

Admin User Guide

PoliteMail v.20.4.9.4

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Important Considerations

Admin User Role

An Admin user has account wide access to all Users, Content (templates and images), and Lists. Admin users may access any other User's reports, view, and edit any content or lists. Only an Admin user may add, reassign, migrate or delete Users, and make other system-wide settings modifications.

By default, PoliteMail Users must explicitly share any content or lists they create if they want them to be accessible to any other User besides themselves (and the Admin). Therefore, to create an "open sharing" account, you may set all Users to Admin, which enables all reports and content to be automatically accessible to all other Admin users.

An Admin may control content sharing within the system. An Admin may create or modify templates or lists, and make them available to certain individual Users or Groups (a specific Region or Business Unit). The Admin may assign ownership of any item to a specific User, thereby giving that User the ability to edit, modify and delete that item. By assigning ownership to 'All Users' the Admin makes the content available to every other User in the system. By assigning an item to a specific Region or Business Unit, the Admin limits sharing and access to just that group. Any User within the group may view the item and use it, but no User may modify or delete the shared item unless the ownership of that item is also assigned.

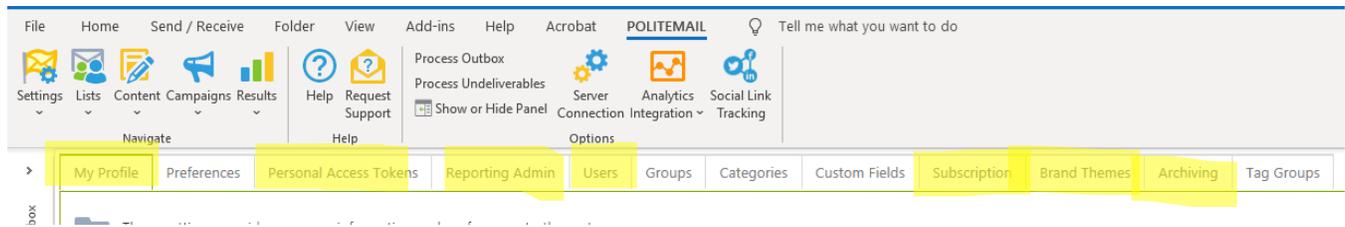
More information can be found on our Knowledge Base site here:

[Creating the Admin PoliteMail for an Outlook User](#)

Settings Overview

Admin Users Need to Apply Settings for the Entire Account

The initial admin user will apply settings that will affect the entire shared PoliteMail Account. We will discuss the following highlighted areas in this manual:



Additional topics can be discussed in the Advanced Admin User Guide

My Profile

A screenshot of the 'My Profile' settings page. The page has a navigation bar with tabs: My Profile, Preferences, Reporting Admin, Users, Groups, Categories, and Cus. The main content area is titled 'My Profile' and contains the following fields:

- Account/Login Email: alisa.carbone@politemail.com (with a [Change Password](#) link)
- First Name: Alisa
- Last Name: Carbone
- Title: (empty)
- Phone: (empty)
- Mobile/Cell: (empty)
- Fax: (empty)

Below these fields is the 'CANSPAM Compliance Address' section with the following fields:

- Company: Company Name
- Address Line 1: (empty)
- Address Line 2: (empty)
- City: (empty)
- State/Prov: (empty)
- Zip/Postal Code: (empty)
- Country: (empty)

At the bottom, there is a 'Preferences' section with the following fields:

- Account Type: Enterprise
- Prevent sending to OptOuts: False

There are two links: [View Client Information](#) and [View Server Information](#). A 'Save' button is at the bottom.

Each user regardless of user type has access to their own **My Profile** tab. This area contains information that is unique to each user based on the information that is inputted when the account is created. Users may add or remove additional information, and it does not affect the PoliteMail sending process.

However, the **View Server Information** section of the My Profile tab is restricted to Admin users only.

View Server Information

Admin users can access this page to check the status of current, next, and last sends through PoliteMail.

Server Information

Server Version: 4.72.18.0218
Expiration: 6/5/2018

Check the current server version of your PoliteMail Server and view when your server license is scheduled to expire.

SMTP Service

START **STOP** **EMPTY QUEUE**

Status: Started
Updated: 11/17/2017 11:52:18 AM
Messages in Queue: 0
Total Size: 0 B
Last Modified: 11/16/2017 6:43:40 PM
Estimated Send Rate¹: 1.93 messages per second

Check the status of your SMTP Service. The **Start** button should be greyed out if the status is set to "Started".
Cycle the SMTP Service by clicking **Stop** and then **Start**.

¹Estimated Send Rate is calculated from directory modification dates and the send log.

Next Send

Sending User: [Colton Castonguay](#)
From: Colton Castonguay <colton.castonguay@politemail.com>;
Subject: PREVIEW: Test
Messages: 1
Date: 11/17/2017 4:50:59 PM

Last Sent via PoliteMail Server

Count	Send Date	Creation Rate
1	11/16/2017 6:43:40 PM	
24	11/16/2017 5:41:38 PM	
1	11/15/2017 3:02:40 PM	
19	11/14/2017 2:00:14 PM	
1	11/13/2017 5:11:53 PM	

Send license compliance information to PoliteMail so that our server support team to ensure that your PoliteMail server continues to be appropriately sized based on your sending volume.

Send Log

10/17/2017 11:52 AM   to 11/17/2017 11:52 AM   **Export**

License Compliance

	Licensed	Actual	Compliance Status
Users	100	24	True
Cores	2	2	True
Total Unique Recipients	5,000	4,167	True
Avg Mail Volume	5,000	4,486	True

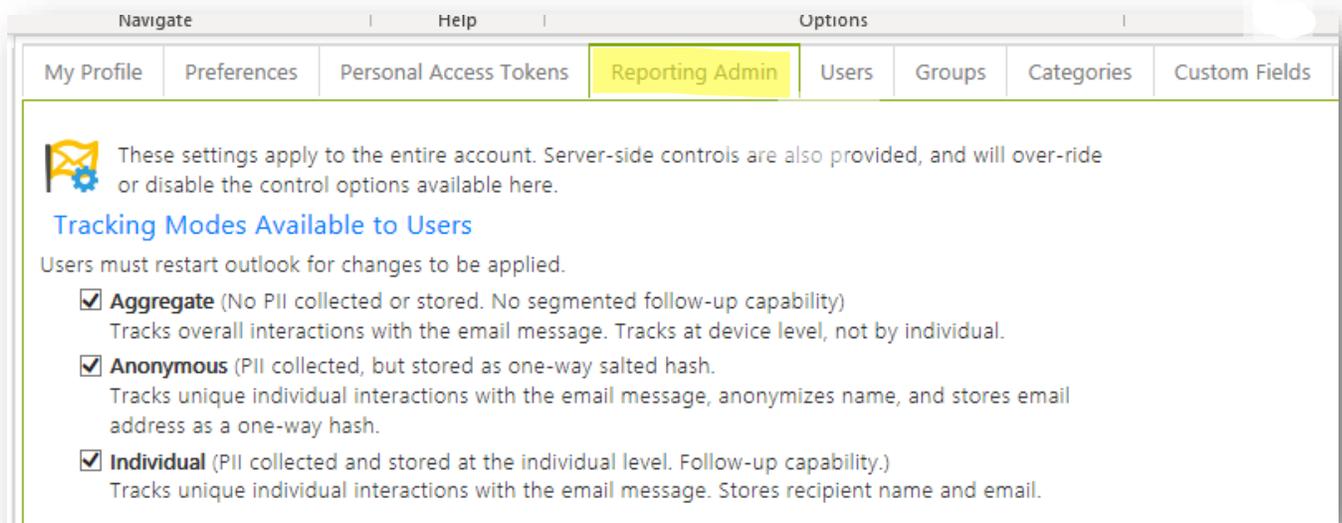
[Send compliance information to PoliteMail](#)

Personal Access Tokens

Personal Access Tokens (PATs) allow a PoliteMail user to delegate revokable permissions to other users for use with the PoliteMail API. By using a PAT a user can authenticate as an existing PoliteMail user when using the PoliteMail API. To create a PAT, click the Add button. Give the PAT a name, and set an expiration date. Click the Copy button to copy the PAT. PATs can be revoked by clicking the Revoke button.

Reporting Admin

Set the tracking modes that will be used by the entire account.



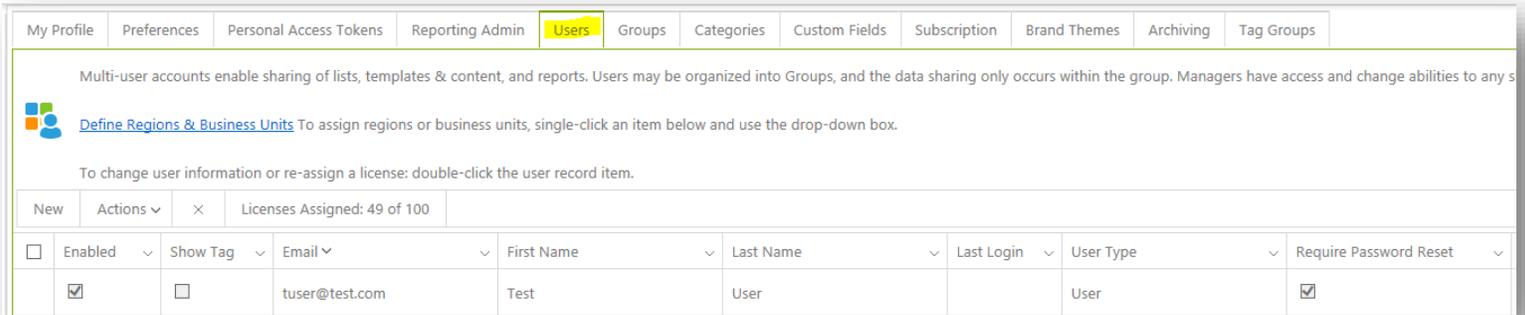
Check the tracking modes that you would like to enable for the entire account to use and un-check the tracking modes that you do not want users to leverage.

For more about tracking modes, visit PoliteMail’s Knowledge Base.

[PoliteMail Tracking Modes](#)

Users

Admin users must set up user accounts, reset user passwords, and re-assign user licenses.



The screenshot shows a web application interface for managing users. At the top, there is a navigation bar with tabs: My Profile, Preferences, Personal Access Tokens, Reporting Admin, Users (highlighted), Groups, Categories, Custom Fields, Subscription, Brand Themes, Archiving, and Tag Groups. Below the navigation bar, there is a text area explaining multi-user accounts and providing instructions on how to define regions and business units, and how to change user information or re-assign licenses. Below this text is a table with a header row and one data row. The table has columns: New, Actions, Licenses Assigned: 49 of 100, Enabled, Show Tag, Email, First Name, Last Name, Last Login, User Type, and Require Password Reset. The data row shows a user with email 'tuser@test.com', first name 'Test', last name 'User', and 'Require Password Reset' checked.

New	Actions	Licenses Assigned: 49 of 100	Enabled	Show Tag	Email	First Name	Last Name	Last Login	User Type	Require Password Reset
<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	tuser@test.com	Test	User		User	<input checked="" type="checkbox"/>

Types of Users

Admin

Admin users may see all content created by all users. Admin users have capabilities to apply settings to the entire account, change user settings, modify and delete users.

Manager

Manager user may see what they create, content that is shared with them, and any content created by users in the group that they manage.

User

General user can only see content that they themselves created or content that has been shared with them. Users may be organized into groups and managed by a manager user.

Creating a New User

Use this procedure if you are using Password Authentication or Windows Authenticate. If you are using Azure Active Directory, you will need to add your users through there.

Go to the PoliteMail tab in Outlook, select **Settings** and go to the **Users** tab.

Click **New** to create a new user.

Enter the first name, last name, and email address of the new user. You can also assign them to a Group. Click Save.

The screenshot shows the 'Edit User' dialog box in Outlook. The dialog is open over a list of users. The 'New' button in the top left is highlighted in yellow. The 'Edit User' form contains the following fields:

- Authentication Mode: Password Authentication
- First Name: John
- Last Name: Doe
- Email Address: john.doe@yourcompany.com
- Password: wZnwK-aNCIn-qlxus-Mltgg-ib2YQ (with a 'Reset' button)
- Password Reset: True
- User Type: Admin
- Business: HUMAN RESOURCES
- Region: NORTH AMERICA
- Phone: (empty)
- Send Setup Email?: Yes, HTML format with download link

The 'Save' button at the bottom is highlighted in yellow.

This will queue up a message to be sent to the email address with a welcome message, a link to download the software, user credentials, and a link to the PoliteMail Quick Start Guide.

[Migrating a User](#)

To migrate a user, place a checkmark next to the name of the contact you want to migrate. Click the "X "at the top of the menu next to Actions. Now you will get a pop-up window asking if you'd like to migrate or delete the user. We always recommend migrate in order to keep data and content intact. Once you click Migrate, you'll be prompted to enter in the name of the user you are migrating data to.

[Deleting a User](#)

To delete a user, click the selection box for their name and click the "X". This will delete the user's account, any historical data tied to their account, as well as any content created by them. We recommend either migrating the user's data or re-assigning licenses instead of deleting a user entirely.

[Modifying a User/Reassigning a User Account](#)

To modify a user, double click the row for the person and modify the information. To reassign a user account, click the selection box for the name, scroll over and select edit, change the name fields and select update.

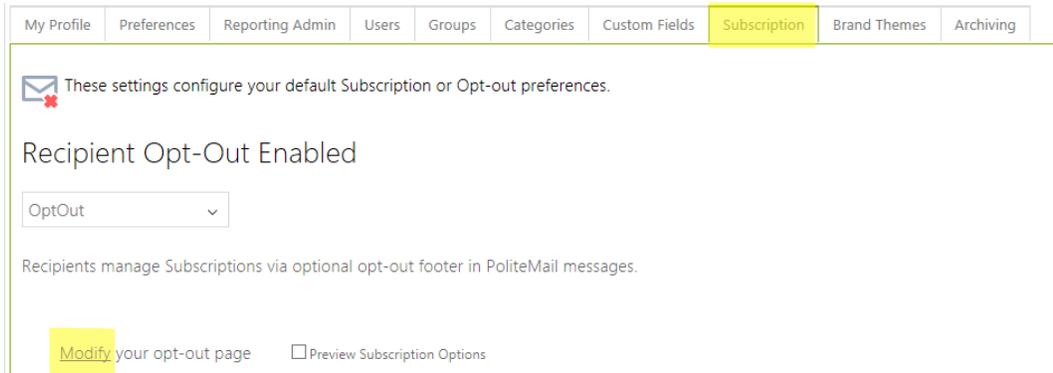
To learn more about user management, see these articles from our Knowledge Base

[User Types for Role Based Administration](#)

[Adding, Replacing, Migrating and Deleting Users](#)

Subscription/Opt-Out

PoliteMail's Subscription and Opt-Out features are located under the same tab. It's recommended to modify the opt out page and upload your company logo. PoliteMail will use this logo on the landing page of your **PoliteMail Feedback** feature.



Click Modify to upload a logo from your local machine.



Select logo file (.jpg, .png, .gif) to display

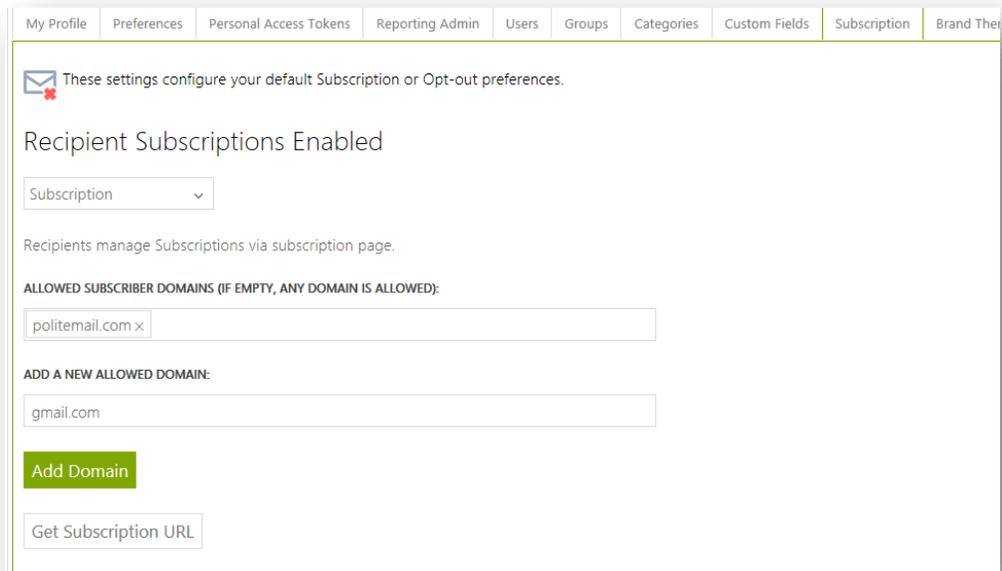
Browse...

Upload

For more information, see this Knowledge Base article:

[Create a Subscription List with Opt-Out Options](#)

If you'd like to create lists users can subscribe to, you must first specify which email domains are allowed. Under the "Recipient Opt-Out Enabled" pull-down menu, choose Subscription. Type in your list of allowed domains under Add a New Allowed Domain and click the Add Domain button. From this window, you can also get the Subscription URL link.

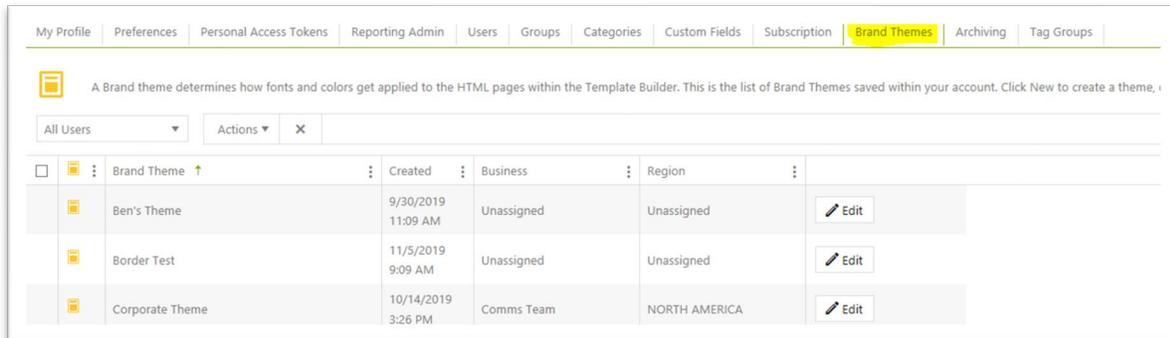


The screenshot shows a web interface for managing subscription settings. At the top, there is a navigation bar with tabs: My Profile, Preferences, Personal Access Tokens, Reporting Admin, Users, Groups, Categories, Custom Fields, Subscription (highlighted), and Brand Theme. Below the navigation bar, a message icon and text state: "These settings configure your default Subscription or Opt-out preferences." The main heading is "Recipient Subscriptions Enabled". Below this is a dropdown menu currently set to "Subscription". A note says "Recipients manage Subscriptions via subscription page." Under the heading "ALLOWED SUBSCRIBER DOMAINS (IF EMPTY, ANY DOMAIN IS ALLOWED):", there is a text input field containing "politemail.com" with a close button (x). Below that, under "ADD A NEW ALLOWED DOMAIN:", there is another text input field containing "gmail.com". A green "Add Domain" button is positioned below the input fields. At the bottom, there is a "Get Subscription URL" button.

Click here to read more about [PoliteMail's Subscription Feature](#)

Brand Themes

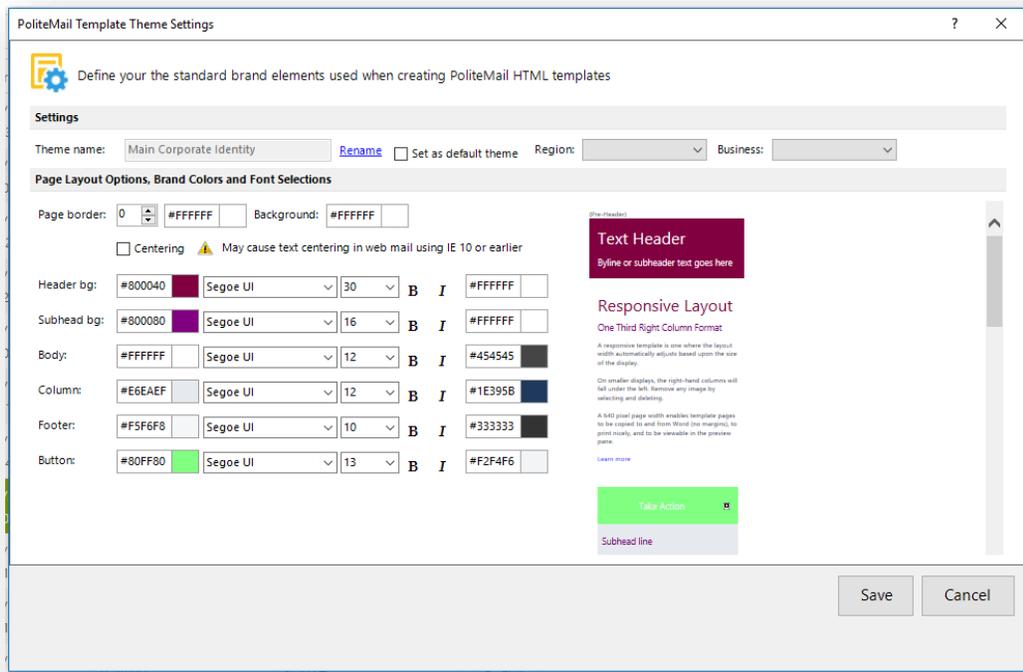
Set up the font and color schemes for your brand themes to stay within your brand guidelines.



A screenshot of the 'Brand Themes' management interface. At the top, there is a navigation bar with tabs: My Profile, Preferences, Personal Access Tokens, Reporting Admin, Users, Groups, Categories, Custom Fields, Subscription, Brand Themes (highlighted), Archiving, and Tag Groups. Below the navigation bar, there is a header section with a brief description: 'A Brand theme determines how fonts and colors get applied to the HTML pages within the Template Builder. This is the list of Brand Themes saved within your account. Click New to create a theme.' Below this is a filter dropdown set to 'All Users' and an 'Actions' dropdown. The main content is a table with columns for 'Brand Theme', 'Created', 'Business', and 'Region'. Each row has an 'Edit' button.

Brand Theme	Created	Business	Region	
Ben's Theme	9/30/2019 11:09 AM	Unassigned	Unassigned	Edit
Border Test	11/5/2019 9:09 AM	Unassigned	Unassigned	Edit
Corporate Theme	10/14/2019 3:26 PM	Comms Team	NORTH AMERICA	Edit

You can set up your Brand Theme within the PoliteMail Builder by clicking the **New** button. Give your theme a name, select fonts, and set custom colors. Any changes made will appear in the preview on the right and then **Save** your brand theme. You can organize Brand Themes even further by assigning them to a Business or Region.



A screenshot of the 'PoliteMail Template Theme Settings' dialog box. The title bar reads 'PoliteMail Template Theme Settings'. The main heading is 'Define your the standard brand elements used when creating PoliteMail HTML templates'. Under 'Settings', there is a 'Theme name' field with 'Main Corporate Identity', a 'Rename' button, a 'Set as default theme' checkbox, 'Region' and 'Business' dropdowns. The 'Page Layout Options, Brand Colors and Font Selections' section includes: 'Page border' (0 px, #FFFFFF), 'Background' (#FFFFFF), a 'Centering' checkbox with a warning, 'Header bg' (#800040, Segoe UI, 30 pt, B I, #FFFFFF), 'Subhead bg' (#800080, Segoe UI, 16 pt, B I, #FFFFFF), 'Body' (#FFFFFF, Segoe UI, 12 pt, B I, #454545), 'Column' (#E6EAEF, Segoe UI, 12 pt, B I, #1E395B), 'Footer' (#F5F6F8, Segoe UI, 10 pt, B I, #333333), and 'Button' (#80FF80, Segoe UI, 13 pt, B I, #F2F4F6). On the right, a preview shows a 'Text Header' and a 'Responsive Layout' with a 'One Third Right Column Format'. At the bottom are 'Save' and 'Cancel' buttons.

These brand themes will be used as the foundation of your PoliteMail templates in the PoliteMail Builder. To delete a Brand Theme, click the check box next to the Theme you want to delete. Then click on the **X** button.

[Click here to learn about Brand Themes and the PoliteMail Builder.](#)

Archiving

Admin users should set up archiving upon initial connection to PoliteMail.

Make sure that archiving is enabled to allow your PoliteMail database to remain [optimal over time](#).

My Profile | Preferences | Reporting Admin | Users | Groups | Categories | Custom Fields | Subscription | Brand Themes | **Archiving**

These settings control how your PoliteMail data is archived and cached.

Data Archiving:
PoliteMail will automatically compile interactions into final reports once the send date reaches the Archive age set below. Individual interaction record will function for archived sends. Content downloads and tracked links will still function, but no data will be collected.

Enabled | 30 days

Report Cache:
Enable PoliteMail to use a background service to cache reports. Set the caching window below. Caching will run SQL queries and compile interaction c as only recent sends will then need be run on report request. Un-cached reports will be run on-demand.

Start time: 8:00 AM | End time: 8:00 PM | All day weekends

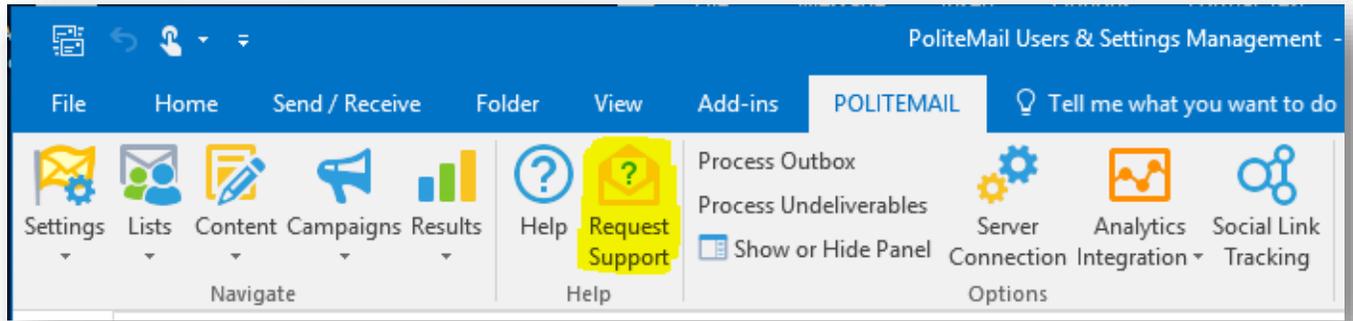
Update cache hourly for sends made within: 5 days
Update cache daily for all sends made within: 14 days
Update cache weekly for all sends made within: 45 days
Update cache monthly for all sends made within: 9995 days

Save

Set an archiving age. When an archiving age is set, all messages will collect data until it meets your specific archive age. PoliteMail will no longer collect new metrics for messages that are older than the specified archiving age. The links and images will continue to redirect and appear in these archived messages.

Requesting Support

Any questions or concerns? Feel free to contact us directly through the “Request Support” button in PoliteMail.



This generates an email that will be delivered directly to our support team.

