

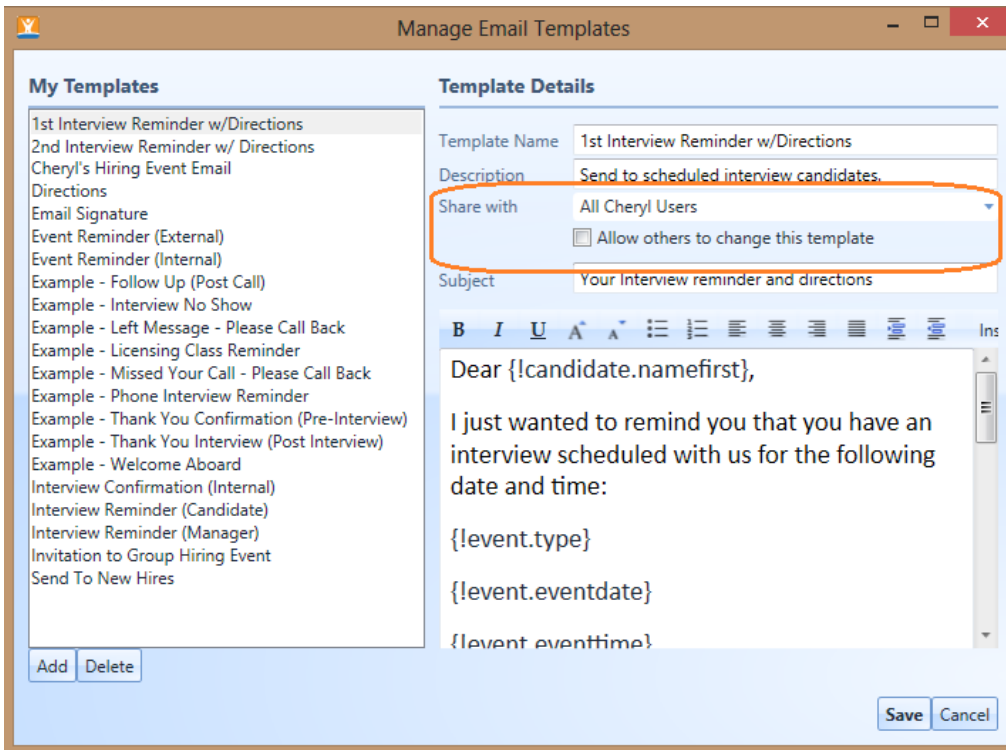


Quick Tip: Sharing & Controlling Templates

As you create new email and sms templates in InsuraSeek, you will now be able to share templates and control editing with the new "Share with" setting. Let's review its location and functionality.

Locating the "Share with" field.

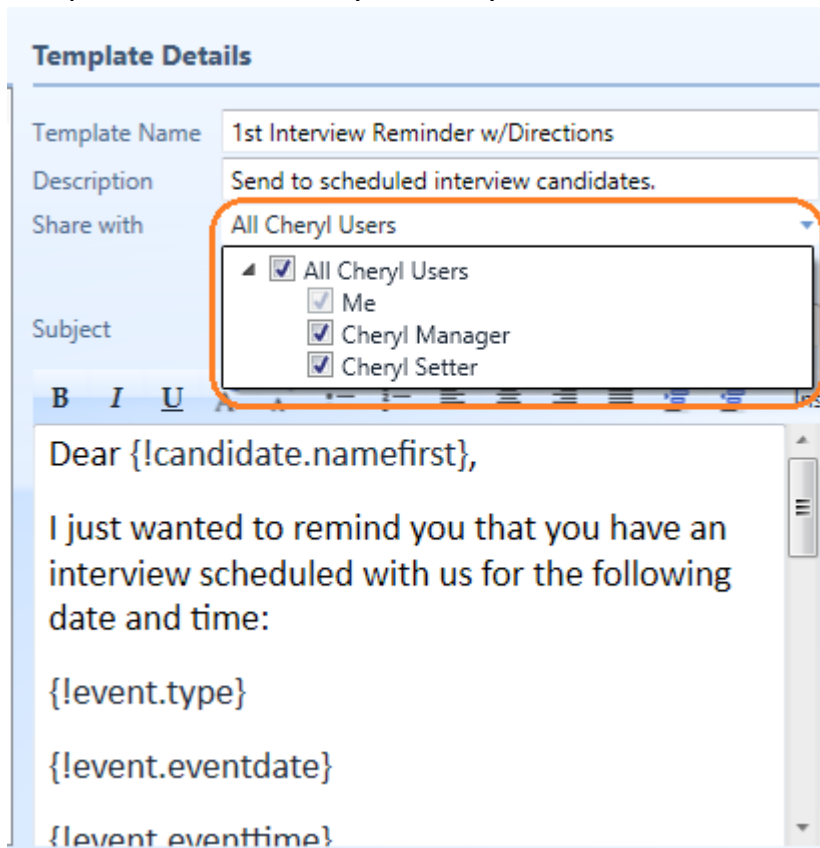
Begin in your email template library. Inside your templates, beneath the Template Name and Description fields, you will now see "Share with."



Designating who sees the template in their library.

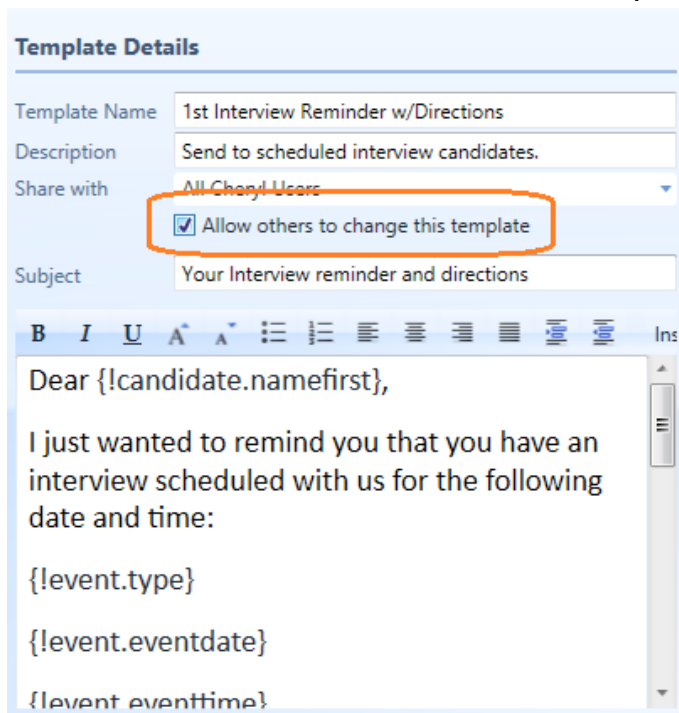
In the "Share with" drop down, you can select which users in your organization will see the

template in their library. Select your desired names from this list.



Giving users access to edit a shared template.

You can determine if users have access to make their own edits to the UNIVERSAL template. Please note: Allowing others to change the template means when someone makes a change to the template copy – it changes for EVERYONE's template. Turning off this ability will help you control the content that comes out from your organization.



When you have finished editing your template, be sure to **click save** to preserve your changes!

