

## Emailgistics Onboarding Pre-flight Checklist

Please review the following items to ensure the shared mailbox is ready to be onboarded. Verifying these items will help ensure a trouble-free onboarding experience.

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### Microsoft 365 Configuration

Verify that your organization is using Microsoft 365 Exchange Online. If using a hybrid environment, ensure synchronization of users and shared mailboxes with Microsoft 365.

### Admin Access

Ensure that a Microsoft 365 Global Admin is available for the onboarding session. This will allow for necessary configuration changes during the session.

### Mailbox Type

Confirm that the mailbox for onboarding is configured as a shared mailbox, not a user mailbox or distribution list. Refer to the provided instructions on converting user mailboxes and distribution lists to shared mailboxes here.

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## Optional Configuration

### App Registration Method

Optional: Complete the Active Directory App Registration in your Microsoft 365 tenant for Emailgistics, following the instructions in our App Registration onboarding method technote. While this step can be done during the onboard session, completing it in advance will expedite the onboarding process.

### Mailbox Authentication Method

Ensure the mailbox intended for onboarding via mailbox authentication has a password assigned to it. The password serves as a measure to grant permissions to Emailgistics via SSO.  
 The Global Admin responsible for onboarding should know the password associated with the mailbox to facilitate the authentication process and ensure a smooth onboarding experience.

**Note:** *If you are using a hybrid environment, it is essential to synchronize the password between Exchange, Microsoft 365, and Active Directory (AD) to prevent any sign-in issues and ensure seamless access to the mailbox across all platforms. This synchronization can be performed through the Active Users section in the Microsoft 365 admin center.*

## User Permissions

- Ensure that each user in the shared mailbox has a Microsoft 365 license and has full permissions (read+manage and send as) in the shared mailbox being onboarded.
  - Ensure that Shared Mailboxes are auto-mapped to users' Outlook Desktop Application (unless strictly using Outlook Web App). If the mailbox is added as an account to users' Outlook manually, remove the shared mailbox from Outlook to allow default automapping to occur.
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## Inbox Cleanup

- Before onboarding, ensure the shared mailbox's Inbox has fewer than 1000 emails. Excessive numbers of old emails may significantly slow down the onboarding process. You can archive old messages or create a sub-folder called "Old Inbox" in Outlook and move the messages there. Note that messages moved to a sub-folder in the Inbox will not be synced.
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## PowerShell Requirements

- Ensure that the Global Admin responsible for onboarding uses a computer running Windows 10 or later, with PowerShell 5.1 or later. Emailgistics utilizes a PowerShell script to identify the users associated with the Shared Mailbox during onboarding.
- Ensure the following modules are available in your PowerShell environment:

### Microsoft Graph Module

- **Check if installed:**

```
Get-InstalledModule -Name Microsoft.Graph*
```

- **Install (if not installed):**

```
Install-Module -Name Microsoft.Graph -Scope CurrentUser
```

### Exchange Online Management Module

- **Check if installed:**

```
Get-InstalledModule -Name ExchangeOnlineManagement
```

- **Install (if not installed):**

```
Install-Module ExchangeOnlineManagement -RequiredVersion 3.7.1 -Force
```

You may be prompted to trust the repository. If so, respond with `Yes` or `Yes to All`.

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## **Outlook Add-in Compatibility**

Emailgistics offers an Outlook Add-in to enhance functionality and reporting accuracy. The Add-in is compatible with Outlook on the web (OWA) and Outlook Desktop. For Outlook Desktop users, make sure they have the Microsoft 365 version of Outlook version 2105 (build 14026.20246) or a later version. If users are not on the 365 version of Outlook, it is recommended that they are upgraded to Outlook 365.

If you have any questions or need any assistance please reach out to [support@emailgistics.com](mailto:support@emailgistics.com).