


## Create a company or team account

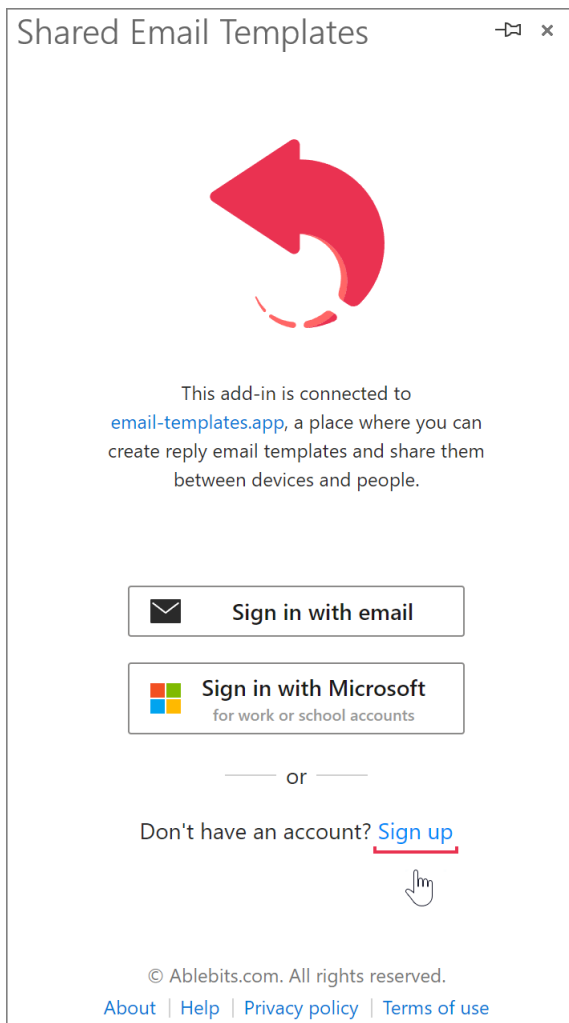
When creating a company or team account in Shared Email Templates, you can choose between *signing up with email* and *signing up with Microsoft*.

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.

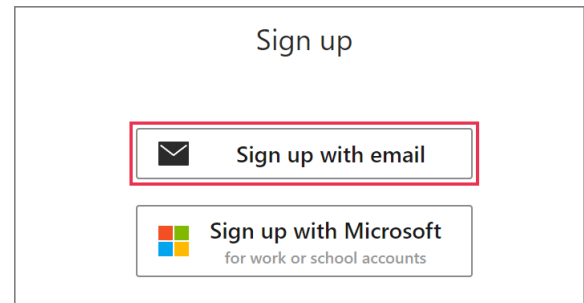
 After signing up with email, it won't be possible to sign up with Microsoft.

### Sign up with email

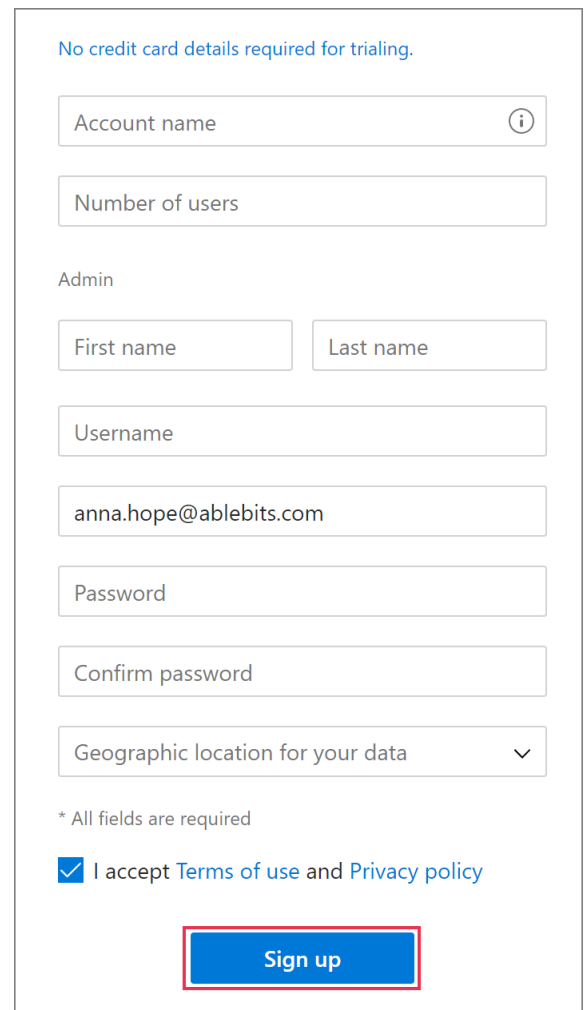
- 1 In Outlook, start the Shared Email Templates add-in and click **Sign up** on its pane.



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

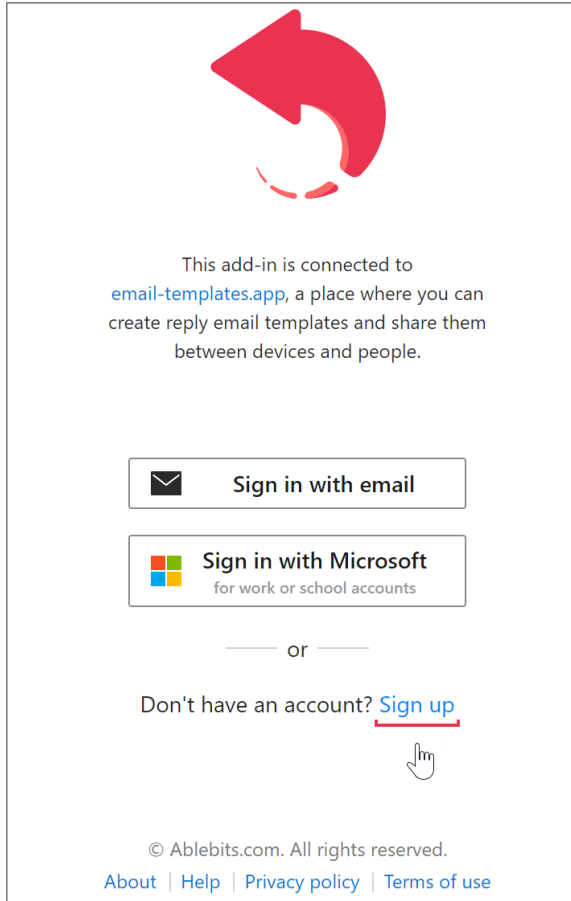


- 3 Fill out a sign-up form, decide where your data will be stored (in the United States or in the European Union), read the Shared Email Templates [Terms of use](#) and [Privacy policy](#), confirm your acceptance by selecting the corresponding checkbox, and then click **Sign up**.

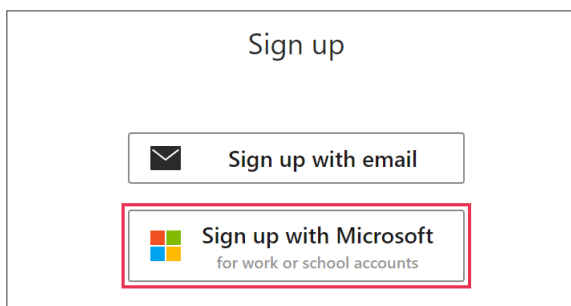


## Sign up with Microsoft

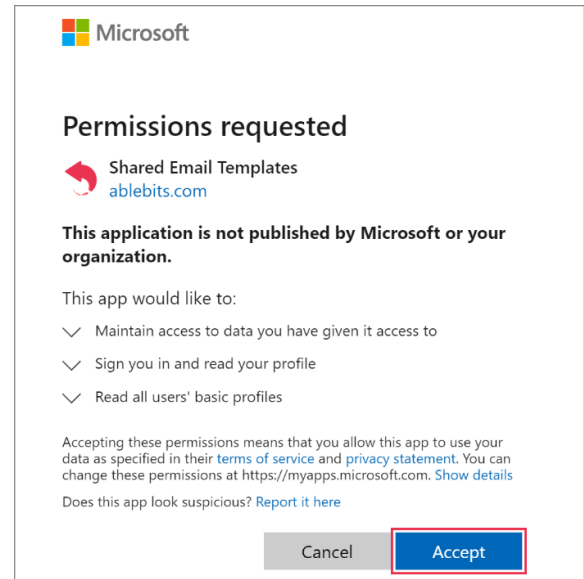
- 1 Start Shared Email Templates in your Outlook and click **Sign up** on the add-in pane.



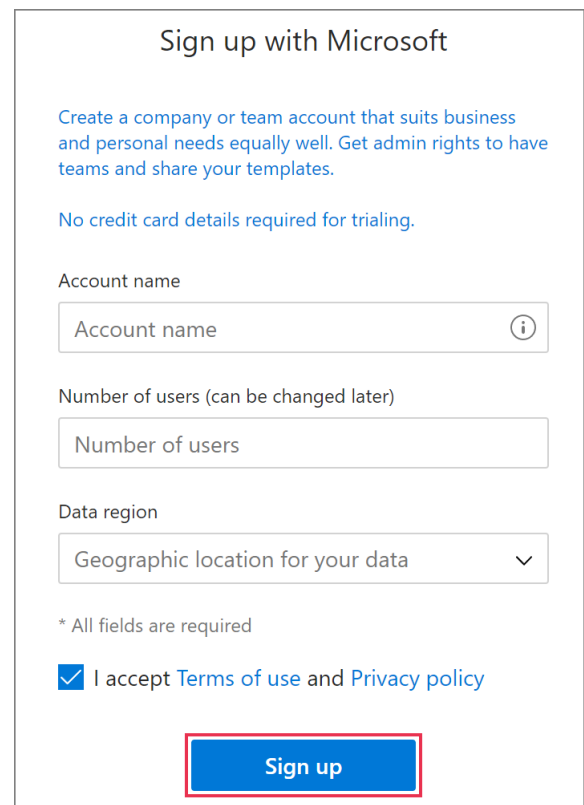
- 2 Select **Sign up with Microsoft**.



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



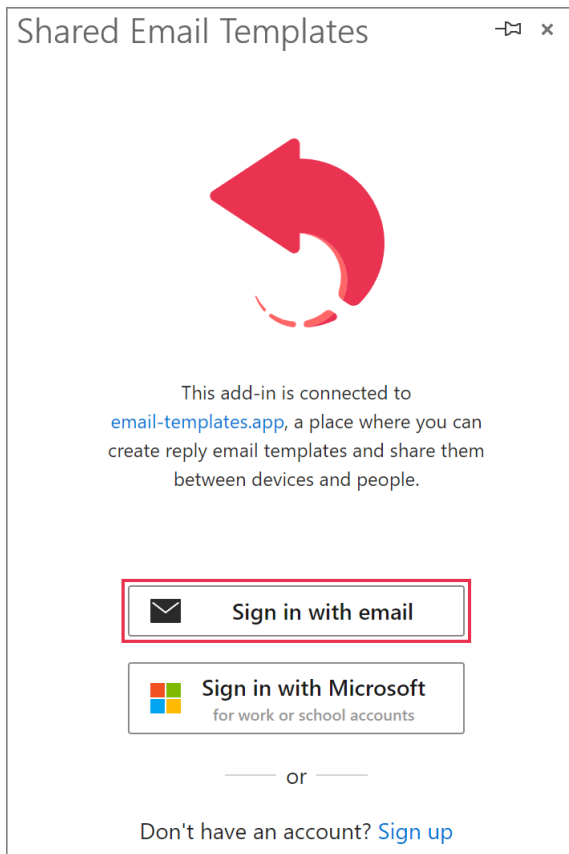
- 4 In the sign-up form that will appear, check your account name, and correct it if needed. Enter the number of trial users. Decide where your data will be stored: in the United States or in the European Union. Read and accept the Shared Email Templates [Terms of use](#) and [Privacy policy](#). Then 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**.

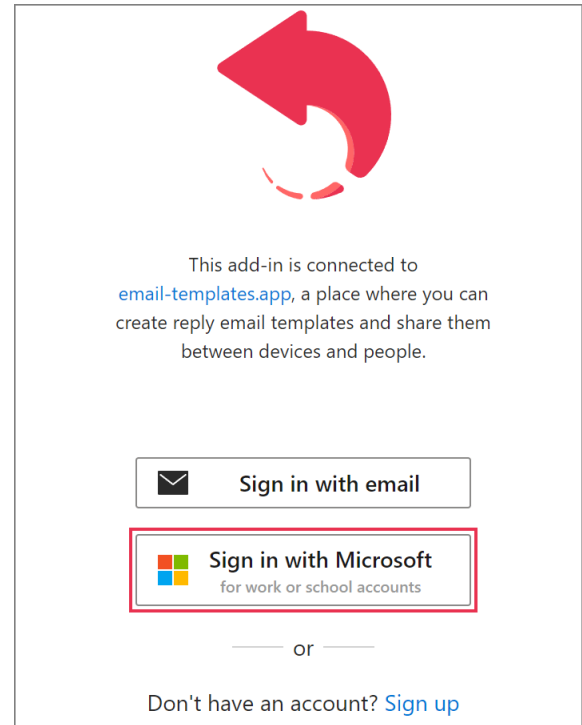
Sign in with email

☒ Remember me [Forgot password?](#)

**Sign in**

### Sign in with Microsoft

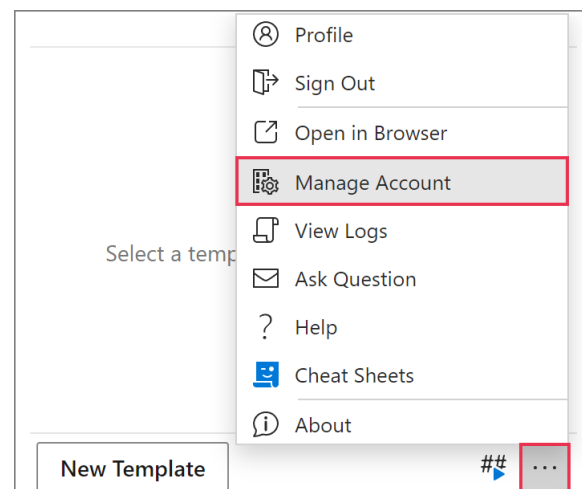
- 1 To sign in to an account that was created via signing up with Microsoft, select **Sign in with Microsoft**.



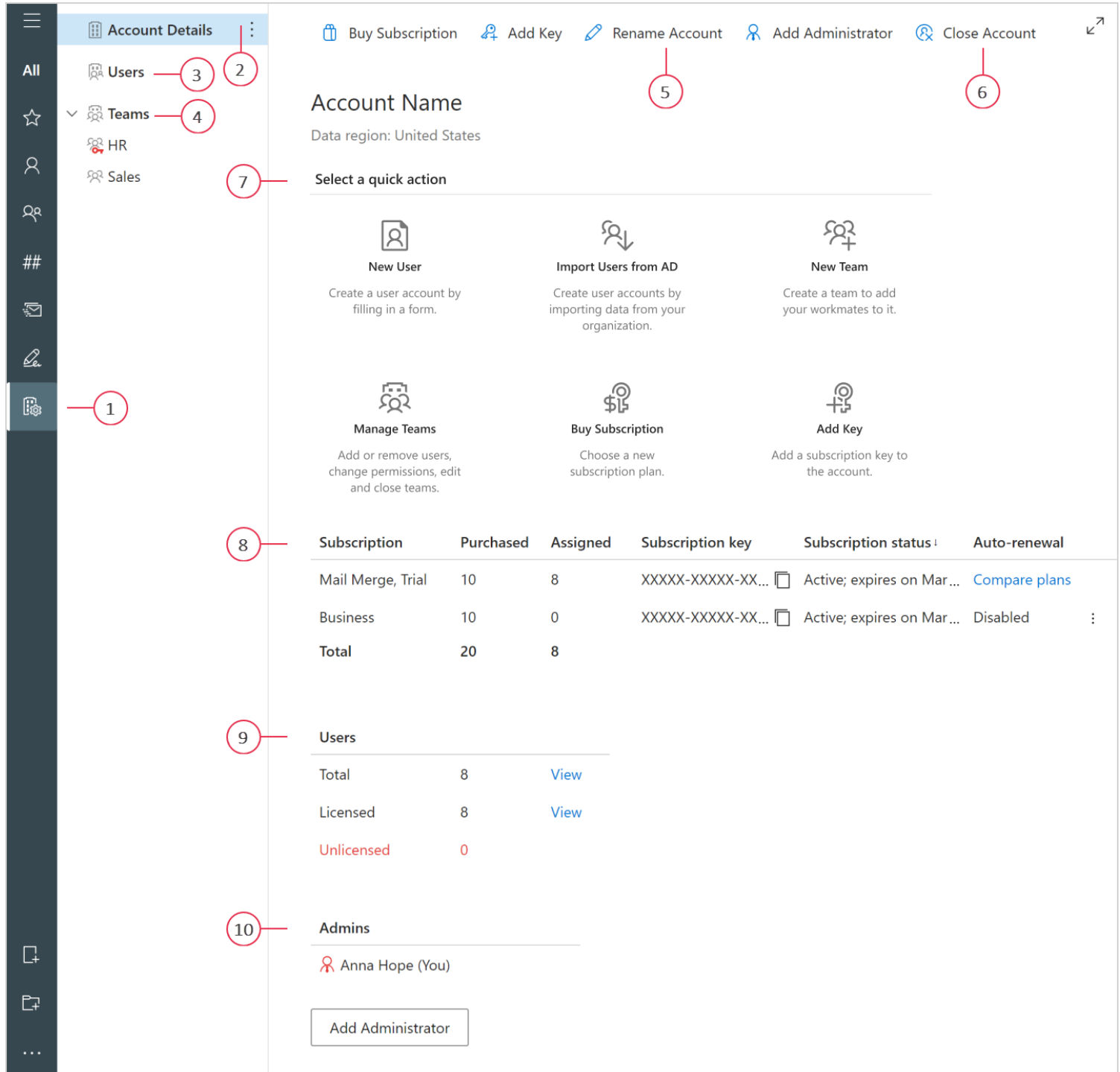
- 2 To proceed, use the Microsoft dialog that will appear on your screen.

## 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.



The screenshot shows the 'Account Details' page of the Shared Email Templates app. The interface includes a left sidebar with navigation icons, a top navigation bar with action links, and a main content area with various sections. Red circles with numbers 1 through 10 highlight specific elements: 1 points to the 'Manage Account' icon in the sidebar; 2 points to the 'Users' link in the left sidebar; 3 points to the 'Users' link in the main sidebar; 4 points to the 'Teams' link in the main sidebar; 5 points to the 'Rename Account' link in the top bar; 6 points to the 'Close Account' link in the top bar; 7 points to the 'Sales' link in the main sidebar; 8 points to the 'Subscription' table; 9 points to the 'Users' table; and 10 points to the 'Admins' section.

**Account Details**

Buy Subscription Add Key Rename Account 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 from AD**  
Create user accounts by importing data from your organization.
- 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	Subscription key	Subscription status	Auto-renewal
Mail Merge, Trial	10	8	XXXXX-XXXXX-XX...	Active; expires on Mar...	<a href="#">Compare plans</a>
Business	10	0	XXXXX-XXXXX-XX...	Active; expires on Mar...	Disabled
<b>Total</b>	<b>20</b>	<b>8</b>			

**Users**

Total	8	<a href="#">View</a>
Licensed	8	<a href="#">View</a>
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 Rename Account.** Click this button to change the name of your company or team account.
- 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 the 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

Teams

HR

Sales

Search user

Full name†

Username

Email address

Invited①

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

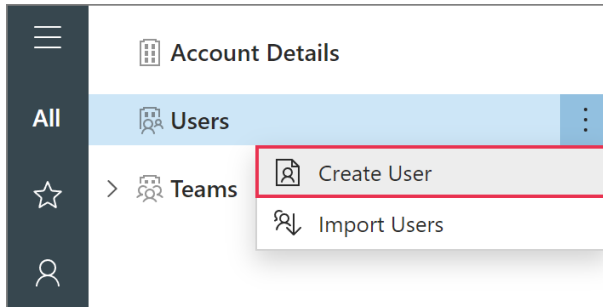
If you're an admin of a company or team account that was created via signing up with email, you can invite users to your account by importing them from Azure AD, an Azure AD group, or a CSV file. You can also create user accounts manually. Note that available licenses are required.

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.

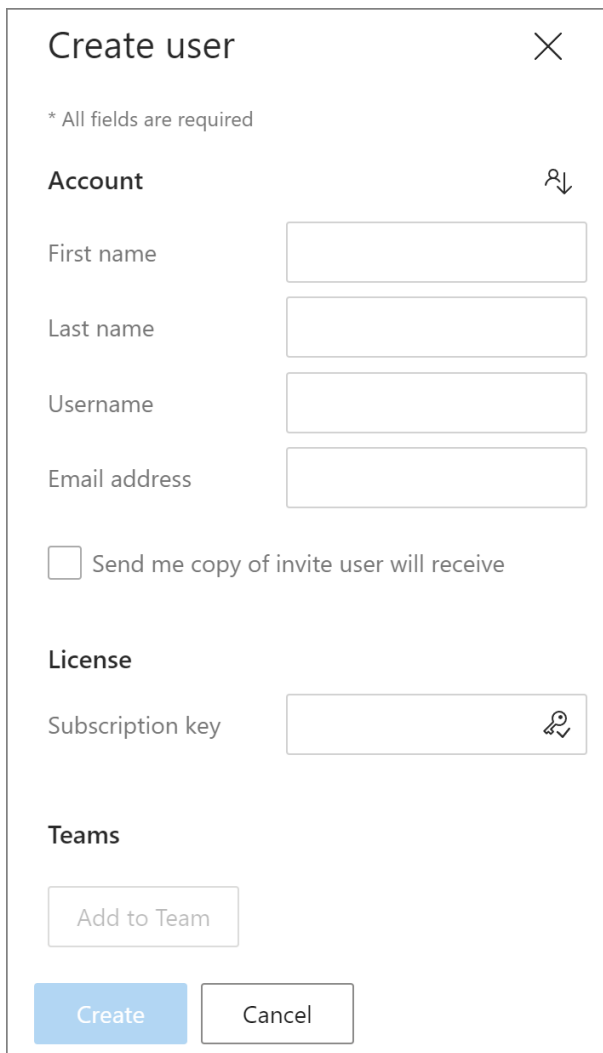
## How to create user accounts


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

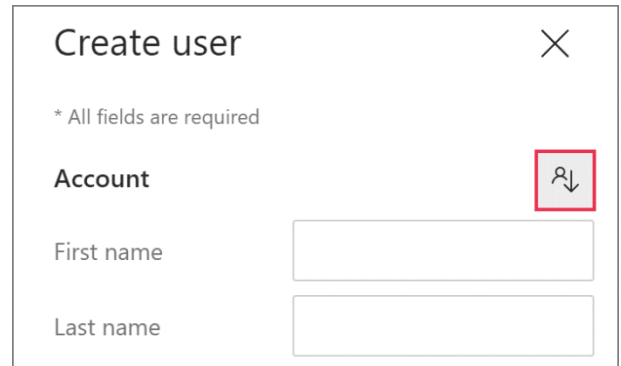
- 1 In the Shared Email Templates app, right-click **Users**, and then select **Create User**.



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

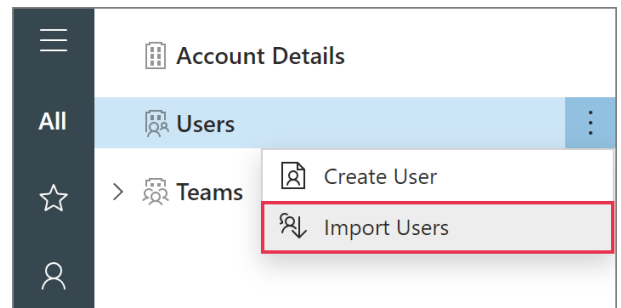
A screenshot of the 'Create user' form. It has a title bar with a close button. Below the title is a note: '\* All fields are required'. The form is divided into sections: 'Account' with fields for 'First name', 'Last name', 'Username', and 'Email address'; a checkbox for 'Send me copy of invite user will receive'; 'License' with a 'Subscription key' field; 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.

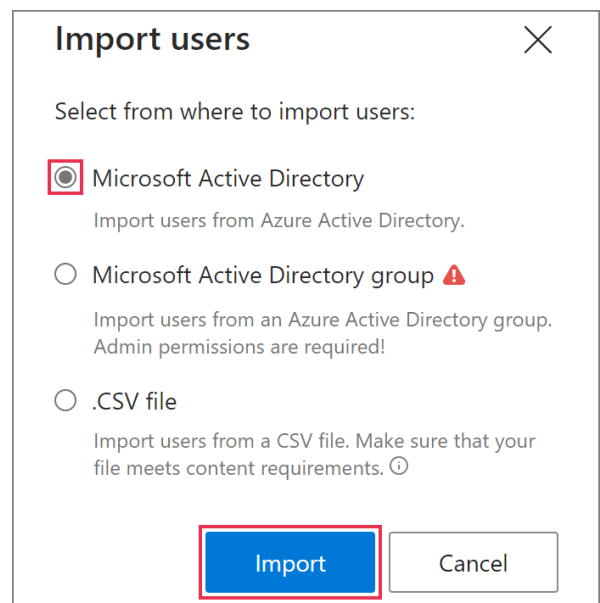
A screenshot of the 'Create user' form. The 'Account' section is highlighted with a red box, showing a dropdown icon. Below it are input fields for 'First name' and 'Last name'.

## How to import users from Azure AD

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



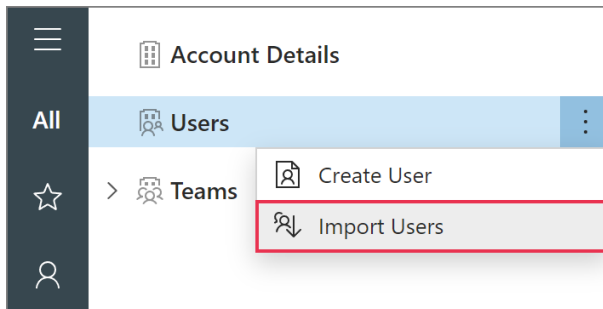
- 2 With the **Microsoft Active Directory** option selected, click the **Import** button.

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 and highlighted with a red box), 'Microsoft Active Directory group' (with a warning icon), and '.CSV file'. At the bottom are 'Import' and 'Cancel' buttons, with the 'Import' button highlighted by a red box.

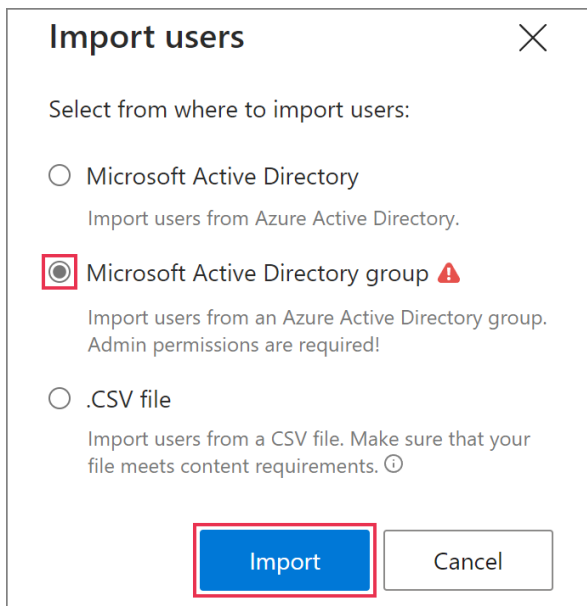
- 3 Sign in to your Microsoft work or school account.
- 4 Select users, and then click the **Import** button.


## 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.

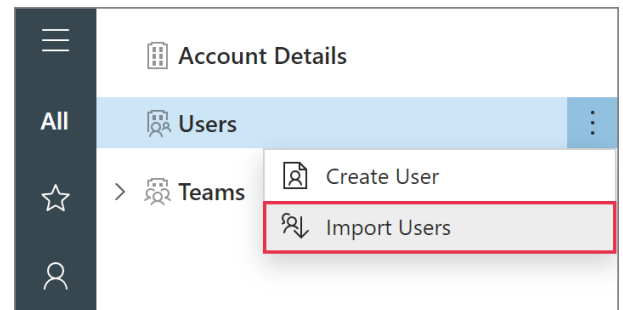
- 3 Sign in to your Microsoft work or school account.

- 4 Select a group. Then click the **Next** button.
- 5 Select users and click the **Import** button.

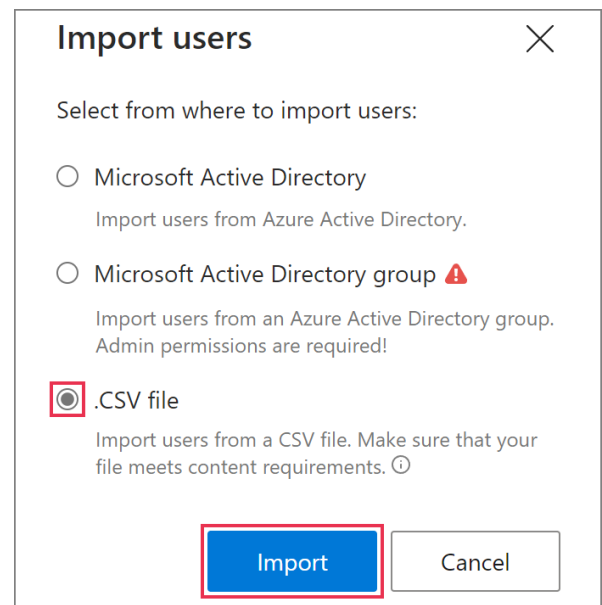
## How to import users from a CSV file


(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.

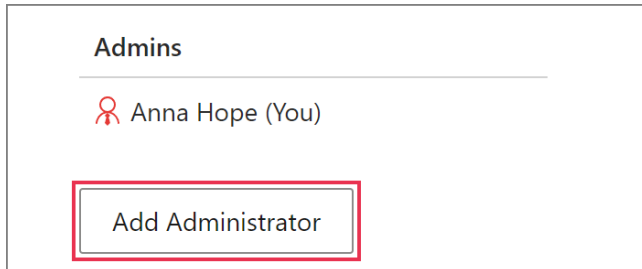


 To see a hint explaining how to prepare a CSV file for importing users, hover the cursor over the information icon.

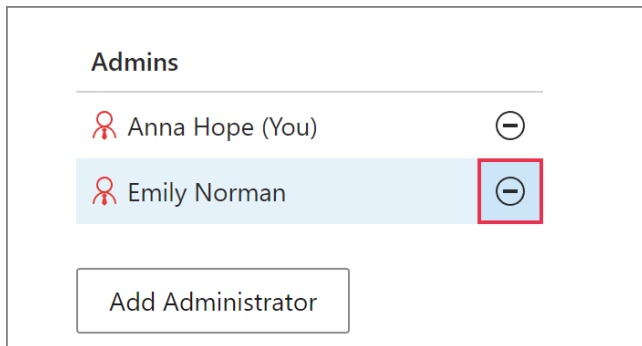
- 3 Select the necessary CSV file.

## 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	jakob.berg@ablebits.com

 To edit custom 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....
<input checked="" type="radio"/> Graham Lee	graham.lee	graham.lee@ablebits.c...
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**.

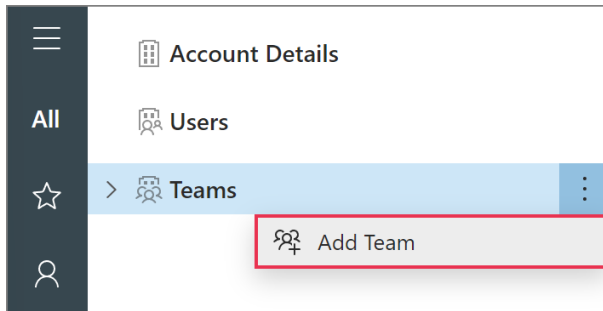
<input type="radio"/> Full name ↑	Username	Email address
 Anna Hope	anna.hope	anna.hope@ablebits.com
<input checked="" type="radio"/> Emily Norman	emily.norman	emily.norman@ablebits...
		
	erika.nordstr...	erika.nordstrom@ableb...
	ernie.pitcher	ernie.pitcher@ablebits....
	graham.lee	graham.lee@ablebits.c...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



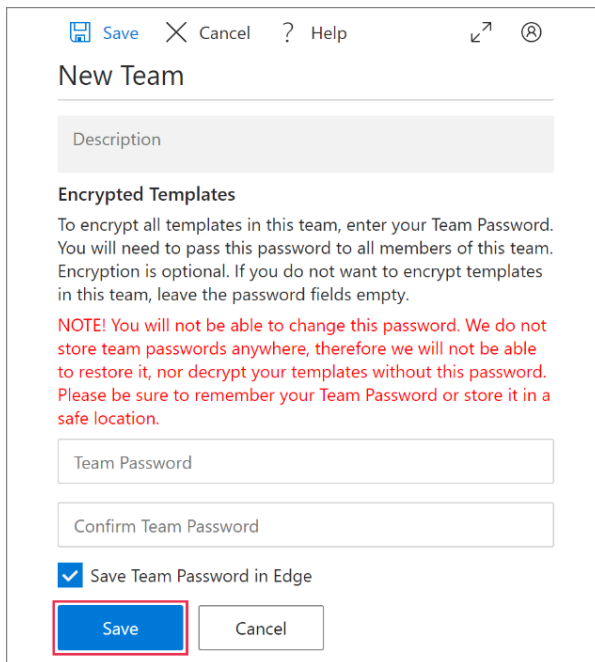
## Manage teams


### How to create a team

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



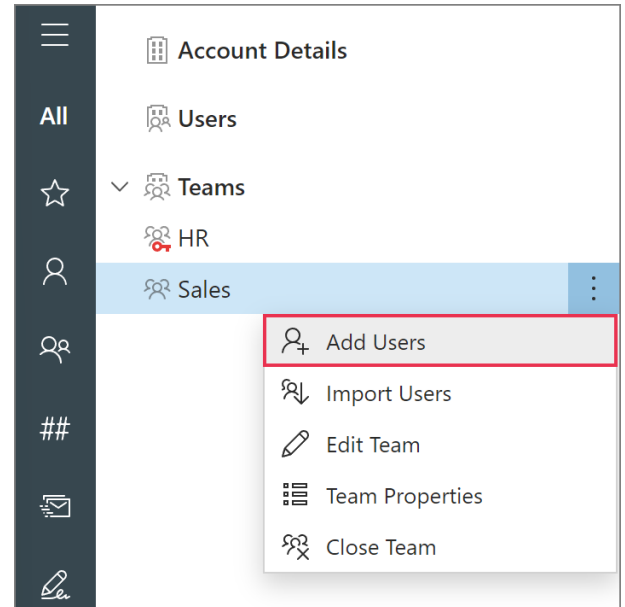
- 2 Enter the name of your new team. You can also add some description and encrypt the team with a password. When you're done, click **Save**.

A screenshot of the 'New Team' dialog box. At the top are buttons for 'Save', 'Cancel', and 'Help'. Below is a 'Description' text area. A section titled 'Encrypted Templates' explains that a team password is required to encrypt templates and provides a warning: 'NOTE! You will not be able to change 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.' Below this are two password input fields: 'Team Password' and 'Confirm Team Password'. There is a checkbox labeled 'Save Team Password in Edge' which is checked. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

 Once you encrypt a team, you'll be responsible for providing its members with the team password.

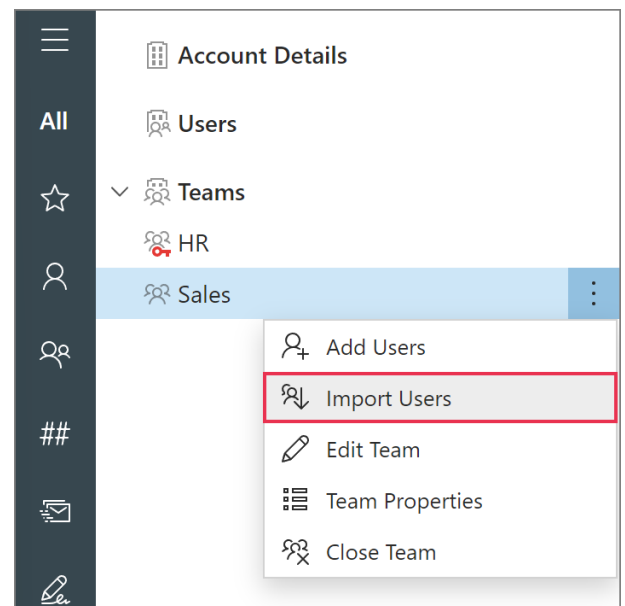
### How to add users to a team


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.

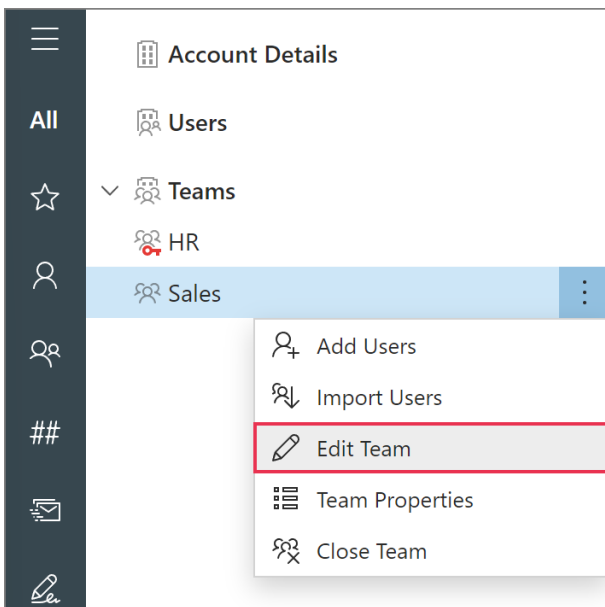
## How to remove a user from a team

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 <sup>1</sup>	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		

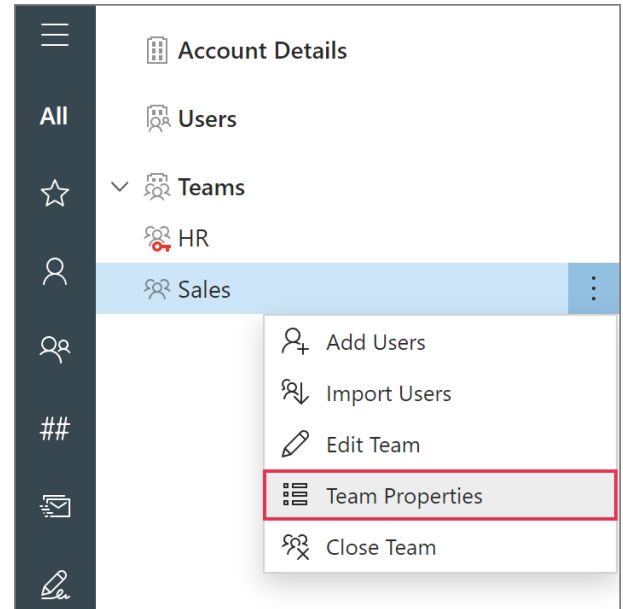
## How to edit a team

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**.



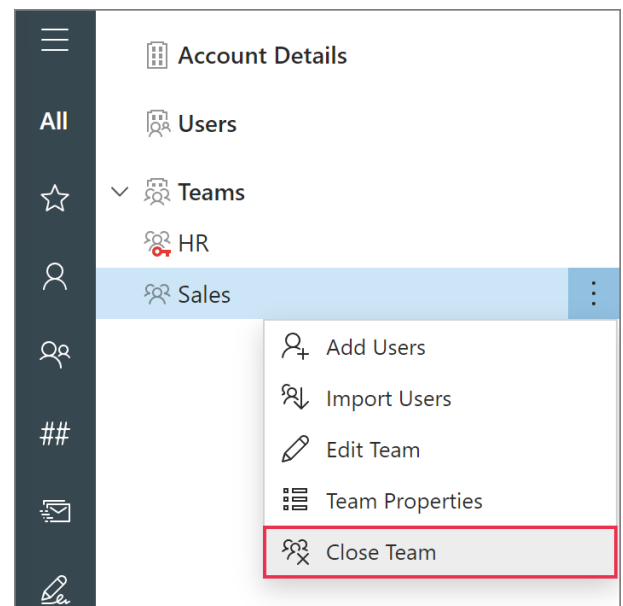
## How to edit team properties

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

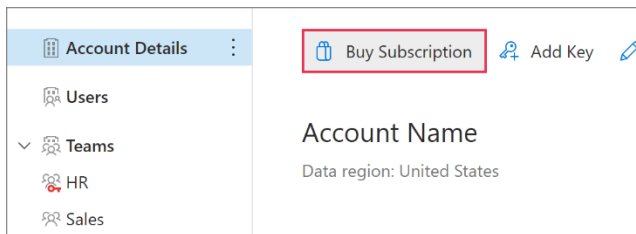
If a team is no longer needed, you can close it. Go to the **Manage Account** tab, right-click a team, and select **Close Team**.



## Manage subscriptions

### How to buy a subscription

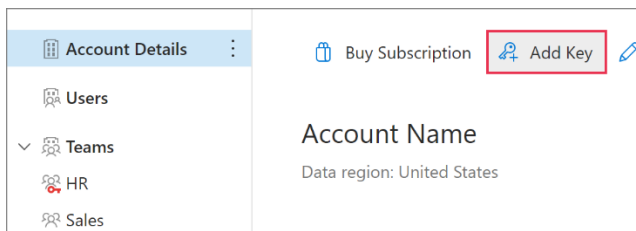
- 1 In the Shared Email Templates app, go to the **Account Details** section, and then select **Buy Subscription**.



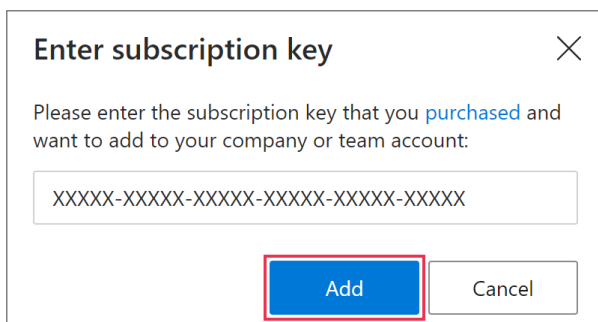
- 2 On the Shared Email Templates webpage that will automatically open, select the subscription plan that suits you best. Then click the **Subscribe** button.
- 3 You'll be redirected to our e-commerce service provider's webpage. Place your order there.

### How to add a new subscription key

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



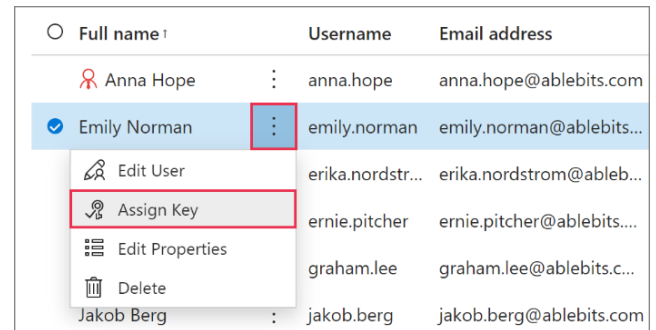
- 2 Enter your subscription key into the dialog that will appear. Then click **Add**.




The dialog box has a title 'Enter subscription key' and a close button (X). The text inside says: 'Please enter the subscription key that you purchased and want to add to your company or team account:'. Below this is a text input field containing 'XXXXX-XXXXX-XXXXX-XXXXX-XXXXX-XXXXX'. At the bottom, there are two buttons: 'Add' (highlighted with a red box) and 'Cancel'.

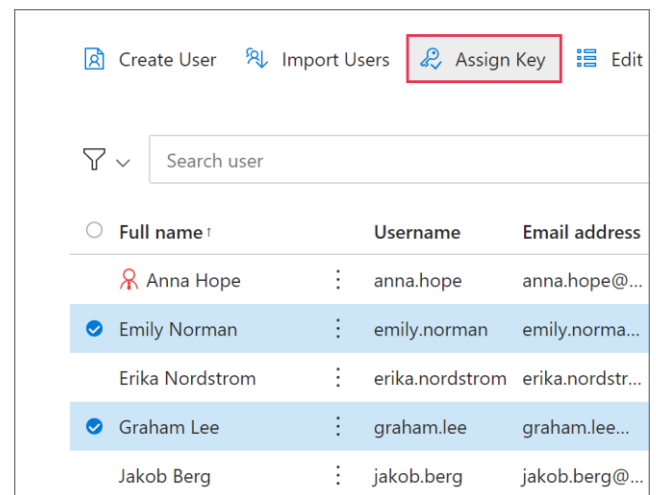
### How to assign a subscription key to a user

- 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 renew a subscription

In the Shared Email Templates app, go to the **Manage Account** tab. On the right of a subscription that you want to renew, open the **More** menu. From the list of available options, select **Renew now**.







key	Subscription status <sup>1</sup>	Auto-renewal
X-XX...	 Active; expires on Mar...	<a href="#">Compare plans</a>
X-XX...	 Active; expires on Mar...	Disabled
		 <ul style="list-style-type: none"> <li> Renew now</li> <li> Change quantity</li> <li> Enable auto-renewal</li> </ul>

## 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**.







key	Subscription status <sup>1</sup>	Auto-renewal
X-XX...	 Active; expires on Mar...	<a href="#">Compare plans</a>
X-XX...	 Active; expires on Mar...	Enabled
		 <ul style="list-style-type: none"> <li> Renew now</li> <li> Change quantity</li> <li> Disable auto-renewal</li> </ul>

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

key	Subscription status <sup>1</sup>	Auto-renewal
X-XX...	 Active; expires on Mar...	<a href="#">Compare plans</a>
X-XX...	 Active; expires on Mar...	Disabled
		 <ul style="list-style-type: none"> <li> Renew now</li> <li> Change quantity</li> <li> Enable auto-renewal</li> </ul>

## 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**.

key	Subscription status <sup>1</sup>	Auto-renewal
X-XX...	 Active; expires on Mar...	<a href="#">Compare plans</a>
X-XX...	 Active; expires on Mar...	Disabled
		 <ul style="list-style-type: none"> <li> Renew now</li> <li> Change quantity</li> <li> Enable auto-renewal</li> </ul>

Our e-commerce service provider's webpage will automatically open. Enter the delivery email address associated with the original purchase and click **Continue to checkout**. In the **Quantity** field, specify the total number of licenses you need. To place an order, click **Upgrade now**.

## Learn more

- Manage users  
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