



CAPABILITY INVENTORY ACROSS WORKSPACE, GOVERNANCE, INTEGRATIONS, AND OPERATIONS

SoteriMail Platform Capabilities

A practical inventory of the SoteriMail capabilities available across end-user, administrator, partner, and platform-owner workflows.

Workspace modules

Archive and recovery

Governance and integrations

SM **SoteriMail**
Tenant archive workspace Live adapter

Archive Recover Activity Admin

SEARCH ARCHIVE
Find the right mailbox first.

SEARCH FACTS
Policy-aware handoff ready

Mailbox context, reason, query, and audit scope are captured before archive access continues.



COMMUNICATION WORKSPACE

Daily work stays close to archive context.

SoteriMail combines communication surfaces with archive and recovery workflows so users do not need to jump between unrelated portals.

Mail

- Microsoft mailbox viewing and navigation
- Dense message list and reading pane
- Compose and send
- Read, unread, archive, move, delete, pin, snooze, categorize, and create task actions
- Delegated mailbox readiness model

Calendar

- Day, week, and month views
- Event creation and editing
- RSVP actions
- Recurring event support
- Free-busy scheduling and shared calendar awareness

Tasks and Contacts

- Task creation, assignment, due dates, status, and priority
- Task creation from mailbox or archive actions
- Microsoft contact synchronization
- Contact detail editing, email, phone, organization, and job-title context

PRIMARY VALUE

Reduced context switching

CONTROL MODEL

Mailbox and role scope

OPERATIONAL SIGNAL

Activity-first traceability

ARCHIVE AND RECOVERY

Search, restore, and activity are tied together.

Archive workflows preserve mailbox, query, reason, and actor context so recovery and support can move with cleaner evidence.

ARCHIVE SEARCH

Mailbox-scoped discovery

- Mailbox-scoped archive search
- Query plus advanced filters
- Result preview and retention context
- Console or deeper workflow handoff where required
- Administrator cross-mailbox visibility where role permits

RECOVERY

Controlled restore operations

- Restore request submission
- Overwrite mode selection
- Restore queue tracking
- Audit of recovery operations

ACTIVITY

Operational trace

- Search, restore, sync, support, mailbox, task, and security events
- Mailbox and event-type filtering
- Organization-scoped audit visibility for administrators
- Context for support escalation and operational review

OUTLOOK ADD-IN

The Outlook add-in supports archive search and restore from Outlook with Microsoft identity-aware access and role-aware controls.

PR

Preview path

Native or console-assisted search paths can be selected by mailbox and capability context.

RT

Restore target

Restores keep the destination mailbox and overwrite behavior explicit.

EV

Evidence context

Search, recovery, and support events retain who, what, when, mailbox, and reason detail.

AD

Admin scope

Administrative archive work is role-aware and bounded by organization scope.

IDENTITY, ACCESS, AND READINESS

Readiness is explicit, not implied.

Administrators can see whether Microsoft identity, platform account, archive mailbox, link status, login readiness, and archive access readiness line up.

Authentication

- Portal sign-in
- Mandatory TOTP 2FA
- Microsoft-first identity awareness where integration exists

Identity readiness

- Microsoft account detection
- Archive mailbox detection
- Link status visibility
- Login and archive access readiness
- Recommended and manual linking workflows

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|-------------------------|--|
| PLATFORM OWNER | Global platform governance, billing, branding inheritance, mailer policy, tenant lifecycle |
| AGGREGATOR ADMIN | Partner workspace, own-organization operations, downstream MSP and customer oversight |
| MSP ADMIN | Partner workspace, own-organization operations, customer readiness and branding |
| CUSTOMER ADMIN | Organization access, archive operations, onboarding, integrations, support, setup |
| END USER | Personal mailbox workspace, archive search, restore, support escalation |

RBAC SCOPE

Roles are enforced with organization and mailbox scope so end users remain restricted to their own mailbox while administrators operate within defined tenant boundaries.

ADMINISTRATION AND GOVERNANCE

Operational control for customer and partner environments.

Setup, Admin, Support, Security, and Platform areas are structured as guided workspaces rather than raw configuration pages.

Setup

- Readiness checklist
- Integration health
- User readiness
- Rollout guidance
- Next-step recommendations

Admin

- User and role management
- Bulk onboarding from mailbox inventory
- Microsoft and Acronis connection management
- Identity linking review
- Operational review

Support

- Escalation intake
- Queue operations
- Assignment
- Notes
- Triage
- Progress
- Response
- Resolve and reopen

Security and Compliance

- Executive protection score
- Risk level assessment
- Email security
- Awareness
- Collaboration app security
- Posture management
- Recommendations

PLATFORM OWNER

Tenant onboarding, tenant status changes, global user management, billing configuration, statement generation, branding, and mailer control.

AGGREGATOR AND MSP

Partner workspace, inherited and local branding, own-organization workspace, and partner mailer configuration for child organizations.



INTEGRATIONS, SAAS OPERATIONS, AND REPORTING

SoteriMail is ready for customer onboarding as a managed SaaS service.

Soteria Cloud manages the platform while customers and partners work through SoteriMail's web workspace, Outlook add-in, guided onboarding, and authorized archive workflows.

ACRONIS

Archive and protection context

- Tenant onboarding readiness
- Mailbox discovery
- Archive availability validation
- Archive readiness checks
- Archive search and restore orchestration
- Service and protection signal detection

MICROSOFT

Identity and collaboration context

- Directory sync
- Microsoft-first sign-in and mailbox linking
- Mailbox operations
- Calendar and free-busy workflows
- Contact management
- Outlook add-in identity context

OPERATIONS

SaaS and commercial scope

- Soteria Cloud-hosted SaaS access
- Ready customer and partner onboarding
- Managed platform updates and service operations
- Web workspace and Outlook add-in access
- Billing by tenant type and billable user statements
- Partner and customer roll-up visibility

PLATFORM SUMMARY

SoteriMail combines communication, archive, recovery, support, identity, and governance capabilities into one tenant-aware operational workspace.