

# Adding, Replacing, Migrating, and Deleting Users

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Applies To:  **PoliteMail Desktop**  **PoliteMail Online**  PoliteMail M365

Version:  4.9  5.0  5.1+

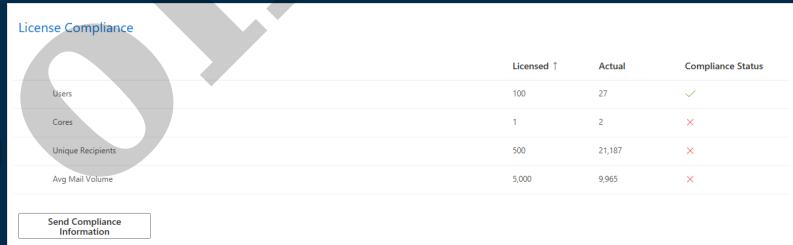
To perform any of these tasks, you must have Admin privileges. If you are not an Admin, please contact your local PoliteMail Administrator for assistance.

## Verify your Licenses

To add, delete, or migrate a user there are a few simple steps to follow. However, before taking any action, we recommend double-checking the number of licenses you have available to cover your needs.

**Version 5.0+:** Navigate to **POLITEMAIL > Account > Server Info**. Scroll to the bottom of the page to view the number of users and total number of licenses.

**Version 4.9x:** Navigate to the **Outlook > PoliteMail > Settings > Users**. On the menu bar, the number of licenses used will appear next to the total number of licenses.



## Updating Users with SSO

When PoliteMail is configured to use Single Sign-On (SSO), new user provisioning is handled entirely through your organization's identity provider (IdP), such as Entra ID. No manual setup is needed inside PoliteMail. To grant someone access, the team managing the SSO application simply adds the individual to the appropriate role-based security group (e.g., Admin, User, Manager). Once assigned, the user's group membership is passed through the SSO token during authentication, and PoliteMail automatically creates their profile with the correct permissions.

After the group assignment is complete, the user only needs to sign in through the standard PoliteMail SSO login. On their first login attempt, PoliteMail detects their identity and role from the IdP and provisions their

account. If access errors occur, please reach out to PoliteMail support.

### What the User Should Expect

- The user will not appear in PoliteMail until they complete their first SSO login.
- Account creation happens automatically during that login based on their assigned security group.
- Propagation delays may require waiting 5-15 minutes before retrying sign-in.

## User Actions

To Do This...	... Do This.
Add a User	<ol style="list-style-type: none"><li>1. Go to <b>POLITEMAIL &gt; Account &gt; Users</b>. Select <b>New</b> from the menu. Fill in the employee information in the panel.</li><li>2. Under the "Send Setup Email" field, make sure its set to Yes, HTML format with download link so your new user will get the software download.</li><li>3. Click <b>Save</b>.</li></ol>
Migrate a User	<ol style="list-style-type: none"><li>1. Go to <b>POLITEMAIL &gt; Account &gt; Users</b>. Select the contact you want to migrate.</li><li>2. Click the Delete button. You will get a pop-up window asking if you'd like to migrate or delete the user.</li><li>3. <b>PoliteMail always recommends migrate in order to keep data and content intact.</b> Once you click Migrate, you'll be prompted to enter in the name of the user you are migrating data to.</li></ol> <p>Please note that you can only migrate information to a user who is an Admin. If the user does not have Admin privileges, another Admin user will need to change their role to Admin, migrate the data, and then change the user role back to Manager or User.</p>
Delete a User	<ol style="list-style-type: none"><li>1. Go to <b>POLITEMAIL &gt; Account &gt; Users</b>. Select the contact you want to delete.</li><li>2. Click the 'Delete' button ('X' in <b>Version 4.9x</b>). You will get a pop-up window asking if you'd like to migrate or delete the user. Select Delete.</li></ol> <p><i>Deleting a user from PoliteMail will permanently delete this user and their history from your PoliteMail account. Any content owned by that user, including PoliteMail Results, will be deleted permanently. We recommend migrating users instead of deleting a user entirely.</i></p>

To Do This...	... Do This.
Reassign a License	<ol style="list-style-type: none"><li>1. Select the name of the original licensee. In the window, swap out the existing user's info for the new user's info. We also recommend selecting <i>Reset</i> to assign a brand-new password for the user.</li><li>2. Select <b>Save</b>.</li></ol> <p>You may also want to set Send Setup Email to YES so the new user can get their new password and login credentials.</p>

## User Migration and Data Migration

When an existing User is migrated to a new User, all data and Content is moved to the new User, including Templates, mailing lists, history, and Metrics.

Once the migration is done, the old user is completely removed; this means that User migration is not an option if you want to copy or clone a User.