

CHECKLIST · TECHNOLOGY

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

Published 13 October 2026. Read the full story, sources and any updates at digitaladvisors.com.au/journal/shared-business-inbox-without-sharing-password/

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- ☐ **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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