How can I move a user from one PoliteMail tenant to another?

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PoliteMail supports multiple tenants, which allows an Administrator to manage multiple instances of PoliteMail at once, but they are distinctly separate, with users unable to access or share content between tenants. This gives large companies additional flexibility in how they want to set up PoliteMail if they span multiple distinct sub-organizations.

Moving a user from one tenant to another, however, is not an automated process, and is actually easier to be done by your Administrator rather than by PoliteMail on the back end. At a high level, here are the steps:

1. Create a new user in the second Tenant with a temporary email, such as sample_user2@politemail.com.
2. Export and download the content (metrics reports, templates, images, attachments, etc) that needs to be moved.
3. Import those items into the new tenant.
4. Finally, delete the old email from the old Tenant and rename the email in the new Tenant to the proper email.

Exporting Content Items

The process to export content items will vary by item:

Content Type	Process
Smart Attachments	Smart Attachments have an option to bulk export the files. From the list of Smart Attachments, select the files you want to export, then click on **Actions > Download.** The files will be individually downloaded, so if you have a lot of Smart Attachments to move, this may take a while.
Templates	For Templates and Template Sections, you will need to save the HTML that makes up the Template. To do so, open the PoliteMail Builder and double-click on the Template to add it to your message. From there, click the 'View HTML' button, and then copy and paste the HTML into a basic text program such as Notepad, and then save it.
Metrics Reports	Metrics cannot currently be imported into PoliteMail, but you can export the report as an Excel, Word, or .msg file for viewing. Just open the report and click on the export format you want from the options in the upper right of the Metrics report.
Images	Open the PoliteMail Builder and double-click or drag the desired image onto the main window. From there, you can right-click on the image to save it as a picture on your PC.
Paragraphs and Links	Open the PoliteMail Builder and double-click or drag to place the content item into the main window, then select the content to copy and paste it into Word or other application of your choice, and save it from there.