

Admin User Guide

PoliteMail v.21.4.9.7

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Important Considerations

Admin User Role

An Administrator has account wide access to all Users, Content (templates and images), and Lists. Admins may access any other User’s reports, as well as view and edit any content or lists. Only an Admin 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.

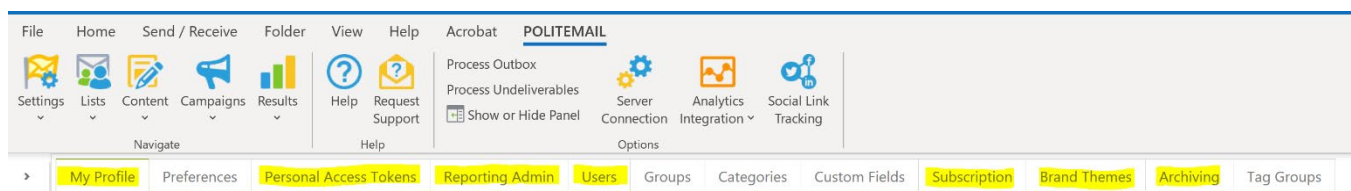
An Admin may control content sharing within the system. An Admin may create or modify templates or lists and make them available to certain individual Users or Groups (a specific Region or Business Unit). The Admin may assign ownership of any item to a specific User, thereby giving that User the ability 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 User for PoliteMail](#)

Settings Overview

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 will be discussed in the Advanced Admin User Guide. If you are planning to send tracked messages using PoliteMail, you may want to review the User Guide as well to learn more about preferences and tools to make sending successful.

My Profile

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.

My Profile	Preferences	Personal Access Tokens	Reporting Admin	Users	Groups	Categories
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These settings provide your user information and preferences to the system.

My Profile

Account/Login: Alisa.carbone2@politemail.com [Change Password](#)

Email:

First Name:

Last Name:

Title:

Phone:

Mobile/Cell:

Fax:

CANSPAM Compliance Address

Company:

Address Line 1:

Address Line 2:

City:

State/Prov:

Zip/Postal Code:

Country:

Preferences

Account Type: Enterprise

Prevent sending to OptOuts: False

[View Client Information](#)

[View Server Information](#)

View Server Information

Admin users can access this page to check

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

Mail.

Server Information

Server Version: 4.72.18.0218
 Expiration: 6/5/2018

Check the status of your SMTP Service. The **Start** button should be greyed out if the status is set to "Started".

SMTP Service

START STOP EMPTY QUEUE

Cycle the SMTP Service by clicking **Stop** and then **Start**.

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 Rate: 1.93 messages per second

*Estimated 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

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.

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 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](#)

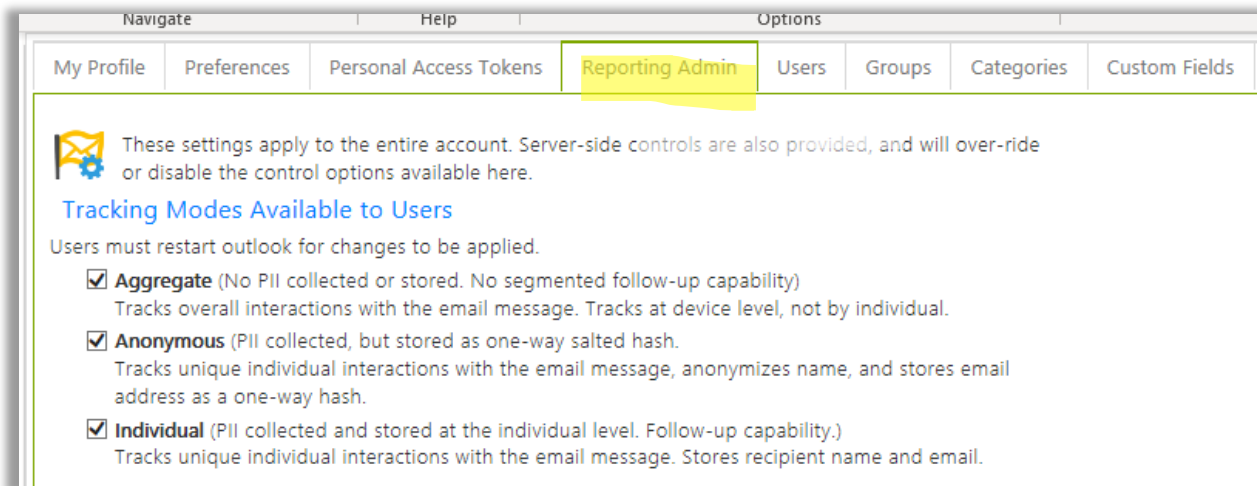
Personal Access Tokens

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.

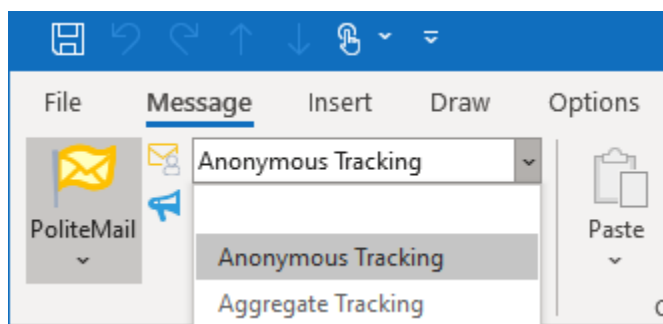
[Click here to access PoliteMail's API Entity Directory.](#)

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 example, uncheck Individual if you don't want your users to have access to Individual tracking. Click Save at the bottom of the window. Once users restart Outlook, Individual tracking will no longer be an option.

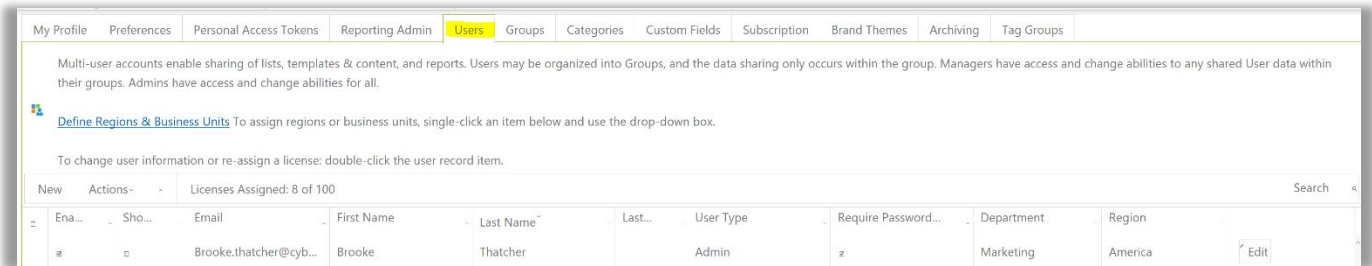


For more about tracking modes, visit PoliteMail’s Knowledge Base.

[PoliteMail Tracking Modes](#)

Users

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



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

User

General Users 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 a table with a 'New' button and an 'Actions' dropdown. The table has columns for 'Enabled' and a checkbox. The 'Edit User' dialog box is open, showing 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 field)
- Send Setup Email?: Yes, HTML format with download link

At the bottom of the dialog, there are three buttons: 'Save' (highlighted in yellow), 'Cancel', and 'Clear'.

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 User Guides.

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.

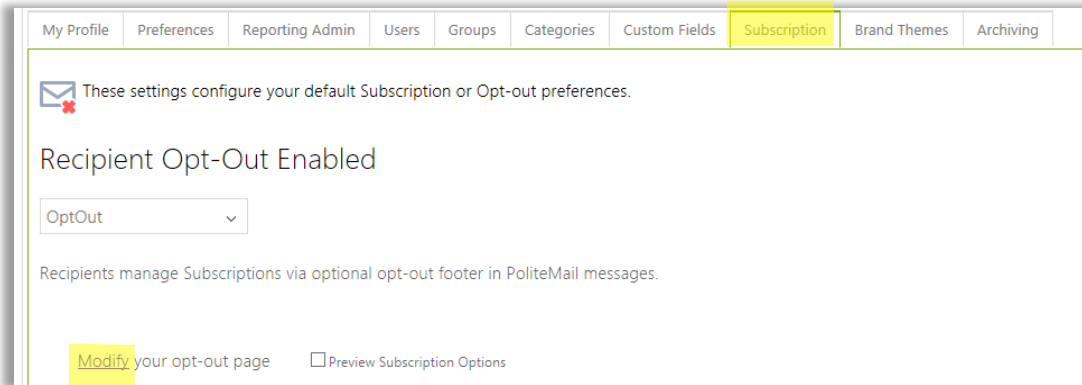
To learn more about user management, see these articles from our Knowledge Base

[User Types for Role Based Administration](#)

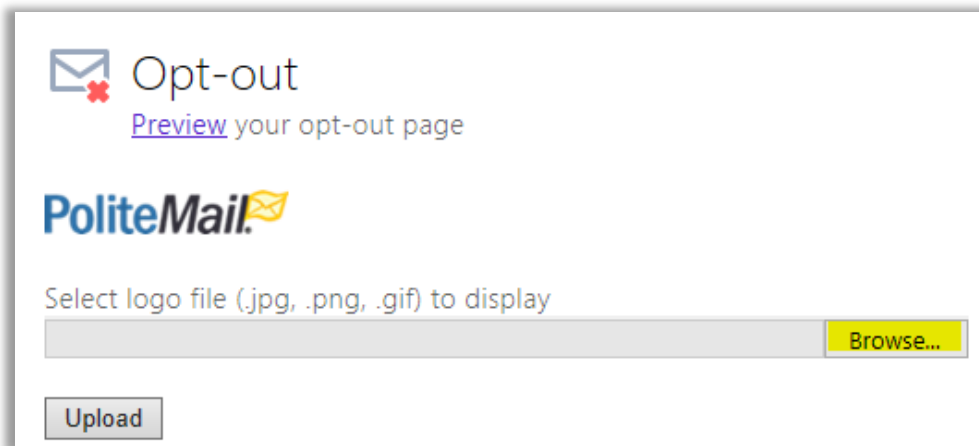
[Adding, Replacing, Migrating and Deleting Users](#)

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.



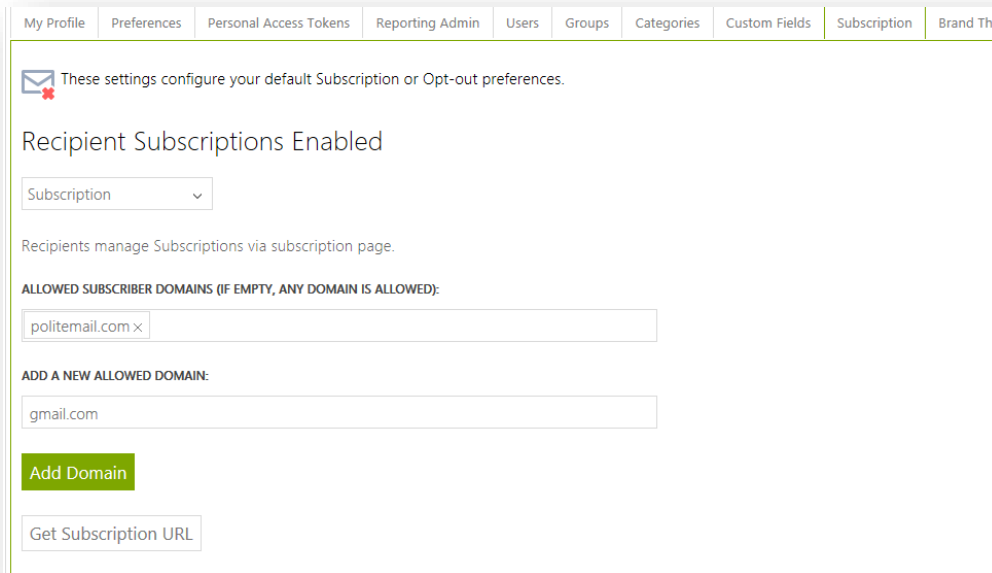
Click Modify to upload a logo from your local machine.



For more information, see this Knowledge Base article:

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

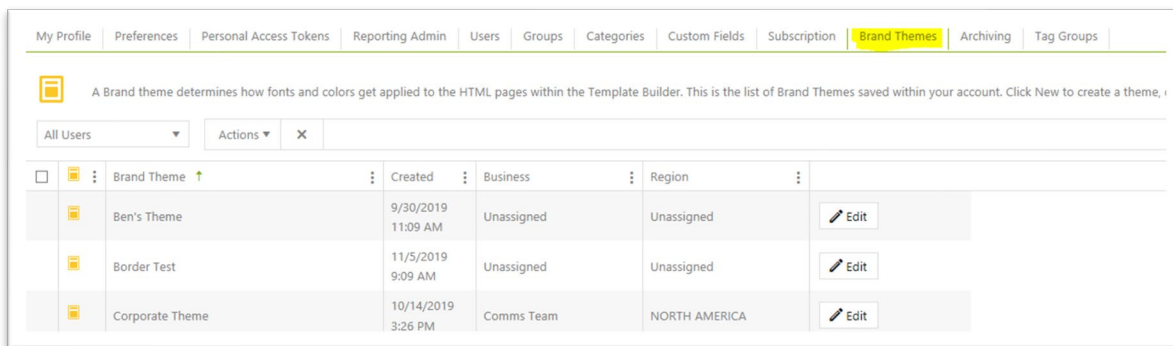
If you'd like to create lists users can subscribe to, you must first specify which email domains are allowed. Under the "Recipient Opt-Out Enabled" pull-down menu, choose Subscription. Type in your list of allowed domains under Add a New Allowed Domain and click the Add Domain button. From this window,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



The screenshot shows the 'Subscription' settings page in the PoliteMail 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 (selected), and Brand Theme. Below the navigation bar, there is a message icon and text: "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 states: "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) on the right. Below that, under the heading "ADD A NEW ALLOWED DOMAIN:", there is a text input field containing "gmail.com". A green "Add Domain" button is positioned below the input field. At the bottom of the form, there is a "Get Subscription URL" button.

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

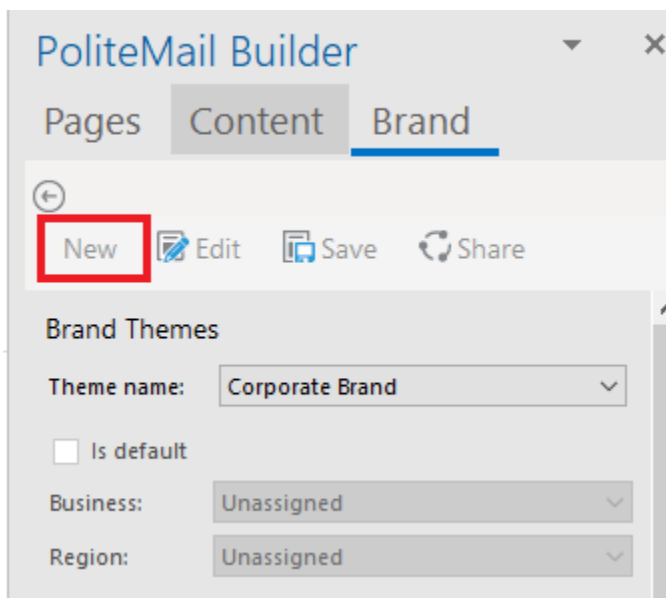
Brand Themes



	Brand Theme ↑	Created	Business	Region	
<input type="checkbox"/>	Ben's Theme	9/30/2019 11:09 AM	Unassigned	Unassigned	
<input type="checkbox"/>	Border Test	11/5/2019 9:09 AM	Unassigned	Unassigned	
<input type="checkbox"/>	Corporate Theme	10/14/2019 3:26 PM	Comms Team	NORTH AMERICA	

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

Within this tab, you can view, share, or delete established Brand Themes. To set up a new Brand Theme within the PoliteMail Builder, click the **New** button within the Brand tab. 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.



PoliteMail Builder

Pages Content **Brand**

New

Brand Themes

Theme name: Corporate Brand

Is default

Business: Unassigned

Region: Unassigned

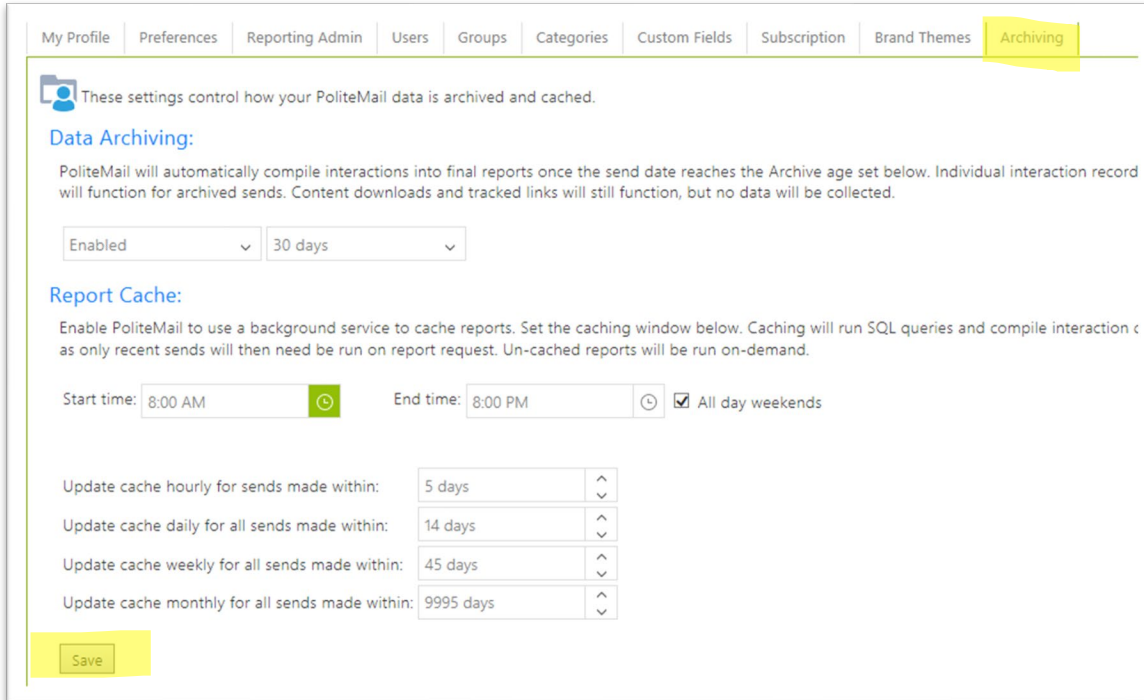
These brand themes will be used as the foundation of your PoliteMail templates in the PoliteMail Builder. To delete a Brand Theme, click the check box next to the Theme you want to delete. Then click on the **X** button.

[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

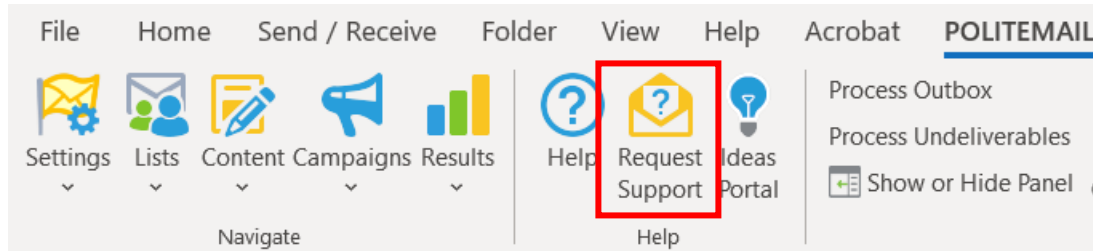
Update cache monthly for all sends made within: 9995 days

Save

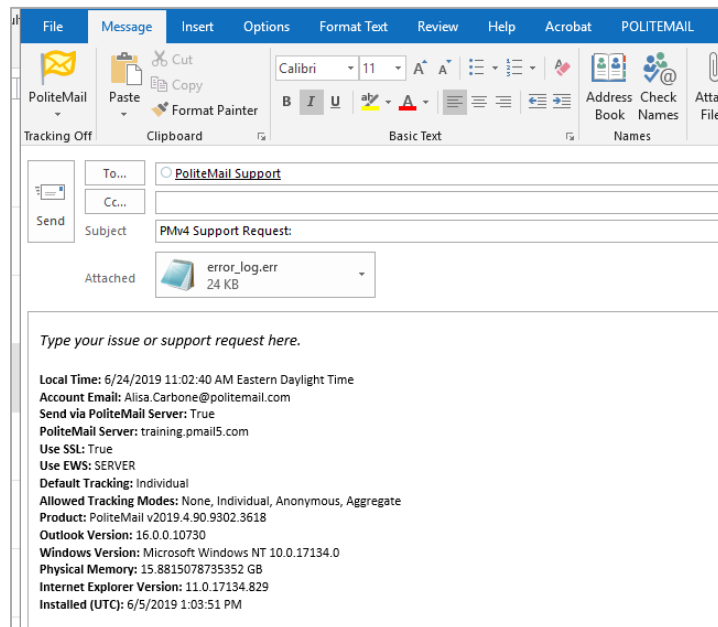
Set an archiving age. When an archiving age is set, all messages will collect data until it meets your specific archive age. PoliteMail will no longer collect new metrics for messages that are older than the specified archiving age. The links and images will continue to redirect and appear in these archived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

Requesting Support

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



This generates an email with critical client information that will be delivered directly to our support team.



PoliteMail Ideas Portal

Next to Request Support is PoliteMail Ideas Portal. If you have an idea for PoliteMail, please click this button to be directed to our idea submission site.

