

Create a company or team account

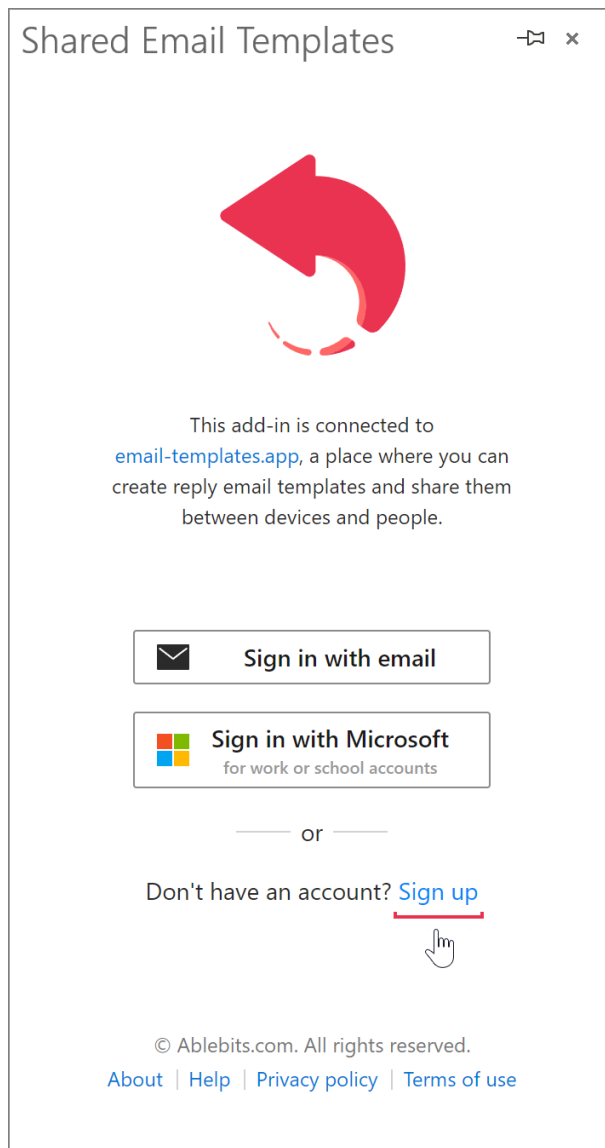
When creating a company or team account in Shared Email Templates, you can choose between *signing up with email* and *signing up with Microsoft*.



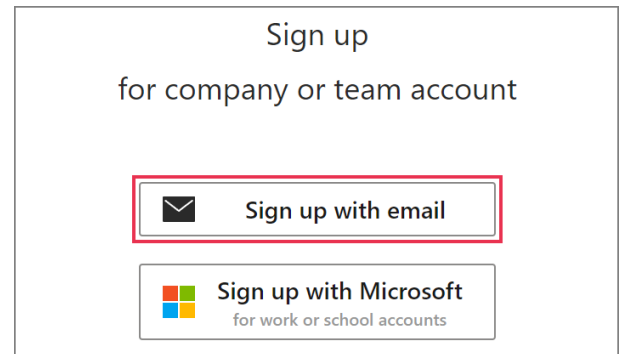
If you decide to sign up for Shared Email Templates with your Microsoft credentials, don't worry—we won't get access to your Microsoft password.

Sign up with email

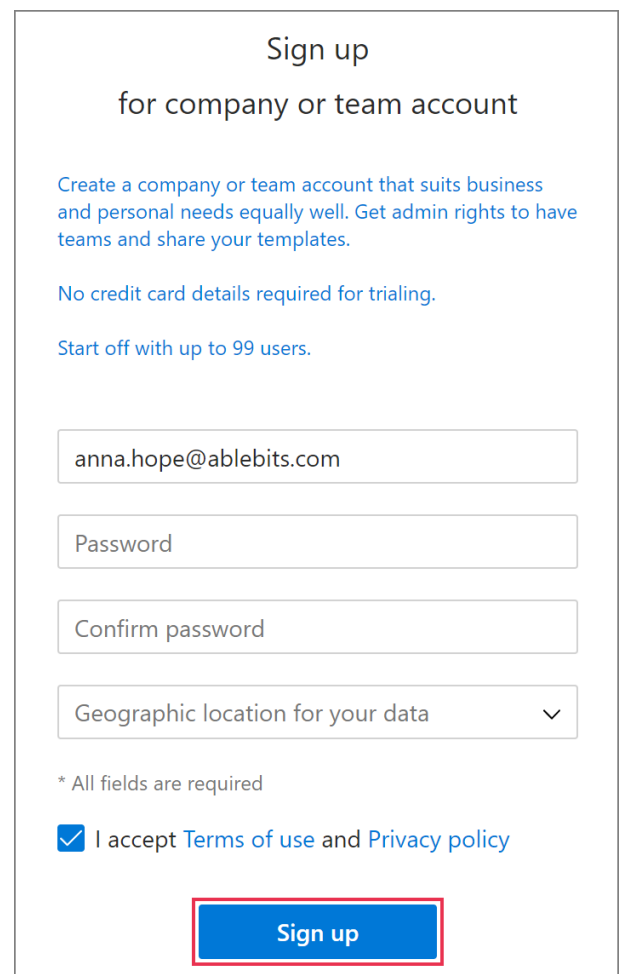
- 1 In Outlook, start the Shared Email Templates add-in and click **Sign up** on its pane.



- 2 Select **Sign up with email**.

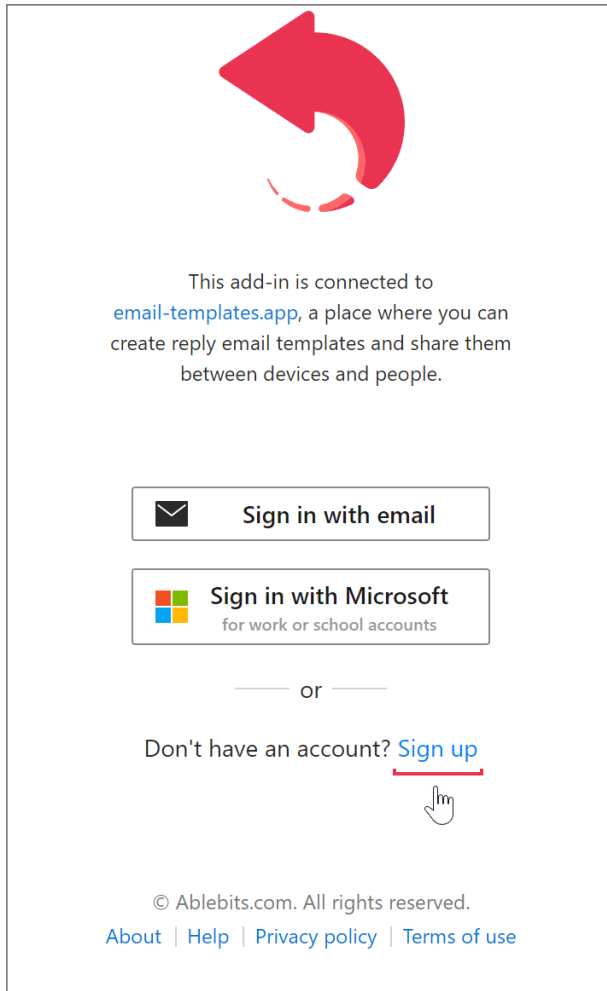


- 3 Fill out a sign-up form, decide where your data will be stored (in the United States, the European Union, or Australia), read the Shared Email Templates [Terms of use](#) and [Privacy policy](#), confirm your acceptance by selecting the corresponding checkbox, and then click **Sign up**.

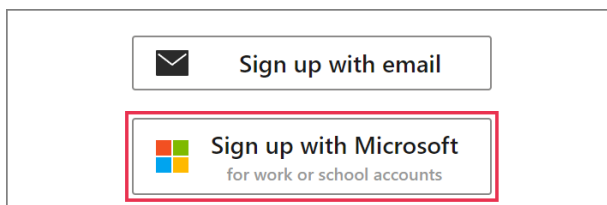


Sign up with Microsoft

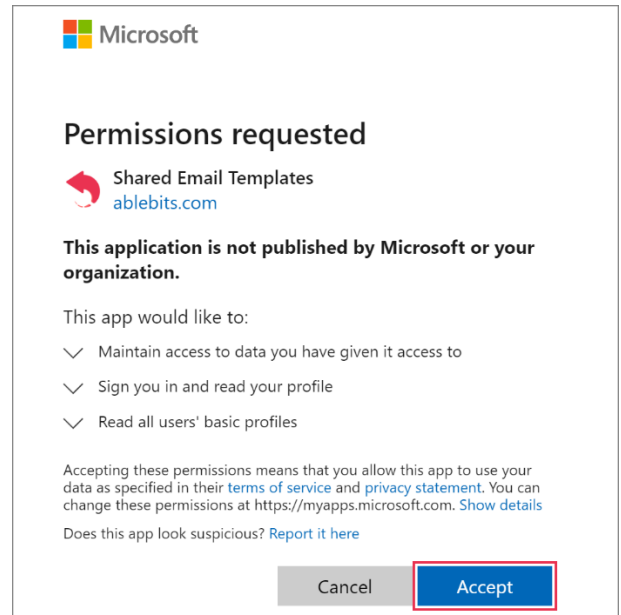
- 1 Start Shared Email Templates in your Outlook and click **Sign up** on the add-in pane.



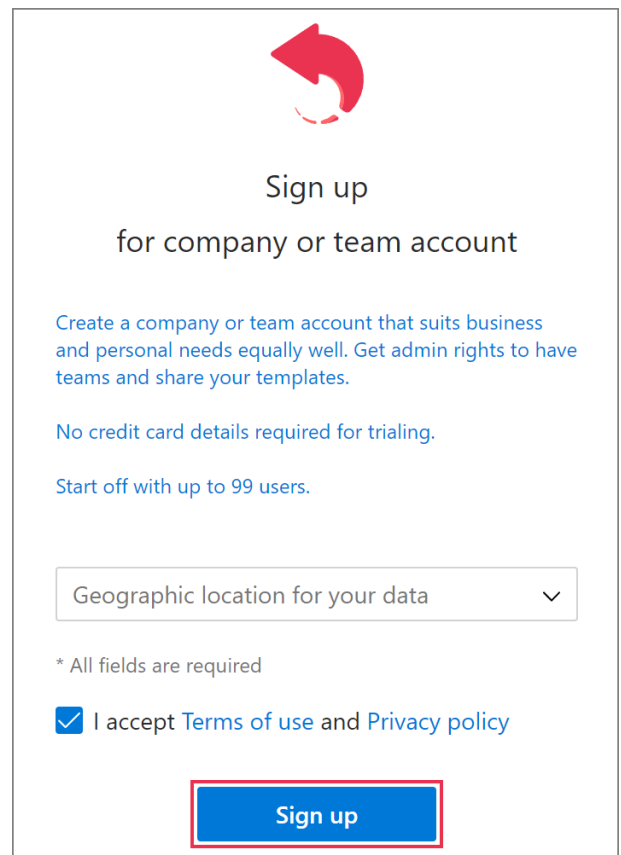
- 2 Select **Sign up with Microsoft**.



- 3 Sign in to your Microsoft work or school account and accept permissions requested by Shared Email Templates.



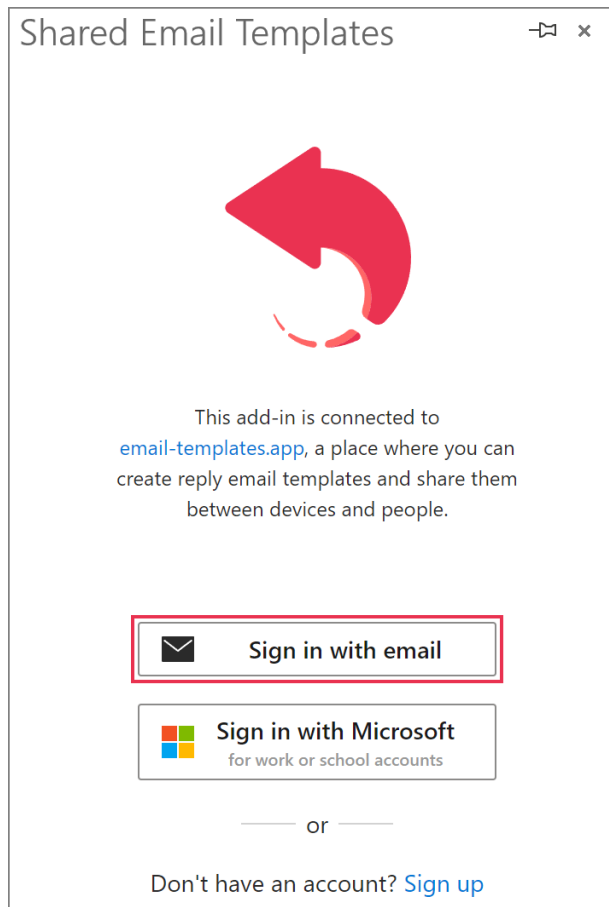
- 4 In the sign-up form that will appear, specify where to store your data: in the United States, the European Union, or Australia. Read and accept the Shared Email Templates [Terms of use](#) and [Privacy policy](#). Then click **Sign up**.



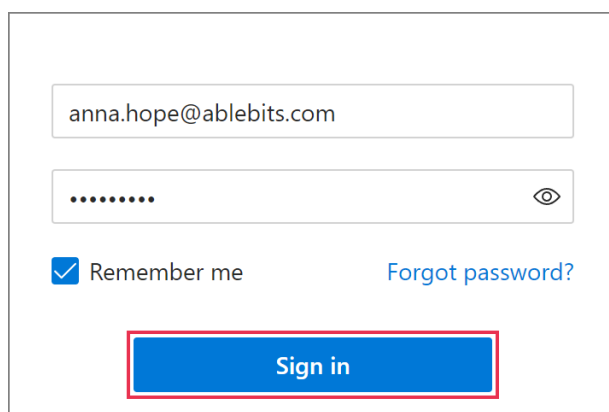
Sign in to an account

Sign in with email

- 1 To sign in to an account that was created via signing up with email, select **Sign in with email**.

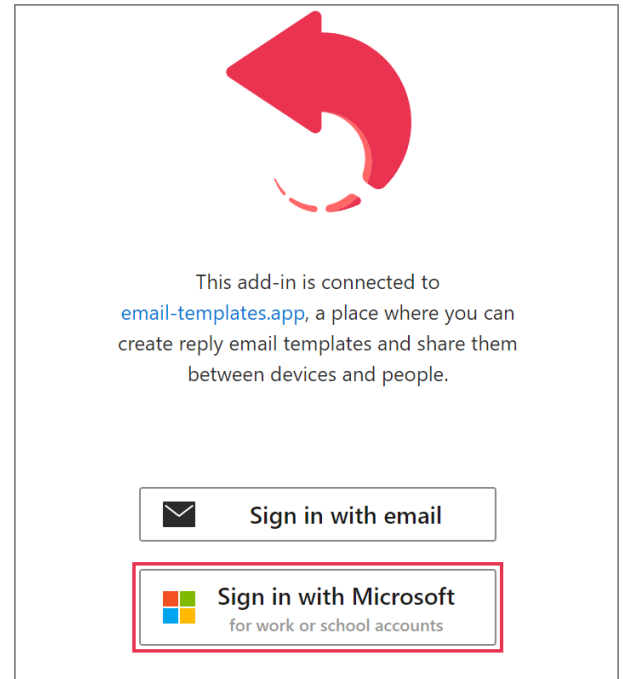


- 2 Enter your username or email address and password. Then click **Sign in**.

The screenshot shows a sign-in form. It has two input fields: the first contains the email address 'anna.hope@ablebits.com', and the second is for a password, shown as dots. To the right of the password field is an eye icon. Below the password field is a checkbox labeled 'Remember me' which is checked, and a link 'Forgot password?'. At the bottom of the form is a blue 'Sign in' button, which is highlighted with a red rectangular box.

Sign in with Microsoft

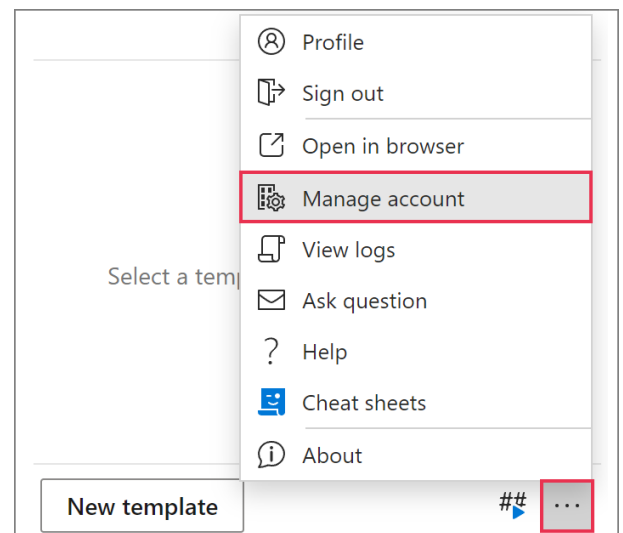
- 1 To sign in to an account that was created via signing up with Microsoft, select **Sign in with Microsoft**.



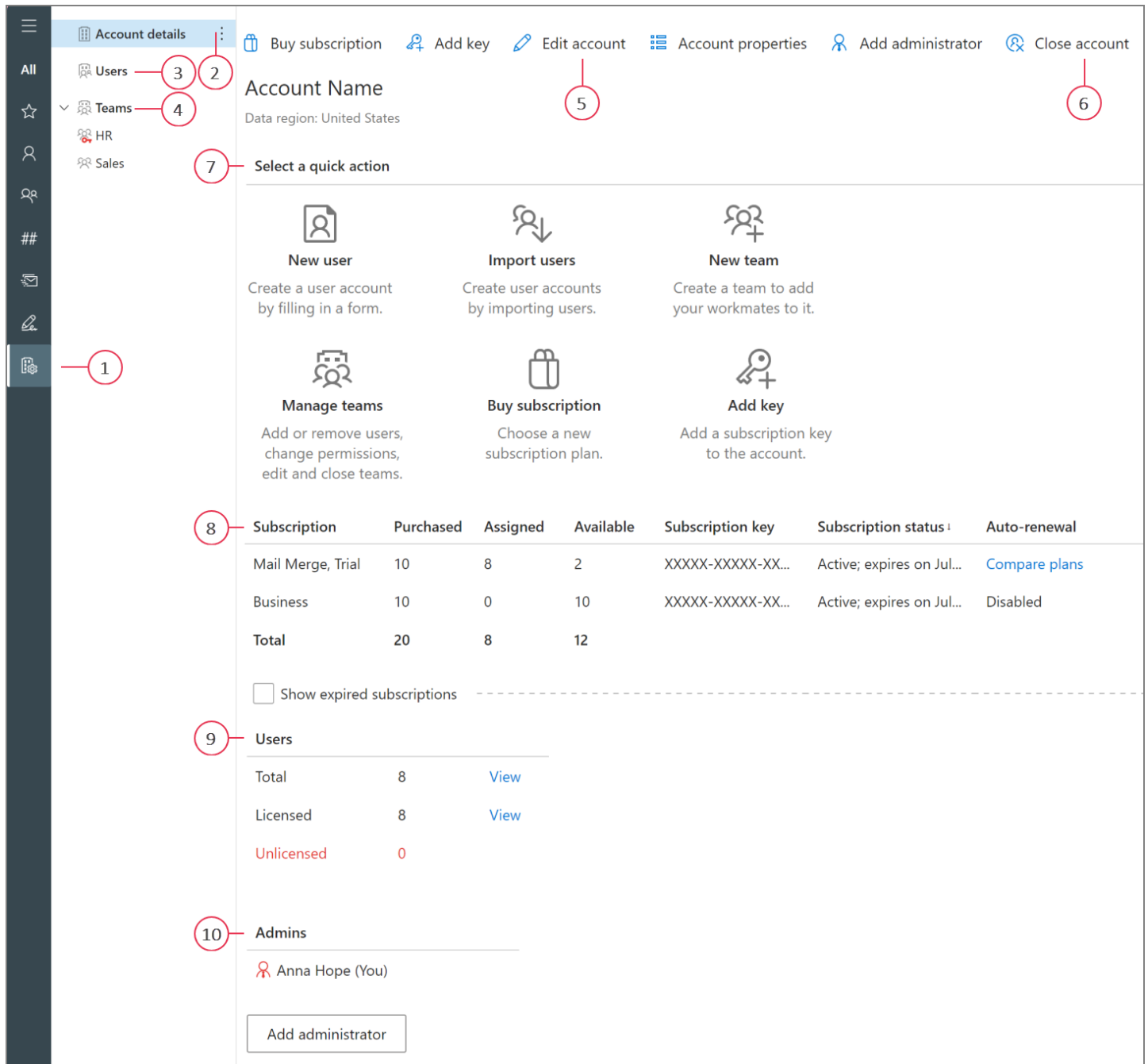
- 2 To proceed, use the Microsoft dialog that will appear on your screen.

Manage a company or team account

On the **More** menu at the bottom of the Shared Email Templates pane, select **Manage account**.



In your default browser, you'll see the Shared Email Templates app.



Account details

Buy subscription Add key Edit account Account properties Add administrator Close account

Account Name
Data region: United States

Select a quick action

New user
Create a user account by filling in a form.

Import users
Create user accounts by importing users.

New team
Create a team to add your workmates to it.

Manage teams
Add or remove users, change permissions, edit and close teams.

Buy subscription
Choose a new subscription plan.

Add key
Add a subscription key to the account.


Subscription	Purchased	Assigned	Available	Subscription key	Subscription status ¹	Auto-renewal
Mail Merge, Trial	10	8	2	XXXXX-XXXXX-XX...	Active; expires on Jul...	Compare plans
Business	10	0	10	XXXXX-XXXXX-XX...	Active; expires on Jul...	Disabled
Total	20	8	12			

☐ Show expired subscriptions

Users

Total	8	View
Licensed	8	View
Unlicensed	0	

Admins

 Anna Hope (You)

[Add administrator](#)

1 Manage account. It's a starting point for an admin's activities.

2 Account details. This section contains detailed information on a company or team account, including subscriptions, users, and admins.

3 Users. Users' records are available here.

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

- 5 Edit account.** Click this button to change the name of your company or team account, add a postal address, a phone number, an email, or a link to your website.
- 6 Close account.** If you decide that you don't need your company or team account anymore, you'll be able to delete it after clicking this button.
- 7 Select a quick action.** Here are quick action buttons.

- 8 Subscription.** Here you can check subscription plans, keys, and statuses, cancel auto-renewal, and renew subscriptions manually if necessary. You can also change the quantity of licenses for a subscription.
- 9 Users.** You can see how many users you have, which of them are licensed, and who needs a subscription.
- 10 Admins.** A list of administrators is available here.

Manage users

In the **Users** section, you can see users' full names, usernames (in accounts created via signing up with email), email addresses, subscription plans, keys, and statuses. You can also see how many teams each user has already joined.

Users								
<div> <div>Users</div> <div> <div>Teams</div> <div>HR</div> <div>Sales</div> </div> </div>		<div> <div>Search user</div> </div>						
		Full name [†]	Username	Email address	Invited [Ⓢ]	Subscription	Subscription key	Status
		Anna Hope	anna.hope	anna.hope@ablebits.com	1 of 3	Business	XXXXX-XXXXX-XX...	Active
		Emily Norman	emily.norman	emily.norman@ablebits...	1 of 3	Business	XXXXX-XXXXX-XX...	Active
		Erika Nordstrom	erika.nordstr...	erika.nordstrom@ableb...	1 of 3	Business	XXXXX-XXXXX-XX...	Active
		Ernie Pitcher	ernie.pitcher	ernie.pitcher@ablebits....	1 of 3	Business	XXXXX-XXXXX-XX...	Active
		Graham Lee	graham.lee	graham.lee@ablebits.c...	1 of 3	Business	XXXXX-XXXXX-XX...	Active
		Jakob Berg	jakob.berg	jakob.berg@ablebits.com	1 of 4	Enterprise	XXXXX-XXXXX-XX...	Active
		Lisa Morris	lisa.morris	lisa.morris@ablebits.com	1 of 3	Business	XXXXX-XXXXX-XX...	Active

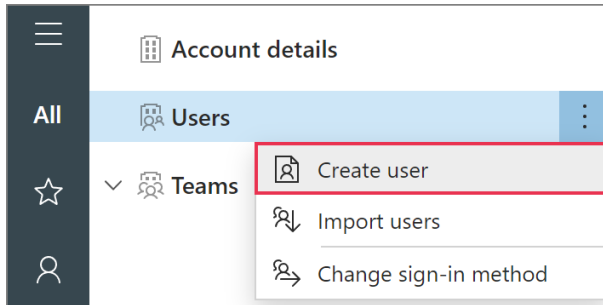
If you're an admin of a company or team account that was created via signing up with email, you can invite users to your account by importing them from Azure AD, an Azure AD group, or a CSV file. You can also create user accounts manually. Note that available licenses are required.

If you're an admin of a company or team account that was created via signing up with Microsoft, you can invite users to your account by importing them from Azure AD and an Azure AD group. Note that available licenses are required.

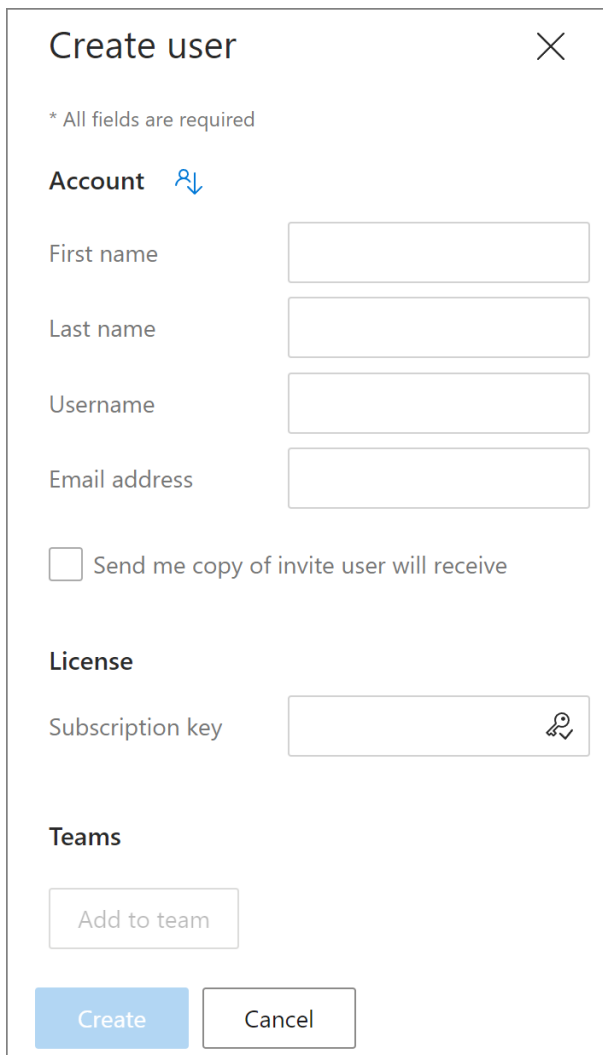
How to create user accounts


(Only in a company or team account created via signing up with email)

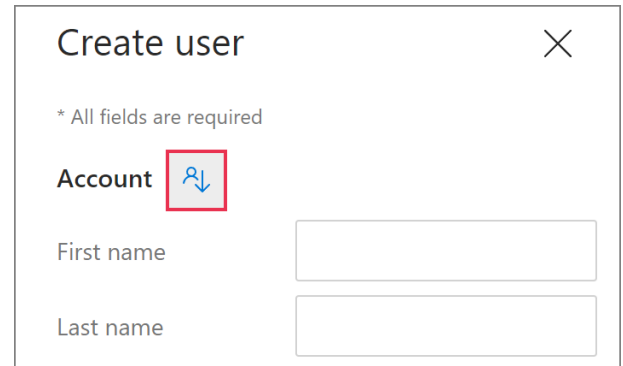
- 1 In the Shared Email Templates app, right-click **Users**, and then select **Create user**.



- 2 Fill in the form that will appear. Then click the **Create** button.

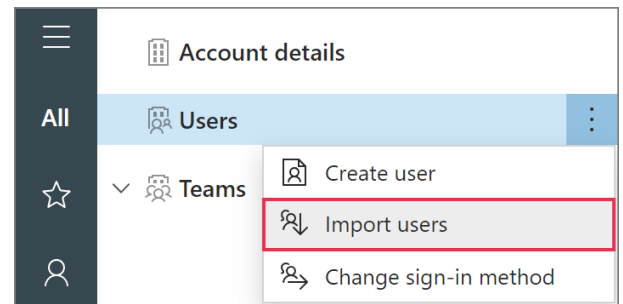
A screenshot of the 'Create user' form. It has a title bar with a close button. Below the title is a note: '* All fields are required'. The form has sections for 'Account' (with a user icon), 'First name', 'Last name', 'Username', 'Email address', a checkbox for 'Send me copy of invite user will receive', 'License' (with 'Subscription key' and a key icon), and 'Teams' (with an 'Add to team' button). At the bottom are 'Create' and 'Cancel' buttons.

 To find a user's details in Azure AD, click the icon shown in the screenshot below.

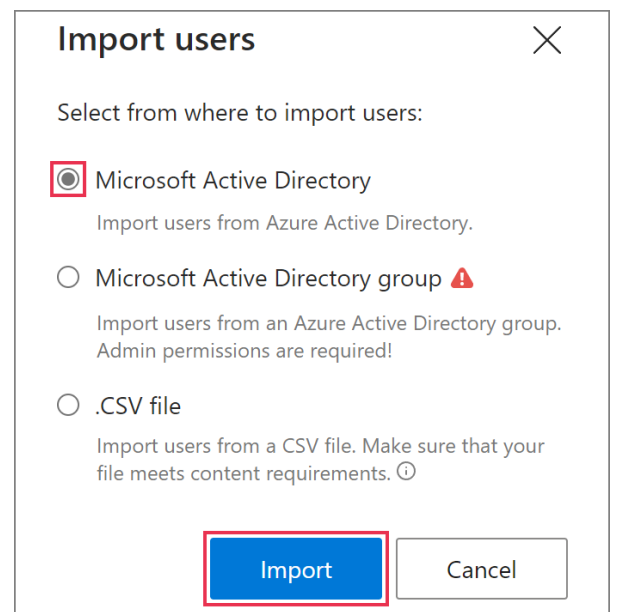
A screenshot of the 'Create user' form. The 'Account' label is highlighted with a red box, and next to it is a blue icon of a person with a downward arrow.

How to import users from Azure AD

- 1 In the Shared Email Templates app, right-click **Users**, and then select **Import Users**.



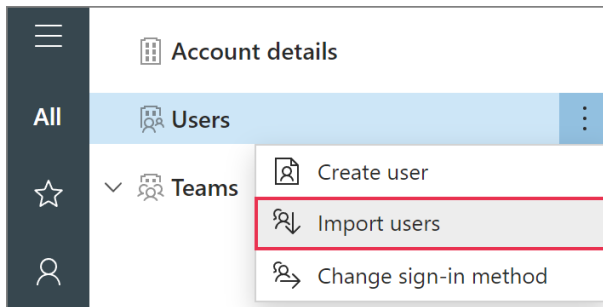
- 2 With the **Microsoft Active Directory** option selected, click the **Import** button.

A screenshot of the 'Import users' form. It has a title bar with a close button. Below the title is the text 'Select from where to import users:'. There are three radio button options: 'Microsoft Active Directory' (selected), 'Microsoft Active Directory group' (with a warning icon), and '.CSV file'. Each option has a description. At the bottom are 'Import' and 'Cancel' buttons.

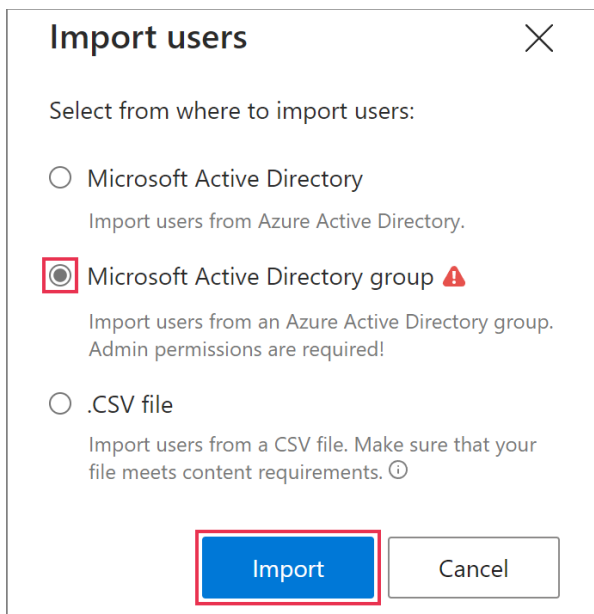
- 3 Sign in to your Microsoft work or school account.
- 4 Select users, and then click the **Import** button.


How to import users from an Azure AD group

- 1 In the Shared Email Templates app, right-click **Users**, and then select **Import users**.



- 2 Select the **Microsoft Active Directory group** option. Then click the **Import** button.



 Microsoft 365 admin permissions are required.

- 3 Sign in to your Microsoft work or school account.

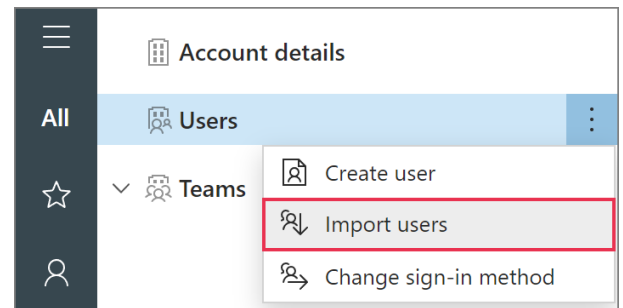
- 4 Select a group. Then click the **Next** button.

- 5 Select users and click the **Import** button.

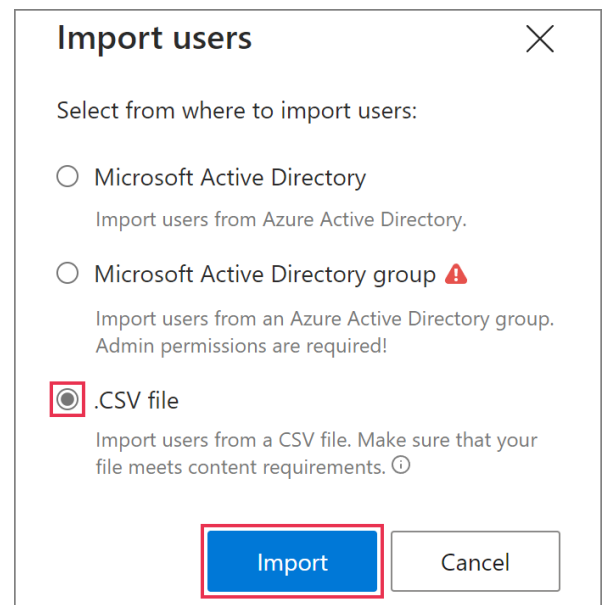
How to import users from a CSV file


(Only in a company or team account created via signing up with email)

- 1 In the Shared Email Templates app, right-click **Users**, and then select **Import users**.



- 2 Select the **.CSV file** option and click the **Import** button.

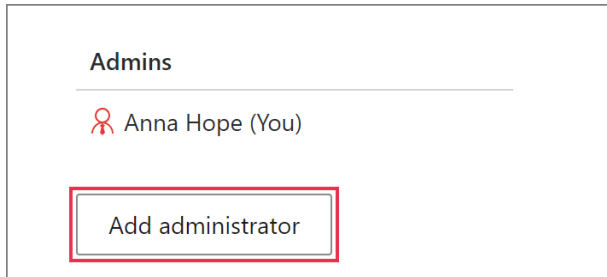


 To see a hint explaining how to prepare a CSV file for importing users, hover the cursor over the information icon.

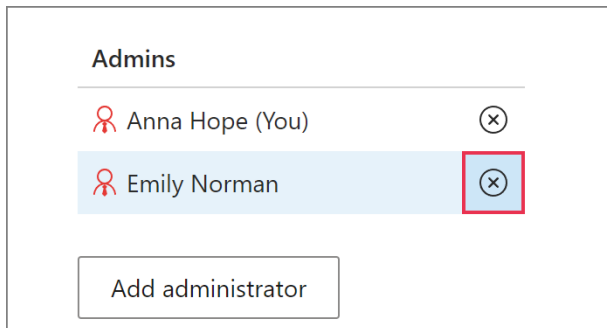
- 3 Select the necessary CSV file.

How to provide users with admin rights

In the Shared Email Templates app, go to the **Manage account** tab and click the **Add administrator** button.




To revoke admin rights, select an admin and click the **Remove admin rights** button.










How to edit a user profile


To edit a user profile, open it by selecting a row that contains the user's record.

<input type="radio"/> Full name †	Username	Email address
 Anna Hope	anna.hope	anna.hope@ablebits.com
<input checked="" type="radio"/> Emily Norman	emily.norman	emily.norman@ablebits...
Erika Nordstrom	erika.nordstr...	erika.nordstrom@ableb...
Ernie Pitcher	ernie.pitcher	ernie.pitcher@ablebits....
Graham Lee	graham.lee	graham.lee@ablebits.c...
Jakob Berg	jakob.berg	jakob.berg@ablebits.com

You can also start editing a user profile via the **More** menu.







<input type="radio"/> Full name †	Username	Email address
 Anna Hope	anna.hope	anna.hope@ablebits.com
<input checked="" type="radio"/> Emily Norman	emily.norman	emily.norman@ablebits...
	erika.nordstr...	erika.nordstrom@ableb...
	ernie.pitcher	ernie.pitcher@ablebits....
	graham.lee	graham.lee@ablebits.c...
		
	Jakob Berg	jakob.berg@ablebits.com

 To edit profile properties for several users in one go, select those users and click **Edit properties**.


<input type="radio"/> Full name †	Username	Email address
 Anna Hope	anna.hope	anna.hope@ablebits.com
<input checked="" type="radio"/> Emily Norman	emily.norman	emily.norman@ablebits...
Erika Nordstrom	erika.nordstr...	erika.nordstrom@ableb...
<input checked="" type="radio"/> Ernie Pitcher	ernie.pitcher	ernie.pitcher@ablebits.c...
<input checked="" type="radio"/> Graham Lee	graham.lee	graham.lee@ablebits.co...
Jakob Berg	jakob.berg	jakob.berg@ablebits.com

How to delete a user account

Open the **More** menu that is on the right of the name of the user whose account you want to delete, and then select **Delete**.

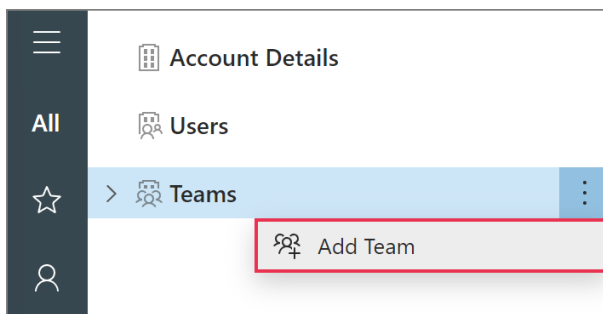
<input type="radio"/> Full name †	Username	Email address
 Anna Hope	anna.hope	anna.hope@ablebits.com
<input checked="" type="radio"/> Emily Norman	emily.norman	emily.norman@ablebits...
	erika.nordstr...	erika.nordstrom@ableb...
	ernie.pitcher	ernie.pitcher@ablebits....
	graham.lee	graham.lee@ablebits.c...
		
	Jakob Berg	jakob.berg@ablebits.com

Manage teams

 To be able to use team templates, an admin must be added to a team as a user. To be able to create and edit team templates, an admin must be added to a team as an editor.

How to create a team

- 1 On the **Manage account** tab in the Shared Email Templates app, right-click **Teams** and select **Add team**.



- 2 Enter the name of your new team. You can also add some description and encrypt the team with a password. If you decide to encrypt a team, you'll be responsible for providing its members with the team password. It won't be possible to change or remove the password. When you're done, click **Save**.

New team

Description

Encrypted templates

To encrypt all templates in this team, enter your Team Password. You will need to pass this password to all members of this team. Encryption is optional. If you do not want to encrypt templates in this team, leave the password fields empty.

NOTE! You will not be able to change or remove this password. We do not store team passwords anywhere, therefore we will not be able to restore it, nor decrypt your templates without this password. Please be sure to remember your Team Password or store it in a safe location.

Team password

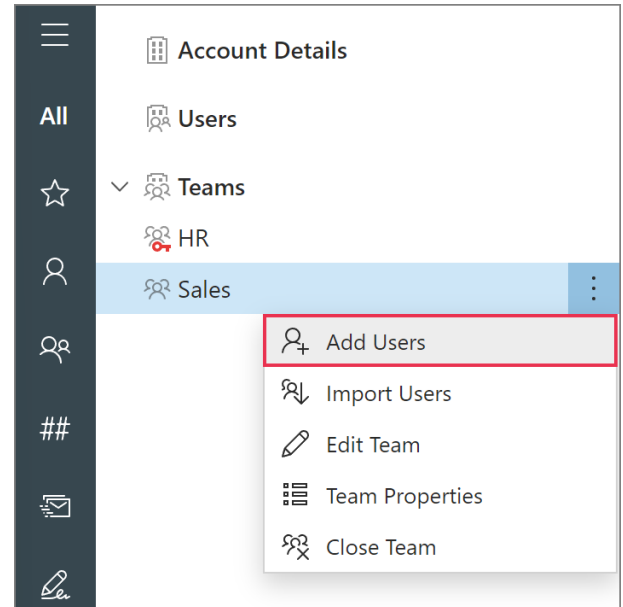
Confirm team password

☒ Save team password in Edge

Save Cancel

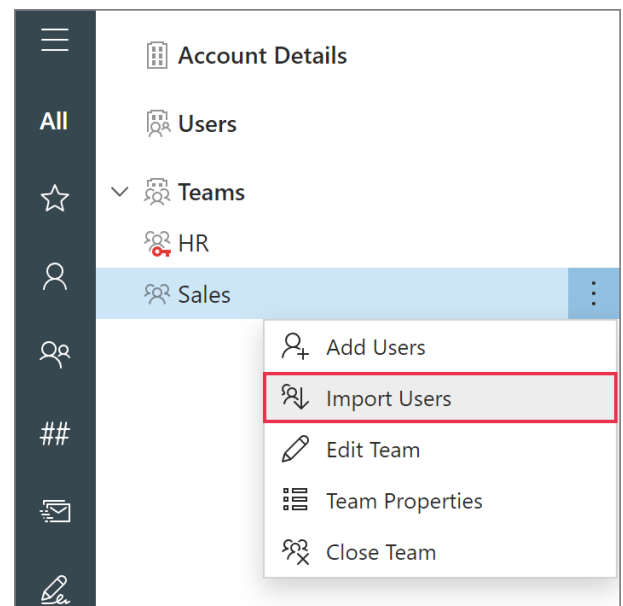
How to add users to a team


On the **Manage account** tab in the Shared Email Templates app, right-click a team and select **Add users**.



How to import users to a team






To import users from Azure Active Directory or from an Azure AD group, go to the **Manage account** tab in the Shared Email Templates app, right-click a team and select **Import users**.



 To import team members from an Azure AD group, you need Microsoft 365 admin permissions.

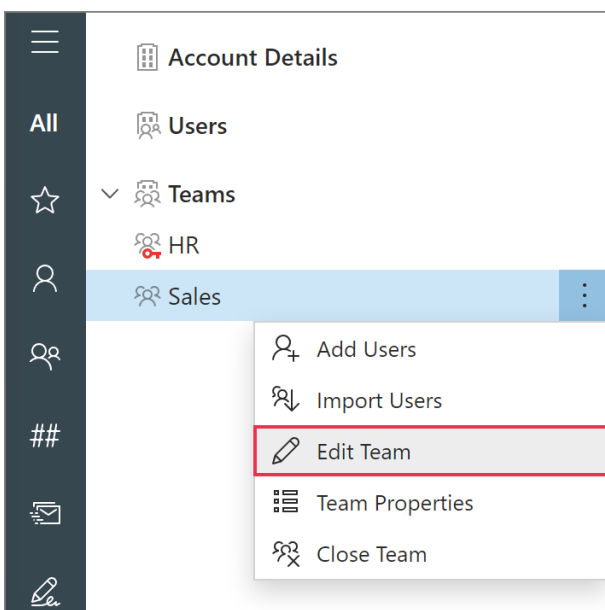
How to remove a user from a team

Go to the **Manage account** tab in the Shared Email Templates app and select a team. Then open the **More** menu that is on the right of a team member's name. Select **Remove user**.

Full name ¹	Username	Email address
 Anna Hope	anna.hope	anna.hope@ablebits....
 Emily Norman	emily.norm...	emily.norman@ableb...
 Edit User	graham.lee	graham.lee@ablebits...
 Change Permissions	jakob.berg	jakob.berg@ablebits....
 Remove User		

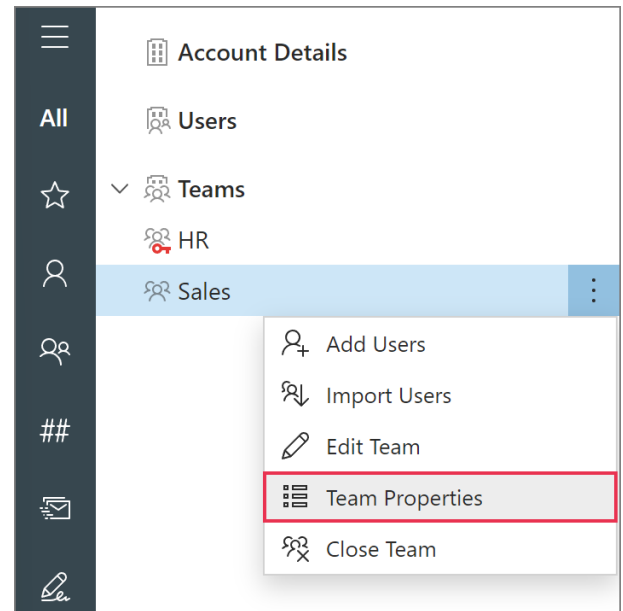
How to edit a team

If you want to change the name or description of a team, go to the **Manage account** tab in the Shared Email Templates app, right-click a team, and then select **Edit team**.



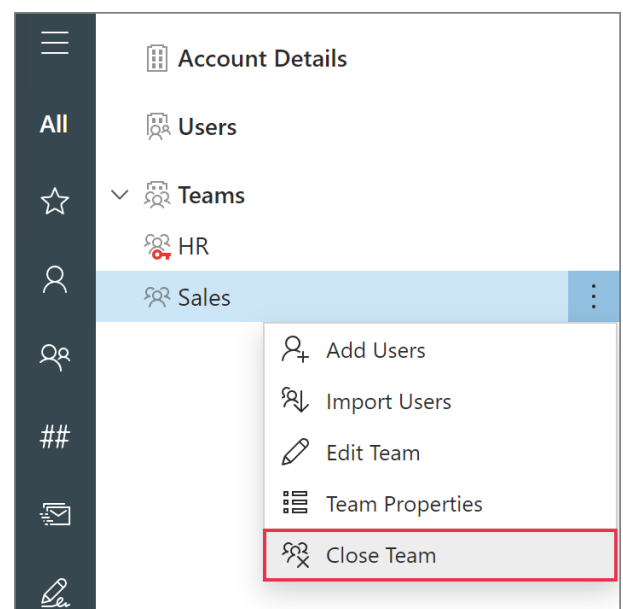
How to edit team properties

If you want to add, edit, or delete a custom team property, go to the **Manage account** tab in the Shared Email Templates app, right-click a team, and then select **Team properties**.



How to close a team

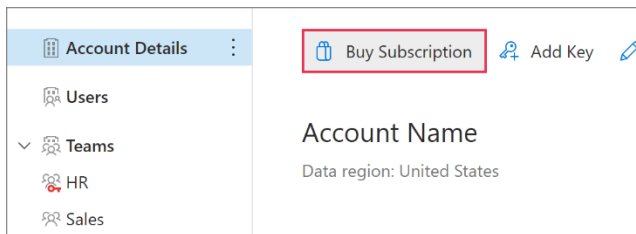
If a team is no longer needed, you can close it. Go to the **Manage account** tab, right-click a team, and select **Close team**.



Manage subscriptions

How to buy a subscription

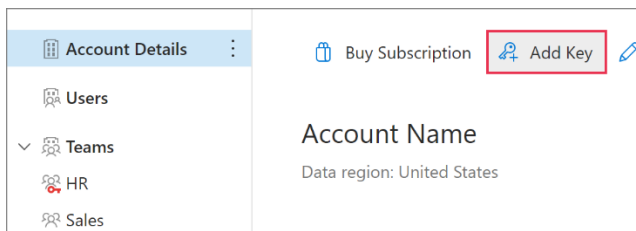
- 1 In the Shared Email Templates app, go to the **Account details** section, and then select **Buy subscription**.



- 2 On the Shared Email Templates webpage that will automatically open, select the subscription plan that suits you best. Then click the **Subscribe** button.
- 3 You'll be redirected to our e-commerce service provider's webpage. Place your order there.

How to add a new subscription key

- 1 In the Shared Email Templates app, go to the **Account details** section and select **Add key**.



- 2 Enter your subscription key into the dialog that will appear. Then click **Add**.

Enter subscription key

Please enter the subscription key that you [purchased](#) and want to add to your company or team account:

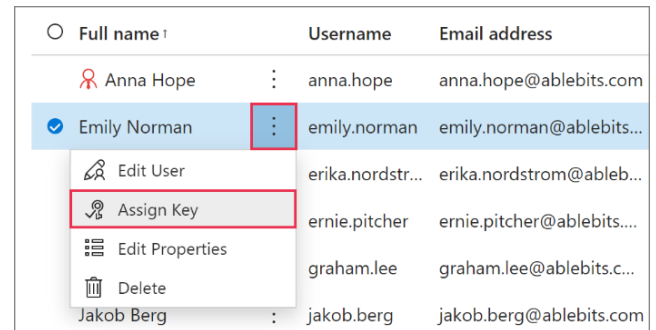
XXXXX-XXXXX-XXXXX-XXXXX-XXXXX-XXXXX

Add


Cancel

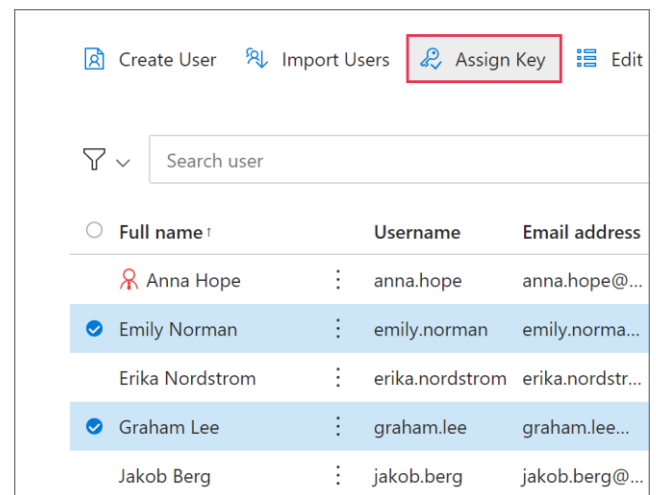
How to assign a subscription key to a user

- 1 In the Shared Email Templates app in your browser, go to the **Manage account** tab and select **Users**. Open the **More** menu that is on the right of a user's name and select **Assign key**.



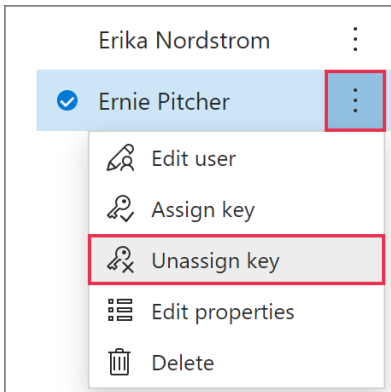
- 2 In the **Select key** dialog, select the necessary key.

 To assign a subscription key to several users in one go, select those users, and then click **Assign key** above the list of users.

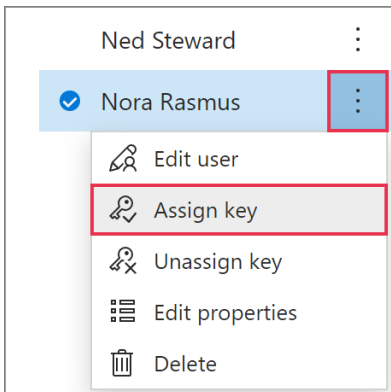


How to transfer a subscription key to another user

- 1 Go to **Manage account > Users**. Select the user whose subscription key you want to transfer. On the **More** menu that is on the right of this user's name, select **Unassign key**.



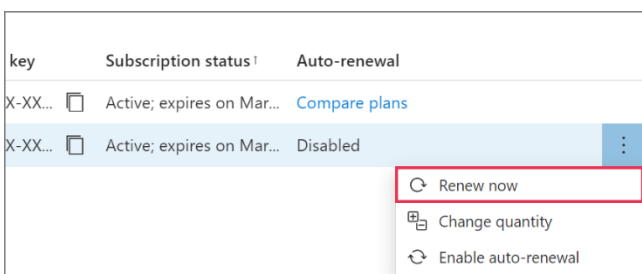
- 2 Select the user to whom you want to transfer the subscription key. On the **More** menu that is on the right of this user's name, select **Assign key**.



- 3 Select the subscription key from the list of available ones.

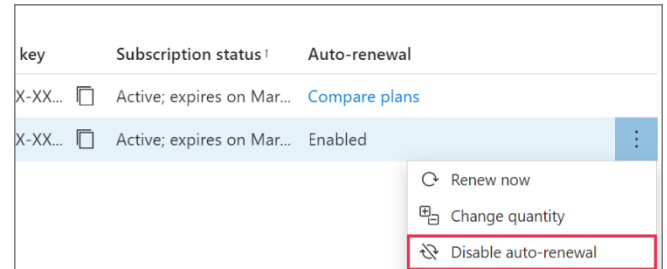
How to renew a subscription

Go to the **Manage account** tab. On the right of a subscription that you want to renew, open the **More** menu. Select **Renew now**.

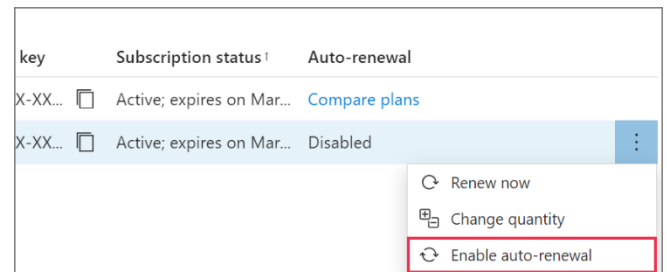


How to disable and enable auto-renewal

To cancel auto-renewal, go to the **Manage account** tab. On the right of a subscription, open the **More** menu and select **Disable auto-renewal**.

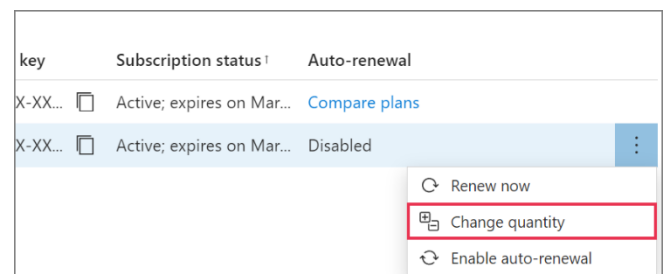


If you want a subscription to be renewed automatically, select **Enable auto-renewal**.



How to change the quantity of licenses

On the **Manage account** tab, open the **More** menu that is on the right of a subscription and select **Change quantity**.



Using the sidebar that will appear, enter the total number of seats, and select **Change**.

Our e-commerce service provider's webpage will automatically open. To place your order, enter the delivery email address associated with the original purchase and click **Continue to checkout**.

Learn more

- Manage users
ablebits.com/docs/outlook-shared-templates-manage-company-users
- Manage teams
ablebits.com/docs/outlook-shared-templates-manage-company-teams
- Manage subscriptions
ablebits.com/docs/outlook-shared-templates-manage-company-subscriptions



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- Shared Email Templates how-to videos
ablebits.com/docs/outlook-shared-templates-videos

