CHECKLIST · TECHNOLOGY

How to set up a shared business inbox without sharing a password

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digitaladvisors.com.au/journal/shared-business-inbox-without-sharing-password/

- [ ] **List every address that more than one person signs in to.** Typical ones are info@, accounts@, bookings@ and support@.
- [ ] **In Microsoft 365, create a shared mailbox for each.** In the admin center, go to Teams & Groups, then Shared mailboxes, then Add a shared mailbox.
- [ ] **Add each person by name with Full Access and Send As.** Access given through a security group won't make the mailbox appear in Outlook automatically.
- [ ] **Ask your Microsoft 365 administrator to confirm sign-in is blocked on the shared mailbox account.** Microsoft says to block it and keep it blocked.
- [ ] **Change where sent mail is saved.** In the shared mailbox settings, select Edit under Sent items so replies are kept in the shared mailbox.
- [ ] **In Google Workspace, check the Admin console Home page for "Set up a shared email address".** Google says to use delegated Gmail accounts if the shared inbox feature hasn't reached you yet.
- [ ] **Change the old shared password once everyone has moved.** This applies to any ordinary mailbox or Google account that staff used to sign in to together.
- [ ] **Reset the password when you convert a leaver's Microsoft 365 mailbox to a shared mailbox.** Keep the user account, because the shared mailbox depends on it.

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