shared Email Templates.



3. Paste the template that contains macros from the list above.



## Create meetings

The following macros can be used for creating Outlook meetings:


- ~%FillSubject or ~%AddSubject to fill in the Title field or add some information to the existing title.
- ~%FillTo or ~%AddTo to fill in the required participants field or add additional participants.
- ~%FillCc or ~%AddCc to add optional participants.

Additionally, you can use [calendar-related macros](#) to add locations.

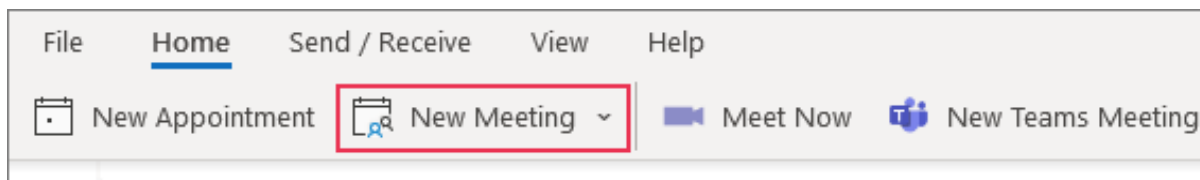
**Note.** The ~%FillSubject macro replaces prefilled text with the text from the macro while the ~%AddSubject macro adds the text from the macro to existing text in the Subject field.

**Note.** The ~%AddSubject macro adds the text without spaces, so remember to put a space after the opening square bracket.

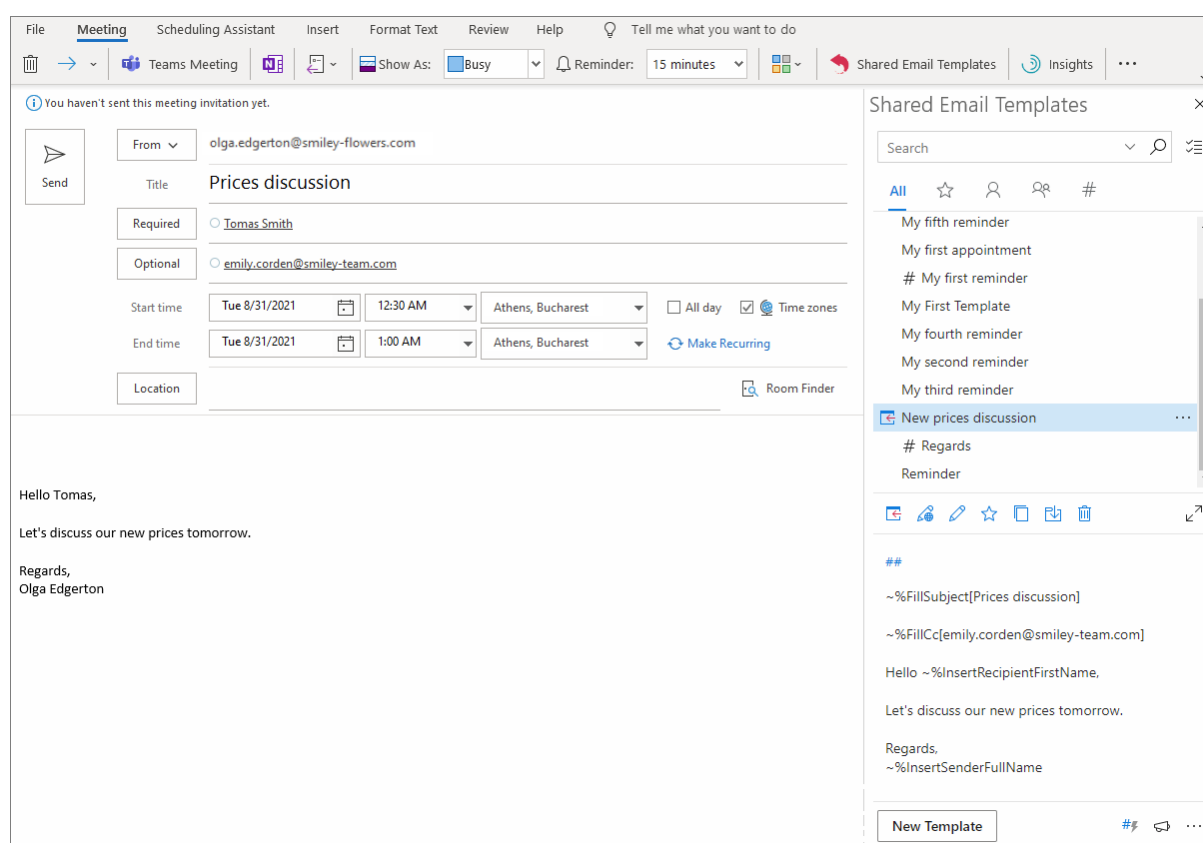


 **Note.** If you want to place text before the existing text in the Title email field, add the macro in such a format: ~%AddSubject[your text ;{before}]. A space after your text is needed.

Go to your Outlook calendar and click **New Meeting** in the ribbon.



Open Shared Email Templates and paste the template that contains any of the macros above.



## Use calendar-related macros

The **Appointment macros** category includes the following calendar related macros:

- ~%FillLocation – fills the Location field with an address or the name of a place.



- ~%AddLocation – adds an address to initial information in the field.
- ~%Location – adds an address from the Location field to an email body.

**Note.** The ~%FillLocation macro first clears the Location field and then inserts the text from the macro while ~%AddLocation places the text from the macro alongside the existing location .

**Note.** ~%AddLocation adds the text without a space, so you have to type a space before the address, otherwise the existing and added locations will merge together .

**Note.** If you want to place the text before the existing text in the Location field, add the macro in such a format: ~%AddLocation[*your text ;{before}*]. Don't forget to put a space after the text.

Calendar-based macros can be used both for appointments and meetings. Have a look at the example below. It shows a meeting created with the help of a template.

The screenshot displays the Outlook 'Meeting' form and a side panel titled 'Shared Email Templates'.

**Meeting Form Fields:**

- From:** olga.edgerton@smiley-flowers.com
- Title:** Prices discussion
- Required:** (empty)
- Optional:** (empty)
- Start time:** Tue 8/31/2021, 1:00 PM, Athens, Bucharest
- End time:** Tue 8/31/2021, 1:30 PM, Athens, Bucharest
- Location:** Av. Matignon 2 2nd floor
- Buttons:** All day, Time zones, Make Recurring, Room Finder

**Shared Email Templates Panel:**

- Search bar and filters (All, star, person, magnifying glass, hash).
- Template list:
  - My first appointment
  - # My first reminder
  - My First Template
  - My fourth reminder
  - My second reminder
  - My third reminder
  - New prices discussion** (highlighted)
  - # Regards
  - Reminder
- Preview of the selected template:

```
##
~%FillLocation[Av. Matignon 2]
~%AddLocation[ 2nd floor]
Hello ~%InsertRecipientFirstName,
Let's discuss our new prices tomorrow.
Regards,
~%InsertSenderFullName
```
- Buttons: New Template, #, speech bubble, and ellipsis.



## Create a meeting/appointment template from selection

You can easily transform an existing meeting or appointment into a reusable template. Here's how:

1. Open a scheduled appointment/meeting or create a new one .
2. Open Shared Email Templates.
3. Select the text that you want to include in a template.
4. Click **New Template**. The text will appear in the preview pane.

The screenshot shows the Outlook 'Meeting' tab. The main window displays a meeting invitation for 'New prices discussion' on Tuesday, 8/31/2021, from 1:00 PM to 1:30 PM in Athens, Bucharest. The 'From' field is 'olga.edgerton@smiley-flowers.com'. The 'Send' button is visible. Below the meeting details, the email body contains the text: 'Hello, Let's discuss our new prices tomorrow. Regards,'. On the right side, the 'Shared Email Templates' pane is open, showing a 'New Template' button and a preview of the selected text. The preview pane shows the text: 'Hello, Let's discuss our new prices tomorrow. Regards,'. The 'Save' button is highlighted in blue.

5. Name the template and save it.



## Add fillable fields

The ~%WhatToEnter macro prompts you to enter some information or choose from a predefined set of values before inserting a template.

- [Text field](#) – prompts you to type a text before pasting the template.
- [Drop-down list](#) – suggests selecting a value from a drop-down list before inserting the template.
- [Date](#) – gives you the opportunity to insert a date in the format you specify.
- [Dataset value](#) – prompts you to pick a value from a dataset and insert it into an email.

Click the item from the list to see how to apply this macro in practice.

### Text field: text input

1. Open a template and place the cursor exactly where you want the information from the Text field to be inserted. Select ~%WhatToEnter from the list of macros.
2. Choose the Text field from the drop-down list. Enter a window title – it will remind you what exactly to type. Optionally, set a default value. Click **Insert**.

**What To Enter**

Text field ▼

Window title

Office address

Default value

Insert Cancel



3. A template with this macro will look like in the screenshot below.

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that we are going to replace the flowers in your office at ~%WhatToEnter[field label:{title:"Office address"}] on Monday.

Regards,  
Smiley Flowers

4. When you paste the template, the dialog window will appear asking you to type the text. Add some text and click **OK**.

Office address

14 Av. Gambetta

**OK** Cancel

5. As a result, the text will be inserted into an email body.

Send

From olga.edgerton@smiley-flowers.com

To

Cc

Bcc

Subject My sixth reminder

Hello ,

Just a friendly reminder that we are going to replace the flowers in your office at 14 Av. Gambetta on Monday.

Regards,  
Smiley Flowers

Shared Email Templates

Search

All ☆ 👤 🔍 #

My fifth reminder

My first appointment

# My first reminder

My First Template

My fourth reminder

My second reminder

**My sixth reminder** ...

My third reminder

##

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that we are going to replace the flowers in your office at ~%WhatToEnter[field label:{title:"Office address"}] on Monday.

Regards,  
Smiley Flowers

New Template # 🗨 ...

## Drop-down list

1. Add the ~%WhatToEnter macro to your template.



2. Choose Dropdown list. Type a window title – a reminder what to choose. Type the options in the Items field. Click **Insert**.

**What To Enter**

Dropdown list ▼

Window title  
Day of the week

Items  
Monday  
Tuesday  
Wednesday  
Thursday

☐ User can edit selected item(s)

☐ User can select multiple items  
separated by

**Insert** Cancel

**Tip.** Tick **User can edit selected item(s)** to enable items editing while pasting the template.

**Tip.** Tick **User can select multiple items, separated by** to give the possibility to select several items. Keep in mind to type a separator.

Look at the example of the ~%WhatToEnter macro with a drop-down list below.

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that we are going to replace the flowers in your office at ~%WhatToEnter[field label; {title:"Office address"}] on ~%WhatToEnter[Monday;Tuesday;Wednesday;Thursday; Friday;{title:"Day of the week"}].

Regards,  
Smiley Flowers

3. Before the template is pasted, you'll have to fill in the fields. Then click **OK**.

**Fill in these fields** ✕

Office address  
14 Av. Gambetta

Day of the week  
Monday ▼

**OK** Cancel





## 4. Enjoy a ready email.

The screenshot shows an Outlook email composition window. On the left, the email header includes a 'Send' button, a 'From' field with 'olga.edgerton@smiley-flowers.com', a 'To' field with 'Tomas Smith', and empty 'Cc' and 'Bcc' fields. The subject is 'My sixth reminder'. The body of the email reads: 'Hello Tomas, Just a friendly reminder that we are going to replace the flowers in your office at 14 Av. Gambetta on Monday. Regards, Smiley Flowers'. On the right, a 'Shared Email Templates' sidebar is open, displaying a list of templates: 'My First Template', 'My fourth reminder', 'My second reminder', 'My sixth reminder' (which is selected and highlighted in blue), 'My third reminder', 'New prices discussion', and '# Regards'. Below the list are icons for creating, editing, deleting, and other actions. At the bottom of the sidebar is a 'New Template' button.

## Pop-up calendar

1. To add a date picker to your template, click ~%WhatToEnter in the dropdown list of macros and choose Date.
2. Type a name for a dialog window that will remind you what to insert. Select an appropriate date format and language tag or leave the default values. Click **Insert**.

The 'What To Enter' dialog box is shown with the following fields: a dropdown menu set to 'Date', a 'Window title' text box containing 'Date', a 'Date format' dropdown menu set to 'mm/dd/yyyy', and a 'Language tag (locale)' dropdown menu set to '(default)'. At the bottom, there are two buttons: 'Insert' (highlighted with a red border) and 'Cancel'.



3. See the result below.

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that we are going to replace the flowers in your office at ~%WhatToEnter[field label; {title:"Office address"}] on ~%WhatToEnter[Monday;Tuesday;Wednesday;Thursday;Friday;{title:"Day of the week"}] ~%WhatToEnter[{date,title:"Date"}],

Regards,  
Smiley Flowers

4. Click **Paste**. Fill in the fields and click **OK**.

Fill in these fields

Office address  
14 Av. Gambetta

Day of the week  
Monday

Date  
06-Sep-2021

OK Cancel

5. Your email is ready to go.

Send

From olga.edgerton@smiley-flowers.com

To Tomas Smithy

Cc

Bcc

Subject My sixth reminder

Hello Tomas,

Just a friendly reminder that we are going to replace the flowers in your office at 14 Av. Gambetta on Monday 06-Sep-2021.

Regards,  
Smiley Flowers

Shared Email Templates

Search

All ☆ 👤 🔍 #

My first reminder  
My fourth reminder  
My second reminder  
My sixth reminder  
My third reminder  
New prices discussion  
# Regards

New Template

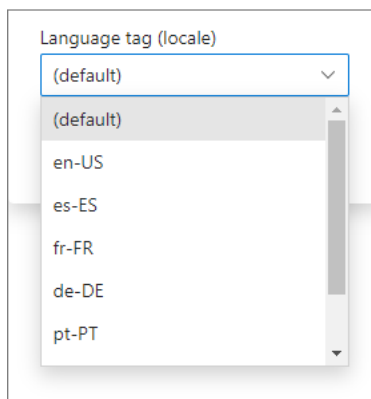
# ↻ ⋮



## Customize date

If a date format you chose contains not only numbers, but also words (names of months and days of the week) you may need to define their language. It concerns all date formats that include mmm, mmmm, ddd, dddd.

The dropdown menu will suggest several language tags.



In case you don't see a necessary language tag, you can add it manually. To do this, find the language code in the third column [here](#) and type it in the language tag field. Once you set the date format and the language tag, you can click **Insert**.


Remember that you can also set the default date format and the language tag by creating the [DateLocale](#) property.



# Datasets

A dataset is a set of values in a table form. The data from a dataset can be used in templates.

A vital element for a dataset is a key column - the leftmost column of your dataset. Another name for it is identifier. It contains values that help you identify the rows from which data for your templates will be taken.

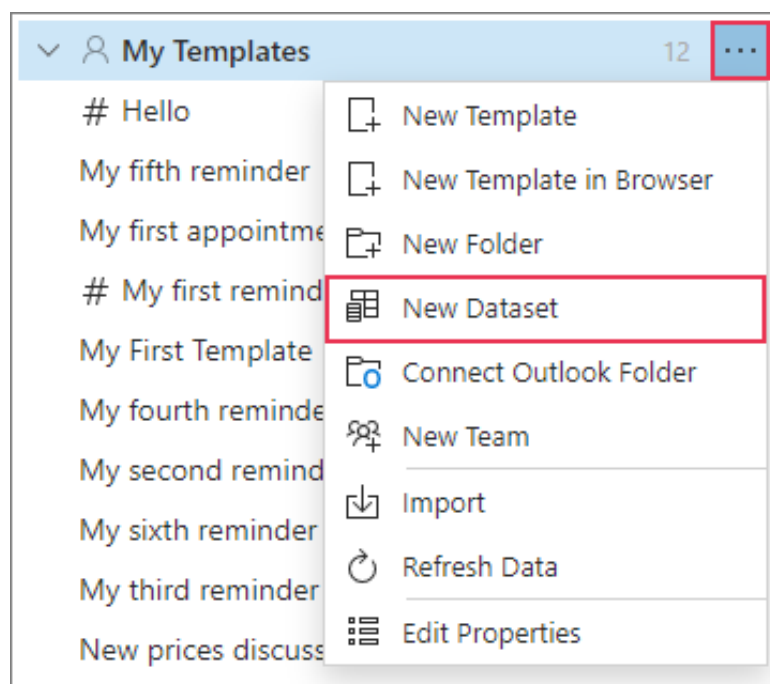
 **Note.** All values in a key column should be unique. Otherwise, wrong data will be inserted.

 **Note.** All the actions with datasets are done in the [web app](#).

## Create and edit a simple dataset

You can create a simple dataset with a maximum of 32 rows, 32 columns and 255 symbols in each cell.

1. To create a dataset, choose **New Dataset** in the context pop-up menu for folders. You will be redirected to the web app.





2. Enter the dataset name and select **Simple**. A dataset draft will appear in the preview pane.

Save Cancel ? Help

My Templates > Support Templates >

## Service Plans

Select the dataset type:

**Simple**

Create a dataset manually in the add-in or import a CSV file. You can edit this dataset in the Shared Email Templates web app only.

Excel Table from OneDrive

Connect your existing Excel workbook located in OneDrive. You can edit such dataset in Excel only.

Excel Table from SharePoint

Connect your existing Excel workbook located in SharePoint. You can edit such dataset in Excel only.

Save Cancel

3. Click + to add a row or a column.

## Service Plans

Key column	+
Value 1	

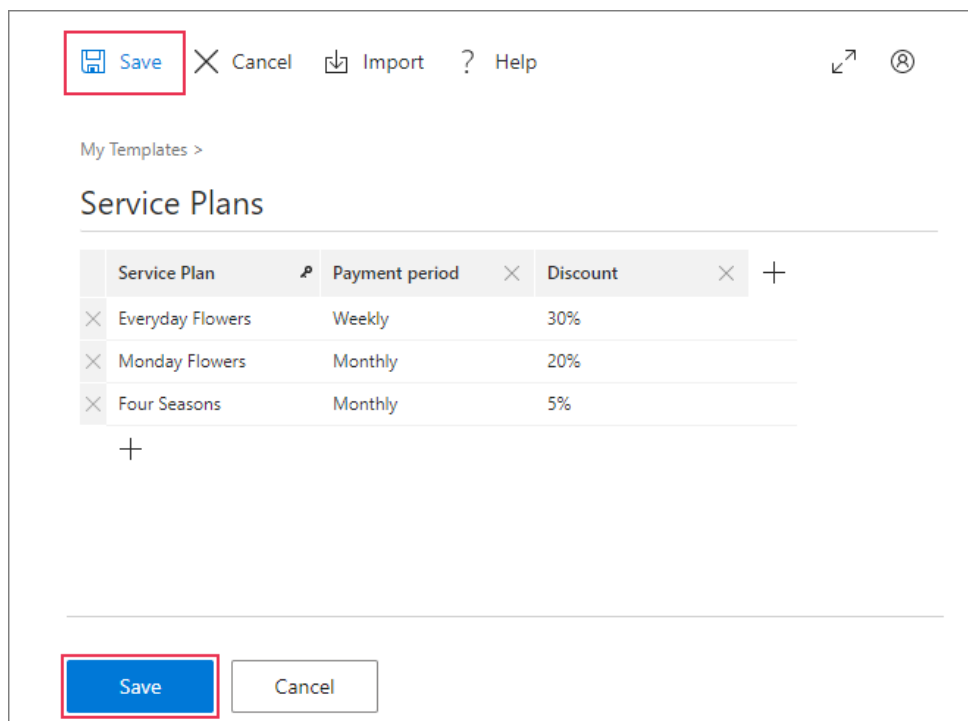
+

4. To edit a value, just click it and insert or edit a text. Make sure that the values are unique.

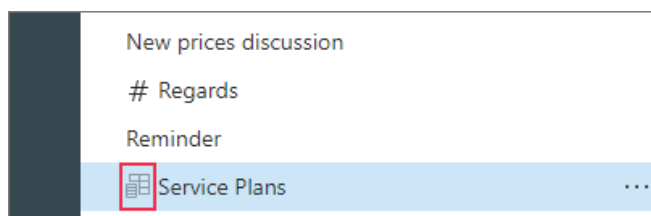


**Tip.** If you want to change the order of the columns, just drag and drop them. Note that the key column is pinned and cannot be moved.

5. When you are ready, click **Save**.



The dataset will appear in the tree. You can recognize it by a special icon.



If you need to edit a dataset, select it and click **Edit** in the context pop-up menu or the action bar.

## Use simple datasets in templates

Depending on your aims there are two options of dataset values:

- **Modifiable values** – you choose what to enter right before inserting the template.
- **Fixed values** – you choose the values once when you edit the template. The selected data is automatically inserted when you paste the template.



## Add modifiable values

You can create a template with a value from a dataset that will change from time to time. For example, different values for different recipients. Follow the steps below.

1. Open a template, choose the ~%WhatToEnter macro from the macros list. Select **Dataset** in the first dropdown in the dialog window.
2. In the window title field, type a question or a text that will hint you what to enter while pasting a template. Try to you use unambiguous wording, especially if you share this template with your colleagues. Then select a dataset from which you will take values.
3. Finally, select the column from which to insert data . Click **Insert**.

**What To Enter**

Dataset

Window title

Select expiry date


Select dataset

Orders

Select column

Service Plan

**Insert** Cancel

 **Note.** If [single sign-on](#) is disabled, you will have to sign in to your Microsoft account.

A ready template will look like in the picture below.

Hello ~%InsertRecipientFirstName,

Just a friendly reminder that according to your  
~%WhatToEnter[{dataset: "Service  
Plans", column: "Service Plan", title: "Select service plan"}]  
service plan, we are going to replace the flowers in your  
office on Monday.

Regards,  
Smiley Flowers



4. Save a template and paste it into your email. Before the template is pasted, you'll be asked to choose the value you need to paste. Note that the value is selected based on the key column. Pick a value and click **OK**.

A dialog box titled "Select service plan" with a close button (X) in the top right corner. It contains a dropdown menu with "Monday Flowers" selected. Below the dropdown are two buttons: "OK" (highlighted with a red border) and "Cancel".

5. The email is ready!

The image shows an email composition window on the left and a "Shared Email Templates" pane on the right. The email window has fields for "From" (olga.edgerton@smiley-flowers.com), "To" (Tomas Smith), "Cc", "Bcc", and "Subject" (My seventh reminder). The body of the email contains a greeting "Hello Tomas," followed by a reminder message and a signature "Regards, Smiley Flowers". The "Shared Email Templates" pane on the right shows a list of templates, with "My seventh reminder" selected. Below the list, the template content is displayed, including a greeting, a reminder message, and a signature. A "New Template" button is at the bottom of the pane.

## Add fixed values

Templates with fixed dataset values are created with the help of the `~%DatasetValue` macro.

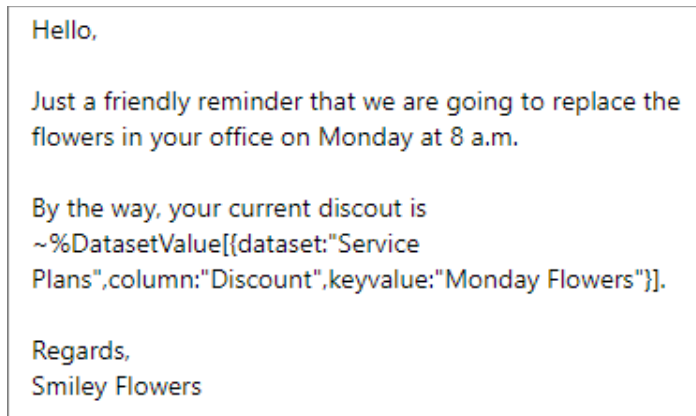
1. Open a template, pick the `~%DatasetValue` macro. Select necessary values in the dialog window and click **Insert**.

A dialog box titled "Dataset Value". It contains three dropdown menus: "Select dataset" (Service Plans), "Select column" (Discount), and "Key value" (Monday Flowers). Below the dropdowns are two buttons: "Insert" (highlighted with a red border) and "Cancel".

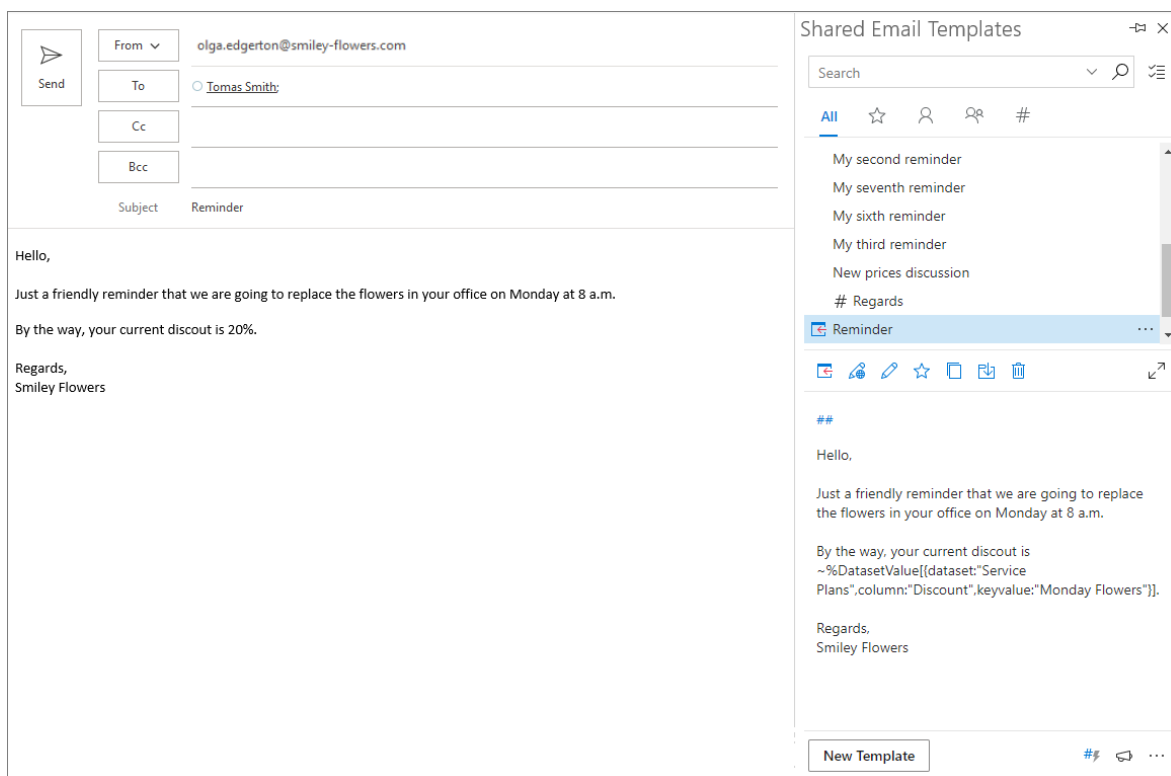




- 
2. The template will look like in the screenshot below.



3. Save the template.
4. Every time you paste the template into an email, the value will be taken from the dataset and inserted into an email body like in the screenshot below.

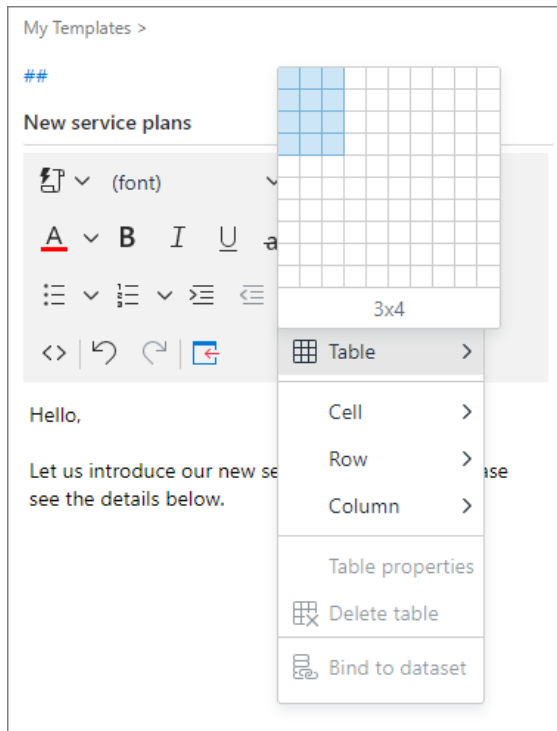


## Fill tables with datasets

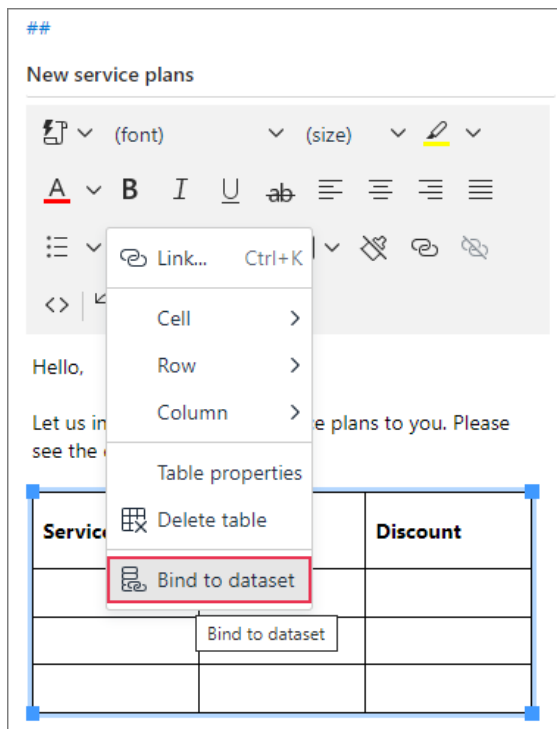
You can use datasets to automatically fill in the tables in your templates with the data. But first you need to bind your table to a dataset.



1. Open a template. Click the **Table** icon in the toolbar. Select the size of the table.

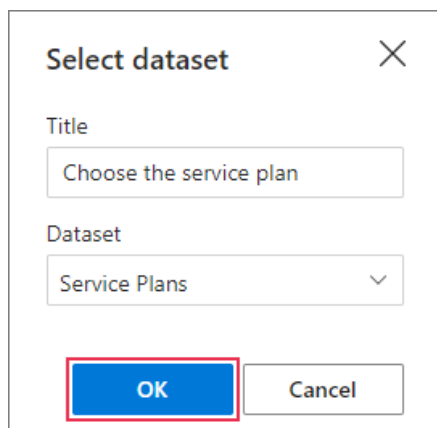


2. Right-click the row that you want to autofill with the data from a dataset and click **Bind to dataset**.





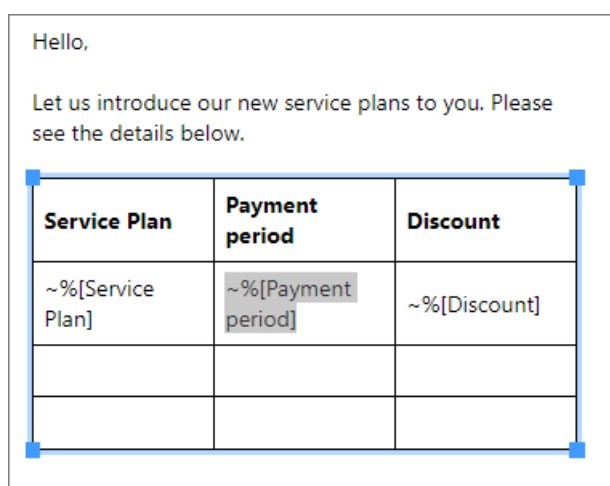
3. In the dialog window enter the title – a clue what data to choose while pasting a template. Remember that you choose the value based on the key column. Next, choose the dataset – source of data. Click **OK** when you are ready.



The 'Select dataset' dialog box has a title bar with a close button. It contains a 'Title' text box with the placeholder 'Choose the service plan', a 'Dataset' dropdown menu with 'Service Plans' selected, and 'OK' and 'Cancel' buttons at the bottom. The 'OK' button is highlighted with a red border.

**Note.** By default, all the columns are auto filled in the same order as they are presented in the dataset. Your template table may contain fewer columns than the dataset table. In this case additional columns won't be added. For example, if there are 3 columns in a dataset and 2 columns in a table, only 2 columns will be completed.

**Note.** If you want to enter any data by yourself, simply select and delete the ~%[] parameters from the cell.



The email template preview shows a greeting 'Hello,' followed by the text 'Let us introduce our new service plans to you. Please see the details below.' Below this is a table with three columns: 'Service Plan', 'Payment period', and 'Discount'. The first row of the table contains the parameters ~%[Service Plan], ~%[Payment period], and ~%[Discount]. The table has three rows in total, with the first row highlighted by a blue border.

Service Plan	Payment period	Discount
~%[Service Plan]	~%[Payment period]	~%[Discount]

**Note.** You bind only one row of the table, but when you paste the template you'll be able to choose as many rows as you need. Also, you can set some [default rows](#) that will be selected automatically.



- When you are ready, save the template.
- Paste the template. Tick the data you need to insert (it can be one row or several rows) and click **OK**.

Choose the service plan X

☒ Search

☒ Everyday Flowers

☒ Four Seasons

☒ Monday Flowers

**OK** Cancel

- As you see, when we insert the template, the rows in the table are filled in with the data from the dataset.

Send From To Cc Bcc Subject

Hello,

Let us introduce our new service plans to you. Please see the details below.

Service Plan	Payment period	Discount
Everyday Flowers	Weekly	30%
Four Seasons	Monthly	5%
Monday Flowers	Monthly	20%

Shared Email Templates

Search

All ☆ 👤 👥 #

My sixth reminder  
My third reminder  
New prices discussion  
**New service plans** ...  
# Regards  
Reminder  
Service Plans

##

Hello,

Let us introduce our new service plans to you. Please see the details below.

Service Plan	Payment period	Discount
~%[Service Plan]	~%[Payment period]	~%[Discount]

New Template # 🗨 ...

**Note.** To unbind the table from a dataset, right-click a cell in a bound row and pick **Unbind from dataset**. The ~%[ ] parameters will be deleted right away.



## Use default rows

Default rows are rows the data from which is ticked automatically. You don't need to mark these rows in a dialog window all the time. You can set default rows when you edit a dataset.

1. Open the dataset edit mode. Add a new column by clicking + sign and name the column **Default Row**. Enter any sign in the cells of rows that you want to mark as default. Save the changes.

My Templates >

### Service Plans

	Service Plan	Payment period	Discount	Default Row
X	Everyday Flowers	Weekly	30%	+
X	Four Seasons	Monthly	5%	+
X	Monday Flowers	Monthly	20%	
+				

Save Cancel

2. Now go to a template with a bound table and paste it. As you can see, the default rows are already ticked.

### Choose the service plan

☐ Search

☒ Everyday Flowers

☒ Four Seasons

☐ Monday Flowers

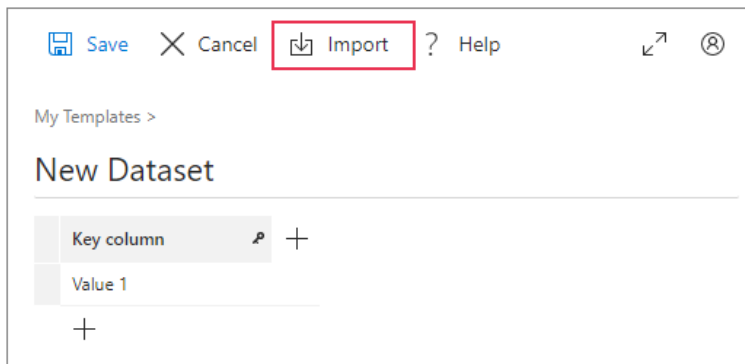
OK Cancel



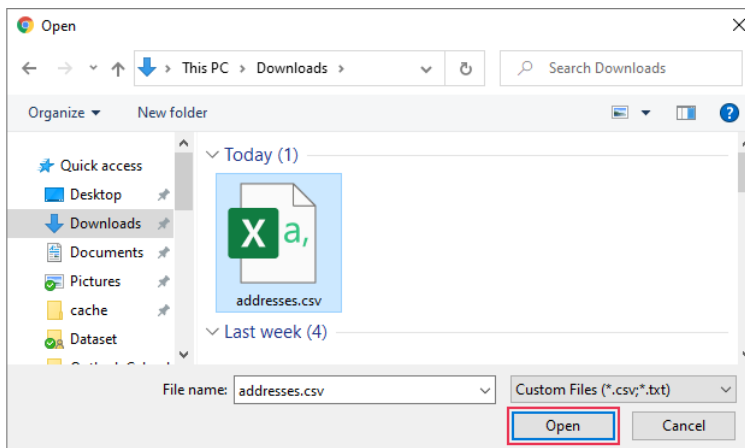
## Import datasets from .csv files

In the web app it's possible to import a dataset from a .csv file.

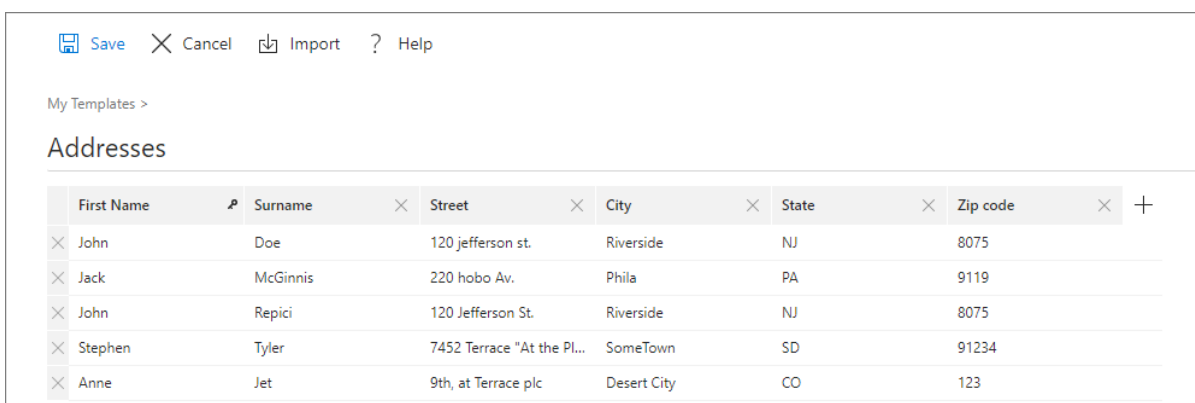
1. Open the context pop-up menu for folders and click **New Dataset**.
2. Choose **Simple**.
3. Click **Import**.




4. Select a file from your local storage and click **Open**.



5. A table will be inserted. Don't forget to name the dataset. It won't take the name of the .csv file automatically.





 **Note.** If a table from your .csv file exceeds the size limit (32 rows, 32 columns and 255 symbols), the extra data will be cut off.

6. Save the dataset.

## Dynamic datasets from Excel files

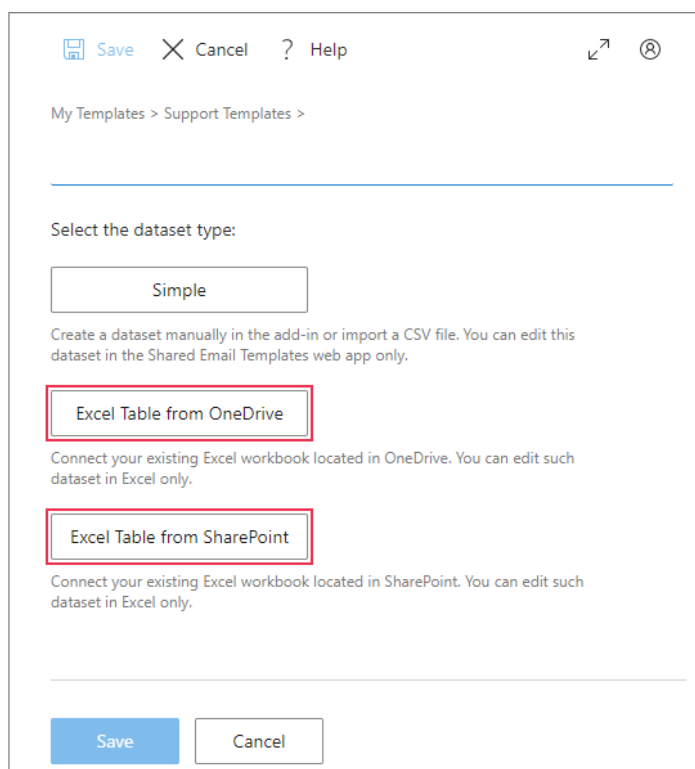
You can connect Excel files from OneDrive or SharePoint to a dataset. As a result, a dynamic dataset will be created. It means that the data in the dataset will be updated every time you edit the Excel file.

Before connecting a table, check the following:

- The file should be saved as an Excel Workbook in .xlsx format.
- The data inside the .xlsx file should be arranged in a table form. To do this, select the data range and press the **Ctrl + T** keys together. The data will be transformed into a table.

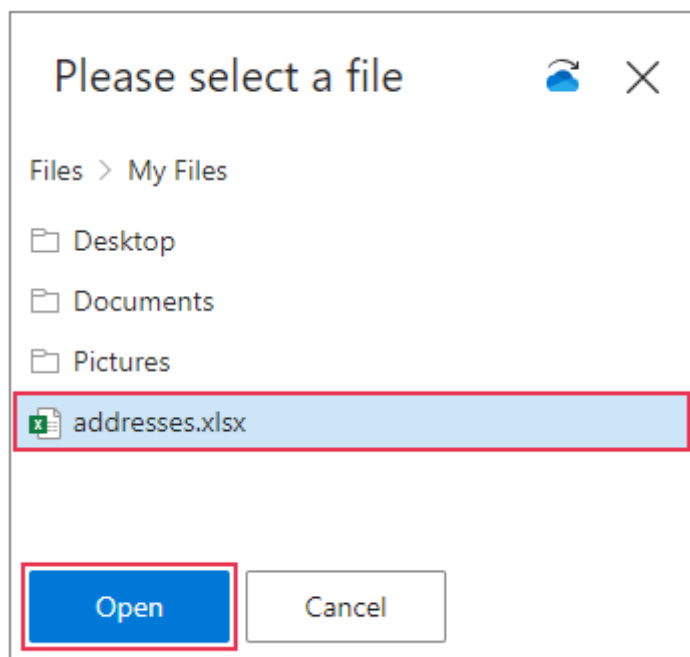
 **Note.** The file should have .xlsx format.

1. Open the context pop-up menu for folders and click **New Dataset**.
2. Choose **Excel Table from OneDrive** or **Excel Table from SharePoint**.

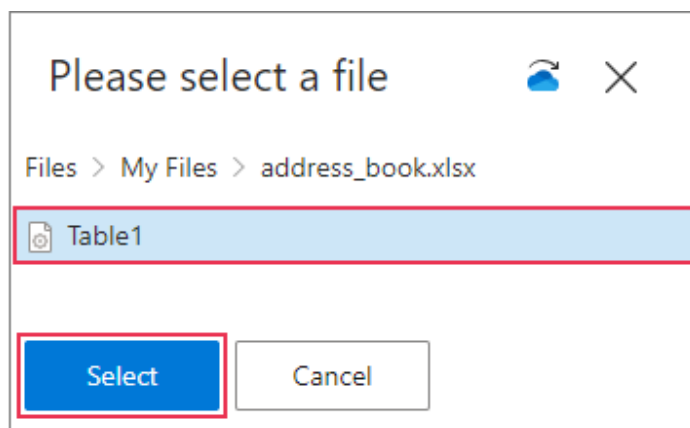





3. Pick an .xlsx file and click **Open**.



4. Pick a necessary table and click **Select**.



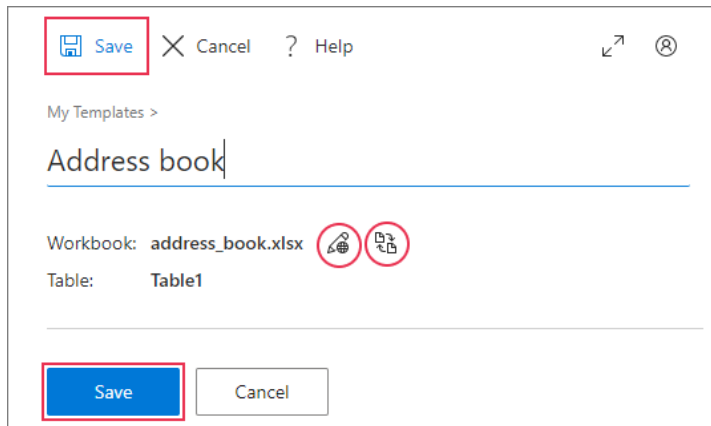
 **Note.** If you use an Excel file as a shared template (located in a team), make sure that everybody can access it.


5. Near the name of the workbook, you will see two icons: **Open Workbook** and **Change Workbook**. Click **Open Workbook** to check whether you selected the right workbook and click **Change Workbook** if the workbook turned out to be wrong.







6. When the right workbook is selected, don't forget to name the dataset and click **Save**.



 **Note.** Once you've saved the template, you will not be able to change the table.

7. You will see a new dataset in the tree.

 **Note.** Once an Excel table is linked as a dataset, don't remove it or change its location in OneDrive/SharePoint, otherwise the add-in won't be able to find it.

 **Note.** If you connect an Excel table that has more than 1000 rows, it may slow down the performance of Shared Email Templates.

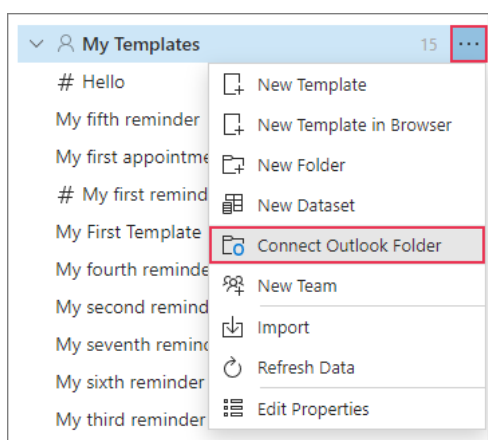


# Use Outlook drafts

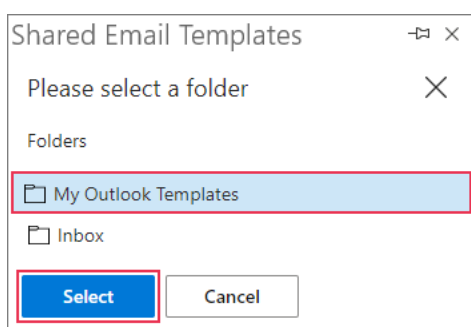
Whether you keep your Outlook drafts in the built-in Drafts folder or a custom folder that you created, you can use those drafts as templates. Simply, collect all your drafts in one Outlook folder and link it to Shared Email Templates.


## Link Outlook folders

1. Open the context pop-up menu for folders and click **Connect Outlook Folder**.




2. You will see a list of available folders. Choose the one you need and click **Select**.



3. The folder with its content will be added to the tree. You can quickly recognize the folder by the blue O sign .
4. To use a draft in an email, find it in the tree and click the **Paste** icon.



 **Note.** If you want to share your Outlook drafts with your team, remember to provide team members with access to your original Outlook folder. Find out how to do this in our [blog article](#).

## Outlook drafts limitations

When using Outlook drafts, you may run into the following limitations:

- Linked Outlook folders do not synchronize automatically with Shared Email Templates. You need to do it manually by clicking **Refresh Data** in the context pop-up menu.
- Drafts can be edited only in Outlook, not in Shared Email Templates.
- Rich-text formatting is not displayed in the preview pane.
- Outlook drafts cannot be shared for personal Office 365 (Home, Personal or Student) and free outlook.com accounts.
- Linked Outlook folders can be shared only with one business domain ([user@business.com](#)).



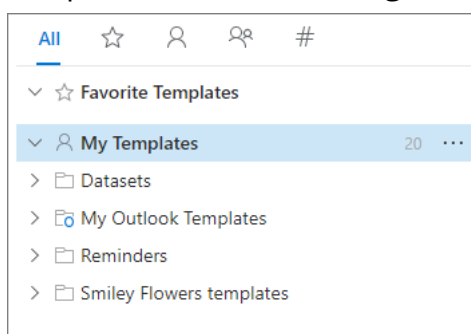
# Organize templates

If you are a fan of order or a perfectionist, this chapter is for you. Here you can learn how to create a neat tree structure.

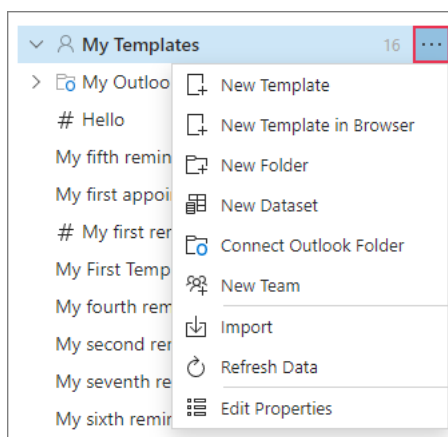
## Use folders

Organizing templates into folders is a perfect opportunity to group them according to topics, aims of use, recipients, etc.

Just have a look at how neat the tree has become when I moved all the templates created in this guide to different folders.



You can copy, move, edit, or delete a folder. All these actions are done with the help of the context pop-up menu for folders, the action bar or the sidebar in the web app.



## Create a folder

1. Open the context pop-up menu for folders and click **New Folder**.



2. Name the folder and add a description that will be visible in the preview pane. Click **Save**.
3. The folder will appear in the tree in **My Templates**.

## Edit a folder

The **Edit** option allows you to change the name or the description of a folder.

## Copy a folder

Clicking **Copy** will display a list of places where you can copy the folder. It can either be a folder with your templates or team templates. The folder will be copied there with all the templates that it contains.

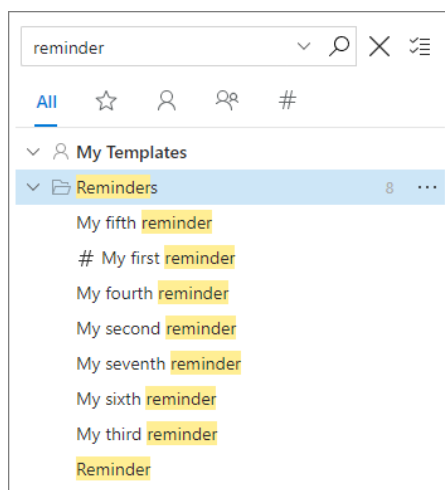
## Move a folder

Moving a folder is similar to copying . When you click **Move** you get the list of places where you can move the folder. Note that the folder will disappear from its original location.

## Search a folder

You can look for folders and other items with the help of the search bar.

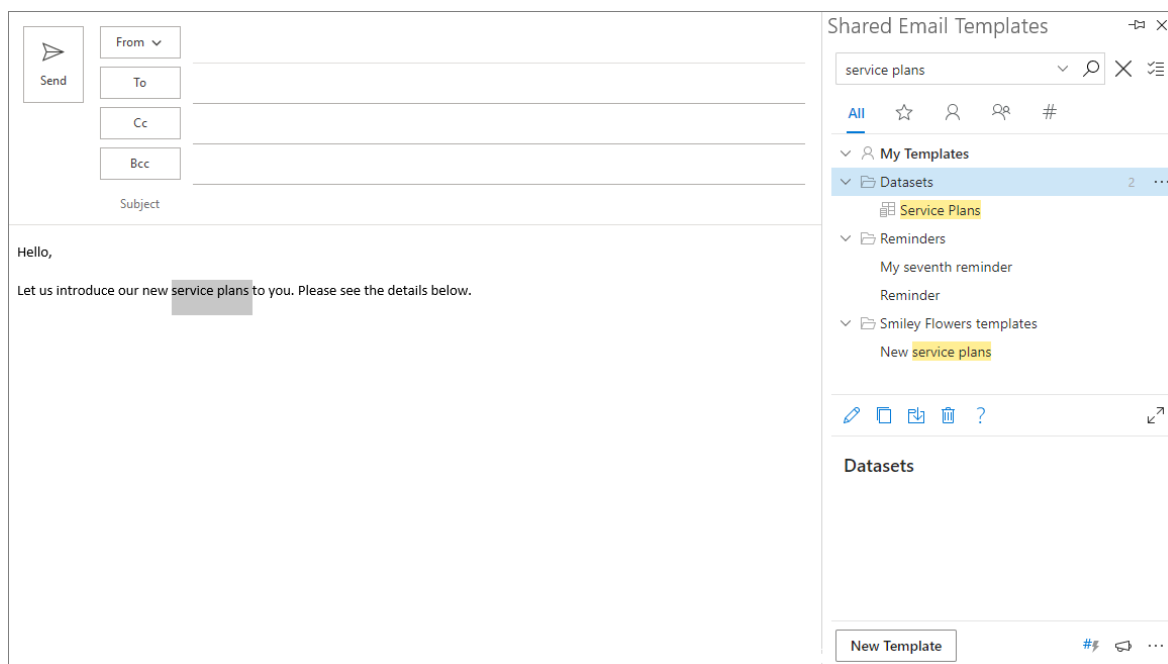
1. Type the key word/phrase from the name of a folder and press **Enter** or click the **Magnifying glass** icon. All items that contain this name will be highlighted.





You can also search by selection. Select a word in an email body and click the

**Magnifying glass** icon.



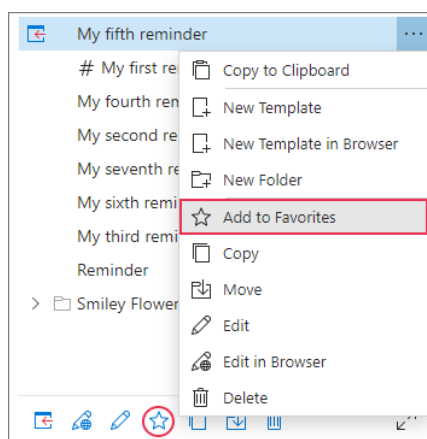
## Delete a folder

When you no longer need a folder, you can delete it. But first make sure that it doesn't contain any important templates, as the items will be deleted forever.

## Use favorites

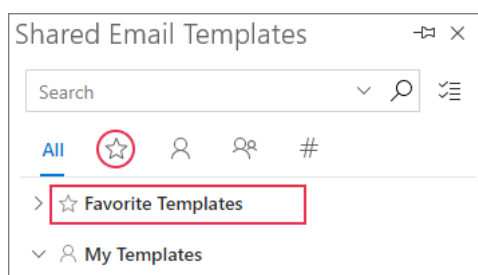
To add a template to favorites, do the following:

1. Select the template and click the star icon or click **Add to Favorites** in the context pop-up menu for templates.





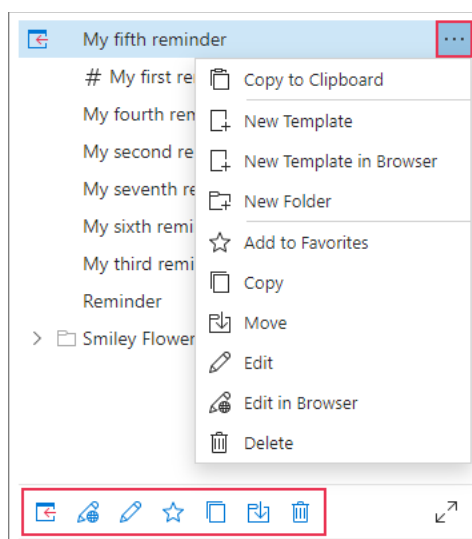
You can find favorite templates in the **Favorite Templates** folder or in favorite templates view.



## Actions with single templates

Copy, move or delete single templates from the context pop-up menu for templates, the action bar or the sidebar in the web app.

1. Open the context pop-up menu for templates and choose the action you need. Another way is to use icons in the action bar.



### Copy single templates

After you click **Copy**, you need to choose the place where to copy the template and click it. The template will immediately be copied there.

### Move single templates


Click **Move** and choose the destination. Remember that the template will be deleted from its original location.




## Delete single templates

Before you click **Delete**, check that you selected the right template, as it will be deleted forever.

## Search a template

Type the name of a template in the search bar, press **Enter** or click the **Magnifying glass**  icon.

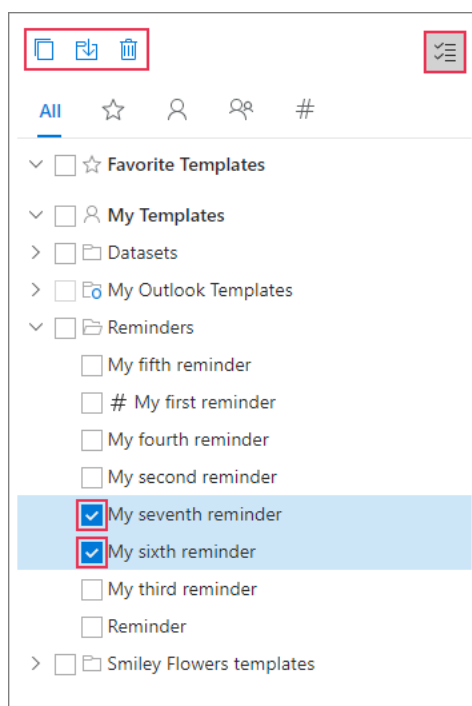
Additionally, you can search by selecting a word in an email body and clicking the **Magnifying glass**  icon.

The items that contain this keyword in their names will be highlighted in yellow.

## Actions with a group of templates/folders

You can copy, move or delete several templates/folders at a time.

1. Turn on the **Selection Mode** icon, tick the folders/templates you need and click the icon in the action bar.



 **Tip.** To quit selection mode, just click the **Selection Mode** icon again.





### **Copy a group of templates**

After you click **Copy**, select the place where you want the items to be copied.

### **Move a group of templates**

After you click **Move**, choose the destination. The items will appear in the new place in a second.

### **Delete a group of templates**

Before you click **Delete**, check that you selected the items correctly, as they will be deleted forever.

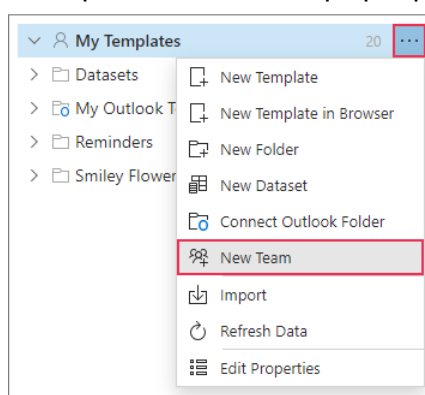


# Templates sharing with teams

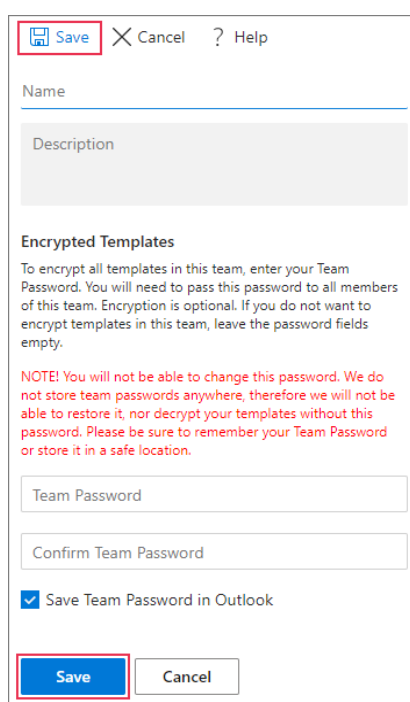
Do you and your colleagues write similar emails? For these cases we have introduced the Teams feature. Team is a shared folder with templates that can be used by all team members. It means that you can benefit from your colleagues' templates and vice versa. Note that all team members can manage templates, including editing and deleting.

## Create a team

1. Open the context pop-up menu for templates, and then select **New Team**.

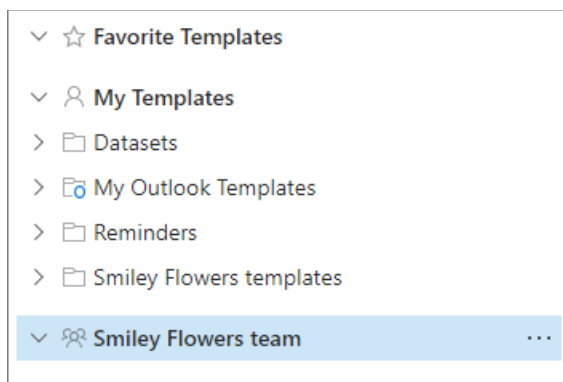


2. In the dialog window, write a name and description for the team. [Encrypting a team](#) will be suggested. When you are done, click **Save**.





The team will appear in the tree.



In the web app, you can create a team in the same way as above, or simply click the **New Team** icon in the sidebar.

Once a team is created, you can add templates that will immediately be available for other members of the team.

Before creating a template in a team, make sure that you selected a team folder, otherwise it will be saved in another place.

## Encrypt a team

If you want to protect information inside a team, encrypt the data with the help of a password. It means that a person without a password won't be able to see the content of the team.

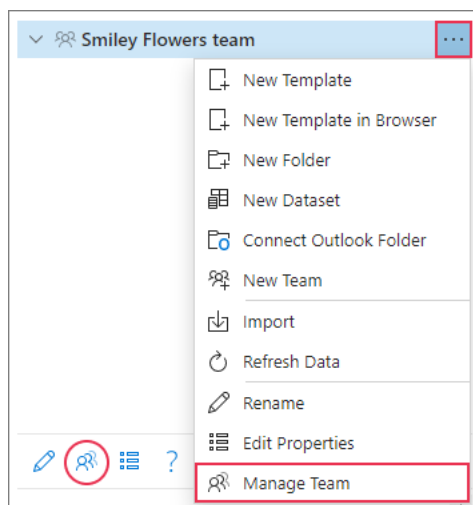
Please pay attention to the following:

- Only encryption of all templates within a team is possible, there's no way to encrypt individual templates.
- Only an empty team (without members and templates) can be encrypted.
- Encryption cannot be removed.
- Password cannot be changed.

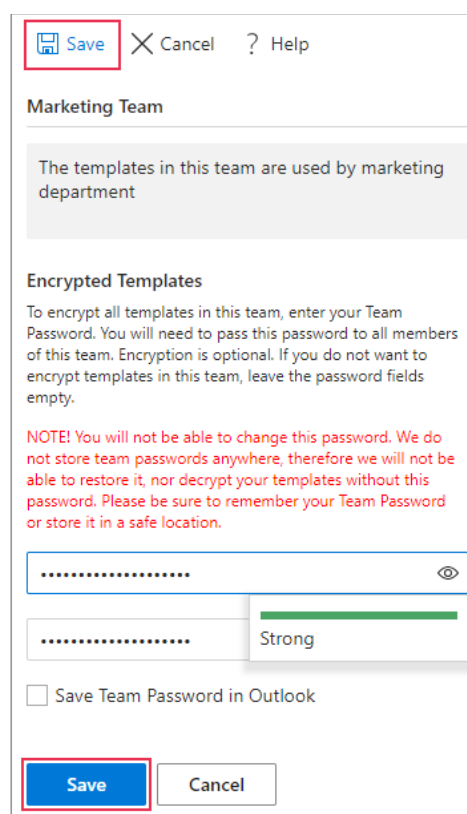
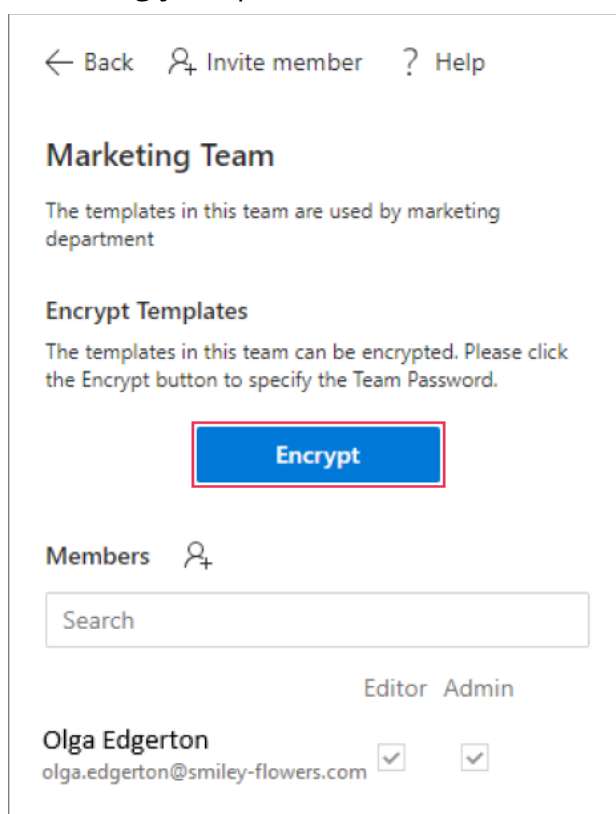
You can add encryption when creating a team or later on.



1. Open the context pop-up menu for teams and click **Manage Team** or select a team and click the **Manage Team** icon in the action bar.



2. Click Encrypt and type password in both fields. A strong password will ensure maximum security. Click the password field and a tooltip will tell you how strong your password is.



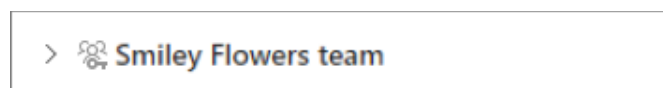
**Note!** If you don't tick **Save Team Password in Outlook**, you'll have to enter the password every time you open Shared Email Templates. As we care about




security, you'll also have to enter the password every time you sign in to Shared Email Templates from a new device or a browser.

3. When you are ready, click **Save**.

If you have done everything correctly, a small key will appear near the team name.



 **Note!** It's impossible to decrypt the team, but here's a workaround. Go to **the** selection mode, tick all the templates from the team and move them to a new team. After that, [close the empty team](#).

Let the team members know the password. Regrettably, it cannot be done automatically. To be on the safe side, use a secure way of password sharing. Telling the password in person is the best.

What to do if you forgot your password? There are several possible solutions:

1. Select the team and click **Rename** in the action bar or the context pop-up menu for folders. Then click the eye icon in the password field. Your password will show up (works only if you saved the password in Outlook).
2. Select the team and click **Edit Properties** in the action bar or the context pop-up menu for folders. Find **TeamPassword** in the predefined properties and select it. You will see the full password in the preview pane.
3. Ask other members of the team.

If nothing of the above worked for you, unfortunately, there is no other way to restore your password and templates inside the folder.

## Invite team members

Remember that only invited members can see the content of a team.

To invite somebody, follow the steps below:



1. Open the context pop-up menu for teams and choose **Manage Team**.
2. Click an icon with +.

← Back **Invite member** ? Help

### Marketing Team

The templates in this team are used by marketing department

**Members**

Editor Admin

**Olga Edgerton**  
olga.edgerton@smiley-flowers.com ☒ ☒

3. Type an email of your colleague and click **Add**.

← Back Import ? Help

### Invite member

 **Add**

4. Tick the role of this member (editor or admin) and click **Send invite**.

### Invite member

 **Add**

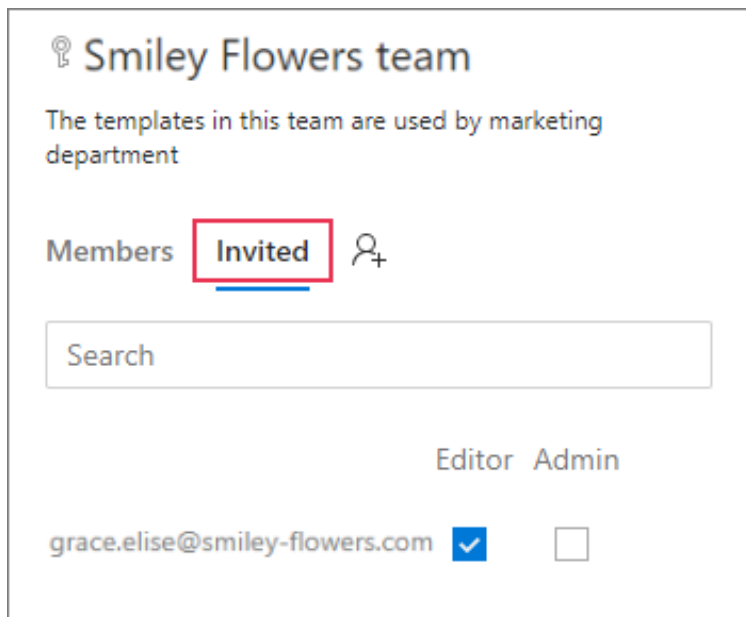
**Invite list** Editor Admin

grace.elise@adx-team.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
--------------------------	-------------------------------------	--------------------------	--

**Send invite** Cancel

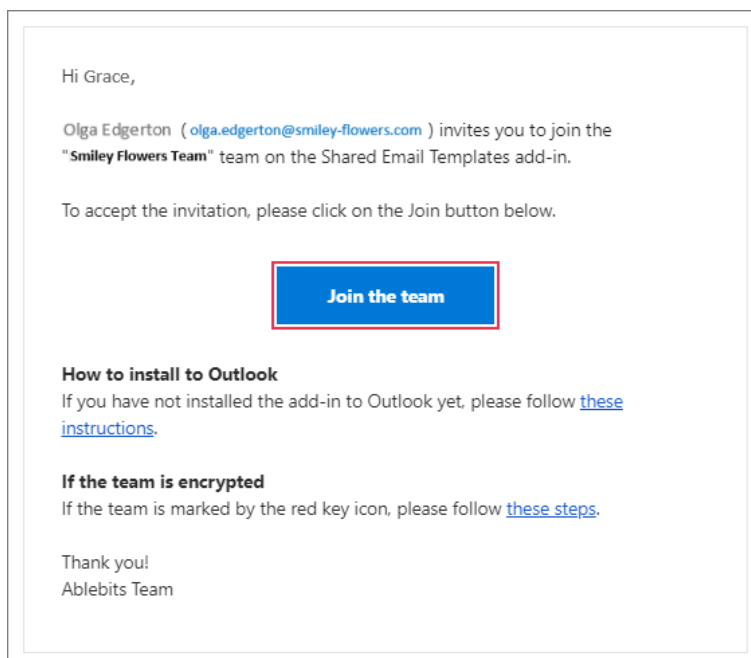


See the email addresses of the people you invited on the **Invited** tab. When a person joins the team, the email will move into the **Members** tab.




## Accept invitation to join a team

1. When you receive an email invitation to become a member of a team in Shared Email Templates, click **Join the team**.




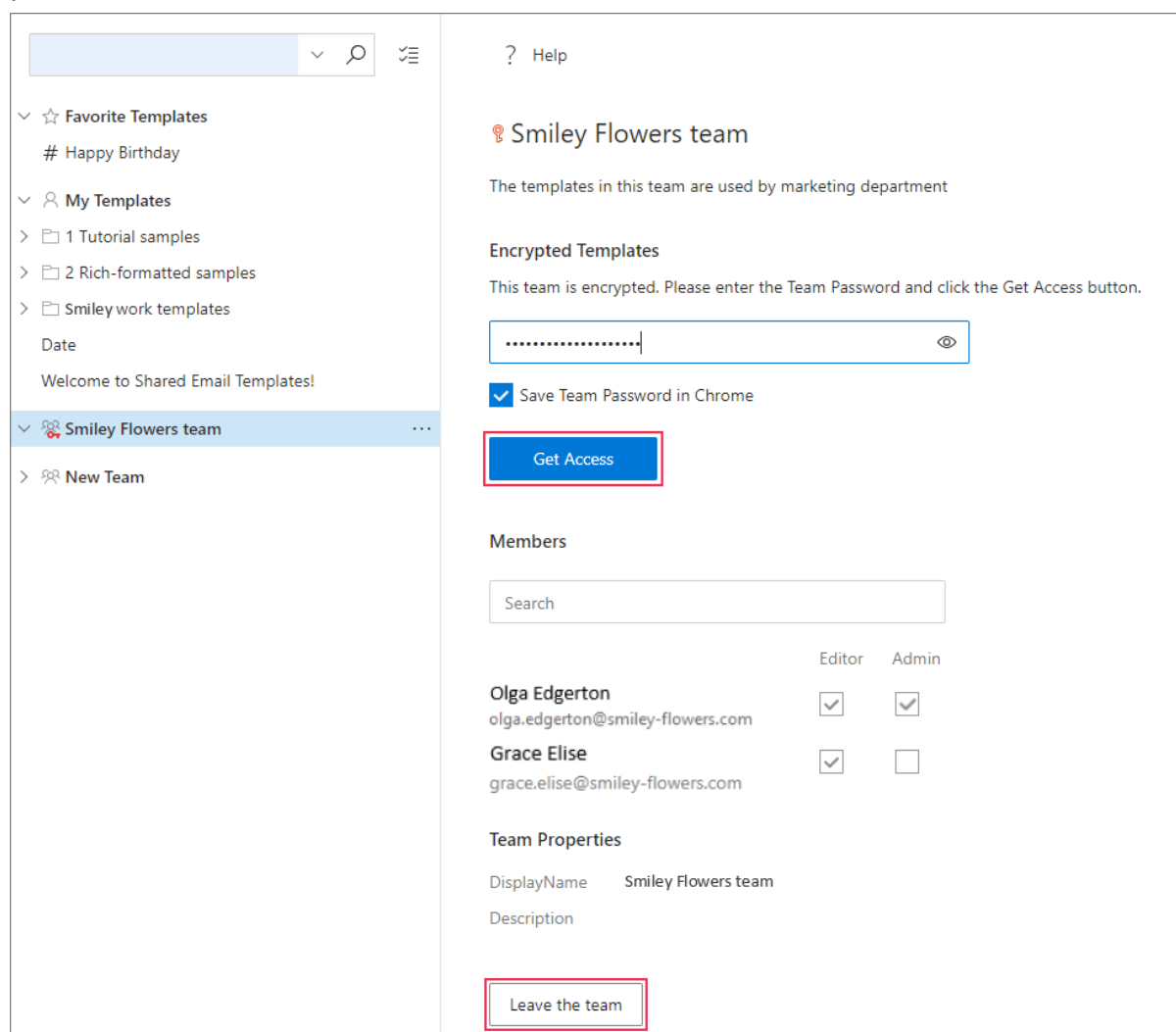
2. You will be redirected to the web app, where a new team will appear in the list.



 **Note.** If the team you were invited to is encrypted (you see a key sign), ask the admin to give you the password.

Select the team in the tree and enter the password in the preview pane (If you don't want to enter the password all the time, tick **Save Team Password in Outlook**) and click **Get Access**. Now you can use the templates inside the team.

 **Note.** In case you don't want to be a team member anymore, you can leave the team. To do this, select the team and click **Leave the team** in the preview pane.



The screenshot shows the 'Shared Email Templates for Outlook' interface. On the left, a sidebar lists various template categories: 'Favorite Templates' (with a sub-item '# Happy Birthday'), 'My Templates' (with sub-items '1 Tutorial samples', '2 Rich-formatted samples', and 'Smiley work templates'), and 'Smiley Flowers team' (which is selected and highlighted in blue). Below these is a 'New Team' button. The main area on the right is titled '? Help' and 'Smiley Flowers team'. It contains a description: 'The templates in this team are used by marketing department'. Below this, it says 'Encrypted Templates' and 'This team is encrypted. Please enter the Team Password and click the Get Access button.' There is a password input field with a masked password '.....' and an eye icon. A checkbox labeled 'Save Team Password in Chrome' is checked. A blue 'Get Access' button is highlighted with a red rectangle. Below this is a 'Members' section with a search bar and a table of team members. The table has columns for the member's name and email, and checkboxes for 'Editor' and 'Admin' roles. Two members are listed: Olga Edgerton (olga.edgerton@smiley-flowers.com) and Grace Elise (grace.elise@smiley-flowers.com). Olga has both Editor and Admin roles checked, while Grace has only the Editor role checked. Below the members list is a 'Team Properties' section with fields for 'DisplayName' (Smiley Flowers team) and 'Description'. At the bottom of the right pane, a 'Leave the team' button is highlighted with a red rectangle.

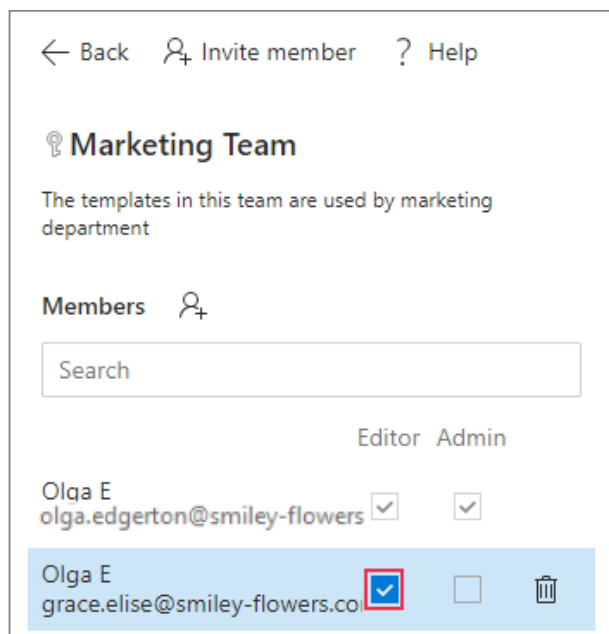
## Manage team members

If you are the team admin, you can add/delete members and change their roles.

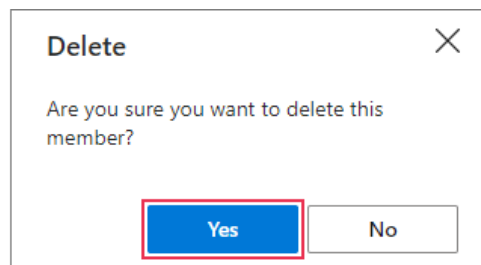
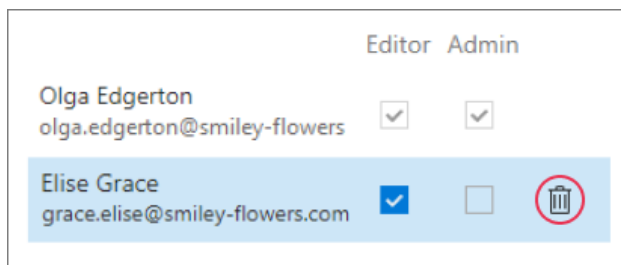




1. Click **Manage team** in the action bar or the context pop-up menu for teams. You will see the list of members and their rights. Tick or untick boxes to give or revoke rights.



2. To delete a member, move your mouse over the name and click the **Rubbish bin** icon that will appear on the right. After that click **Yes**. The team will disappear from this person's tree.



## Team properties

Team properties are properties of a team. They may include team email address, office address or other information. Actually, it can be anything you want. The limit is a maximum of 32 properties per team.

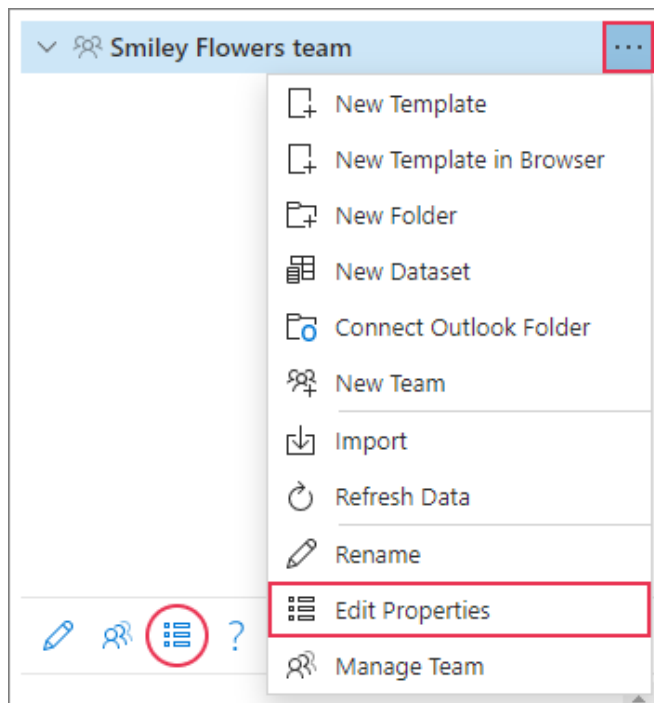
Team properties fall into two categories:

- Predefined properties (the name of the team, description and password)
- Custom properties (created by you)

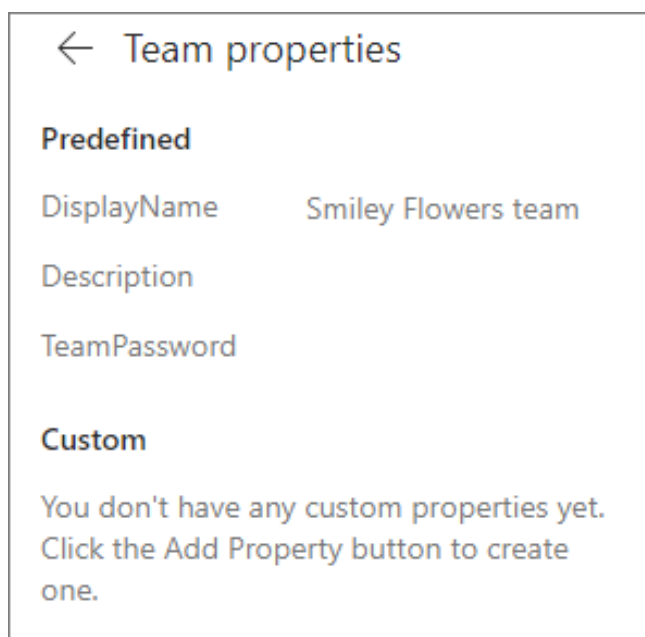


To see the list of properties, do the following:

1. Open the context pop-up menu for teams and click **Edit Properties** or simply click the **Edit Properties** icon in the action bar.



The team properties pane will open. Here you can see the whole list of team properties. All actions with properties are performed from this pane.





## Add team properties

1. Go to the team properties pane and click **Add Property**.

← Team properties

**Predefined**




DisplayName Smiley Flowers team

Description

TeamPassword

**Custom**




You don't have any custom properties yet. Click the Add Property button to create one.

Select a property to preview its content

**Add Property**

2. Fill in the fields with the name and the value of the property and click **Save**.

 Save  Cancel  Help

Name

Value

**Save** Cancel

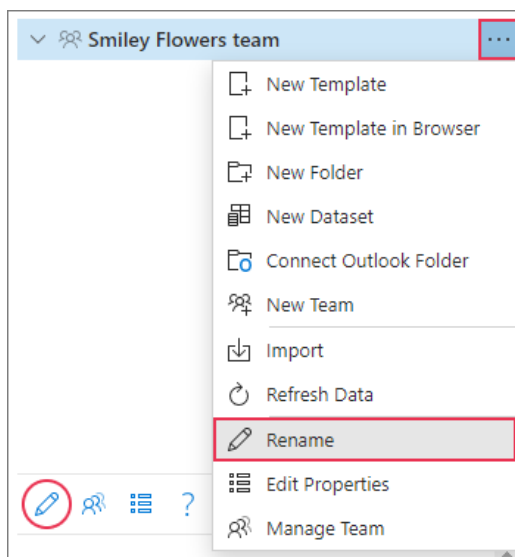


The newly created property will appear in the **Custom** section in the team properties list.

## Edit team properties

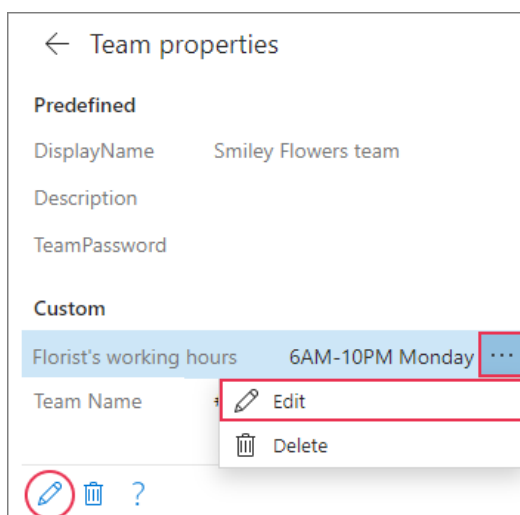
Only two of three predefined properties can be edited: DisplayName and Description.

1. Select the team in the tree and click the **Rename** icon in the action bar or the context pop-up menu for teams.



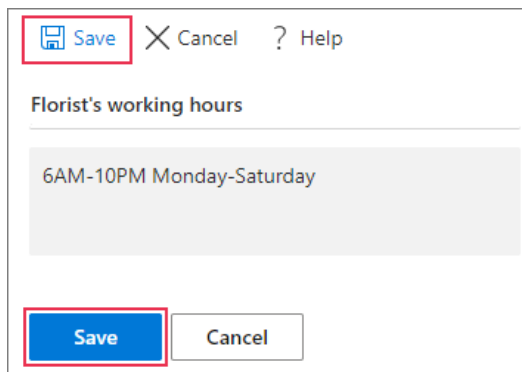
Custom properties are edited from the team properties pane.

1. Select a property, click the **Edit** icon in the action bar or the context pop-up menu.



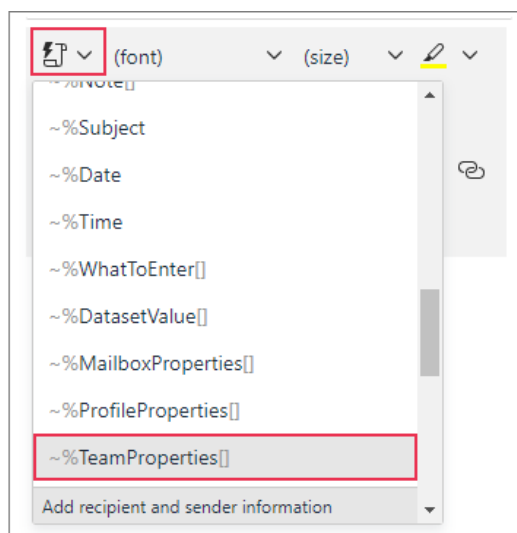


2. Now you can change the name and value of the property. Remember to click **Save** or the changes won't apply.

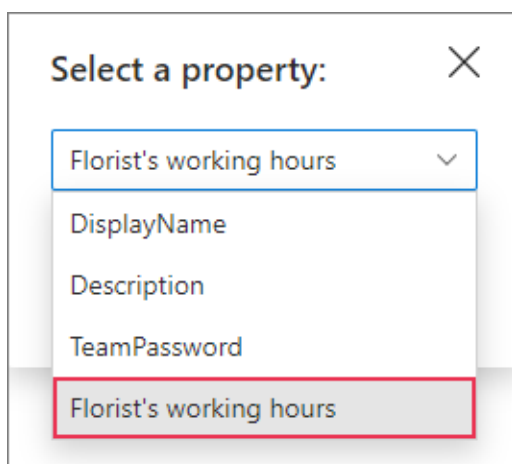


## Insert team properties

1. Click the **Insert Macro** icon in the template and select ~%TeamProperties.



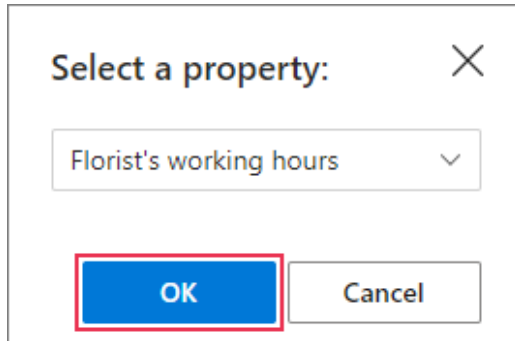
2. Select a property in the dialog window.





**Note.** The list of properties that you will see depends on the team where your template is located. If the template is in a team with 5 properties, you will see 5 properties. If it is in a team with three properties, you will see only 3 properties.

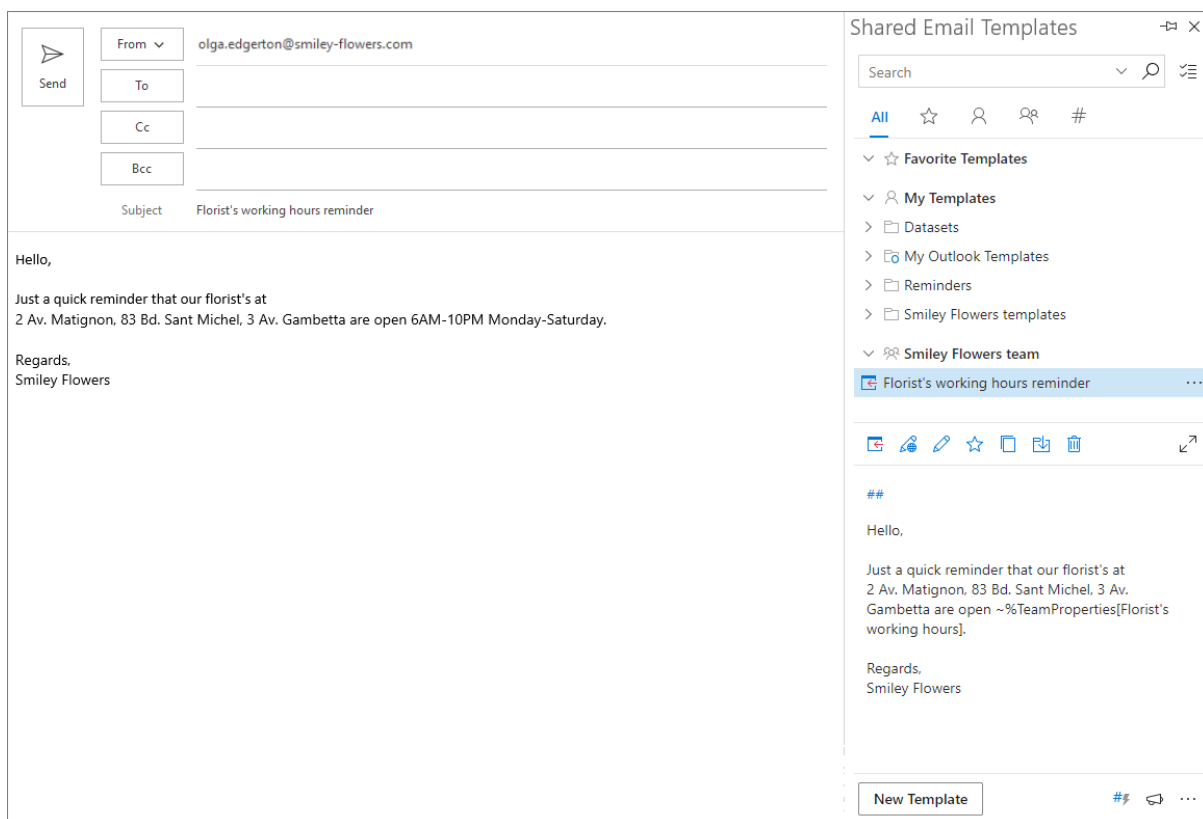
3. Click **OK**.



A dialog box titled "Select a property:" with a close button (X) in the top right corner. It contains a dropdown menu with the text "Florist's working hours" and a downward arrow. Below the dropdown are two buttons: "OK" (highlighted with a red rectangle) and "Cancel".

4. Save the template.

5. Paste the template.

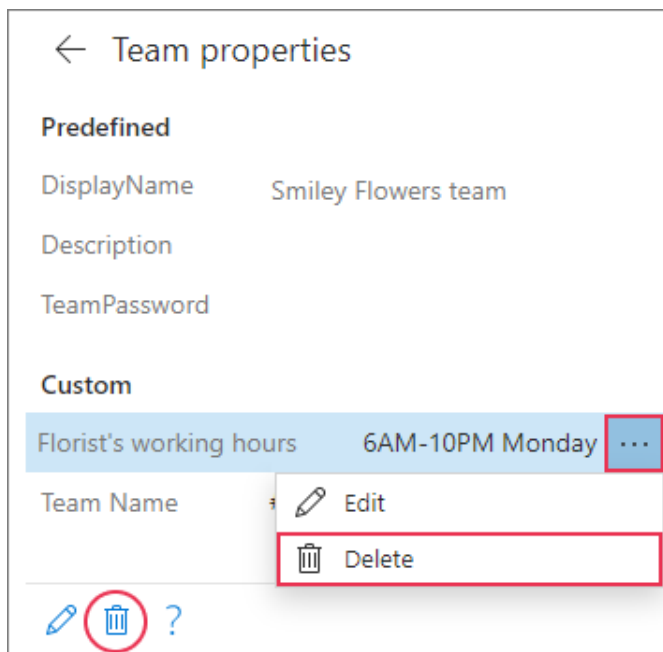


The screenshot shows the Outlook email composition window. On the left, the "Send" button is visible. The "From" field is set to "olga.edgerton@smiley-flowers.com". The "To", "Cc", and "Bcc" fields are empty. The "Subject" field contains "Florist's working hours reminder". The email body starts with "Hello," followed by a reminder about florist hours: "Just a quick reminder that our florist's at 2 Av. Matignon, 83 Bd. Sant Michel, 3 Av. Gambetta are open 6AM-10PM Monday-Saturday." It ends with "Regards, Smiley Flowers". On the right, the "Shared Email Templates" pane is open, showing a search bar and a list of templates. The "Florist's working hours reminder" template is selected. Below the list, the template content is displayed, showing the same text as the email body. At the bottom of the pane is a "New Template" button.

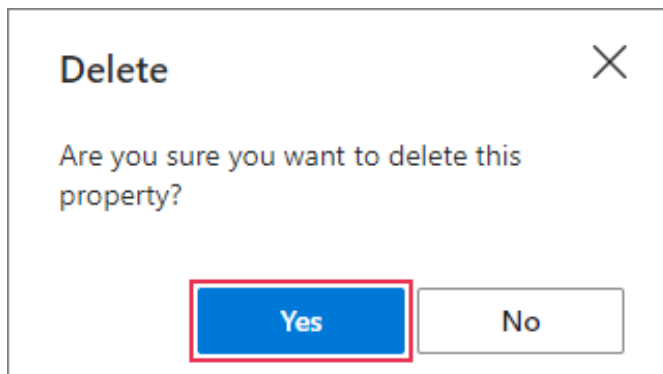


## Remove team properties

1. Go to the team properties pane, select a property and click **Delete** in the action bar or the context pop-up menu.



2. Confirm the action by clicking **Yes**.

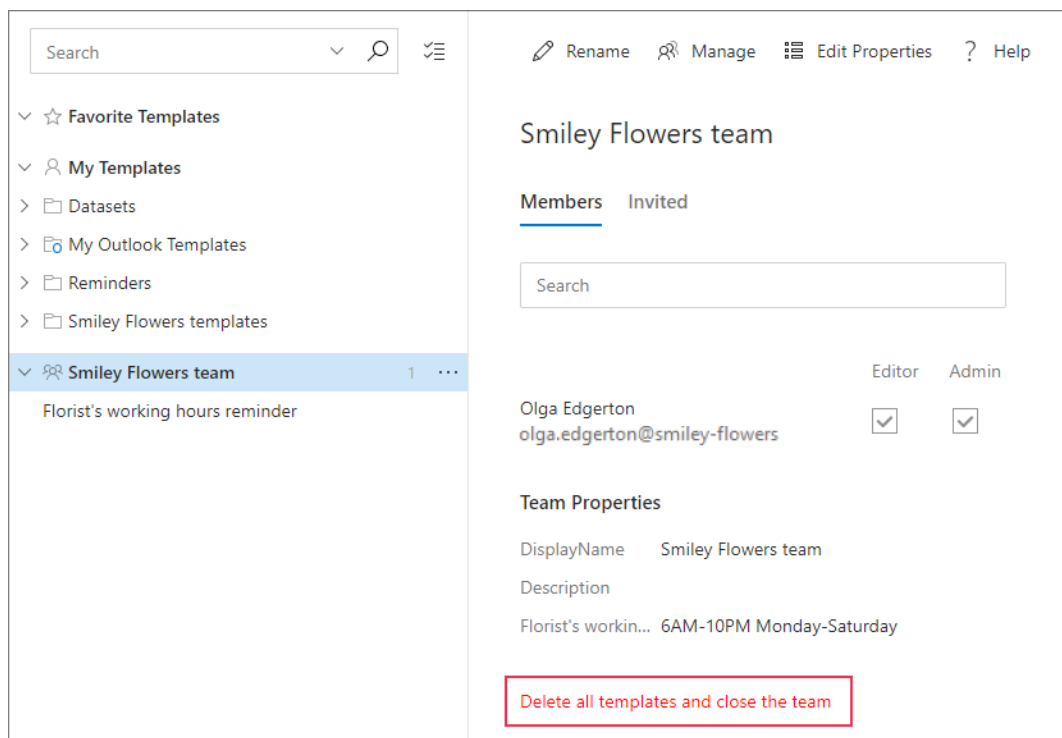


## Close a team

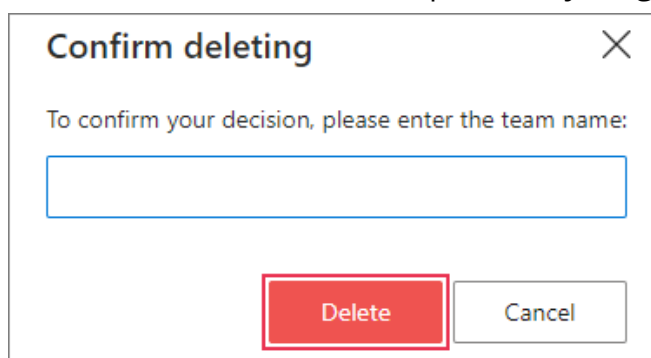
If you don't need a team anymore, you can close it.




1. Select the team in the tree and click **Delete all templates and close the team** in the preview pane.



2. Enter the team's name for confirmation. The team and all the templates inside it will be deleted permanently. Neither you nor your teammates will have access to these templates any longer.



 **Note!** There is no way to restore the team. Make sure you saved all necessary templates before deleting the team.





## Additional resources

Feel like you need more information? Plenty more useful resources are available on our website!

### 1. [Ablebits documents](#)

Here you can find documentation on Shared Email Templates, as well as other Ablebits products.

### 2. [Tips and tricks for Shared Email Templates](#)

These smart and savvy tips will help you make the most of the add-in. Find out how to use advanced functionality that wasn't described in this document.

### 3. [Release notes](#)

Want to stay up to date with the latest news and updates? The release notes will tell you everything that is introduced, improved and fixed in a new version.

### 4. [Known issues](#)

Unfortunately, some issues cannot be fixed on our side because of browser or platform limitations. If you face any problems, check [this page](#) to find out whether a specific issue is known to us and if there is a workaround.

### 5. [Cheat sheets](#)

On this page, find all the Shared Email Templates cheat sheets. Each one covers a specific topic and shows in detail how to make use of various capabilities of the add-in.



## How to get support

We are constantly striving for improving our product, making it more user-friendly and useful for our clients. If you find any bugs, please report them via [this form](#) and we will do our best to fix them as soon as possible.

Also, there are plenty of resources and ways to contact us [here](#).