PoliteMail User Training Manual

version 5.0

Create

Send

Measure

Contents

Welcome to PoliteMail!

This training manual is designed for all new users of PoliteMail. It provides a basic overview for each function within the tool.

The PoliteMail Knowledge Base

The PoliteMail Knowledge Base (KB) is an online, searchable resource that provides more detailed information on the functionality of PoliteMail. The KB is mentioned throughout this manual, and is denoted by the cloud icon, as well as a QR Code to access it easily from your mobile device. For even more detailed information, please refer to our PoliteMail Knowledge Base site.

Support @ **PoliteMail**

FAQs   Sign in

PoliteMail Knowledge Base

Need help with PoliteMail? Find your answers here...
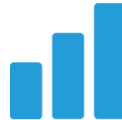
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View our Quick Start Guide | PoliteMail API Directory

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General How-to Q&A
Articles addressing solutions to common issues & questions.

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Information regarding technical configurations & data security.

Contact Support
Most popular & frequent issue resolutions & support request form.

What is PoliteMail

PoliteMail enables users to measure and improve email communications. With PoliteMail, you can create, send, and measure Outlook broadcasts including corporate newsletters, executive and leadership messages, HR and benefits emails, employee education and training, or any other communications program, to any distribution group.
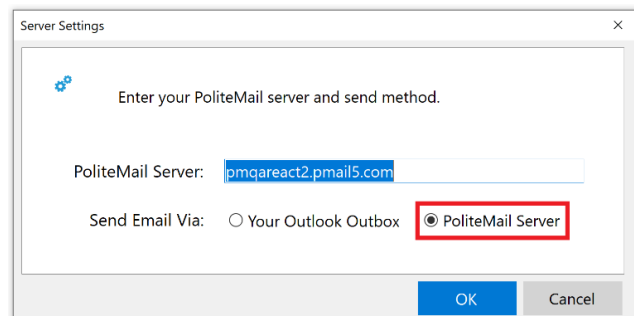
Getting Connected

There are two possible ways to log in to PoliteMail with version 5.0+. Your IT department will choose the one that best fits your organization's needs upon implementation. The two options are Password Authentication, or Single Sign-On through an already established authentication protocol.

- If you are using Single Sign-On, your IT department will set up your login credentials.

- If you are using Password Authentication, you will receive an email entitled, "Your PoliteMail Account is Ready," which will include a link to the software for installation, your account password, and your unique PoliteMail Server host name (needed for your first server connection).

Installing PoliteMail

1. Click the download software link
2. Close Outlook and double-click on the .exe file you just downloaded to launch the installer.
3. Re-open Outlook. You will be asked to make a connection to the PoliteMail Server account.
4. The Server Settings window appears.
    a. Enter in the PoliteMail Server host name contained in the welcome email
    b. Click on **PoliteMail Server** under Send Email Via. Sending through the PoliteMail Server will increase the speed of the send while not bogging down the Outlook outbox, especially for those with larger (>1000) distribution list population.
5. Click **OK.** The next two screens will ask you to enter in your email and password provided in the welcome email.
6. Once you hit Sign in, you will know that you are logged into PoliteMail when you are brought to the Account tab.

→ If you are using Single Sign-On, you may see a different login screen depending on what your IT Administrator has set up.

☁ [Getting connected.](#)

After Installation

Upon your first log in to PoliteMail, you will be asked for permission for a scan of the inboxes you have access to. This allows PoliteMail to measure all responses to these inboxes from the messages and appointments you will send. These responses will be calculated in your metrics, and scanning these inboxes is important for accurate data analysis. Please choose **Yes**, if you would like PoliteMail to capture responses to additional inboxes for metric purposes.
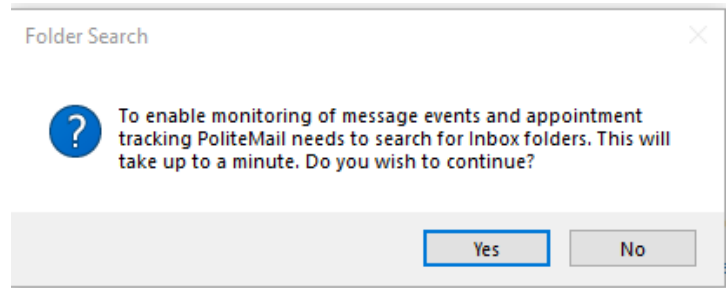
A new **POLITEMAIL** tab will appear within your Outlook interface in two places: in the ribbon of your main Outlook inbox, and in the ribbon of a new Outlook email message.
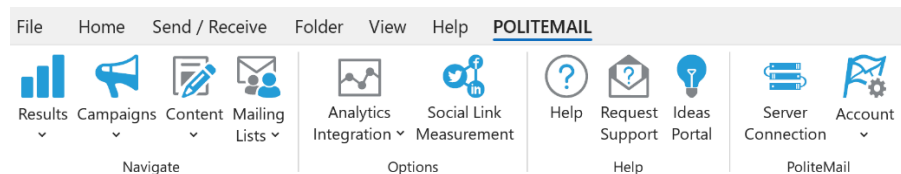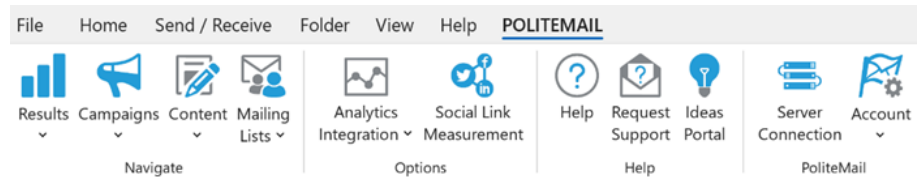

PoliteMail tab in the Outlook window
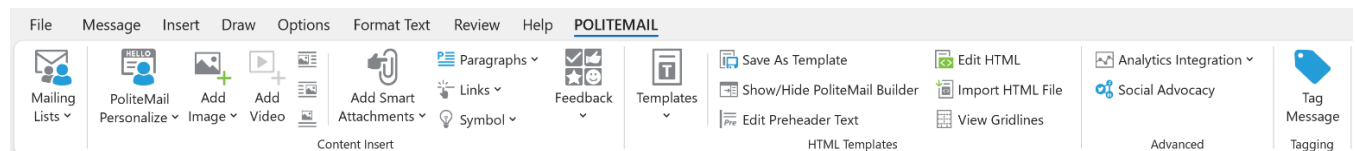
PoliteMail tab in a new Outlook email message

If PoliteMail disappears from your Outlook at any point, please see this article on how to enable PoliteMail. You may also click on the Help icon to access the complete PoliteMail Knowledge Base site.

The PoliteMail tab in Outlook

Click the POLITEMAIL tab to view the tools that make up the PoliteMail add-in.

Button	Description
Results	Email metrics and analytics reporting tools. View metrics reports by message, campaign, list, sender, from, account, measurable social media links, and interactions.
Campaigns	Create and manage mailing campaigns. Group messages into Campaigns for bundled metric details. Also view Scheduled Sends.
Content	View, edit and manage email templates, brand themes, paragraphs, images, measured links and Smart Attachment content.
Mailing Lists	Import and manage mailing lists created outside of the Exchange global address book. It also provides lists of undeliverable email addresses and contacts who have opted out.
Analytics Integration	Enables your web analytics tool to report on traffic coming from your email messages and campaigns.
Social Link Measurement	Allows measurement of links used outside of an email. Create a measured URL to copy and post on external web sites or social media.
Help	Directs users to the PoliteMail Knowledge Base site. Search this resource for common questions and answers.
Request Support	Generates an email with pertinent system configuration information and error log data to send to the Support Team for assistance. Please add a brief description of the problem to the top of the email, including any helpful attachments, and send the support request directly to PoliteMail Support.
Ideas Portal	Directs users to the PoliteMail idea submission site. Request new features or improvements that you would like to see in future releases.
Server Connection	This makes the authenticated connection between your PoliteMail for Outlook software and the PoliteMail Server for your account. Check your server connection, account email address, password, server, and send via option.
Account	Contains user preferences and other PoliteMail settings. Admin users can access additional settings to manage measurement modes, users, groups, custom fields, subscriptions, and archiving options.

PoliteMail in a New Message

Click the **New Email** button in Outlook to create a new Outlook message, and you will notice the addition of a PoliteMail button in the Message tab.
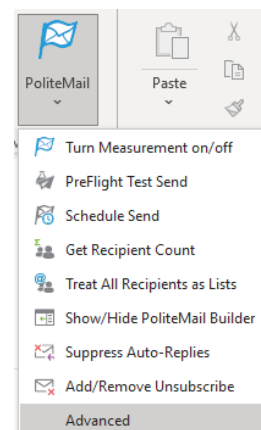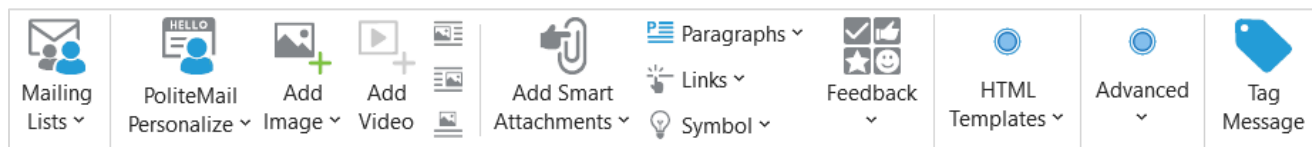
Button	Description
Measurement	Click the flag to turn measurement on. This will open a separate window where you set the mode to Individual, Anonymous or Aggregate and assign the message to a Campaign if needed. See Types of Measurement for more information.
Preflight Test Send	Creates an exact copy of the current message addressed to yourself as a test that will allow you to verify content, layout, and links. The subject will be preceded with PREVIEW.
Schedule Send	Sets a specific future date and time for this message to be sent, including if the recipient is in a different time zone.
Get Recipient Count	Provides a count of total recipients for the email.
Treat all Recipients as Lists	Attempts to expand each recipient as if it were a list. Useful when only the SMTP alias of a list is available in the Global Address list.
Show/Hide PoliteMail Builder	Toggles the visibility of the PoliteMail Builder, the built-in template creator.
Suppress Auto-Replies	Suppresses all automatic emails for this message only and works when using Global contacts from your Exchange Server within your internal domain.
Add/Remove Unsubscribe	Inserts or removes an opt-out footer into your email that allows recipients to opt-out or unsubscribe from future mailings.

Advanced	Description
Disable Open Measurement	Measures links in messages but omits the measurement beacon. Used for sending PoliteMail messages to mobile devices.
Disable O365/iOS Measurement	Turns off measurement is Office365 and iOS, respectively.
Direct Replies To	Specifies a different inbox where bounced emails will return.

The PoliteMail tab in a New Outlook Message

There will also be a tab for **POLITEMAIL** with the following tools related to content creation.

Button	Description
Mailing Lists	Enables you to select from any lists you have imported, and have that list included within the recipient addressing. By default, the list will be added to the To: field, but can be copied to the CC: field.
PoliteMail Personalize	Places an automated merge field into your message. Personalized fields added to your message will be replaced with data when you send with Measurement selected. If data does not exist for this contact, it will be left blank.
Add Image	Places an image such as a logo or picture into your email. Unlike Outlook's Insert Picture, Add Image will not increase the size of your email, as the image is placed as a web reference, keeping the email size smaller and faster.
Smart Attachments	Places any file into your email as a measurable link. Unlike Outlook's Attachment, a Smart Attachment does not increase the size of your email message and enables you to measure when the file is viewed. This feature is also available in the PoliteMail Builder.
Paragraphs	Choose from sections of content that have been saved for reuse. The section will be loaded into the current message at the curose. Save any section by right-clicking and selecting 'Save as a Paragraph'. This feature is also available in PoliteMail Builder.
Links	Choose from links that have been saved for resuse. PoliteMail will measure all URLs included within an email message, not just those added using this Links tool. To store a commonly used link, right-click the link in the email, and choose 'Save Link'. This feature is also available in the PoliteMail Builder.
Symbol	Insert a variety of symbols into your message.
HTML Templates	See next page for a breakdown
Advanced	See next page for a breakdown
Tag Message	Allows users to add message tags that can be categorized and searched.
Feedback	Enables simple surveys, polls, and Open Visibility metrics to be included in your message.

The HTML and Advanced Buttons

HTML Templates	Description
Templates	Select from a list of standard template sections or build a new HTML template page to create custom templates.
Save As Template	Saves the current email as a template page in the **Content Library**. The stored name will match the subject line and can be found under the Templates pull-down menu.
Edit HTML	View and edit the underlying HTML code of the message. You may copy the HTML from here, paste it into an editor, make changes and paste it back in. Click Edit HTML again will switch back to the HTML view mode.
Import HTML File	Loads an HTML page into the Outlook editor. Note that all CSS should be inline, and that Outlook does not support all HTML tags (no floating divs, no background images, limited css, etc.).
Show/Hide PoliteMail Builder	Toggles the visibility of the PoliteMail Builder, the built-in template creator.
Edit Preheader Text	Allows you to change the preheader text your recipients will see when the email is displayed in Outlook.
View Gridlines	Toggles gridlines in any tables in the message. This makes it easier to adjust widths for the best appearance.

Advanced	Description
Analytics Integration	Allows you to enable analytics integration for this message with Google Analytics, Webtrends, or Adobe Analytics.
Social Advocacy	Allows users to add a block of social media icons to messages composed in PoliteMail, so recipients can share stories to their own personal social media sites.

User Account Settings

Reviewing Your User Preferences

Please check your settings prior to your first send. These can be found under **PoliteMail** > **Account** > **Settings > User Preferences.** Settings marked "Global/Locked" can be modified and locked by Admins, preventing Managers and Users from changing them**.** Settings marked with a green triangle are new in version 5.0.

User Preferences > Editing

Setting	Global/Locked	Description	Recommended Setting
Default Campaign	Yes	Automatially assigns all measured messages to this campaign. May be overridden by user unless locked.	Use as the default if one campaign is used very often.
Default Template	Yes	Loads the current template when a new template is created with the PoliteMail Builder.	Use as the default if one template is used very often.
Embed Images	Yes	Embeds images into messages. Loads images with no connection but increases email size.	Keep this turned off for faster and smaller emails.
Enable Subscription	Yes	Writes a CAN-SPAM compliant footer into every new measured email message.	Use if required to add a footer to emails.
Override Word Count	Yes	Allows you to manually insert the number of words in a message, and bases metrics off this word count. If on, the overrwrite word count prompt will appear every time before the message is sent.	Turn on when emails are written in multiple languages.

User Preferences > List Handling

Setting	Global/Locked	Description	Recommended Setting
Use Expansion Cache	Yes	Cashe distribution lists, making them expand faster on subsequent openings.	Turn on for faster data retrieval.
Clear EWS Cache	Yes	Remove all entries from EWS cache. The cache is used to store list membership for 24 hours, without having to expand the list using Exchange Web Services.	Clear the cache for better performance.
List Expansion Methods Enabled	Yes	Sets the methods for expanding distribution lists.	Set by System Admin based on requirements.

User Preferences > Individual Settings

Setting	Global/ Locked	Description	Recommended Setting
Forget Client Credentials	No	Clears stored credentials for the next user.	Clear this for better performance and security.
Re-establish List Warnings	No	Re-enables previously suppressed warning dialogs for invalid list operations.	Keep on to be warned of failed or error operations.
Reset All Table Views ▲	No	Restores column configurations and removes all filters.	User preference.
Monitor Multiple Inboxes for Undeliverables and Auto-Replies	No	If more than one inbox is used, click the Scan Inboxes button and select the inbox folders PoliteMail will monitor for auto-replies.	Recommended if more than one inbox is utilized.

User Preferences > Options

| Setting	Global/ Locked	Description	Recommended Setting
Delete any preflight messages older than ▲	Yes	Automatically deletes preflight test messages after the specified duration.	Preflights count in the final measurement reports and can create inaccurate data if many are sent. Turn on for the most accurate data.
Use Edge	Yes	Opens Edge broswer instead of Internet Explorer for pop-up windows.	Turn off if Internet Explorer is used as the default browser.

User Preferences > Sending

Setting	Global/ Locked	Description	Recommended Setting
Allowed from address required ▲	Yes	If the company requires approved senders for emails, the user receives a notification and a PoliteMail admin can approve the sending address.	Set by admin based on sending requirements.
Remind me to enable PoliteMail meas. when sending to lists with members >	Yes	Displays a warning with messages without measurement if the recipient count is greater than the specified number.	Recommended to prevent messages being sent with no measurement.
Measurement Default	Yes	Sets the default measurement mode. Can be changed by user unless locked.	Set to most commonly used measurement method.
Email me when large broadcasts complete and on the interval specified	Yes	Select how often to be notified on the progress of large sends.	Turn on to monitor large sends.

Measurement

Measurement Modes

PoliteMail uses a standard web-page image beacon to determine opens and other recipient behavior. Email **open measurement** is a result of the invisible measurement image being viewed within the email. This enables measurement of the opened email, and no other user interaction is required (unlike a read-receipt, which interrupts the user and requires input).
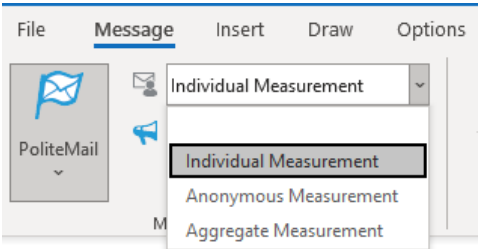
PoliteMail offers three measurement modes. Click on the **PoliteMail Flag** to enable measurement and select a measurement mode by clicking the drop-down menu to show other options. These options may be enabled or disabled by Admins.

Measurement Type	Description
Individual	The individual's email address is associated with the interactions.
Anonymous	The email address is NOT associated with the interactions (GDPR-Compliant).
Aggregate	No email addresses are collected, all metrics are non-unique summations by device.

Office365 Measurement

Apple introduced Mail Privacy Protection in 2021, which further reduces email data collection and increases privacy. Apple hides your IP and loads images in the background by routing http/https requests via proxy servers, with a generated, regional IP address. Ultimately this means that for users on Macs and iOS devices, your email data will most likely be non-existent or a lot less accurate.

PoliteMail addresses this by effectively filtering out proxy opens, as well as offering new measurement technologies which rely on authentication data instead of image requests in order to maintain accurate email metrics. If you have recipients using Mac and iOS devices, you may want to enable the O365 Measurement setting so those users can be accurately measured.

Go to **Account** > **O365 Measurement** and click on Sender Authentication to set up O365 Measurement with the Actionable Email Developer Dashboard. The data fields will already be pre-populated, but you will want to put in the name of your Exchange Administrator under **Additional Information**. Once enabled, O365 Measurement will be applied to every sent measured message.

To remove O365 Measurement, open a new Message, click on the pull-down menu under the PoliteMail flag. Choose Disable O365 Measurement, Disable iOS Measurement, or both.

Content

In PoliteMail, content consists of Templates, Images, Brand Themes, Links, Paragraphs, and Smart Attachments.

Sharing Content

When a user either creates or imports content, only that user and PoliteMail Admins will be able to use or edit it. If the Admin is using Groups, then the Manager-level users of that Group will be able to see the imported content.

➜ To share content, click on the item from the data grid. A panel will open on the right side of the screen. From there, click the 'Shared' checkbox.

Users may choose to share the content they import or create. If a user shares content and marks the Business and Region subgroups as "Unassigned", then all users across the account will be able to access it. If the user belongs to a Group and chooses to share it with the Group, only Users and Managers in that Group will have access .

Templates

Creating a Template

You create a new Template from the PoliteMail Builder:

1. If Templates don't show, click the ☰ and select 'Templates'.
2. Click on the **New** button. You can also set sharing and ownership permissions from the PoliteMail Builder.

Changing Template Options

1. Go to **POLITEMAIL** > **Content** > **Templates.**
2. Click on the template from the data grid, which opens a panel on the right.
3. Make your desired changes and click 'Save'.

➜ This can also be done by clicking on Actions ⌄ . You can also export as a CSV or Excel file.

| Template Action	PoliteMail Builder	Data Grid
Create New	●	
Export to Excel		●
Edit Name	●	●
Edit Subject Line	●	●
Set Sharing	●	●
Change Owner	●	

Brand Themes

Brand Themes can hold your organization's specific font and colors, and apply them to any template. Brand themes can only be created in the PoliteMail Builder.

Creating a Brand Theme
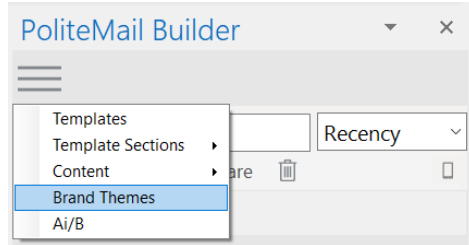
You create a new Brand Theme from the PoliteMail Builder:

1. If Brand Themes are not listed, click the ═ and select 'Brand Themes'.
2. Click on the 'New' button.
3. Select your formatting options, give the Theme a name, and click 'Save'.
4. You can also choose to share the theme by clicking the 'Share' button.

Editing a Brand Theme

Editing the colors, fonts, etc. of the Brand Theme must be done from the PoliteMail Builder. Just click the Brand Theme you wish to change and click the 'Edit' button.

You can change the name and sharing settings from the data grid. Go to **POLITEMAIL** > **Content** > **Brand Theme**. Clicking on a Brand Theme will open the panel on the right to make your changes. You can also export as a CSV or Excel doc from the 'Actions' button.

Theme Action	PoliteMail Builder	Data Grid
Create New	●	
Export to Excel		●
Edit Name	●	●
Set Sharing	●	●
Change Owner		●

Paragraphs

Paragraphs can either be written in an email message or created in an outside program like Word.
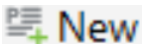
Creating a Paragraph

To create a New Paragraph from a New Message:

1. Highlight the paragraph, and then right-click and choose Save as Paragraph. You can also copy and paste the paragraph from Word into the new message.
2. The Paragraph will be saved and appear in the Paragraphs drop down menu with the name being the first few words in the saved paragraph.
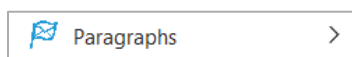
To import a Paragraph from the PoliteMail Builder:

1. Go to **Menu** > **Content** > **Paragraphs**. Type your Paragraph in the New Email window and then highlight it.
2. Click ![New]. A dialog box will open where you can name your Paragraph and save it in the Builder.

Paragraph Action	PoliteMail Builder	Data Grid
Create New	●	
Export to Excel		●
Edit Name	●	●
Set Sharing	●	●
Change Owner		●
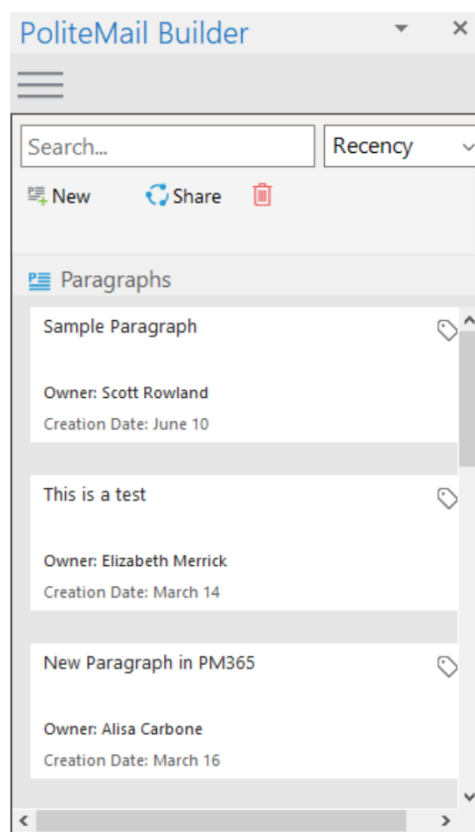
Inserting a Paragraph

1. Place the cursor where you want the paragraph placed and right-click the mouse.
2. Select 'Paragraphs' and choose your desired paragraph from the list.

Alternatively, you can simply double-click on the desired paragraph from the PoliteMail Builder.

Images

Images can be imported either through the data grid, from the POLITEMAIL tab in the New Message window, or through the PoliteMail Builder.

Importing an Image

To import from the data grid:

1. Go to **POLITEMAIL** > **Content** >**Image**.
2. Click ⊕ New. This will open a window for you to browse for an image on your device.
   a. Clicking on an Image in the data grid will open an edit window where you can change the name, replace the image, set sharing, set ownership, and set security.

→ You will see a checkbox labeled 'Secured'. A secured image cannot be accessed by users off your internal network and is primarily used for On-Premise clients (Cloud clients will have set up a receive connector).

To import from the New Message window:

1. Go to **POLITEMAIL > Add Image**.
2. You can select from the list, or select 'Add Image' to browse for an image on your device.

To import from the PoliteMail Builder:

1. In the PoliteMail Builder, click the ☰ and go to 'Content' > 'Images'.
2. Click on 🖼 New . A dialog box will open.
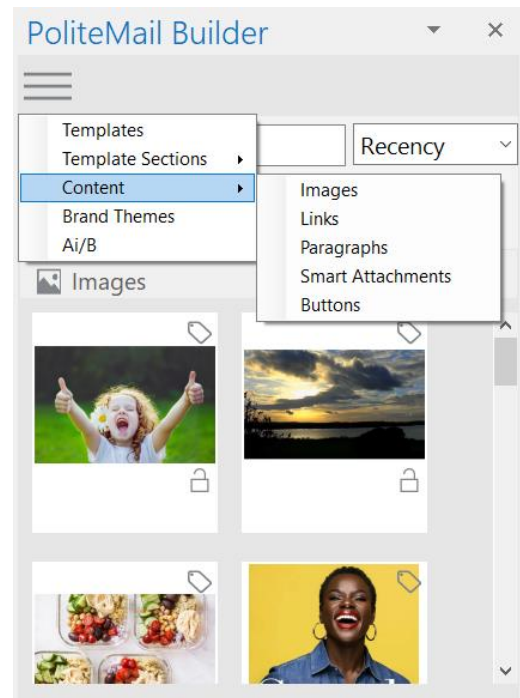3. Click 'Browse' and browse to the image to import.

Image Action	PoliteMail Builder	Data Grid
Create New	●	●
Export to Excel		●
Edit Name		●
Set Sharing	●	●
Change Owner		●
Change Security		●

Links

With the [Links](#) function in PoliteMail, you can save links and easily pull them into new messages without having to retype it.

Creating Links

Links can be created either through the data grid or through the PoliteMail Builder.

To create from the data grid:

1. Go to **POLITEMAIL** > **Content** > **Links**.
2. Click ⊕ New. Give your link a name and URL. You can also share the link from this window.

To create a link from the PoliteMail Builder:

1. While in the PoliteMail Builder, go to ☰ > Content > Images.
2. Click 🖼 New and give your link a name, URL, and a description (this helps to find it easily if you save a lot of links).

→ In all measured messages, PoliteMail will automatically measure <u>any</u> link, whether you use the Links feature or not.

Link Action	PoliteMail Builder	Data Grid
Create New	●	●
Export to Excel		●
Edit Name	●	●
Edit URL	●	●
Set Sharing	●	●
Change Owner		●

Smart Attachments

PoliteMail's [Smart Attachment](#) feature is a great way to keep your email message size down by hosting attachments on PoliteMail's server, versus using Outlook's Add Attachment feature. These attachments can also be measured and reported on.

Importing Smart Attachments

Smart Attachments can be imported either through the data grid or through the PoliteMail Builder.

To import from the data grid:

1. Go to **POLITEMAIL** > **Content** > **Smart Attachment**.
2. Click ⊕ New. You will be asked to choose between a secured or a public Smart Attachment. Labelling a Smart Attachment as secured will prevent users from forwarding it or copying and pasting it to another email.
3. Clicking on a Smart Attachment from the list will open a side panel where you can change the link text, description, set sharing, and set security.

To import from the PoliteMail Builder:

1. While in the PoliteMail Builder, go to ☰ > Content > Smart Attachment.
2. Click 🖼 New . A dialog will appear for you to browse to your attachment, give it a name, and select if you want it secured.

Link Action	PoliteMail Builder	Data Grid
Create New	●	●
Export to Excel		●
Edit Link Test		●
Edit Description		●
Set Sharing	●	●
Set Security		●

Buttons

Buttons allow you to quickly and easily add a graphical element that users can click on to be directed elsewhere. Buttons work much like Links, but are more visual. In addition, while you can change the size, text, and destination URL of a button, you are limited to the pre-made options shown.

Adding a Button

1. In the Composition window, place your cursor where you want the button to be.
2. Buttons can only be added from the PoliteMail Builder. Go to ≡ > Content > Buttons. A list of pre-made button formats appears.
3. Drag or double-click the button you want to place.
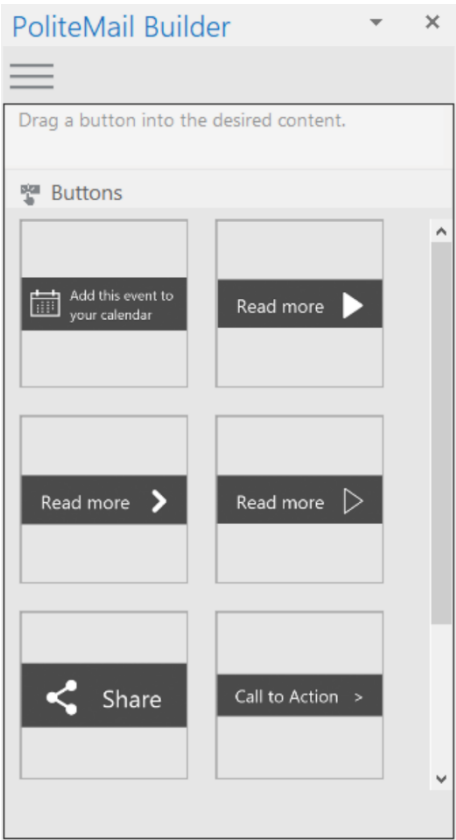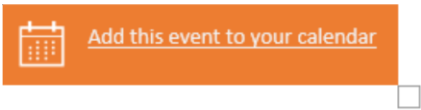
Editing a Button

Action	Process
Resizing a Button	Hover your mouse over the button to reveal a white square in the bottom right corner. Drag it to make it your desired size. Note that dragging the square resizes the button but not the text or icon within it.
Edit Button Text	Select the text in the button to change. You can also click on the white square to select everything. The editor toolbar will pop up, allowing you to change the format, color, font, etc.
Change Button Color	Click the white square to select the entire button. The editor toolbar will appear. Click the paint bucket and select your desired color.
Add Hyperlink	Select either the text or the icon and press 'Ctrl+K'. Alternatively, you can right-click and select 'Link…'. Enter the destination URL and click 'OK'. Now when users click the button, it will bring them to this destination.

[Buttons](#)

Mailing Lists

You can upload contact lists from other resources such as a CRM system or other contact management systems in CSV format. The only requirement is that you have a header for an email address named "Email" in one of the columns. Additional information like name, address, etc. can be added into other columns as well.

Importing a Mailing List

1. Go to the PoliteMail tab in Outlook, click on the **Mailing** Lists button, and select **Mailing Lists**.
2. Click **Import** and select either CSV or Outlook/Exchange. You will then be brought to the Import Contacts window.
3. Selecting **Create New List** will create a new mailing list.
4. Click 'Browse' to select and choose a saved CSV file or Exchange list.
5. Click the 'New Mailing List Name' field to name this list. Checking the "Has Column Headers" field will import the headers you have created in your mailing list.
   a. If you choose **Add to Existing List,** this will append any new addresses onto the list, but it will not remove old contacts. If you need to remove contacts from a list, it's recommended to do a fresh import of the list.
6. When choosing the Contact Owner, when it's set to the default **All Users**, the contacts can be viewed by everybody if they are shared. However, if you change the contact owner to a specific person, only this person will be able to see the contacts and the metrics associated with them. User role and Group membership may also factor into who gets to access and use the contacts.
7. Click **Next.** A second page appears where you can map your CSV data to corresponding columns. You'll want to make sure the information you have entered matches the data fields.
   a. If you have created custom fields, they should be available as an option in the pull-down menu. If you don't want to import a data field, set the PoliteMail mapping pull-down menu to **Do not Import**.

Import Contacts

Browse

☐ Has Column Headers

◉ Create New List
◉ Add To Existing List

New Mailing List Name

Supervisors

Contact Owner

All Users

☐ Mark entire import as Opt-out

Next
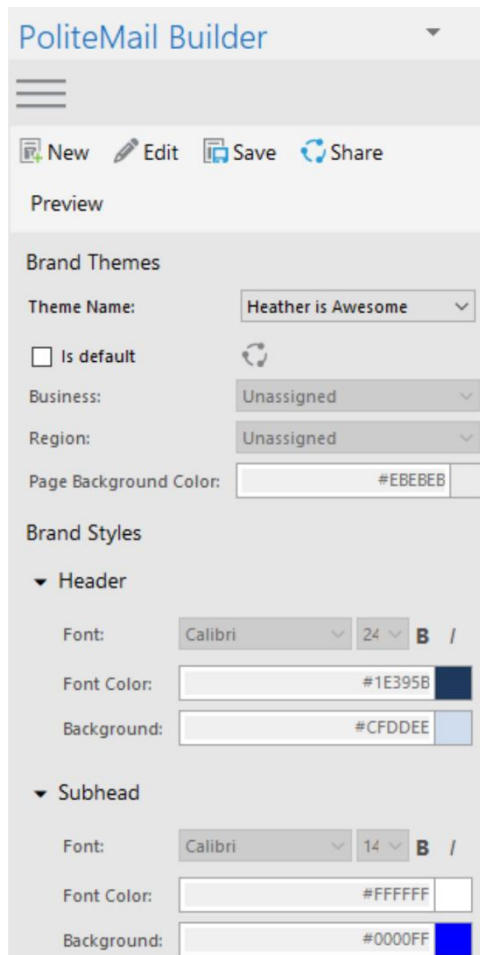
[Mailing Lists](#)

PoliteMail Builder

PoliteMail offers the ability to create and save templates using the PoliteMail Builder, all from within Outlook! The PoliteMail Builder can open as a side panel whenever you compose an email. From the New Email window, click the PoliteMail flag button, and then select 'Show/Hide PoliteMail Builder'.

The PoliteMail Builder Panel
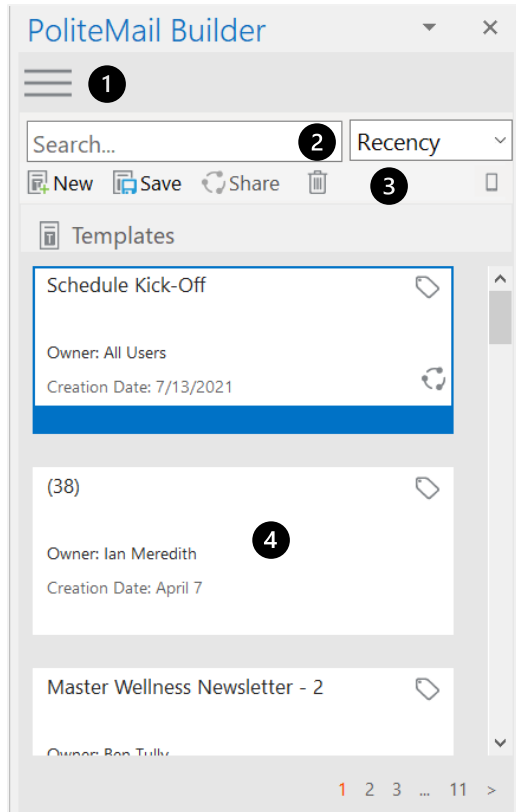
❶ Use the ☰ button (also sometimes called the 'hamburger' menu) to select a content type to view, create, or edit. A drop-down menu will appear where you can choose from templates or template sections, content items such as images, links, paragraphs, and smart attachments, brand themes, and Ai/B testing.

❷ You can search for a specific content item by typing its name here, and selecting from the matches that display. To the right, you can also sort the list of items displayed by recency, alphabetically, or items exclusively to you or are shared.

❸ The 'New' button will create a new content item based on the type of content item currently being viewed. Once created, the 'Save' button adds it to the PoliteMail system. Click the 'Share' button to quickly share any item you have currently selected. Finally, the trach can icon will delete the selected item, and the rectangular icon on the far right will preview it.

❹ A list of all items of the content type you have selected will appear here. Note there may be multiple pages, as shown at the bottom.

Brand Themes

A Brand Theme is used to define a specific look (colors, fonts, etc) for the outgoing communication, either for the entire organization or for a specific Business or Region Group.

Brand Themes determine the look of each section of your message, such as the header, sub-header, column layout, and footer. These might make up the Template you've selected or are manually included by adding Template Sections.

Brand Themes will not change the look of a simple email message that does not contain any Template Sections, even if the message is being measured.

If you plan on using a Template or Template Sections, select your Brand Theme before composing your message. Changing a Brand Theme will not apply to any message in progress.

Selecting a Brand Theme

1. From the PoliteMail Builder, click on the ☰ and select 'Brand Themes'.
2. Choose from the Theme Name drop-down to select an existing theme.

Creating a New Theme

1. Click ⊞ New . You can now set if your theme is the default, set a Business or Region, or change the background color of the entire page.
2. Under Brand Styles, you can change the font, formatting, font color, and background color of each Template Section.
3. The buttons at the top allow you to cancel your theme without saving and return to the themes, list, save the theme, and preview the theme to see how it looks.

Template Sections
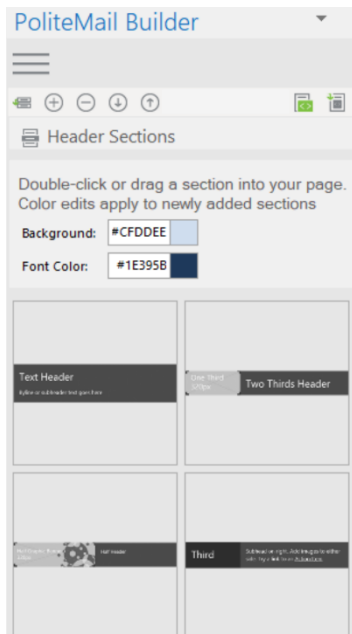
Template Sections are the various parts of a Template, which allows you to mix and match to create a new Template quickly. You will see several template categories including Header, Footer, and Body options. Clicking on these buttons will display all options available.

To add a section, click and drag it to the composition window, or place your cursor where you want the section to go, and then double-click on it in the PoliteMail Builder. There are options for duplicating sections and re-arranging sections as well.

Once inserted, you can customize the section by entering your own text or adding other content items from the PoliteMail Builder.

By default, the background and other formatting will be determined by the Brand Theme.

Templates

The Templates tab holds all your saved templates. You can apply tags to templates, as well as share them with other users. Templates can be searched by name or by tag. You can also preview your templates to see how they look on both desktop and mobile devices.

 [Templates](#)

Ai/B Subject Testing

Leverage attention data from over 1.5 billion internal emails and apply modern AI text analysis and language process tools to your message subject content. PoliteMail will allow you to test subject line alternatives and automatically suggest wording to gain the highest attention. Open the PoliteMail Builder and go to the Ai/B section. Type in a subject line and hit enter.

The AI model will recommend some alternative subject lines that will draw more attention. The recommended subject lines are listed in ranked order, with the top subject line considered the best. To replace your current subject line, double click on one of the recommended subject lines.

You can also enter two subject lines and click the Compare button to see which one is stronger.
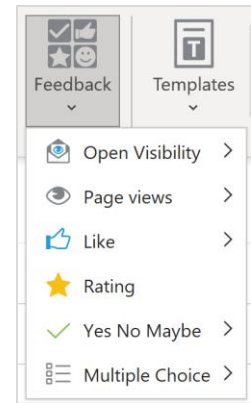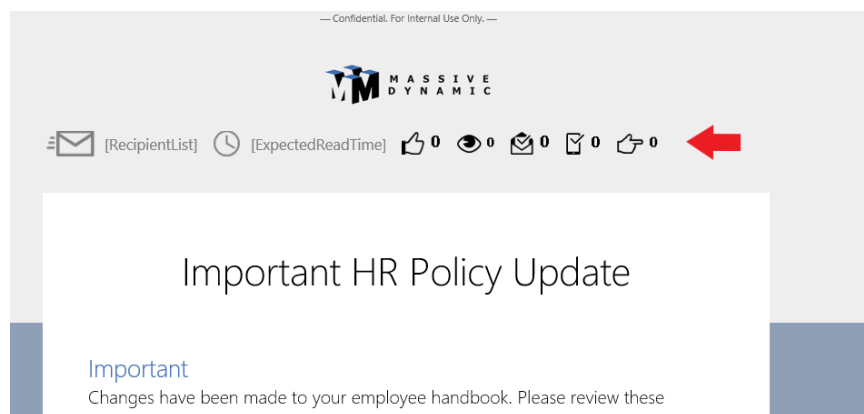
 [Ai/B Testing](#)

Feedback

The feedback menu provides several options for adding simple polls and surveys. The poll will appear in your email message wherever you place your cursor. When recipients answer a question or provide a rating, they will be brought to a separate website page with either the current results of the survey, or a thank you for your feedback page. Results from your poll(s) will be displayed at the bottom of a metrics report.

Feedback Options

Menu Item	Description
Open Visibility	Allows recipients to see interaction data in near real-time, including likes, page views, read time, mobile opens, and clicks. This information will appear at the top of your template or message, and recipients will be able to view and refresh the data.
Page Views	Lets you choose specific items to display, instead of displaying all of them like Open Visibility does. This includes the name of the recipient list, read time, page views, opens, and clicks.
Like	Lets you add a Like button, or both a Like and Dislike button.
Rating	Lets recipients enter a rating from 1 to 5 stars. A pop-up window will appear so you can specify the verbiage of the rating request. If you make this a Poll instead of a Survey, the recipient will see the current results when they finish their rating. Otherwise, the results will only be visible to you in the results report.
Yes No Maybe	Works like a rating, except you may choose from several different Yes/No options.
Multiple Choice	Works like a rating, except you may ask a multiple choice question. You can also customize each possible answer.

— Confidential. For Internal Use Only. —

M A S S I V E D Y N A M I C

[RecipientList] [ExpectedReadTime] 0 0 0 0 0

Important HR Policy Update

Important
Changes have been made to your employee handbook. Please review these

[Open Visibility](#)

Metrics

One the most impactful features of PoliteMail is the reporting capability. After sending your measured PoliteMail message, you will be able to see results within the Results button. Under the button, you can view results for Messages, Campaigns, Mailing Lists, Senders, From, an Account Report, Social Links, or Interactions.

Message Metrics

1. From the **POLITEMAIL** tab, click **Results** and select 'Messages' from either the drop-down or the tabs across the top. A list of all your messages appears

2. Double-click on the one you want, or click on it once and the click on Email Metrics.

The Top Menu

View Heatmap   Benchmark: PoliteMail Average ∨   Segmentation   Excel   Word   Mail   ?

Item	Definition
View Heatmap	Gives a cool to warm overlay which shows read-time and click metrics visually. This data can be used to see how your readers are viewing your content, and where you should be putting key messages and links.
Benchmark	Select between viewing message metrics to your PoliteMail average or to industry average metrics. You can also view a Comparison Report which compares all your emails to the average as a list.
Segmentation	This allows you to compare the metrics of two different distribution lists, such as the email performance for two different regions or departments.
Excel	Exports the data in an Excel format.
Word	Exports the report in a Word format.
Mail	Generates an email of the report.
Question Mark	Open a pop-up window that gives definitions for all the metrics listed.

General Performance
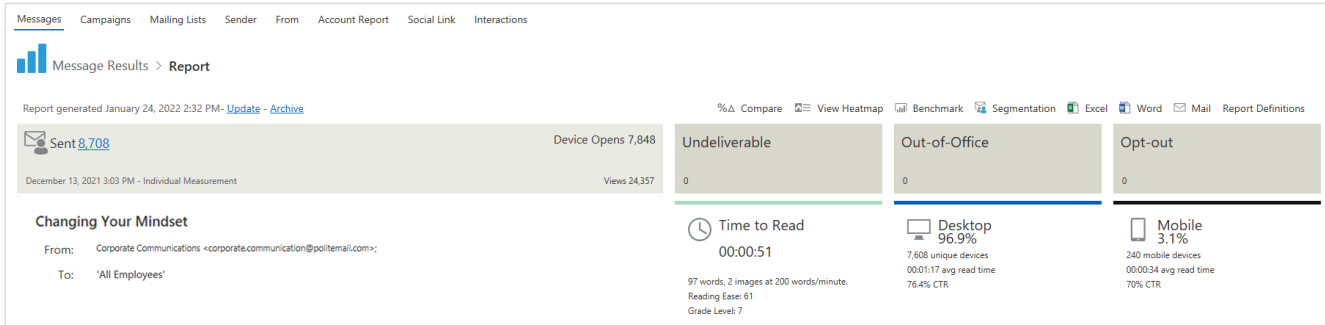
The first section of the report gives general information, such as how many were sent, how many were opened, the number of undeliverable sends, out of office replies, and number of opt-outs. It also will show the estimated Time to Read and the views by device type.

Rate Metrics
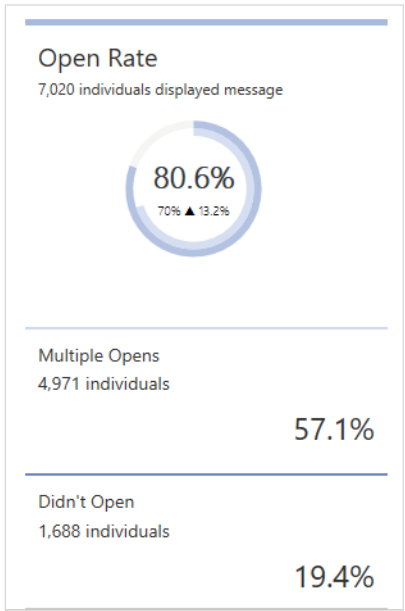
The next section shows a series of pie charts that show varies metrics. If you sent the message using Individual Measurement, you can click on any metric and get a list of recipients who interacted with the message.

- The outer circle represents the value on the message you are viewing.
- The inner circle represents this value against your company average.
- The large center percentage is the metric for the message.
- The smaller percentage is the metric for the company average. A triangle pointing up (▲) indicates the message performed better than the average, and a triangle pointing down (▼) indicates the email performed below the average.
- The percentage to the right of the triangle shows the amount of the variance.

Metrics Definitions

See the table below for PoliteMail metrics definitions. This list may also be accessed by clicking on the question mark at the top of the metrics window.

Metric	Definition
Sent	Total recipients the message was addressed to [count of members in list(s)]
Devices	Unique devices measured (devices identified via browser agent)
Impressions	Total number of all previews/opens (non-unique, total open count)
Undeliverables	Hard bounces (returned to a mailbox PoliteMail is monitoring) *Does not work with Aggregate mode
Out of Office	Out-of-office replies (returned to a mailbox PoliteMail is monitoring) Does not work with Aggregate mode
Opt-Out	Opt-out or unsubscribe action taken on this message
Opt-In	Opt-in (to a PoliteMail subscription list)
Words	Word count in message
Images	Image count in message
Time to Read	Time to read entire message content at 200 words per minute
Desktop	Email accessed via desktop/laptop computer, as identified via browser user agent
Mobile	Email access via a mobile device, as identified via browser user agent
Desktop Avg Read	Average read time on computer
Mobile Avg Read	Average read time on mobile device
Desktop Click Thru	Click thru rate from computer
Mobile Click Thru	Click thru rate from mobile device
Open Rate	An open occurs when the message content (measurement image) is requested from the PoliteMail Server. Opens are a unique count of messages opened (or previewed) at least once, by individual recipient (by unique device in aggregate). Open Rate = Opens / (Sent – Undeliverable)
Multiple Opens	Count of individual recipients with more than one open, of more than 3 seconds in duration (a quick preview < 3 seconds and is not counted)
Didn't Open	No data recorded, message not opened, or images/content not downloaded
Ignored (<3 sec)	Individual recipients who opened but had the message open for less than 3 seconds. (of unique devices in aggregate)
Skimmed (<30%)	Individual recipients who had the message open for less than 30% of the content length (in time)

Cont. from previous page

| Metric	Definition
Read Rate (30%+)	A read is an individual recipient who had the message open for at least 30% of the content length (in time). Sums all non-ignore opens by individual recipient. Read Rate = Reads / (Sent – Undeliverable)
Multiple Reads	Individual recipients who had more than one read (>30% time open)
Left Open	A read-time of over 150% of the Time to Read is considered left open
Avg Read Time	Average of all Read Times (excluding noise of sub-2 second read times and read times (left open) > 150%) Average Read Time = Sum Read-Time / Read Times Percent Read = Average Read Time / Time to Read
Click Through Rate	A click is an individual recipient (unique devices in aggregate) who clicks at least one link in the email message. Click Through Rate (CTR) = Clicks / (Sent – Undeliverable)
Attention Rate	Attention Rate = (Opens - Ignored) / Sent Attention Rate highlights if the From address, send day/time and subject line are working to get the recipient's attention
Effective Rate	Effective Rate = Click Through Rate / Opens Effective Rate is the ratio Clicks to Opens, which indicates how effective the call to action was at getting clicks, counting only those you know had an opportunity to see it (opens)
Engagement	Engagement Rate = Percent Read + (1-PercentRead * CTR) Calculation which combines Average Read Time and Click Through Rate into one metric which will not exceed 100%
Multiple Clicks	Individual recipients (unique devices in aggregate) who clicked more than one link (or same link more than once)
Didn't Click	Individual recipients who did not click any links in the email
Total Clicks	Total count of all clicks (non-unique count)
Total Links	Total links included in the email message
Total URLs	Total unique URLs included in the email message
Content Utilization	Content Utilization = Clicked URLs / Total URLs Ratio of unique URLs clicked to unique URLs included in message
Likely Forward	Measured messages which were opened by 3+ unique devices
Replies	Individuals who replied to the message

Opens and Clicks
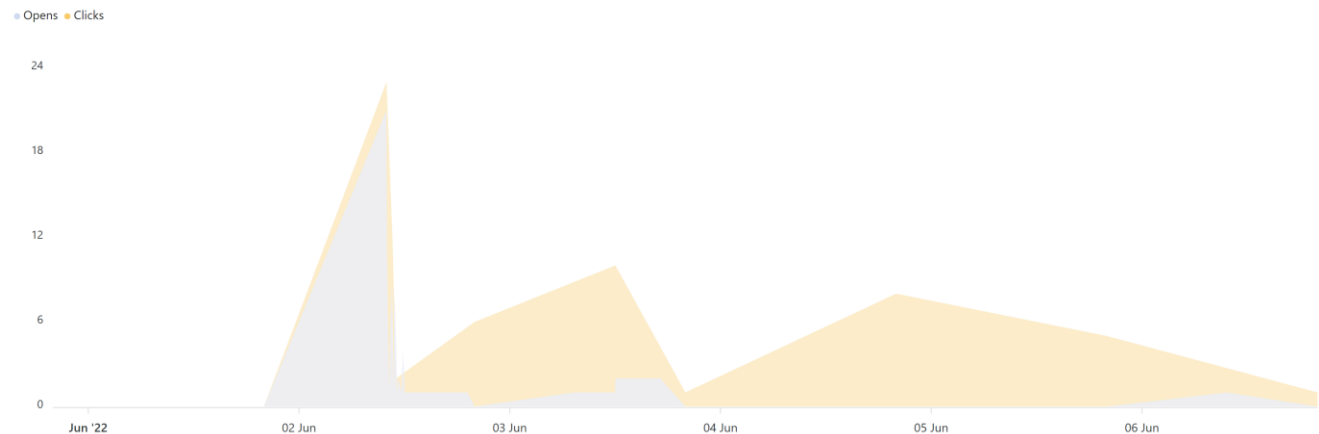
The Opens and Clicks graph gives you a visual representation of opens and clicks. By clicking on the Filter box, you can select a date range to view the data. Hovering over any section will give you precise data counts.

Device Popularity
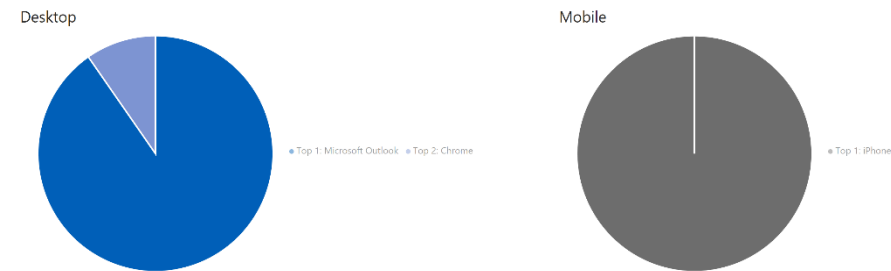
A visual representation of opens by desktop and mobile devices. Hovering over any section will give you precise counts.

Reads

Reads is a tree map showing your read data by Ignored, Skimmed, Read, Engaged and Left Open. The size of each box represents the value, and it shows proportions between each part and the whole. In this example, the message was mostly Read and Engaged with.
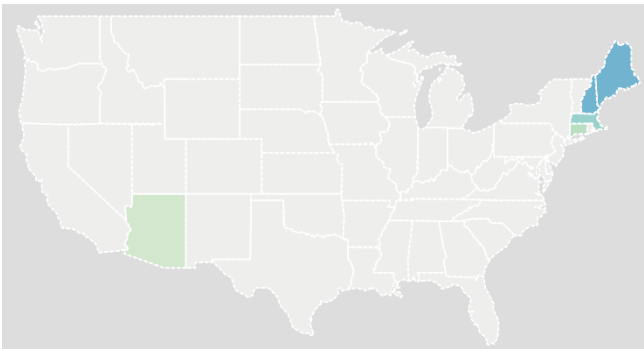
Total Read Time By Hour of Day

0 ● <00:00:16 ● <00:00:24 ● <00:06:19 ● <00:48:36 ● <04:13:29 ● <04:18:31 ● <08:28:28 ● <12:55:33 ● >12:55:33
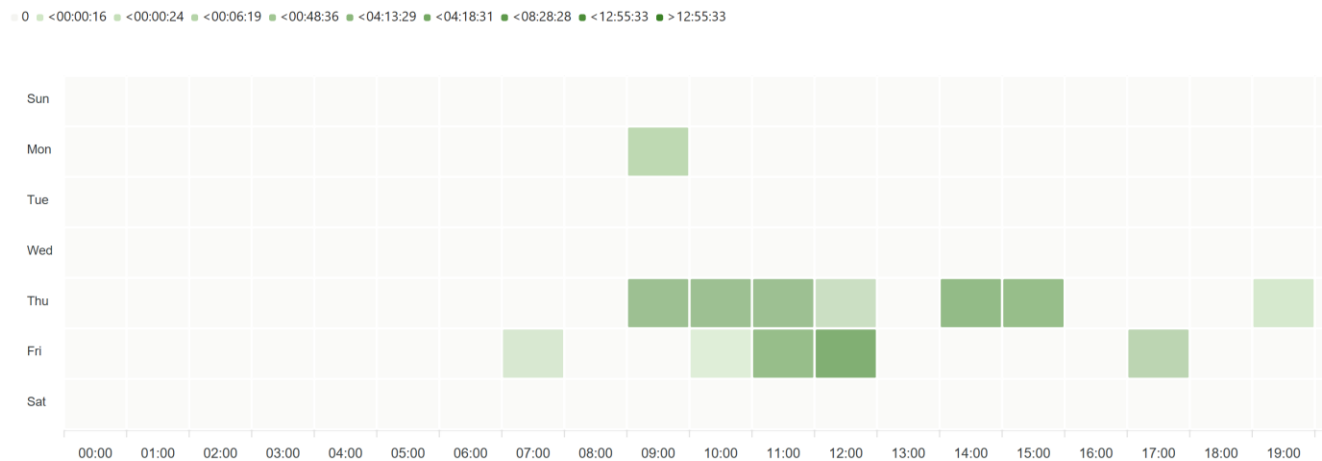
A visual representation of when your message was opened. Use this data to determine the best time of day to send your messages.

Interactions by Geographic Location

A map showing where opens are occurring worldwide.

Click Details

This section gives a summary of all the links in the email, and their individual click rates.

Total Clicks: 5 | Links: 21 | 2 of 21 URLs Clicked

Group By Link

Name	URL	Total Clicks	Unique Clicks	Click Rate
[IMAGE LINK](3)	https://www.saltandlavender.com/mediterranean-vegan-meal-prep-bowls/	3	3	8.33%
[IMAGE LINK]	https://www.youtube.com/watch?v=L4oFJRDAU4Q	2	2	5.56%
[IMAGE LINK] shareIconFacebook-footer_white.png	https://www.facebook.com/politemailsoftware/	0	0	0%

Comparing Different Messages

From the Messages Data Grid, you can select two messages to compare results.

Metrics will show each message color coded. The number displayed is the differential between the first to the second, in percentage terms. In the example below, the second email, Change Makes Progress, has a 4.5% higher Open Rate than the first.
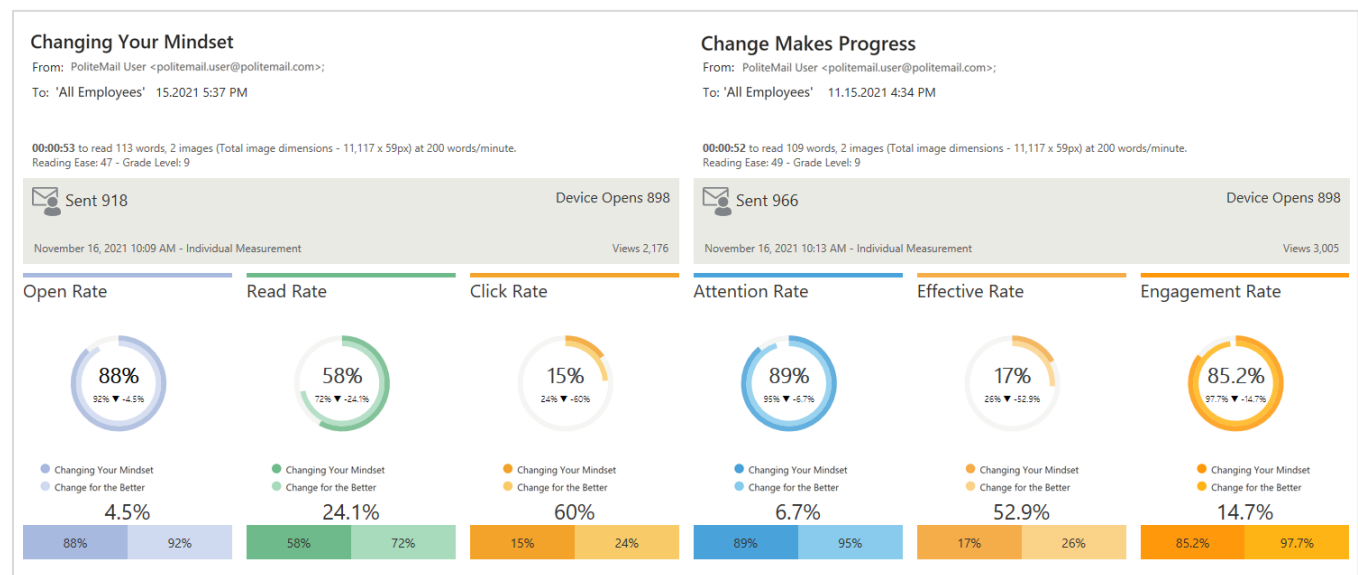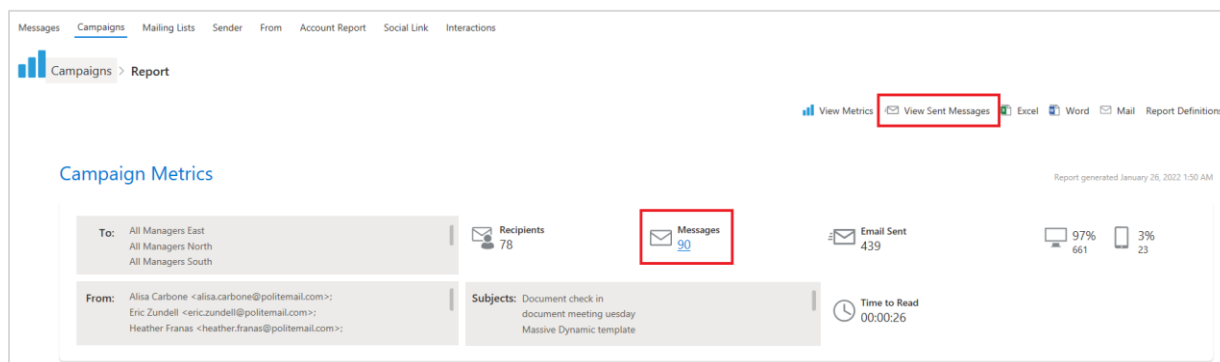
Campaign Metrics

A Campaign is a series of messages that you may have put together as part of an overall message. Campaigns are a great way to group messages, providing you with key insights and the ability to measure metrics over time. Any measured message can be added to a Campaign, including those with different measurement modes (Individual, Anonymous, Aggregate).

To open Campaign metrics, go to **POLITEMAIL** > **Results** > **Campaigns**. Double-click on the Campaign to open the metrics page.

The Campaign metrics page gives you overall metrics for all the messages in the Campaign.

→ Campaign metrics are displayed as averages of all messages, and not a summary of each individual recipient's behaviors.

- If you want to see all messages included in the Campaign, click Messages.
- If you want to review the metrics for the individual messages that are part of the Campaign, click on View Sent Messages.

Campaigns metrics focus on Email Reach, Email Readership, and Email Engagement.

Type	Description
Email Reach	The percentage of your audience that has received and opened the message, and did not immediately delete or skip it.
Email Readership	The percentage of readers who skimmed, casually read, or did an engaged read of the message, based on caclulated needed read time.
Email Engagement	Measures the user's interaction with the email, combining the content read with click activity.

[Campaigns](#)

Other Report Metrics

In addition to individual or campaign metrics, users can measure results from other variables:

| Results Report	Description
Mailing Lists	Shows the Reach, Readership, and Enagement broken down by Mailing List instead of by Campaign.
Sender	Shows the Reach, Readsership, and Engagement for a specfic Sender Name.
From	Shows the Reach, Readership, and Engagement for a specific sending email address. This is useful if sending from a generic email address instead of from a specfic person.
Social Link	Shows a report on the click performance of any external link selected. You can specify the specific date and time range to see the results.
Interactions	Shows the results of any poll or survey in near-real time. You can see if users are opening, clicking or forwarding your message. This information will display for seven days after the send.

Getting Help
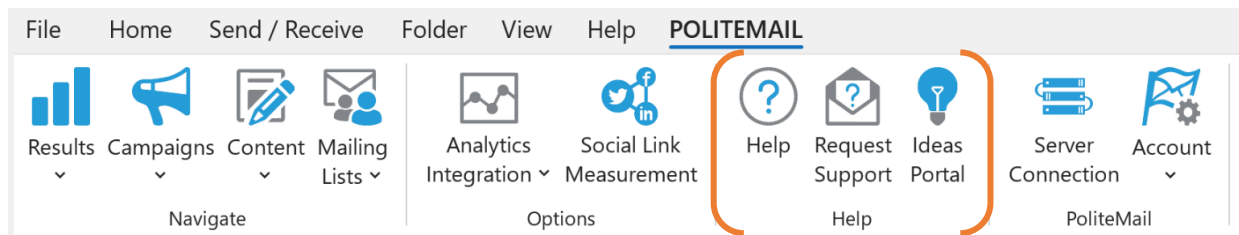
The Knowledge Base

 Clicking the Help button will take you to the PoliteMail Knowledge Base, where you can search for any information you may need.

Requesting Support

 If you are experiencing technical issues with your PoliteMail account, please reach out to our technical support team.

Click on the **Request Support** icon in the PoliteMail tab in Outlook.

This will generate an email with your account information and an error log for our technical support team to use in troubleshooting the issue. Enter a brief synopsis of the issue you are experiencing and screenshots if applicable.

Once you send the message, a case will be created for your support request and our support team will respond.

You can also reach out directly via email: serversupport@politemail.com.

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.