
 This cheat sheet is for you if you've been added to a team in a Shared Email Templates company or team account as a **user with read-only permissions**, which means that you can't create or edit templates, you can only use them.

## How to start Shared Email Templates

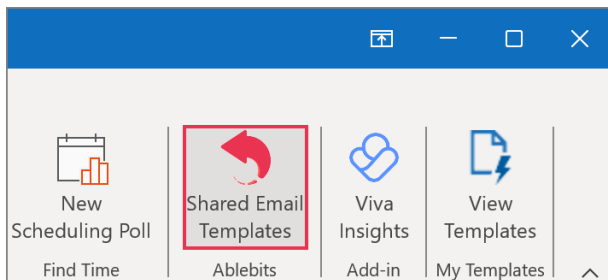
You can open the add-in pane in your Outlook:

- When reading an email.
- When replying to an email.
- When creating an email.

 If you open the add-in pane when reading emails, it won't be possible to insert templates.

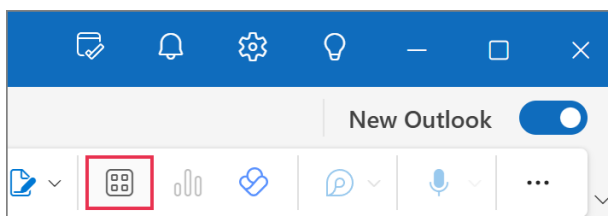
### Start in desktop Outlook for Windows

Select an email message, and then click **Reply**. Or select **New Email**. Then select **Shared Email Templates** on the ribbon.

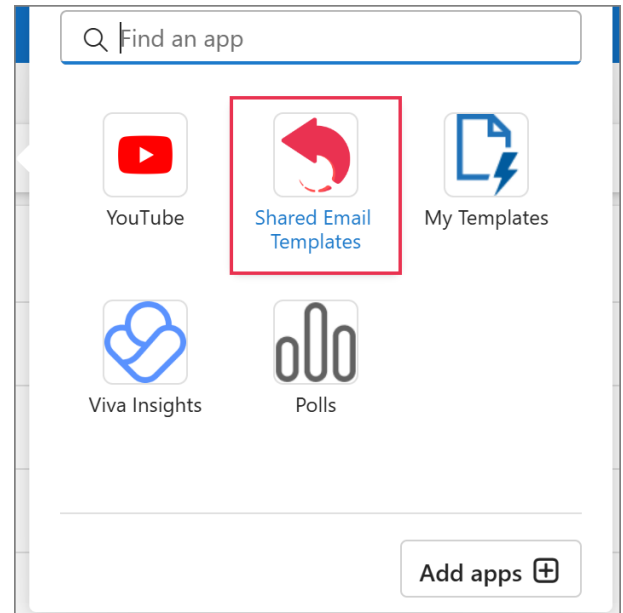


### Start in the new Outlook for Windows

- 1 Select an email message and click **Reply**. Or select **New mail**. Then select **Apps**.

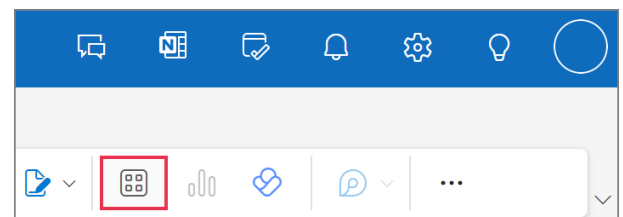


- 2 Select **Shared Email Templates**.

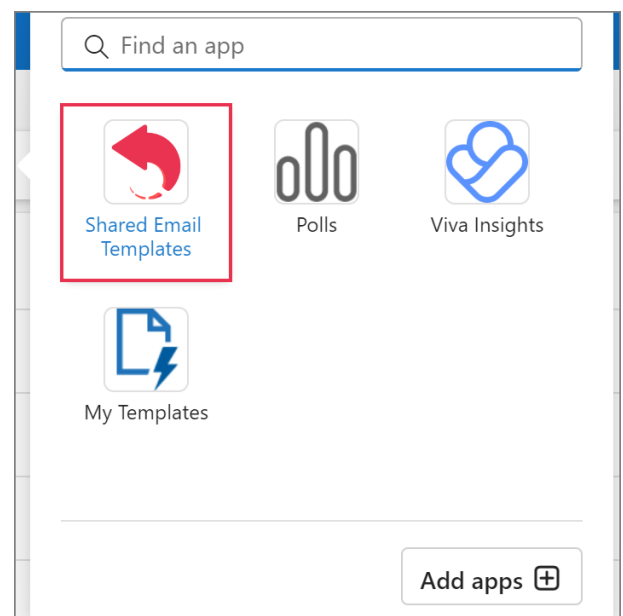


### Start in Outlook Online

- 1 Select an email message and click **Reply**. Or select **New mail**. Then select **Apps**.

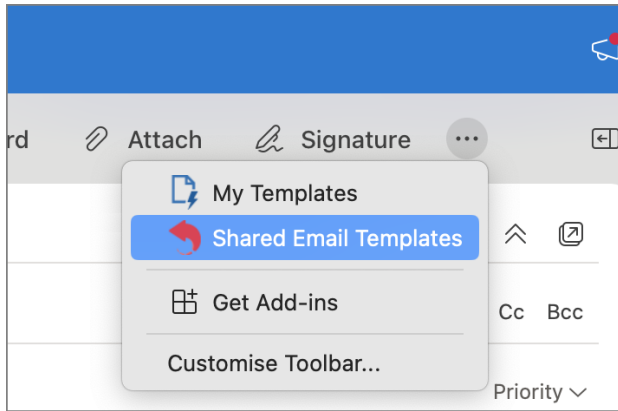


- 2 Select **Shared Email Templates**.



## Start in Outlook for Mac

Select an email message and click **Reply**. Or select **New Email**. Then click the three dots and select **Shared Email Templates**.

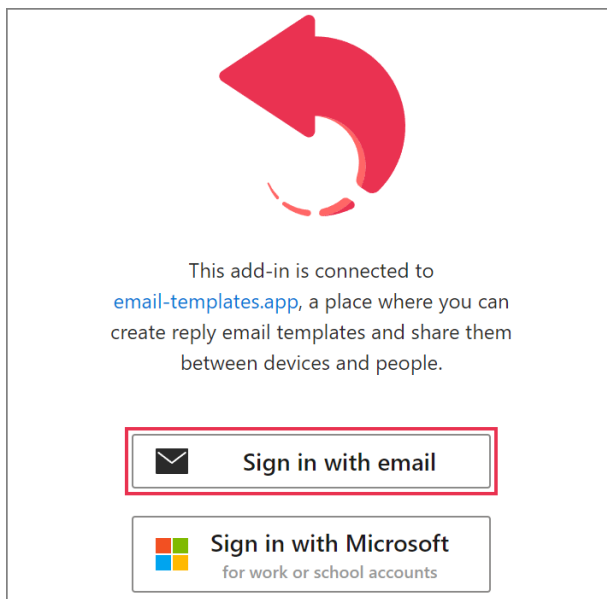


## You got an invite: How to sign in

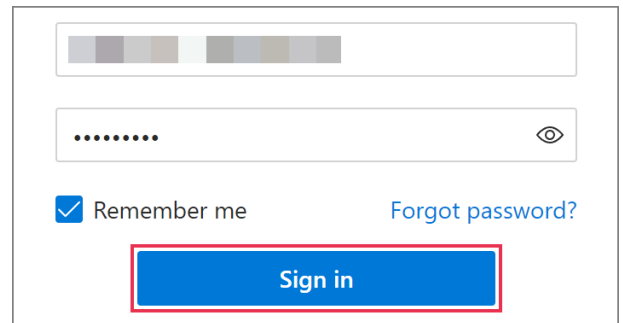
When a colleague invites you to join a Shared Email Templates company or team account, you'll get an invitation informing you what credentials you need for signing in. They may be either your email address and a one-time password or your work or school Microsoft account credentials.

### Sign in with email

- 1 On the add-in pane, select **Sign in with email**.

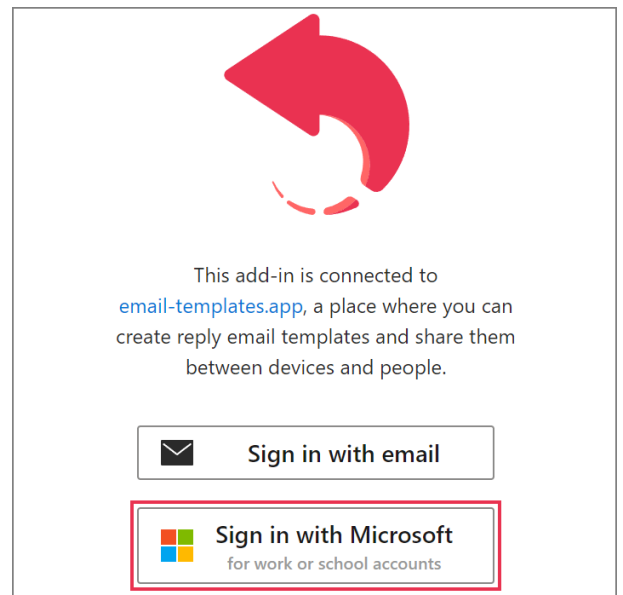


- 2 Enter your email address and password. Then click **Sign in**.


A screenshot of a sign-in form. It has two input fields: one for email address and one for password (masked with dots). Below the password field is a checkbox labeled 'Remember me' and a link 'Forgot password?'. At the bottom, a blue 'Sign in' button is highlighted with a red box.

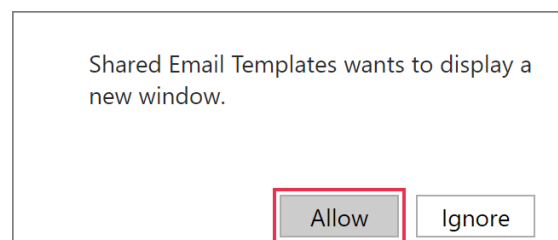
### Sign in with Microsoft

- 1 On the add-in pane, select **Sign in with Microsoft**.

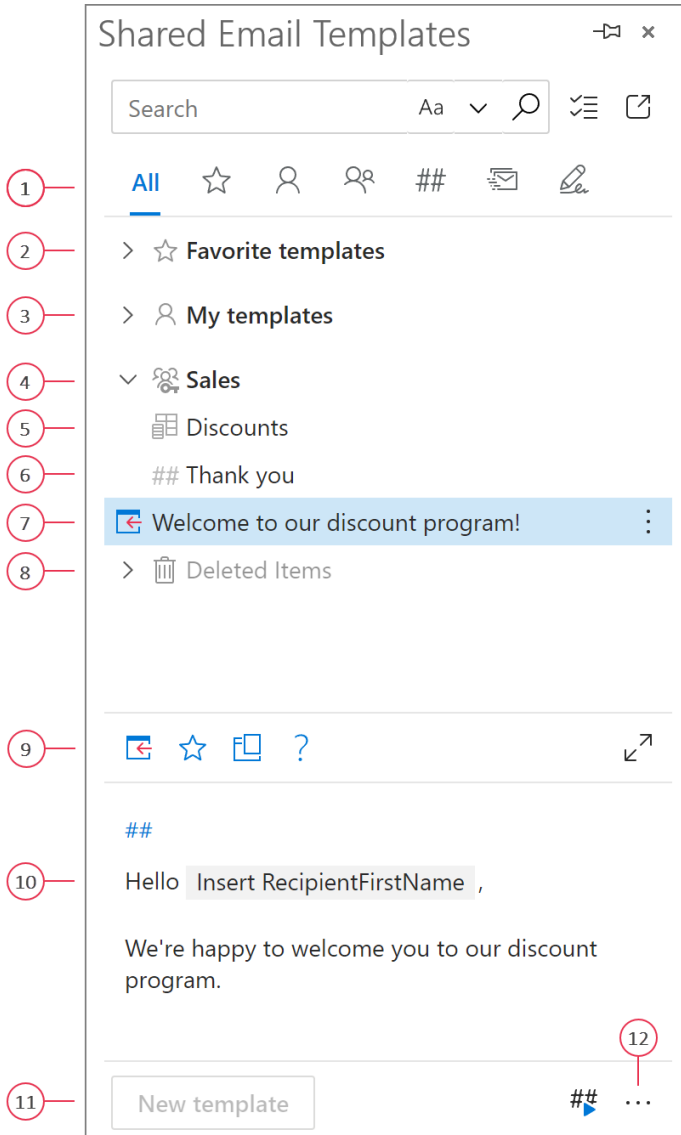


- 2 To proceed, use the Microsoft dialog that will appear on your screen.

 If there's a notification dialog saying the add-in wants to display a new window, select **Allow**.




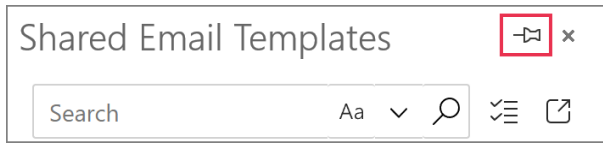
## What's there on the add-in pane



- 1 Choose a view: All templates, Favorite templates, My templates, Team templates, Shortcuts, Mail merge, or Signatures. An admin can hide My templates, Mail merge, and Signatures.
- 2 To add a template to Favorite templates, right-click it and select *Add to favorites*.

- 3 The default personal folders are Favorite templates and My templates. An admin can hide My templates.
- 4 Shared templates are stored in teams. A key icon means that the team is encrypted.
- 5 Values from datasets can be inserted into templates both automatically and interactively.
- 6 You can use [shortcuts](#) as building blocks for email messages.
- 7 To insert a template, select it and click the *Insert* button. You can insert a template when replying to an email or creating a new one, but not when reading an email.
- 8 Deleted templates get to the Deleted Items folder.
- 9 These are template action buttons available to you if you have read-only permissions: *Insert*, *Add to favorites*, *Copy to*, and *Help*. You can insert a template when replying to an email or creating a new one, but not when reading an email.
- 10 When you select a template, you can see its content in the preview pane.
- 11 Here is the *New template* button. It's for creating new templates. If you have read-only permissions for team templates, this button won't be available to you because you're not allowed to create team templates.
- 12 Via the *More* menu, you can open your profile, sign out, open the Shared Email Templates app in a browser, view logs, ask us a question, get access to online help and cheat sheets, check your subscription details and the product version. To get the contact details of your admins, select *Contact admins*.

 You can pin the pane to avoid the necessity of opening it each time you need it.



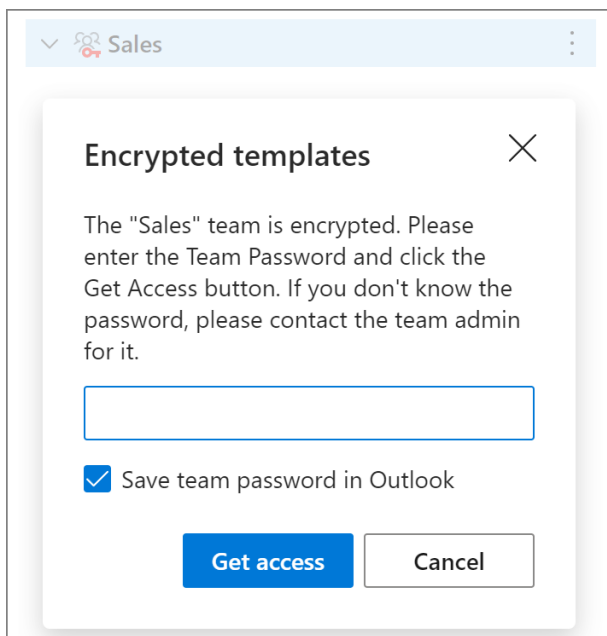
## You're added to a team: What's next


### Unencrypted team

As soon as you're added to a team that is not password-protected, you'll see the team and all its templates on the Shared Email Templates pane. You can start using the templates right away.

### Encrypted team

Encrypted teams are protected with a password and marked with a key icon. To get access to templates, you need to enter a team password.

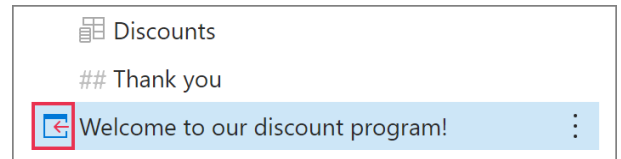


 We do not store team passwords. It's true end-to-end encryption. It's your team admin's responsibility to provide you with the team password.

## How to use templates

### Insert a template into an email message

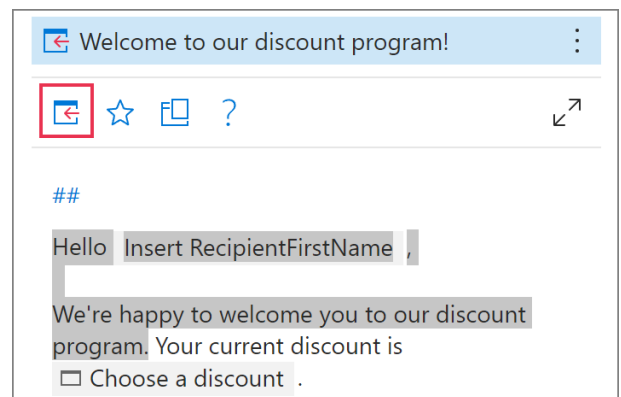
Select a template, and then click **Insert**.



You can also double-click a template to insert it.

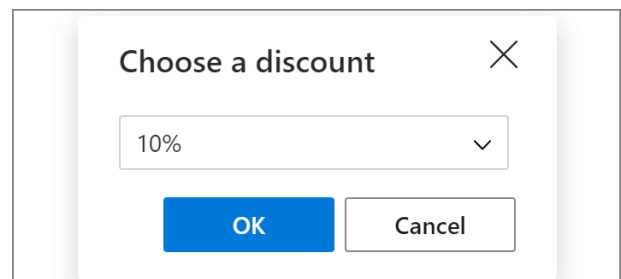
### Insert the selected part of a template

Select a template. In the preview pane, select any part of the template, and then click **Insert**.



### What to do if a dialog shows up

If a template you're inserting contains macros, macro placeholders will be replaced with some data in an email message either automatically or interactively. In the latter case, you'll see a dialog asking you to enter or select the required data.

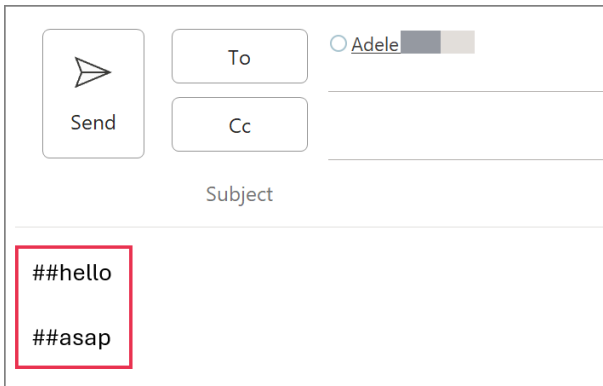


Enter or select the data, and then click **OK**.

## How to use shortcuts

A template shortcut is a short name of a template. It always starts with two hash signs (##). You can use shortcuts to construct your email messages.

- 1 Into the email message body, enter shortcuts.



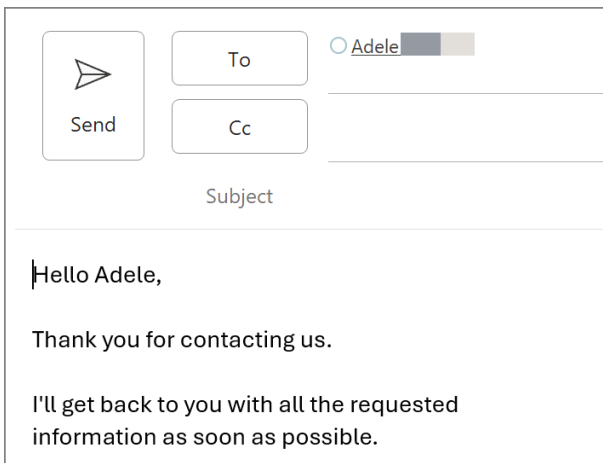
The screenshot shows an email composition window. The 'To' field contains 'Adele'. The 'Subject' field is empty. In the body, the text '##hello' and '##asap' are entered, with a red box highlighting them.

- 2 At the bottom of the add-in pane, select the **Handle shortcuts** button.



The screenshot shows the bottom of the add-in pane. There is a 'New template' button and a button with two hash signs (##) and a blue arrow, which is the 'Handle shortcuts' button. A red box highlights this button.

In the email message, the shortcuts will be replaced with the corresponding templates.



The screenshot shows the same email composition window as before, but now the body contains the text 'Hello Adele,' and 'Thank you for contacting us.' followed by 'I'll get back to you with all the requested information as soon as possible.'

## How to do a search

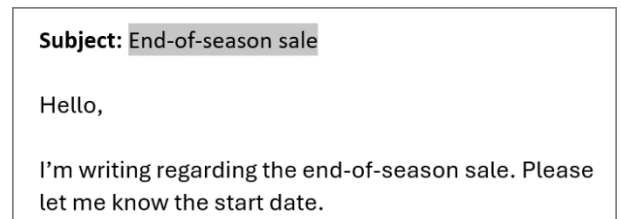
To look for some text in the names and contents of templates and folders, enter it into the search box. To make the search case-sensitive, click **Aa**.



The screenshot shows the search box in the add-in pane. The search box is empty. To the right of the search box are icons for 'Aa' (case-sensitive), a magnifying glass (search), a list icon, and a share icon. Below the search box are icons for 'All', a star, a person, a group of people, two hash signs (##), an envelope, and a pencil.

To search templates for some text that an email message contains, follow these simple steps:

- 1 In an email message that you're creating or replying to, select the text that you'd like to find in templates.



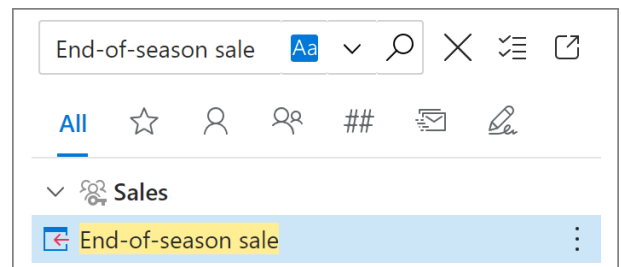
The screenshot shows an email message. The subject is 'End-of-season sale'. The body contains 'Hello,' and 'I'm writing regarding the end-of-season sale. Please let me know the start date.' The text 'End-of-season sale' in the subject is selected.

- 2 In the search box, click the magnifier icon.



The screenshot shows the search box in the add-in pane. The search box now contains the text 'End-of-season sale'. The magnifying glass icon is highlighted with a red box.

The search results will appear on the add-in pane.



The screenshot shows the search results in the add-in pane. The search box contains 'End-of-season sale'. Below the search box, there is a list of results. The first result is 'End-of-season sale' under the 'Sales' folder. It is highlighted with a blue background.

If you open the add-in when reading emails, a search for selected text won't work.



### Need more details?

- Shared Email Templates for Outlook documentation  
[ablebits.com/docs/#shared-email-templates-outlook](https://ablebits.com/docs/#shared-email-templates-outlook)