

Sharing PoliteMail Templates and Content with Groups or Unassigned

Last Modified on 10/22/2025 11:47 am EDT

Applies To: ■ PoliteMail Desktop ■ PoliteMail Online ■ PoliteMail M365

Version: ■ 4.9 ■ 5.0 ■ 5.1+



The concepts of sharing and ownership allow you to control who can see and use the email templates you create or content you import such as images or Smart Attachments.

Understanding Ownership

By default, the user who creates the content is the owner of it. The owner may reassign ownership to another user, and may elect to share that content with other users (allow other users to view, edit). If the item is assigned to 'All Users,' it is shared, and the content is not assigned to a Group (labelled Unassigned), then any user will be able to view, modify or delete it.

Admins and Managers

- Admin users can access and modify any content created by any user whether it is shared or not. This includes all content marked as Private.
- A Manager level user can access content uploaded by Users and other Managers that is labelled Unassigned and not shared. A Manager level user can access and modify content created by users within their Groups. For example, the Manager of the Northeast Region will see content created by other users in the Northeast Region regardless of it is shared or not.
- A User would need to share the content for the other Users in the Northeast Region to see it. For a more detailed explanation of Administrator, Manager, and User roles, refer to [this article](#).

Sharing Content with Other Users

Within a multi-user installation of PoliteMail, you can share email content including templates, graphic images, and file attachments with other users within your account. This data is never shared or otherwise distributed outside of your own PoliteMail account database.

Set Sharing

Private

Shared

PoliteMail Wellness Club - July Newsletter

Save **Cancel**

To assign a user to a content item, start at the **POLITEMAIL** menu at the top of the inbox, click the **Content** button, and select the Content Type you wish to share.

An edit window will open. Check the "Shared" box. Alternatively, you could also navigate to **Actions**, then select Set Sharing. Select your desired sharing mode in the new pop up window.

Content is not shared by default. When an item has been shared, it will appear with a circle of blue arrows.



Version 4.9x: Navigate to the Users pull-down menu and select either 'All Users' or specific user(s). **Items are not shared by default.** When an item has been shared, it will appear with a blue double-arrow.

Sharing within Groups (Regions and/or Business Sub-groups)

Regions and Business organization limits the scope of the sharing, such that only users within the same region and/or business Group will be able to share templates and content.

For example, a User in the Northeast Region would be able to share a template with another User in the Northeast Region, but would have no access to any templates created by Users in the Southwest Region.

1. To assign a Region or Business a content item, start at the **POLITEMAIL** menu at the top of the inbox, click the **Content** button, and select the Content Type you wish to share.
2. An edit window will open and you will be able to assign the content to a Business or Region. You can also navigate to **Actions**, and then select Business or Region to change the parameters.

Notes

- Content not assigned to a Region or Business will be labelled **Unassigned**. If this content is shared, it will be available to **all users** regardless of which Region or Business they are in.
- By default, if a user belongs to a Region or Business sub-group, those settings are applied to any content they create, so once sharing is activated, it remains within that group. If a template needs to be shared with a wider audience, the content ownership may be assigned to a Manager or Admin, and when they share it will be across all their available groups.
- If a user assigns an item to a Group they do not belong to, they will no longer be able to view/modify that item, even if they were the creator of it!

Refer to this chart to see how various settings affect users in Groups:

User Content Owner

Business	Region	Sharing	Viewable by Other Users	Viewable by Manager	Viewable by Administrator
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Business	Region	Sharing	Viewable by Other Users	Viewable by Manager	Viewable by Administrator
Unassigned	Unassigned	No	No	Yes	Yes
Unassigned	Unassigned	Yes	Yes	Yes	Yes
Assigned	Unassigned	No	No	Yes, if Manager is in the Business Group	Yes
Assigned	Unassigned	Yes	Yes, to all Users in the Business Group	Yes, if Manager is in the Business Group	Yes
Unassigned	Assigned	No	No	Yes, if Manager is in the Region Group	Yes
Unassigned	Assigned	Yes	Yes, to all Users in the Region Group	Yes, if Manager is in the Region Group	Yes
Assigned	Assigned	No	No	Manager must belong to BOTH groups.	Yes
Assigned	Assigned	Yes	User must belong to BOTH groups.	Manager must belong to BOTH groups.	Yes

Manager Content Owner

Business	Region	Sharing	Viewable by Other Users	Viewable by Manager	Viewable by Administrator
Unassigned	Unassigned	No	No	Yes	Yes
Unassigned	Unassigned	Yes	Yes	Yes	Yes
Assigned	Unassigned	No	No	Yes, if Manager is in the Business Group	Yes
Assigned	Unassigned	Yes	Yes, to all Users in the Business Group	Yes, if Manager is in the Business Group	Yes
Unassigned	Assigned	No	No	Yes, if Manager is in the Region Group	Yes
Unassigned	Assigned	Yes	Yes, to all Users in the Region Group	Yes, if Manager is in the Region Group	Yes
Assigned	Assigned	No	No	No	Yes
Assigned	Assigned	Yes	User must belong to BOTH groups.	Manager must belong to BOTH groups.	Yes

Admin Content Owner

Business	Region	Sharing	Viewable by Other Users	Viewable by Manager	Viewable by Administrator
Unassigned	Unassigned	No	No	Yes	Yes
Unassigned	Unassigned	Yes	Yes	Yes	Yes
Assigned	Unassigned	No	No	No	Yes
Assigned	Unassigned	Yes	Yes, to all Users in the Business Group	Yes, if Manager is in the Business Group	Yes
Unassigned	Assigned	No	No	No	Yes

Business	Region	Sharing	Viewable by Other Users	Viewable by Manager	Viewable by Administrator
Unassigned	Assigned	Yes	Yes, to all Users in the Region Group	Yes, if Manager is in the Region Group	Yes
Assigned	Assigned	No	No	No	Yes
Assigned	Assigned	Yes	User must belong to BOTH groups.	Manager must belong to BOTH groups.	Yes

Notes

- Please note that if a Manager or User belongs to two Groups, the content must be shared with BOTH groups in order for the content to be seen.
- If ownership is set to All Users and the content is shared, all Users, Managers and Admins will see the content, regardless of which Group they are in.
- Users can view all Admin-shared and Manager-shared content, but they can not modify or save over these items. This is helpful for when you have a template where the content changes, but not the structure. *For example, a Manager creates a Newsletter template and shares it within their Group. The users may add content such as text or images, but must save it as a new template file, since they are not the owner of the template. Thus, a user could have "Newsletter January" and "Newsletter February". The overall structure would remain the same, while the content would differ.*
- Admin users can see all content, whether its shared or not.