

SHAREPOINT SETUP GUIDE

Share association folders with Superkey

A few minutes per folder. If your IT team restricts outside sharing, they'll need about 15 minutes first.

Superkey reads the documents in your association folders so we can keep each association's insurance accurate. We only need to view them. We never edit, move or delete your files.

SHARE WITH	PERMISSION
<code>insurance@superkey.com</code>	Can view
WHAT TO SHARE Each association's folder, or the parent folder that holds them all	

What we look for

Current insurance policies, articles of incorporation, bylaws, the declaration and CC&Rs, rules and regulations, site plans, schedules of values, the IRS CP 575 letter, reserve studies, the current budget, the management agreement, loss runs and lender questionnaires. If these live in each association's folder, share those folders. If one parent folder holds every association, sharing that one folder is simplest.

Share the folders

Anyone who can share the folder can do this.

1

Open the share window

In SharePoint or OneDrive, select the folder and click **Share**.

2

Limit it to Superkey

Open the link settings and choose **Specific people** (newer screens call it **People you choose**). Set the permission to **Can view**.

3

Send it

Enter `insurance@superkey.com` and click **Send**. Repeat for each association folder.

If **Specific people** is greyed out, or you see a message that you can't share outside your organization, your IT team needs to do the steps below first.

If your company restricts outside sharing

For your IT administrator. These steps invite `insurance@superkey.com` as a guest in your Microsoft 365 account, so the folders can be shared with it.

1

Allow sharing with guests

In the **SharePoint admin center**, go to **Policies > Sharing**. Under **External sharing**, set SharePoint to at least **Existing guests**. That allows only guests you've already invited, like Superkey. OneDrive can't be more open than SharePoint.

2

Allow superkey.com

If you limit sharing by domain (**More external sharing settings > Limit external sharing by domain**), add `superkey.com` to the allowed list or make sure it isn't blocked. Check the same in the **Microsoft Entra admin center** under **External Identities > External collaboration settings > Collaboration restrictions**.

3

Check the site's own setting

In the SharePoint admin center, go to **Sites > Active sites**, select the site that holds the association folders, then **Settings > More sharing settings**. Allow existing guests. A site can't be more open than your company-wide setting.

4

Invite Superkey as a guest

In the **Microsoft Entra admin center**, go to **Users > New user > Invite external user**. You need the User Administrator or Guest Inviter role.

EMAIL

`insurance@superkey.com`

DISPLAY NAME

Superkey Insurance

SEND INVITE MESSAGE

Checked

Click **Review + invite**. We'll accept the invitation from our inbox.

Share the folders

Now share the association folders with the guest using the steps above, with **Can view**. To share a whole site instead, use **Settings > Site permissions > Share site** and choose **Read**.

Sign-in rules that can block us

- **Location rules.** If your Conditional Access policies block sign-ins from outside the United States, let us know which locations you allow. Our team signs in from the United States.
- **Two-step verification for guests.** If your policies require guests to verify in your tenant, tell us which methods you allow. Email codes aren't one of Microsoft's options for this, so we'll set up an authenticator app with you.
- **Older share links.** Microsoft is retiring SharePoint's older guest sign-in in October 2026. If a link you sent us before then stops working, send a fresh share and it will work again.

Removing access

You stay in control. To end Superkey's access, stop sharing the folders, or remove the guest user in the Microsoft Entra admin center.

Questions? Email insurance@superkey.com or call (207) 770-5673.