Example: Delegation Setup

Best Practices: The Executive and Assistant Delegation Setup

When an executive relies on an assistant to manage their schedule, inbox, and daily action items, seamless access is essential. By combining mailbox, calendar, and tasks sharing, you can create a highly efficient delegation workflow that keeps everyone on the same page.

Note on access: To share resources across your organization, the main shared account must be an Enhanced mailbox. Because you can mix mailbox types under a single domain, the team members receiving access can use either Basic or Enhanced accounts.

Step 1: Share the Executive Mailbox

Log in to the executive's webmail account and share the inbox with the assistant to help filter out the noise. Set the permission level to "Manage" or "Write and delete" so the assistant can read, reply to, and organize emails into appropriate folders.

- See the step-by-step Mailbox Sharing guide

Step 2: Share the Calendar for Scheduling

Give the assistant access to the executive's calendar to easily book and manage meetings. Grant them "Write and delete" or "Manage" access so they can add new appointments, adjust times, and remove cancellations on the executive's behalf.

- See the step-by-step Calendar Sharing guide

Step 3: Share a Task List for Daily Deliverables

Create and share a specific Task list to track daily action items and projects. Set the assistant's access level to "Write and delete" so they can add new to-dos, update statuses, and check off completed tasks in real time.

- See the step-by-step Tasks Sharing guide

Step 4: Enable "Send As" Permissions (Optional)

If the assistant needs to send emails directly from the executive's email address, a domain administrator must grant "send as" permissions for the executive's mailbox in the Admin Panel.

- See the step-by-step Admin Panel "Send As" Permission guide

Step 5: Reply as the Executive (Optional)

When composing or replying to an email on behalf of the executive, the assistant will click the **From** drop-down menu at the bottom of the compose window and select the executive's address before sending.

- See how to change the "From" address when sending

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