

# Set up a shared mailbox

Configure a shared mailbox

Version 8.0



This documentation is provided under restrictions on use and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this documentation, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

# Table of Contents

Configure a shared mailbox

4

# Configure a shared mailbox

PRODUCTS: ALL CREATIO PRODUCTS

Shared email account enables managing shared access to the mailbox: set the access permissions to read emails for different groups of users, enable processing of incoming emails and sending emails from one address for different users or groups of users.

Shared mailboxes are commonly used:

- For case registration, sending notifications and emailing between the customers and the service team in the process of case resolution or for processing requests about company products.
- For processing information requests about company products. For example, you can create a shared sales department mailbox and grant access to the advertising department employees for sending newsletters and special offers.

**Note.** All incoming and outgoing emails from the shared mailbox, will only be visible in the communication panel, timeline and history to the user who registered this mailbox in Creatio and to the users which get the access permission to work with emails.

**Attention.** To set up a shared mailbox, you need permission to perform the [ *Access to shared account setup* ] and [ *Shared mailbox synchronization setup* ] system operations. [Managing access to system operations](#) is covered in a separate article.

Shared mailbox setup is similar to personal mailbox setup, but it also requires the following actions:

The following options can be used for managing access to the mailbox:

1. Select the [ *Allow shared access* ] option on the email settings page.
2. Click the + button to add employees who will use the shared mailbox. Click the 🔍 button in the displayed field and specify system user or role to grant access to a group of users. Click the [ *Save* ] button. If you want to grant access to the mailbox for a number of users or groups, repeat the previous step for each user or group.
3. Configure access permissions for the shared mailbox (access emails, sending emails or setting up mailbox) for the added users. For this, select the checkbox in the corresponding column ([Fig. 1](#)).

Fig. 1 Example of configuring permissions to a shared mailbox

Allow shared access

Allow other users to send emails using this mailbox or access emails downloaded from this mailbox

Which access rights to add? +

User / Role	Access emails	Send emails	Setup mailbox
Client service department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- a. "Access email" - enables to display emails received on this mailbox in the system sections, for example, on the [ *Timeline* ] tab. At the same time, the emails from the shared mailbox will not be displayed in the communication panel of the user with granted access to emails. This option is used if several employees process emails from one mailbox. For example, for cases registered via email.
  - b. "Send emails" - enables to select this mailbox in the [ *From* ] field when sending emails, setting up business processes and display incoming emails at the communication panel.
  - c. "Setup mailbox" - enables modification of the mailbox settings by several administrators.
4. Save the changes