Cloning a Template Shared With Your Team

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Click on the 'Templates' filter lozenge above the top row of the dashboard to list only the templates in your inbox.

This allows you to easily see all the templates that you have access to.

Templates shared with your team appear in the dashboard just like any other template.

Please note that doing so changes or deletes the template for all users who can access



Template Managers can also clone a local copy of a shared template for their own team.

Please note that a local copy of this sort will **not** be updated when the original template is revised.

To clone the template to a new contract within your team, open the template and select 'Clone as New' from the blue drop-down 'Actions' menu.

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Clone as New

Insert Content from Contract/Temp

Export

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RISK DETAILS

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Users with access to the Admin Portal can assign the Template Manager permission to users on a team by team basis by editing the user's entry.



it, not just for your team.