BILL'S HOME TECH
Home & Small Business Tech Solutions

BILL'S COMPLETE MANUALS

Microsoft 365 for Business

Email on your own domain, shared mailboxes, Teams and safe sign-in — explained in plain English, one step at a time

A plain-English guide for small business owners

Take your time — you can't break it

Written for you by Bill — Bill's Home Tech

(330) 200-8042 · BillsHomeTech.com

For Microsoft 365 Business Basic, Standard & Premium · facts current November 2026

What's Inside

This is your guide to Microsoft 365 for a small business: professional email at your own web address, a shared inbox for the whole office, Teams for chat and meetings, files in OneDrive and SharePoint, and the security settings that keep it all yours. Read it in any order and at your own pace. Each chapter explains what a feature does *for your business*, then gives slow, step-by-step directions. Microsoft moves its buttons around now and then, so when a label on your screen doesn't match exactly, look for the closest word — the idea stays the same.

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PART 1

Getting Started

What Microsoft 365 for Business is, how it differs from the home plans, the words Microsoft uses, and what to gather before you begin. Start here.

CHAPTER 1

A Note from Bill

Hello, and welcome. If you run a small business — an insurance office, a dental practice, a contractor with a few crews, a shop with a front counter and a back office — you've probably heard that you "should be on Microsoft 365." Maybe your accountant mentioned it, maybe a customer asked why your email ends in **@gmail.com**, or maybe you already pay for it and aren't quite sure what you're getting.

I'm Bill. I've spent more than 30 years working with technology, and these days I help people here in Portage County get comfortable with theirs — including plenty of business owners who are terrific at their trade and would rather not spend evenings in an admin screen. I wrote this guide the way I'd explain it sitting across the desk from you: patiently, in plain English, and without trying to sell you anything.

What this guide will do for you

- Explain the business plans — Basic, Standard and Premium — and what they honestly cost as of November 2026.
- Walk you through putting email on **your own domain**, like **you@yourshop.com**.
- Show you how to add employees, give them licenses, and set up a **shared mailbox** for info@ or billing@ that several people can answer.
- Introduce Teams, OneDrive and SharePoint in plain words, and how to share a file without sharing it with the whole world.
- Turn on the security that matters most: **security defaults** and the **Microsoft Authenticator** app.
- Cover what to do the day an employee leaves, how billing works, and the fake invoices and support calls aimed at business owners.

The big promise: you can't break it

Most of what you'll do in Microsoft 365 can be changed again later. Gave someone the wrong license? Swap it. Named a shared mailbox badly? Rename it. The few steps that are hard to undo — deleting a user for good, removing your domain, or canceling the subscription — I'll flag clearly every time, so you never do them by accident.

WHAT THIS DOES FOR YOU

Why this matters

Email at your own domain looks professional, belongs to the business instead of to one person, and keeps working when people come and go. Set up well, Microsoft 365 also gives a small office the kind of security that used to need an IT department.

And I'm only a phone call away

If anything in this guide leaves you unsure, call me at **(330) 200-8042**. There's no such thing as a silly question. Most owners I meet are experts at their own work and simply never had a reason to learn this part. That's what I'm here for.

Let's start with the most common question: how is this different from the Microsoft 365 you might have at home?

— Bill

CHAPTER 2

What Microsoft 365 for Business Is (and How It Differs from Home)

Microsoft sells two very different families of Microsoft 365. The **home** plans — Personal, Family and Premium — are for one household and use a personal Microsoft account, like the ones ending in outlook.com or hotmail.com. Our separate *Microsoft 365* manual covers those. The **business** plans are built for an organization: each employee gets their own work account, the business owns every account, and one or two people act as **administrators** who manage everything from one place.

What the business plans give you

- **Email on your own domain** through Exchange Online, the business version of Outlook email.
- **Teams** for chat, video meetings and calls inside your office and with customers — on plans that include it.
- **OneDrive** for each person's files (1 TB of cloud storage per user) and **SharePoint** for shared company files.
- On Standard and Premium, the **desktop apps** — Word, Excel, PowerPoint and Outlook — on up to five computers, five tablets and five phones per person.
- The **Microsoft 365 admin center**, a web page where you add people, reset passwords and pay the bill.
- Business-grade security settings, and on Premium, extra protection for devices and email.

What changes for you

	Home vs. business
Who owns the accounts	Home: each person. Business: the business. When someone leaves, their mailbox and files stay with you.
How you sign in	Home: a personal Microsoft account. Business: a work account, such as mary@yourshop.com.
How you pay	Home: one price for the household. Business: a price per person (per "user") each month.
Who's in charge	Home: everyone manages their own. Business: an administrator manages everyone.
How many people	Business Basic, Standard and Premium allow up to 300 users.

GOOD TO KNOW

Can I just use my home plan for the business?

For a sole proprietor, a home plan can work for writing letters and spreadsheets, but it isn't built for employees, shared inboxes or a business mailbox you control. Office Home 2024, the one-time purchase, is licensed for non-commercial use only. If more than one person works with you, a business plan is the right fit.

WHAT THIS DOES FOR YOU

What this does for you

When the business owns the accounts, a departing employee can't walk off with your customer emails, and a new hire can be up and running in minutes with an address that matches your business card.

CHAPTER 3

Words You'll See

Microsoft uses a lot of its own vocabulary. Here it is in plain English. You don't need to memorize it; come back here whenever a word trips you up.

Word	What it means
Tenant	Your company's private space inside Microsoft 365. Everything you set up lives in it.
Admin center	The web page at **admin.microsoft.com** where administrators manage users, domains and billing.
User	One person with a work account. You pay per user.
License	The paid seat that turns a user's account on — mailbox, apps and all. One license per person, per plan.
Domain	Your web address, such as **yourshop.com**. Email can use it after you connect it.
DNS records	Small lines of settings at the company where you bought your domain. They tell the internet where your email goes.
Exchange Online	Microsoft's business email service, behind Outlook.
Shared mailbox	An inbox like info@ that several people open. It doesn't need its own license.
SharePoint	Shared company file storage, organized into "sites."
OneDrive	Each person's own file storage. Same idea as at home, but owned by the business.
Teams	Chat, meetings, calls and shared channels in one app.
Microsoft Entra ID	Microsoft's name for the sign-in and identity system behind your work accounts.
Security defaults	A one-switch package of basic protections, including multi-factor sign-in.
MFA	Multi-factor authentication: a password *plus* a second proof, such as tapping Approve on your phone.
Global Administrator	The all-powerful admin role. Guard it carefully.

TIP

"Office 365" is the old name

You'll still see "Office 365" on older invoices, help pages and job listings. It means the same family of business services that Microsoft now calls Microsoft 365.

CHAPTER 4

What You'll Need Before You Start

Getting set up goes much faster with a few things gathered first. Sit down with this checklist. It's fine to spread setup over two or three sittings — nothing here needs to happen in one afternoon.

1. Your domain name and where you bought it

If you already have a website or email address like **yourshop.com**, find out which company you bought the domain from — GoDaddy, Squarespace, Network Solutions, IONOS, Wix and others — and make sure you can sign in there. You'll need to add a few settings at that company in Chapter 10. If you can't remember, an old renewal receipt in your email usually names it.

HEADS UP

Who holds the login?

Domain logins often belong to a former web designer or a relative who "set it up years ago." Get that login into the business's hands now. Our *Your Website & Domain Name* manual walks through recovering it.

2. A list of people and what they need

- Everyone who needs their own email address, with the spelling you want (mary@, mjones@, or mary.jones@).
- Which people need the desktop Word and Excel apps, and which only need email and web apps. That decides the plan.
- Which general addresses you want shared — info@, office@, billing@ — and who should answer each.

3. A smartphone for each person

Every person will set up the free **Microsoft Authenticator** app for safe sign-in (Chapter 21). A smartphone with an up-to-date system makes that easy. If someone doesn't have one, call me and we'll work out another option.

4. A business credit card and a billing contact

Microsoft bills monthly or yearly per user. Decide whose card it goes on, and whose email should receive the invoices, so renewals don't land in a former employee's inbox.

5. Your current email, if you're moving

If you're moving from another email service, write down where your mail lives today and how many messages people need to keep. Moving old mail is the trickiest part of switching, and it's worth planning before you change anything at your domain.

WHAT THIS DOES FOR YOU

What this does for you

Twenty minutes of gathering now saves hours of back-and-forth later, and getting the domain login into the business's hands protects you from one of the most common small-business emergencies.

PART 2

Picking a Plan

The three business plans side by side, the choice between plans with and without Teams, yearly versus monthly billing, a word about Copilot, and signing up.

CHAPTER 5

The Business Plans Side by Side

Microsoft offers three main plans for small businesses. All three include business email, OneDrive and SharePoint storage, and the web and phone versions of Word, Excel and PowerPoint. The difference is whether you get the installed desktop apps and how much extra security comes along.

Plan	Price per user (yearly)	Best for
Business Basic	$7.00 a month	People who mostly need email, Teams and the web and phone apps.
Business Standard	$14.00 a month	Most offices: adds the installed desktop apps (Word, Excel, PowerPoint, Outlook) on up to 5 computers per person.
Business Premium	$22.00 a month	Offices that want stronger protection for email, laptops and phones, plus everything in Standard.

These are Microsoft's U.S. list prices as of November 2026, per person, per month, on a yearly commitment, before tax. On July 1, 2026, Microsoft raised Business Basic from $6.00 to $7.00 and Business Standard from $12.50 to $14.00; Business Premium stayed at $22.00. Existing customers see a new price at their next renewal.

What every plan includes

- A business mailbox for each person on your own domain.
- 1 TB of OneDrive cloud storage per person, plus SharePoint for shared files.
- Web and phone versions of Word, Excel, PowerPoint and Outlook.
- Up to 300 users.
- Copilot Chat, Microsoft's AI chat assistant for work accounts, at no extra charge.

Mixing plans is allowed

You don't have to give everyone the same plan. A common setup is Business Standard for the people at desks who live in Excel, and Business Basic for staff who only need email on a phone. You can mix plans in one tenant and change a person's license later.

TIP

A plan you might also see

Microsoft 365 Apps for business gives the desktop apps and OneDrive but *no* business email. It's for offices that keep their email somewhere else. Most small businesses moving their email to Microsoft want Basic, Standard or Premium instead.

WHAT THIS DOES FOR YOU

What this does for you

Paying only for what each person needs keeps the monthly bill honest. A five-person office on Business Standard pays $70 a month on a yearly plan; putting two of those people on Basic would bring it to $56.

CHAPTER 6

With Teams or Without? Yearly or Monthly?

When you go to buy, Microsoft asks two questions that change the price. Neither is a trick, but both are worth understanding before you click.

With Teams or without Teams

In the U.S., Microsoft sells each business plan in two versions: one that includes Teams and a slightly cheaper one with "(no Teams)" in the name. Microsoft split them after competition complaints in Europe, and now offers both worldwide.

Plan	With Teams	No Teams
Business Basic	$7.00	$5.40
Business Standard	$14.00	$10.79
Business Premium	$22.00	$18.79

Prices per user per month, paid yearly, U.S. list prices as of November 2026.

- **Pick a plan with Teams** if you'll use Teams for meetings, office chat or the phone system. It's the simplest choice for most offices.
- **Pick "no Teams"** only if you already use Zoom or another tool and never plan to use Teams. Adding **Teams Essentials** back later costs $4.00 per user per month, paid yearly, which wipes out most of the savings.

Paid yearly or paid monthly

A **yearly** subscription locks in your seats for twelve months at the lower price and renews automatically. A **monthly** subscription costs about 20% more but lets you add and remove seats from month to month. For example, Business Standard is $14.00 per user per month on a yearly plan, or $16.80 on a monthly plan; Business Basic is $7.00 or $8.40.

GOOD TO KNOW

Seasonal staff?

If you hire extra help every summer or at tax time, a monthly subscription for those seasonal seats can cost less overall than paying a full year for someone who works three months. You can have both kinds in one tenant.

HEADS UP

Yearly means yearly

With a yearly commitment you generally can't reduce the number of seats until the renewal date, even if someone leaves. Chapter 25 explains canceling and renewal.

CHAPTER 7

Copilot and AI Add-Ons, Briefly

Microsoft puts "Copilot" — its AI assistant — on almost every page now. Here's what's included and what costs extra, in a few lines, so you can make a calm decision.

Included with every business plan

Copilot Chat is included with your business license. It's an AI chat window for asking questions, drafting text and summarizing, signed in with your work account.

Costs extra

Microsoft 365 Copilot Business is a paid add-on that works inside your own email, files and meetings. Microsoft lists it at $21.00 per user per month, paid yearly, and has offered a promotional lower price for a time. Microsoft also sells bundles, such as Business Standard with Copilot. It's only available to customers with an eligible business plan.

TIP

Try before you buy for everyone

If you're curious, license Copilot for one person first and see whether it saves real time in your kind of work. You don't have to buy it for the whole office.

WHAT THIS DOES FOR YOU

What this does for you

Knowing that the basic AI chat is already included keeps you from paying for an add-on you don't need just because a sales page made it sound essential.

CHAPTER 8

Signing Up and Your First Admin Account

When you buy a business plan, the very first account you create becomes the **Global Administrator** — the master key to your tenant. Take a little care here; it pays off for years.

Signing up

1. On a computer, go to Microsoft's business plans page at **microsoft.com/microsoft-365/business** and choose **Buy now** or **Try free for one month** under the plan you want.
2. Enter the email address you use today. Microsoft uses it to contact you during setup.
3. Fill in your business name, address and phone number.
4. Create your first work account. Microsoft offers a temporary address ending in **.onmicrosoft.com** — for example **yourshop.onmicrosoft.com**. That's normal. You'll add your real domain in Chapter 10.
5. Choose how many licenses to buy and how to pay, then finish checkout.
6. Sign in at **admin.microsoft.com** with your new account. You're in the admin center.

> **GOOD TO KNOW**
> **That .onmicrosoft.com name is permanent**
> The first part of the .onmicrosoft.com address you pick becomes your tenant's built-in name, and it isn't easy to change later. It stays behind the scenes once your own domain is connected, but choose something sensible, like your business name.

Protect the admin account from day one

- Use a long, unique password, stored in a password manager or written down and kept somewhere safe.
- Set up Microsoft Authenticator on it right away (Chapter 21).
- Make the owner — not an employee or an outside helper — the holder of this account.
- Plan a second admin as a backup, so the business is never locked out if one person is unavailable (Chapter 22).

SCAM ALERT

Nobody from Microsoft will call to "finish your setup"

After you sign up, you may get legitimate welcome emails. But if someone calls claiming to be from Microsoft and asks for your admin password or a sign-in code, hang up. Chapter 23 covers these calls.

WHAT THIS DOES FOR YOU

What this does for you

The admin account controls every mailbox and file in the business. Keeping it in the owner's hands, with strong sign-in protection, is the single most important security step in this guide.

PART 3

Email on Your Own Domain

Why your own domain matters, connecting it to Microsoft 365, the DNS records explained in plain English, and the three settings that stop strangers from sending email in your name.

CHAPTER 9

Why Email on Your Own Domain

An address like **mary@smithhardware.com** tells customers who you are before they even open the message. But looks are only half of it. When your email runs on your own domain inside Microsoft 365, the address belongs to the business, not to any one person or free email company.

What changes when you switch

- **It's portable.** If you ever leave Microsoft, your domain comes with you. Customers keep the same address.
- **It survives staff changes.** When an employee leaves, their mailbox can become a shared mailbox, so nothing sent to that address is lost (Chapter 24).
- **It's harder to fake.** With the settings in Chapter 12, other mail systems can check that a message really came from you.
- **It looks established.** A matching email and website reads as a real business to new customers and to banks and suppliers.

What you need

You need a domain you own, and the login for the company where you registered it (your **registrar**). If you don't own a domain yet, you can buy one from a registrar first — typically somewhere around $10 to $25 a year for a .com, with renewals often costing more than the first year. Check the renewal price before you buy.

HEADS UP

Have a plan for your existing email

If people already get email at this domain somewhere else — at a web host, Google Workspace or your internet provider — changing the settings in Chapter 10 moves where *new* mail arrives. Create everyone's Microsoft 365 mailboxes first, and plan how to bring old mail across, before you change anything. If you're unsure, this is a good place to call for help.

WHAT THIS DOES FOR YOU

What this does for you

Your customers' emails keep arriving at the same address no matter who answers them, and your business name travels with every message you send.

CHAPTER 10

Adding Your Domain in the Admin Center

Connecting your domain happens in two parts: proving to Microsoft that you own it, then telling the internet to send your email to Microsoft. The admin center walks you through both. Set aside about an hour, though most of it is waiting.

Part one: prove you own the domain

1. Sign in at **admin.microsoft.com** with your admin account.
2. In the left menu, choose **Show all** if you don't see everything, then **Settings** > **Domains**.
3. Choose **Add domain**. Type your domain, such as **smithhardware.com**, and choose **Use this domain**.
4. Microsoft offers a way to verify. If your registrar supports it, Microsoft may offer to sign in to the registrar for you and add the record automatically (this is called **Domain Connect**). Otherwise you'll see a **TXT record** to copy.
5. If you're adding it by hand, open a second browser tab, sign in to your registrar, find the **DNS** settings for the domain, and add the TXT record exactly as shown — usually with a host or name of @.
6. Back in the admin center, choose **Verify**. If it doesn't work yet, wait 15 minutes and try again. Changes can take a while to spread across the internet.

Part two: point your email and services to Microsoft

1. After verification, the wizard lists the DNS records Microsoft 365 needs — an **MX** record for email, a **CNAME** record named **autodiscover**, and a **TXT** record for SPF. Chapter 11 explains each one.
2. Add each record at your registrar exactly as shown, or let Domain Connect add them for you.
3. Remove any old MX records that send mail somewhere else — but only after everyone's new mailboxes exist.
4. Return to the admin center and choose **Continue**, or open the domain and choose **Check health**.
5. When the domain shows as **Healthy**, you're connected.

GOOD TO KNOW

"Pending" isn't a failure

A domain can say it's verified but still show a warning if some records are missing. Open it, choose **Check health**, and the admin center lists exactly what it's still looking for.

Make it the default

Once the domain is healthy, select it on the **Domains** page and choose **Set as default**. New users you create will then get addresses at your domain instead of .onmicrosoft.com. Existing users can be changed one by one in **Users** > **Active users**.

HEADS UP

Don't break your website

Your registrar's DNS page also holds the records that make your *website* work — usually records named @ or **www** of type A or CNAME. Leave those alone. Add the Microsoft records alongside them. Before you change anything, take a screenshot of the whole DNS page so you can put things back.

WHAT THIS DOES FOR YOU

What this does for you

Once your domain shows Healthy, every new person you add gets a professional address in seconds — no more calling a web host to make a mailbox.

CHAPTER 11

DNS Records in Plain English

DNS is the internet's address book. Your domain's DNS records are a short list of entries at your registrar that answer questions like "Where should email for this domain go?" You'll rarely look at them, but when email stops working, they're the first place to check. Here's what each one does for Microsoft 365.

Record	What it does
TXT (verification)	A one-time note proving you own the domain. Starts with **MS=**. Safe to leave in place.
MX	"Mail exchanger." Tells the world where to deliver your email. For Microsoft 365, it points to an address ending in **mail.protection.outlook.com** that's unique to your domain.
CNAME autodiscover	Helps Outlook find your mailbox settings automatically. Points to **autodiscover.outlook.com**.
TXT (SPF)	Lists who is allowed to send email for your domain. For Microsoft 365 email only, it reads **v=spf1 include:spf.protection.outlook.com -all**.
CNAME (DKIM)	Two records named selector1 and selector2 that let Microsoft sign your outgoing mail (Chapter 12).
TXT (DMARC)	A record named **_dmarc** that tells other mail systems what to do with fake mail in your name.
A and CNAME for www	Your website. Not part of Microsoft 365 — leave them as they are.

Three rules that prevent most problems

1. **Copy, don't retype.** Use the copy buttons in the admin center. One wrong character and the record won't work.
2. **Only one SPF record per domain.** If you already have a TXT record starting with **v=spf1** — because a newsletter service or website also sends mail for you — combine them into one record instead of adding a second.
3. **Be patient.** DNS changes can take anywhere from minutes to a day or two to be seen everywhere.

TIP

Write down where your DNS lives

Sometimes the DNS isn't at the registrar at all — a web designer may have moved it to their hosting company or a service like Cloudflare. If you change records at the registrar and nothing happens, that's usually why. Note the right place on your cheat-sheet once you find it.

WHAT THIS DOES FOR YOU

What this does for you

Knowing what each record is for lets you spot the one line that's wrong, instead of guessing — and keeps you from deleting your website by accident.

CHAPTER 12

Protecting Your Email Name: SPF, DKIM and DMARC

Scammers love to send email that *looks* like it came from a real business — an invoice from your company to your customers, for example. Three DNS settings let other mail systems check whether a message claiming to be from your domain really is. They sound technical, but each one is a single record.

Setting	In plain English
SPF	A list of who may send for your domain. Added during setup in Chapter 10.
DKIM	A digital signature on every message you send, so it can't be quietly altered or faked.
DMARC	Your instructions to the world: "If a message fails these checks, send it to junk or reject it."

Turning on DKIM signing

1. Sign in to the **Microsoft Defender portal** at **security.microsoft.com** with your admin account.
2. Go to **Email & collaboration** > **Policies & rules** > **Threat policies** > **Email authentication settings**, and open the **DKIM** tab.
3. Choose your domain. Microsoft shows two **CNAME** records (selector1 and selector2). Copy them exactly.
4. Add both CNAME records at your registrar.
5. Wait a while, then return and turn on **Sign messages for this domain with DKIM signatures**. If it refuses, the records haven't been seen yet — try again later.

Adding DMARC last

Microsoft recommends setting up SPF first, then DKIM, then DMARC. A gentle starting DMARC record is a TXT record with the host **_dmarc** and a value such as **v=DMARC1; p=none**, which watches without blocking. Once you're confident all your real mail passes, you can tighten it to **p=quarantine** (send fakes to junk).

HEADS UP

Other services that send as you

If your website contact form, newsletter service, accounting software or online store sends email using your domain, those services need to be included in SPF and set up for DKIM too. Otherwise a strict DMARC setting can send their messages to junk. Check before you tighten DMARC.

WHAT THIS DOES FOR YOU

What this does for you

These three records make it much harder for a scammer to send a fake invoice from your address — protecting your customers, and your reputation, from a trick that costs small businesses real money.

PART 4

People and Mailboxes

Adding employees and giving them licenses, resetting a forgotten password, shared mailboxes for info@ and billing@, and getting Outlook working on computers and phones.

CHAPTER 13

Adding People and Giving Them Licenses

Every person who needs their own email address gets a **user account**, and every user account needs a **license** to turn on their mailbox and apps. Adding someone takes about five minutes once your domain is connected (Chapter 10).

Adding one person

1. Sign in at **admin.microsoft.com** with your admin account.
2. Go to **Users** > **Active users**, then choose **Add a user**. (If your admin center is in the simpler layout Microsoft calls **Simplified view**, the button reads **Add user**.)
3. Type the person's first name, last name and display name — the name customers will see on their email.
4. Type the first part of their email address, such as **mary**, and pick your domain from the list beside it.
5. Choose whether to let Microsoft create a password or make one yourself. Leave **Require this user to change their password when they first sign in** turned on.
6. Choose **Next**. Under **Assign product licenses**, check the plan this person needs — for example, Microsoft 365 Business Standard.
7. Choose **Next** through the optional settings (leave the role as **User** for most people), then **Finish adding**.
8. Write down or securely send the temporary password. The person will set their own the first time they sign in.

GOOD TO KNOW

Out of licenses?

If every license you've bought is already in use, the admin center still lets you add the person and offers to buy another license on the spot. Each extra license adds one person's monthly price to your bill.

HEADS UP

A user without a license

An account with no license can't use email or apps, and Microsoft disables an unlicensed person's mailbox after a 30-day grace period. If someone says "my email stopped working," check that their license is still assigned.

Sending a new employee their sign-in

Never email a temporary password to the person's new work address — they can't open it yet. Tell them in person, by phone, or by text to their own phone. Then have them sign in at **microsoft365.com** (or open Outlook), set their own password, and set up Microsoft Authenticator (Chapter 21).

TIP

The two admin center addresses

Microsoft is gradually moving its web pages to addresses that end in **cloud.microsoft**, so after you sign in you may land on **admin.cloud.microsoft** instead of admin.microsoft.com. Both are genuine Microsoft addresses. Look-alikes with extra words or misspellings are not.

WHAT THIS DOES FOR YOU

What this does for you

A new hire can have a professional email address, Teams and their files ready on their first morning, set up by you in the time it takes to drink a cup of coffee.

CHAPTER 14

Passwords, Name Changes and Switching Licenses

Most of the day-to-day admin work in a small office is small: someone forgot their password, someone got married and changed their name, or someone now needs the desktop version of Excel. Each of these starts in the same place.

Resetting a forgotten password

1. In the admin center, go to **Users** > **Active users**.
2. Find the person in the list and select the small key icon beside their name, or select their name and choose **Reset password**.
3. Let Microsoft make a temporary password, or type one. Leave **Require this user to change their password when they first sign in** turned on.
4. Choose **Reset password**, and give the temporary password to the person by phone or in person.

SCAM ALERT

Confirm before you reset

Scammers sometimes call or text an office pretending to be an employee who's "locked out and in a hurry." Before resetting a password, confirm it's really them — call them back at the number you already have, or ask in person.

Changing someone's name or email address

1. Go to **Users** > **Active users** and select the person's name.
2. On the **Account** tab, choose **Manage contact information** to change their first, last and display name.
3. To change their email address, choose **Manage username and email**. Add the new address, then make it the primary address. Keep the old address as an extra (an **alias**) so mail sent to it still arrives.
4. Save. Tell the person to sign in with the new address next time.

Switching someone to a different plan

1. Make sure you have a free license of the new plan. If not, buy one under **Billing** > **Purchase services**.
2. Go to **Users** > **Active users**, select the person, and open the **Licenses and apps** tab.
3. Check the new plan, uncheck the old one, and choose **Save changes**.

HEADS UP

Uncheck the old license last

Assign the new license before removing the old one, and make sure both plans include email. Removing every email-including license, even briefly, can start the clock on the mailbox being disabled.

WHAT THIS DOES FOR YOU

What this does for you

These three tasks cover most of what an office manager does in the admin center. Once you've done each one, you won't need to call anyone for a forgotten password again.

CHAPTER 15

Shared Mailboxes for info@ and billing@

A **shared mailbox** is an inbox that several people can open at once — perfect for addresses like **info@**, **office@**, **orders@** or **billing@**. Customers write to one address, and whoever is free answers. Replies go out from the shared address, not from the person's own.

Why a shared mailbox instead of a shared password

- **No license needed.** A shared mailbox is free up to 50 GB of mail. Each person who opens it needs their own licensed account.
- **No shared password.** Each person signs in as themselves. When someone leaves, you remove their access — you don't have to change a password and tell everyone.
- **Everyone sees the same thing.** Read, flagged and filed messages look the same for the whole team.
- **It has its own calendar**, handy for a shared schedule such as service calls or office closures.

Creating a shared mailbox

1. In the admin center, go to **Teams & groups** > **Shared mailboxes**.
2. Choose **Add a shared mailbox**. Type a name, such as **Smith Hardware Info**, and the address, such as **info**, at your domain.
3. Choose **Save changes**. It can take a few minutes to appear.
4. Under **Next steps**, choose **Add members to this mailbox**, then add the people who should answer it.

Opening it in Outlook

In most cases a shared mailbox you've been added to shows up in Outlook on your computer by itself, below your own mailbox, within an hour or so. If it doesn't, in Outlook on the web you can right-click **Folders** (or your name) and choose **Add shared folder or mailbox**, then type its address.

TIP

Sending as the shared address

When replying from a shared mailbox, check the **From** line before you send. If it shows your own address, choose the From line and pick the shared address. Members are normally allowed to send as the shared mailbox.

HEADS UP

Don't sign in to a shared mailbox directly

A shared mailbox isn't meant to have its own password and sign-in. Leave it that way. Giving it a password turns it into a back door that nobody is watching.

WHAT THIS DOES FOR YOU

What this does for you

Customers always get an answer from the same familiar address, even when the person who usually handles it is on vacation — and you never pay for an extra license to make that happen.

CHAPTER 16

Setting Up Outlook on Computers and Phones

Once someone has a licensed account, getting their email onto their devices is usually just a matter of signing in. Outlook finds the right settings by itself, thanks to the autodiscover record from Chapter 11.

On a Windows PC or Mac

1. On Business Standard or Premium, install the apps first: sign in at **microsoft365.com**, choose **Install and more** (or **Install apps**), and follow the steps. Business Basic doesn't include the installed desktop apps, so Basic users mostly use Outlook on the web and the Outlook phone app.
2. Open Outlook. When it asks, type the work email address and choose **Continue**.
3. Enter the password, then approve the sign-in in Microsoft Authenticator.
4. Give Outlook a few minutes to download your mail and calendar.

On an iPhone or Android phone

1. Install **Microsoft Outlook** from the App Store or Google Play. It's free.
2. Open it and choose **Add account**. Type the work email address.
3. Sign in and approve with Authenticator.
4. If asked, allow notifications so you hear when new mail arrives.

> GOOD TO KNOW
>
> **Can I use the iPhone Mail app instead?**
>
> Usually yes — add it as a **Microsoft Exchange** account. But the Outlook app tends to handle work accounts, shared mailboxes and Teams meeting invitations more smoothly, so it's the one to try first.

Outlook on the web

From any computer, go to **outlook.office.com** or **microsoft365.com** and sign in. It's the same mailbox, and handy at a front counter or when traveling. Sign out when you're done on a shared computer.

TIP

Two Outlooks on Windows

Windows computers may have both "classic" Outlook and the "new" Outlook. Both open the same mailbox. Menus differ a little; if a step in this guide doesn't match, try the other one or Outlook on the web.

WHAT THIS DOES FOR YOU

What this does for you

Your work email, calendar and shared mailboxes follow you to the counter, the truck and the kitchen table — and stay in sync everywhere.

PART 5

Working Together

Teams for chat and meetings, where files belong — OneDrive or SharePoint — and how to share a file with exactly the right people.

CHAPTER 17

Teams for a Small Office

Microsoft Teams puts office chat, video meetings and shared conversations in one app. For a small business it often replaces a tangle of text messages, "reply all" emails and sticky notes. You don't have to use every part of it — most offices start with chat and meetings.

The parts of Teams, in plain words

Part	What it's for
Chat	Private messages between two people, or a small group. Like texting, but inside the business.
Teams and channels	A **team** is a group, such as "Office Staff." **Channels** are topics inside it, like "Scheduling" or "Orders," where everyone can see the conversation.
Meetings	Video or audio meetings with a link you can send to anyone, including customers.
Calendar	Your Outlook calendar, shown inside Teams.
Files	Files shared in a channel are stored in SharePoint for that team (Chapter 18).

Getting started

1. Install **Microsoft Teams** on your computer from **microsoft.com/microsoft-teams/download-app**, or use it in a web browser at **teams.microsoft.com**. Install the Teams app on your phone from the App Store or Google Play.
2. Sign in with your work account.
3. To message someone, choose **Chat**, then the new-message button, and type their name.
4. To make a team for the office, choose **Teams**, then the **+** or **Create a team** option. Name it, keep it **Private**, and add your staff.

Meetings with customers and suppliers

On business plans that include Teams, a meeting can have up to 300 people and run as long as 30 hours — far more than most small businesses ever need. The free personal version of Teams stops group meetings at 60 minutes and 100 people. Guests don't need an account: they click your link and join from a browser or the Teams app.

1. In Teams, open **Calendar** and choose **New meeting** (or in Outlook, create a new event and turn on **Teams meeting**).

2. Add a title, the date and time, and the email addresses of the people you're inviting.
3. Choose **Send**. Each person gets an invitation with a **Join** link.

TIP

Bought a "no Teams" plan?

If your plan name ends in "(no Teams)," you won't see Teams in your apps. Chapter 6 explains the choice and the Teams Essentials add-on.

HEADS UP

Business chat is business record

Messages in Teams belong to the business, just like work email. Encourage staff to keep personal conversations off work chat, and to keep customer information in the right channel rather than in private side chats.

WHAT THIS DOES FOR YOU

What this does for you

A quick question to the back office no longer interrupts a phone call, and a customer meeting is one link away — no extra video service to pay for.

CHAPTER 18

OneDrive or SharePoint: Where Files Go

Microsoft 365 gives you two places to keep files in the cloud. The difference is simple once you see it, and it matters most on the day someone leaves.

	OneDrive	SharePoint
Whose files	One person's work files	The whole business's shared files
Good for	Drafts, personal notes, work in progress	Price lists, forms, customer folders, policies
Room	1 TB per licensed person	Shared storage for the organization
When someone leaves	Files must be handed off (Chapter 24)	Files stay right where they are

A simple rule for a small office

If more than one person will ever need a file, keep it in SharePoint (or in a Teams channel, which is SharePoint underneath). Keep only personal work in OneDrive. That one habit prevents the classic problem of the only copy of the price list living in a former employee's account.

Finding SharePoint

1. Sign in at **microsoft365.com** and open the app list. Choose **SharePoint**.
2. Every team you make in Teams has its own SharePoint site automatically. Open it from Teams with the channel's **Files** tab, or from the SharePoint page.
3. To see SharePoint files in File Explorer on Windows or Finder on a Mac, open the folder in your browser and choose **Sync** (or **Add shortcut to My files**). They'll appear alongside your OneDrive.

GOOD TO KNOW

The OneDrive folder on your computer

With OneDrive set up, the Desktop and Documents folders on a work computer may be backed up to the cloud. That's helpful if a laptop is lost or dies — the files are still there when you sign in on a new one.

WHAT THIS DOES FOR YOU

What this does for you

Your business files live in one safe, shared place instead of on one person's desktop — and they're still there when a computer breaks or an employee moves on.

CHAPTER 19

Sharing a File Without Sharing It with Everyone

When you choose **Share** on a file in OneDrive, SharePoint or Teams, Microsoft creates a link. Who that link works for depends on one choice. Getting it right keeps customer and employee information where it belongs.

The three kinds of links

Link type	Who can open it
Specific people	Works only for the people you name, inside or outside the business. They must sign in or enter a code to prove who they are. The safest choice for anything private.
People in your organization	Works for anyone with a work account in your business. Not for outsiders.
Anyone	Works for whoever has the link, without signing in — if your admin settings allow it. Treat it like posting the file on a bulletin board.

Sharing with a customer or your accountant

1. Find the file and choose **Share**.
2. Select the link settings (often shown as a line such as "People you choose can edit" or a gear icon).
3. Choose **Specific people**. Decide whether they can **edit** or only **view**.
4. Type the person's email address, add a short note, and choose **Send**.

Seeing and stopping sharing

Choose **Share** again, or the **Manage access** option, to see everyone who has access. From there you can remove a person or delete a link entirely. Do this when a project ends.

TIP

An admin setting worth checking

In the **SharePoint admin center** (from the admin center's left menu, under **Admin centers**), the **Sharing** page controls whether "Anyone" links are allowed at all, and which link type is the default. Many small offices set the default to **Specific people**. OneDrive's setting can be stricter than SharePoint's but never looser.

SCAM ALERT

"Someone shared a file with you"

Fake "shared document" emails are one of the most common ways scammers steal Microsoft passwords. If you weren't expecting a file, check with the sender another way before opening it — and never type your password into a page you reached from an unexpected email link. Chapter 23 has more.

WHAT THIS DOES FOR YOU

What this does for you

You can send a contract to a customer or tax papers to your accountant without email attachments — and take that access back the moment the job is done.

PART 6

Keeping It Secure

The one switch that protects most small offices, setting up Microsoft Authenticator, admin roles and a backup admin, and the fake invoices, calls and sign-in pages aimed at Microsoft 365 customers.

CHAPTER 20

Security Defaults: The One Switch That Matters

Most break-ins to small-business email start with a stolen password. **Security defaults** is Microsoft's free, one-switch package of basic protections that stops most of them. If you set up a new Microsoft 365 business account recently, it's very likely already on.

What security defaults does

- Requires every person to register for multi-factor sign-in, usually with Microsoft Authenticator.
- Asks administrators for that second proof every time they sign in.
- Asks other users for it when something about a sign-in looks unusual.
- Blocks older email programs and connections that can't do multi-factor sign-in — a favorite route for attackers.

Checking that it's on

1. Sign in to the **Microsoft Entra admin center** at **entra.microsoft.com** with your admin account. (You can also reach it from the Microsoft 365 admin center's **Admin centers** list.)
2. Go to **Entra ID** > **Overview** > **Properties**.
3. At the bottom, choose **Manage security defaults**.
4. Make sure it says **Enabled**. If it doesn't, choose **Enabled** and **Save**.

HEADS UP

Business Premium works a little differently

Business Premium includes **Conditional Access**, a more flexible way to set sign-in rules. Microsoft says security defaults isn't the right fit for organizations using Conditional Access — you use one or the other. If you have Premium and someone has set up Conditional Access, leave security defaults off. If you aren't sure, ask before changing anything.

GOOD TO KNOW

"An old printer stopped scanning to email"

Some older scanners and programs use the kind of sign-in security defaults blocks. Don't turn the protection off to fix one device. There are safer ways to set up scan-to-email, and it's a good reason to call for help.

WHAT THIS DOES FOR YOU

What this does for you

With one switch, a password stolen in a data breach or a phishing email is no longer enough for a stranger to read your business email or send invoices in your name.

CHAPTER 21

Microsoft Authenticator and Multi-Factor Sign-In

Multi-factor authentication (MFA) means signing in with something you know — your password — plus something you have — your phone. The free **Microsoft Authenticator** app is the usual way. When you sign in, a number appears on the computer screen, and you type that number into the app on your phone to approve.

Setting it up (each person does this once)

1. On your phone, install **Microsoft Authenticator** from the App Store or Google Play. It's free.
2. On a computer, go to **aka.ms/mfasetup** and sign in with your work account. You'll reach your **Security info** page.
3. Choose **Add sign-in method**, pick **Authenticator app**, and follow the prompts until a square QR code appears on the computer.
4. On your phone, open Authenticator, tap **+** (or **Add account**), choose **Work or school account**, then **Scan a QR code**. Point the phone at the code on the screen.
5. Microsoft sends a test. Type the number shown on the computer into the phone and approve.
6. Back on the Security info page, it's wise to also add your phone number as a backup method.

TIP

Why it asks you to type a number

Microsoft requires **number matching**: you type the number from the sign-in screen into the app instead of just tapping Approve. It stops a trick where attackers send approval requests over and over, hoping you'll tap one to make them go away.

SCAM ALERT

If you get a request you didn't start

If Authenticator asks you to approve a sign-in and you aren't signing in right now, **deny it**. Someone has your password. Change it right away, and tell whoever manages your Microsoft 365. And never read an Authenticator number or a texted code to anyone who calls you.

Getting a new phone

The work account doesn't move to a new phone by itself. Before you trade in the old one, install Authenticator on the new phone, go to **mysignins.microsoft.com/security-info**, add the app again, and scan the new QR code. Then delete the old phone's entry. If the old phone is already gone, an admin can require you to register again (select the person in **Active users** and look for the multi-factor sign-in options).

WHAT THIS DOES FOR YOU

What this does for you

Your phone becomes the key to your work account. Even if a scammer learns your password, they can't get in without the phone in your pocket.

CHAPTER 22

Admin Roles and a Backup Admin

An **admin role** decides what a person can change in Microsoft 365. Most employees should have no admin role at all. The trick is giving the few people who help run things exactly enough power — and making sure the business can never be locked out of its own account.

The roles a small office usually needs

Role	What it can do
Global Administrator	Can change everything, including other admins. The owner, plus one trusted backup.
Billing Administrator	Can buy licenses, see invoices and manage payment. Good for a bookkeeper.
User Administrator	Can add people, reset passwords and manage licenses. Good for an office manager.
Helpdesk Administrator	Can reset passwords for non-admins. Good for a helper who only does that.

Giving someone a role

1. Go to **Users** > **Active users** and select the person.
2. On the **Account** tab, under **Roles**, choose **Manage roles**.
3. Choose **Admin center access**, check the role they need, and **Save changes**.

Why you want a backup admin

If the only Global Administrator is out sick, loses their phone, or leaves the business, nobody can reset passwords, pay the bill or add people. Having a second Global Administrator — often the owner's spouse, partner or a trusted long-time manager — means the business is never stuck. Two is a sensible number for a small office; more Global Administrators means more doors for an attacker to try.

HEADS UP

Outside helpers and admin access

If a computer company or web designer set up your Microsoft 365, check **Active users** and **Roles** for accounts you don't recognize, and check **Settings** > **Partner relationships** for outside companies with access. Keep only the ones you still work with, and make sure the owner holds a Global Administrator account of their own.

TIP

Admins can use a separate account

Some businesses give the owner two accounts: an everyday one for email and a separate admin-only one used just for the admin center. It costs nothing extra if the admin account has no license, and it keeps the most powerful account away from everyday email links.

WHAT THIS DOES FOR YOU

What this does for you

Your office manager can handle passwords and new hires without holding the keys to everything — and the business can always get into its own account.

CHAPTER 23

Fake Microsoft Invoices, Support Calls and Sign-In Pages

Because so many businesses use Microsoft 365, scammers copy Microsoft's look constantly. Here are the tricks aimed at small business owners, and the simple habits that defeat them.

The common tricks

- **Fake invoices and renewals.** An email or PDF says your subscription renewed for hundreds of dollars and lists a phone number to call "if you didn't authorize this." The number reaches the scammer.
- **"Your mailbox is full" or "password expires today."** A link leads to a convincing fake Microsoft sign-in page that steals your password.
- **Fake shared files.** "A document has been shared with you" from a name you know, linking to a fake sign-in page.
- **Fake support calls and pop-ups.** A caller or a browser warning claims to be Microsoft and asks for remote access to your computer.
- **Changed payment details.** An email that seems to come from a supplier — sometimes from a real, hacked mailbox — asks you to pay to a new bank account.

SCAM ALERT

Microsoft won't call you

Microsoft doesn't make unrequested calls offering tech support, and it never asks for your password, an Authenticator number or remote access to your computer by phone. Hang up. If you're worried, sign in at **admin.microsoft.com** yourself and look.

Checking a bill the safe way

1. Don't use the links or phone numbers in the email.
2. Type **admin.microsoft.com** into your browser yourself and sign in.
3. Go to **Billing** > **Bills & payments**. Real Microsoft charges appear there.
4. If you buy through a partner (such as GoDaddy or a local IT company), check with them using a number you already have.

Office habits that prevent most losses

- Confirm any change to bank or payment details by phone, using a number you already had — never one in the email.
- Before signing in, look at the address bar. Genuine Microsoft sign-in pages are at addresses like **login.microsoftonline.com** or end in **microsoft.com** or **cloud.microsoft**.
- Use the **Report** button in Outlook to report phishing; it helps Microsoft's filters learn.
- If someone may have typed their password into a fake page: change the password, check their Authenticator sign-in activity, and look in their Outlook rules for anything they didn't create, such as a rule forwarding mail outside.

HEADS UP

Strange mailbox rules are a warning sign

When criminals break into a business mailbox, they often add a hidden rule that forwards or deletes certain messages so you won't notice. In Outlook on the web, check **Settings** > **Mail** > **Rules**. If you find one you didn't make, call for help before deleting anything.

WHAT THIS DOES FOR YOU

What this does for you

A thirty-second habit — typing the address yourself and calling back on a known number — protects you from the fake invoices and payment changes that cost small businesses the most.

PART 7

Running It Over Time

The day an employee leaves, how billing and renewal work, canceling the right way, and getting help from Microsoft.

CHAPTER 24

When an Employee Leaves

This is the chapter that makes the business plans worth it. Done in the right order, a departure takes about fifteen minutes: the person can no longer get in, customers' emails keep arriving, and nothing is lost. Done in the wrong order — deleting the account first — can throw away years of email and files.

On their last day, in this order

1. **Block sign-in.** In **Users** > **Active users**, select the person and choose **Block sign-in**. Check **Block this user from signing in** and save. This also stops them from resetting the password themselves.
2. **Reset the password** (Chapter 14), and on the same page look for the option to **sign out of all sessions** so phones and laptops that were already signed in are cut off too.
3. **Convert their mailbox to a shared mailbox** while the license is still assigned: select the person, open the **Mail** tab, and choose **Convert to shared mailbox**. Then add the coworker who'll handle their customers as a member (Chapter 15).
4. **Hand off their OneDrive.** On the person's **OneDrive** tab, use the option to give access to another user (often called **Create link to files**). Have that coworker move what the business needs into SharePoint.
5. **Remove their license** once the shared mailbox is in place and holds 50 GB of mail or less. This stops you paying for that seat (on a yearly plan, you'll keep paying for the seat until renewal, but can reuse it for a new hire).
6. **Remove them** from any shared mailboxes, Teams teams and admin roles they had.

HEADS UP

Don't delete the account right away

Microsoft warns not to delete the user account of a mailbox you've converted to shared — the shared mailbox depends on it. And if you delete a user outright, Microsoft keeps their mail and files for only about 30 days before they're gone for good. When in doubt, block and wait.

Their phone and other accounts

- If they used a personal phone, their work email will stop syncing once sign-in is blocked.
- Collect any company laptop, keys and building fobs.
- Change shared passwords they knew — the Wi-Fi, the alarm code, supplier websites, the domain registrar.
- Update anything that used their address as the contact, such as the billing email in Chapter 25.

GOOD TO KNOW

If they're leaving on bad terms

Do steps 1 and 2 *before* you tell them, or while the conversation is happening. It takes a minute and prevents deleted files or angry emails sent in the business's name.

WHAT THIS DOES FOR YOU

What this does for you

Customers who write to a former employee still reach someone, the business keeps every email and file, and a departing person can't take your accounts with them.

CHAPTER 25

Billing, Renewal and Canceling

Microsoft 365 bills per license. Knowing where the bill lives and how renewal works keeps surprises off your credit card statement — and helps you tell a real bill from a fake one (Chapter 23).

Where to find your bills

1. Sign in at **admin.microsoft.com**.
2. Go to **Billing** > **Bills & payments** to see and download invoices.
3. Go to **Billing** > **Your products** to see each subscription, how many licenses you have, and its renewal date. (In Simplified view, choose **Subscriptions**.)
4. Under **Billing** > **Billing notifications** (or **Billing accounts**), set who receives invoices by email.

Adding and removing licenses

Open the subscription in **Your products** and choose **Buy licenses** or **Remove licenses**. On a monthly plan, you can lower the count from month to month. On a yearly plan, you can add licenses at any time, but you generally can't lower the count until the renewal date.

Renewal

Subscriptions renew automatically at the end of each term unless you turn off **recurring billing**. Watch for price changes at renewal — for example, the July 2026 price increase (Chapter 5) reached existing customers at their first renewal after that date.

Canceling the right way

1. First, decide where your email will go next and move it there. Canceling turns off mailboxes.
2. In **Billing** > **Your products**, select the subscription.
3. If you're within **seven days** of the subscription starting or renewing, choose **Cancel subscription**. Microsoft gives a prorated refund or credit only in that window.
4. After seven days, turn off **recurring billing** instead. The subscription runs to the end of the term you paid for, then stops.

HEADS UP

Bought through someone else?

If you bought Microsoft 365 through GoDaddy, a web host or an IT company (a Microsoft **partner**), you usually cancel and get billing help through them, not in Microsoft's admin center.

GOOD TO KNOW

After you cancel

Microsoft keeps your data for a limited time after a subscription ends, so you can still change your mind or export what you need. Don't count on that window — move your email and files first.

WHAT THIS DOES FOR YOU

What this does for you

Knowing your renewal date, your license count and the seven-day rule means you only ever pay for the seats you use.

CHAPTER 26

Getting Help from Microsoft

Business plans include support from Microsoft, but only an administrator can ask for it, and it starts inside the admin center rather than with a public phone number.

Opening a support request

1. Sign in at **admin.microsoft.com** as an admin.
2. Choose **Help & support** (often a question-mark or headset button at the bottom right or in the left menu).
3. Type a short description of the problem. Microsoft suggests help articles first.
4. If those don't solve it, choose **Contact support** to open a ticket. You can ask for a callback or an email reply.
5. Keep the ticket number. You'll need it if you call back.

- Microsoft publishes its business support phone numbers by country on its Microsoft Learn page titled **Find Microsoft 365 for business support phone numbers by country or region**. Use that page, not a number from a search ad.
- If every one of your subscriptions was bought through a partner, the partner provides your support.
- Employees who aren't admins should ask the office's admin, who can open the request for them.

SCAM ALERT

Search ads for "Microsoft support"

Some of the top search results for Microsoft's phone number are paid ads for companies that are not Microsoft, and some are outright scams. Start from the admin center or Microsoft's own Learn page instead.

WHAT THIS DOES FOR YOU

What this does for you

When something is truly broken on Microsoft's side, you reach the real Microsoft quickly — with a ticket number in hand — instead of an impostor.

PART 8

When to Call Bill & Your Cheat-Sheet

An honest word about when a hand is worth it, and a one-page summary to keep with your business paperwork.

CHAPTER 27

When to Call Bill

Much of this guide you can do yourself, a little at a time. But part of being helpful is being honest about when a hand saves you time and worry. Here's my straight advice, with no pressure.

Times it's well worth a call

- **Moving your email** from a web host, Google or your internet provider to Microsoft 365, including old messages — the step where things most often go wrong.
- **Connecting your domain** when you can't find the registrar login, or when your DNS lives somewhere unexpected.
- **Setting up SPF, DKIM and DMARC** when a newsletter, website form or accounting program also sends mail as you.
- **Getting everyone onto Microsoft Authenticator** in one sitting, including the person without a smartphone.
- **An employee leaving** on short notice, especially on bad terms.
- **A suspicious sign-in, invoice or mailbox rule** — I'll help you check what's real and lock things down.
- **Untangling admin access** left behind by a former helper or computer company.

What I don't do

I'm a technology helper, not a reseller. I don't sell Microsoft licenses or take a cut of your subscription, and I'll tell you honestly if a cheaper plan would do. For legal or compliance questions about keeping business records, talk with your attorney or accountant.

What working with me is like

I work at your pace, explain what I'm doing in plain words, and never talk down to anyone. I've been doing this kind of work for more than 30 years, and I serve Portage County, Ohio, in person — at your home or your office — and folks farther away by remote help.

FROM BILL

How to reach me

Call **(330) 200-8042** or book a time at **billshometech.com/book**. My help is **$49 remote · $99 in your home**. This guide is yours to keep for free; if you'd like a hand, I'm only a phone call away.

GOOD TO KNOW

You may meet Sophie first

When you call or visit billshometech.com, you might be greeted by **Sophie**, my AI receptionist. She can answer quick questions and help you book a time. A real person — me — does the actual help.

Thank you for taking the time to look after this part of your business. Set up well, Microsoft 365 quietly does its job for years.

— Bill

CHAPTER 28

Your Microsoft 365 for Business Cheat-Sheet

Keep just this page with your business paperwork. The whole guide, boiled down.

The essentials

Topic	Remember
Admin center	**admin.microsoft.com** (may show as admin.cloud.microsoft). Type it yourself.
Plans (yearly, per person)	Basic $7.00 · Standard $14.00 · Premium $22.00 a month, as of November 2026.
Add a person	Users, Active users, Add a user. Assign a license.
Forgot password	Active users, select the person, Reset password. Confirm it's really them first.
info@ or billing@	A shared mailbox: Teams & groups, Shared mailboxes. No license needed up to 50 GB.
Your domain	Settings, Domains. It should say Healthy.
Sign-in protection	Security defaults on, and Microsoft Authenticator for everyone.
Strange approval request	Deny it, then change your password.
Sharing a file	Share, then Specific people for anything private.
Someone leaves	Block sign-in, reset password, convert to shared mailbox, hand off OneDrive, then remove license.
Canceling	Refunds only within 7 days of start or renewal. Otherwise turn off recurring billing.
Microsoft support	Admin center, Help & support. Microsoft won't call you.

Write it down once

Keep handy	
Our tenant name (.onmicrosoft.com)	_____
Global Administrators (owner + backup)	_____
Where admin passwords are kept	_____
Domain registrar & who has the login	_____
Where our DNS is managed	_____
Plan(s) and number of licenses	_____
Renewal date	_____
Bought from (Microsoft or partner)	_____
Shared mailboxes and who answers them	_____

When something's wrong, in order

1. Breathe. Almost everything in Microsoft 365 can be changed back.
2. Try Outlook on the web at **outlook.office.com**. If mail works there, the problem is on your device.
3. Check that the person's license is still assigned and sign-in isn't blocked.
4. Email not arriving for everyone? Open **Settings** > **Domains** and choose **Check health**.
5. A call, invoice or pop-up asking for a password, code or payment? Stop — it's probably a scam (Chapter 23).
6. Still stuck? Open a ticket in **Help & support**, or call Bill at (330) 200-8042.