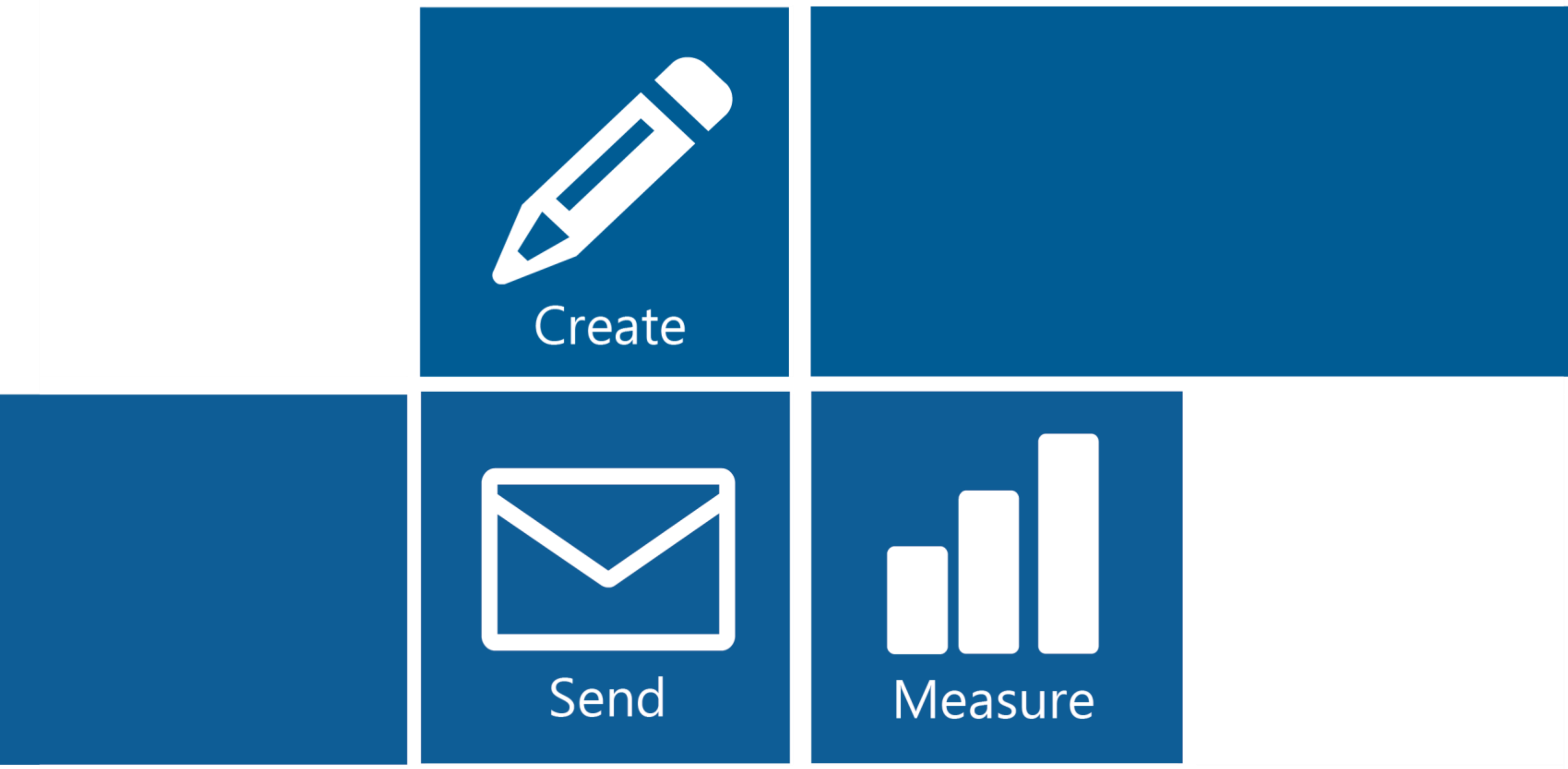
PoliteMail Online

PoliteMail Admin Training Manual

version 5.0



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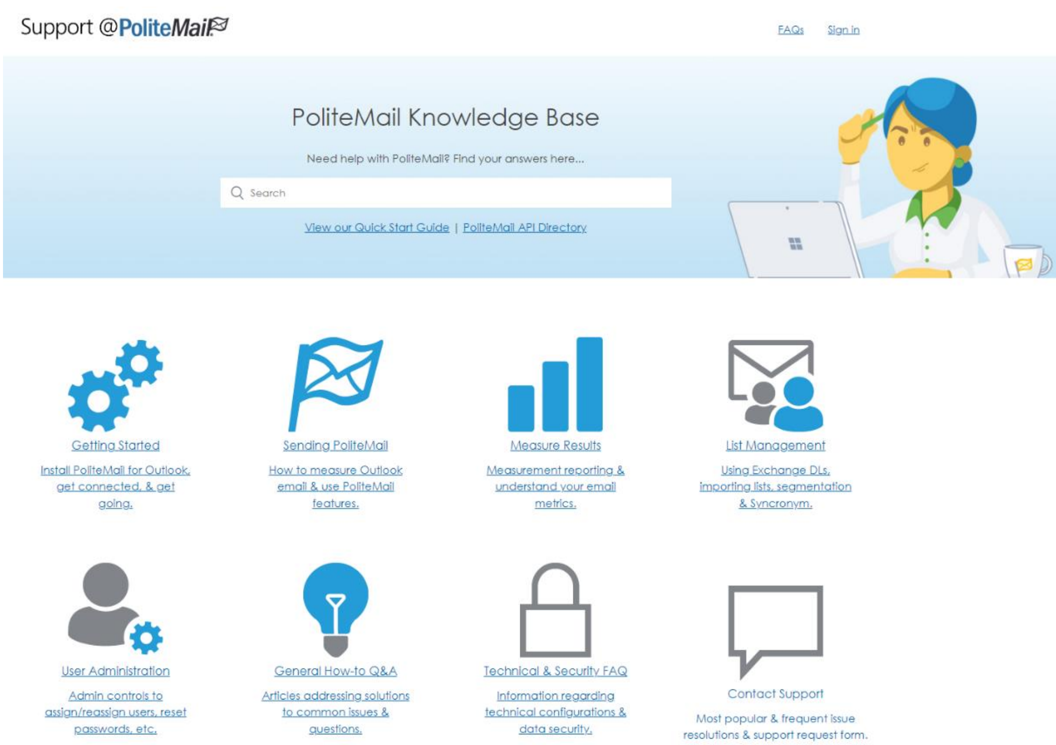
Welcome to PoliteMail!

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.



What is PoliteMail Online?

PoliteMail Online enables users to measure and improve email communications. With PoliteMail, you may create, send, and measure email 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.

Important Considerations

Authentication and Single Sign-On

Your role as an Administrator with PoliteMail will be different depending on if you are using Password Authentication or Single Sign-On to log into PoliteMail. Your IT department will choose the one that best fits your organization’s needs upon implementation.

- If you are using Single Sign-On, you will create users and reset passwords through your Azure Active Directory.
- If you are using Password Authentication, then you will create and modify users within PoliteMail. The document will note when Single Sign-On or Password Authentication will change procedures.

Administrator Role

An Administrator (Admin) has account wide access to all Users, content (templates, images, etc.), and Lists. Admins may access any other user’s reports, as well as view and edit any content or lists. If using Password Authentication as a sign-in method, an Admin can add new users (if using Single Sign-On, your organization’s Administrator will create user roles). An Admin may also edit and delete users and make other system-wide settings modifications.

An Admin may control content sharing within the system. An Admin may create or modify templates or lists and make them available to certain individual Users or Groups (a specific Region or Business Unit). The Admin may assign ownership of any item to a specific user, thereby giving that user the ability to edit, modify and delete that item.

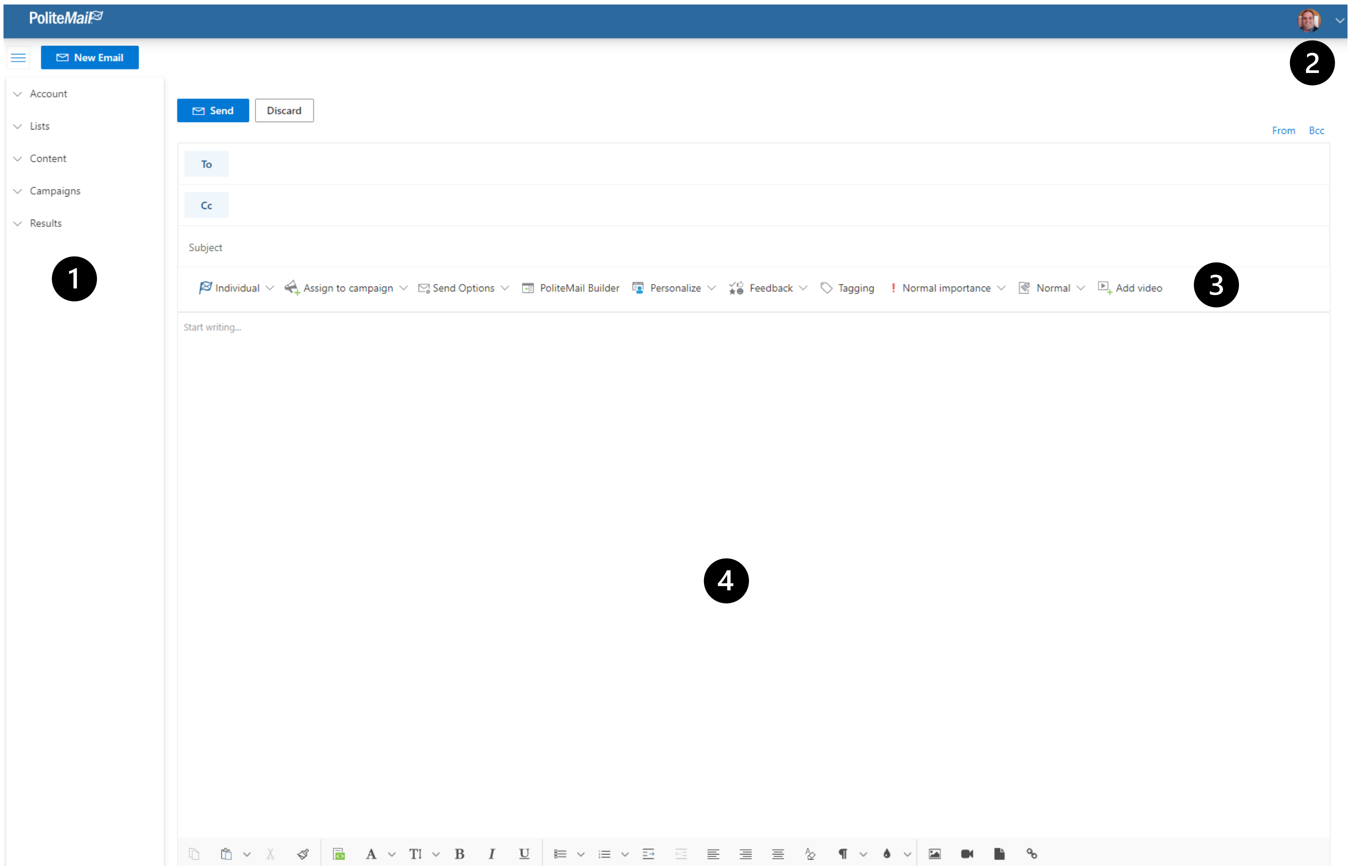
[Creating the Admin User for PoliteMail]

Account Overview

The initial Admin user will apply settings that will affect the entire shared PoliteMail Account. However, there are some settings each user will need to apply when they set up their PoliteMail account. Those settings are discussed in the User Guide.

If you are planning to send measured messages using PoliteMail, you may want to review the User Guide as well to learn more about preferences and tools to make sending successful.

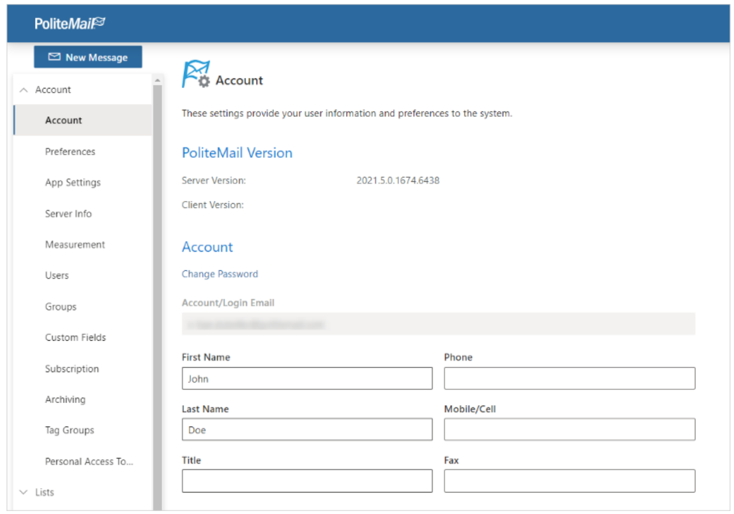
The PoliteMail Online Screen



- ❶ This is the **Navigation Pane**, where you can view the various PoliteMail Online components, such as your account and server information, your Lists, Content Items, Campaigns, and Results.
- ❷ Your **User Menu** is accessed by clicking on your initials or avatar. Use it to access your personal settings, get help from the Knowledge Base or from our chat bot, request support, submit an idea, or log out of PoliteMail Online.
- ❸ This is the **PoliteMail Bar**, which lets you perform various PoliteMail actions on the email, such as setting the collection method, assigning the email to a campaign, using the PoliteMail Builder, inserting polls or surveys, and more.
- ❹ This is the **composition window**, where you will type your message just like you would in Outlook®.

Account

Each user has access to the **Account** tab, which contains information such as PoliteMail version, Account/Login information, and your CAN-SPAM compliance address.

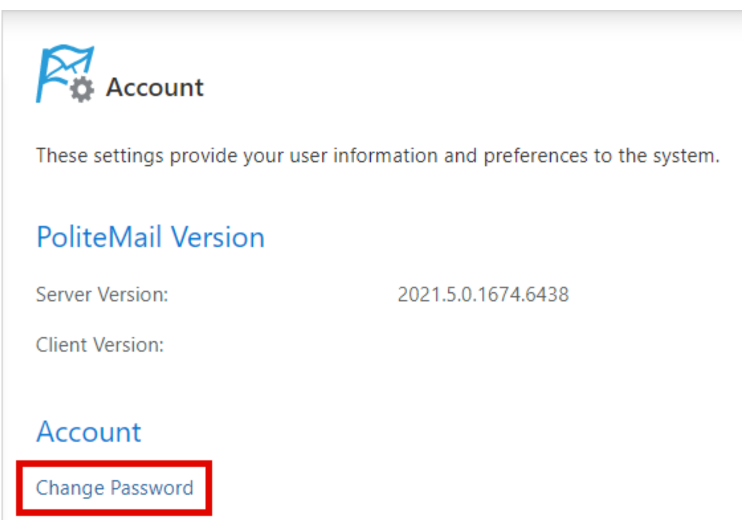


Changing Your Password

If you are using Password Authentication as your login method, you will be asked to input the password given to you when you login for the first time. This password is contained in an email entitled, “Your PoliteMail Account is Ready.” Upon successful login, you will be asked to change the password to one of your choosing.

Your password needs to be 12 characters long, with one uppercase letter, one lowercase letter, and one special character.

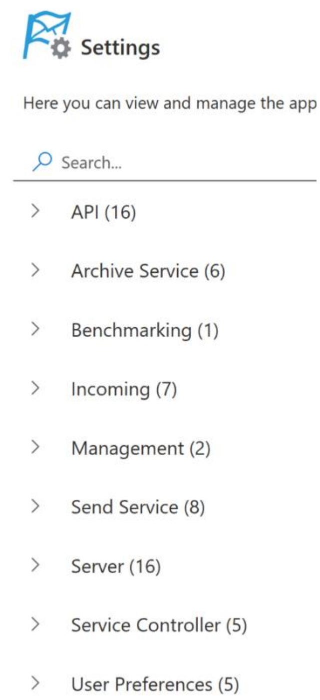
At any point, you can change your password by clicking on the Change Password link on the Account tab. PoliteMail will then prompt you to reauthenticate to the server with your new password.



Account: Settings

The **Settings** tab is where you can adjust settings for optimal user experience. Admins will have access to the most common settings to apply to all users.

You can also use the 'Search' field to enter a specific setting you are looking for.



Global and Lock Options

Settings with the globe icon in the upper right are global settings, and can be clicked on to be applied to every user on the account. For example, if the Admin sets List Expansion to Graph, and sets it as a Global Setting, all users will see Graph already selected as the default in their User Preferences.

Settings with a padlock icon in the upper right can be locked by admins by clicking on them. Locked settings cannot be changed by users, and can be particularly helpful with settings such as list expansion or measurement mode.

User Preferences Breakdown

Here is a breakdown of all settings a User can access, what they mean, and the recommended setting. Settings marked global/locked can be set by the Admin. Settings marked with a green triangle are new to version 5.

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.

Account: Server Info

All users can access this page to check the status of current, next, and last sends through PoliteMail.

Send Information

Verify your send mode, version, and expiration date.

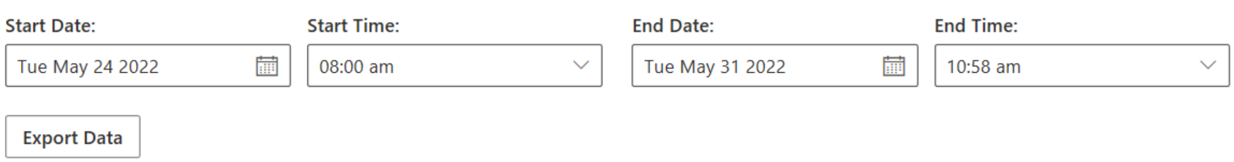
SMTP Service (self-hosted only)

Only Admins can stop the SMTP Service by clicking the Stop SMTP button. However, this should be used for emergencies only. If you stop SMTP, it will affect ALL sends across the account, not just yours. Once you click STOP, the button will change to START SMTP. Click this button to resume Mailflow.

Recently Sent via PoliteMail Server

This section lets you see what mails have recently been sent, as well as any that are scheduled to be sent.

Send Log



The Send Log is where you can export all recipients' email addresses from measured messages within a specific time frame. Set a date range by clicking on the calendar and time icons and then click **Export Data**. A CSV file is then generated. This is how you can verify an email was sent to all the intended recipients at the right time. You may need to adjust the columns in the CSV file to view all of the information.

License Compliance

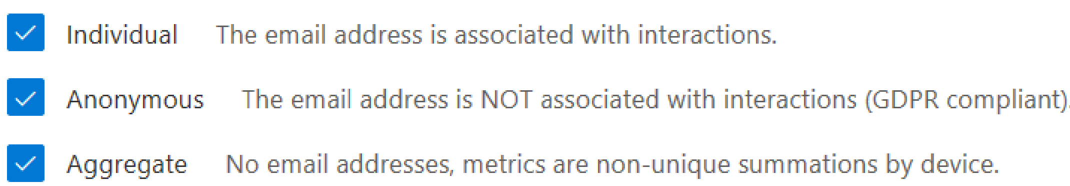
This section shows a summary of your license usage, which can be easily sent to PoliteMail by clicking the 'Send Compliance Information' button. This ensures your server will be set to the appropriate size for your send volume.

Account: Measurement

The **Measurement** screen displays various settings around metrics that apply to the entire account.

PoliteMail uses a 1x1 pixel image as a measurement beacon, invisibly placed at the bottom of the email. When this image is displayed, it starts gathering information on recipients' interactions such as open rate, read rate, and click details. PoliteMail offers 3 Measurement Modes: Individual, Anonymous, and Aggregate.

Measurement Modes

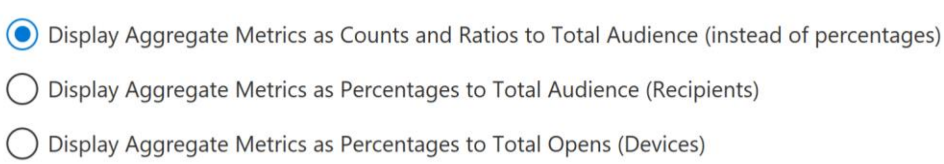


Measurement modes that are checked will be enabled for the entire account. For example, uncheck ‘Individual’ if users should not have access to the Individual Measurement Mode. Click Save at the bottom of the window.

Users must restart Outlook for your changes to take effect.

[PoliteMail Measurement Modes]

Aggregate Calculation Mode



For Aggregate Mode, PoliteMail can determine metrics either as counts and ratios to the total audience, or as a percentage of the total audience or opens. The counts and ratios are technically more accurate, as it will count one recipient who opened the email on more than one device only once.

Account: Users

Admins must set up user accounts, reset user passwords, and re-assign user licenses. Please note that this procedure is only applicable if using Password Authentication. For Single Sign-On Administrators, please refer to your company's IT policy on adding users and resetting passwords.

Types of Users

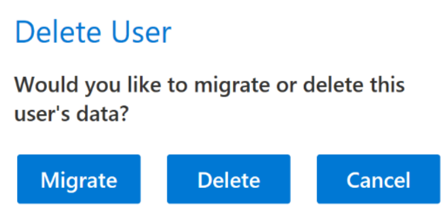
User Type	Description
Admin	Admins may see all content created by all users. Admins have the capability to apply settings to the entire account, change user settings, and modify or delete users.
Manager	Managers may see what they create, content that is shared with them, content created by other Managers, and any content created by users in the group (Business and/or Region) that they manage.
User	General users can only see content that they themselves created or content that has been shared with them. Users may be organized into groups and overseen by a Manager.

Creating a New User

1. Go to **Account > Users**, and click ⊕ New .
2. A panel will appear on the right.
    a. Enter the first name, last name, and email address of the new user. Confirm or change the User Type (User, Manager, Admin).
    b. Assign user to a Business or Region to silo user content viewing, if necessary.
    c. Send Setup Email (Yes-HTML format with Download Link for new users).
    d. Click **Save.** The message "Your PoliteMail account is ready" will queue up to be sent to the new user's email address with a welcome message, a link to download the application, user credentials, and a link to the PoliteMail User Guides.

Migrating or Deleting a User

PoliteMail always recommends migrating a user's data instead of deleting the user in order to keep data and content intact.



1. To migrate a user, place a checkmark next to the name of the contact you want to migrate.
2. Click the Delete icon at the top of the menu next to Actions. You will get a pop-up window asking if you'd like to migrate or delete the user.
    a. If you click Migrate, you'll be prompted to enter in the name of the user you are migrating data to.
    b. If you choose to Delete the user, all content created by that user will also be deleted. Deleting a user also means deleting the templates, lists, and any metrics from messages that person has sent. The entire user's account will be deleted along with any historical data tied to their account.

To learn more about user management, see these articles from our Knowledge Base.

User Types for Role Based Administration

Adding, Replacing, Migrating and Deleting Users

Account: Groups

To organize users and control content, you can assign them to Groups.

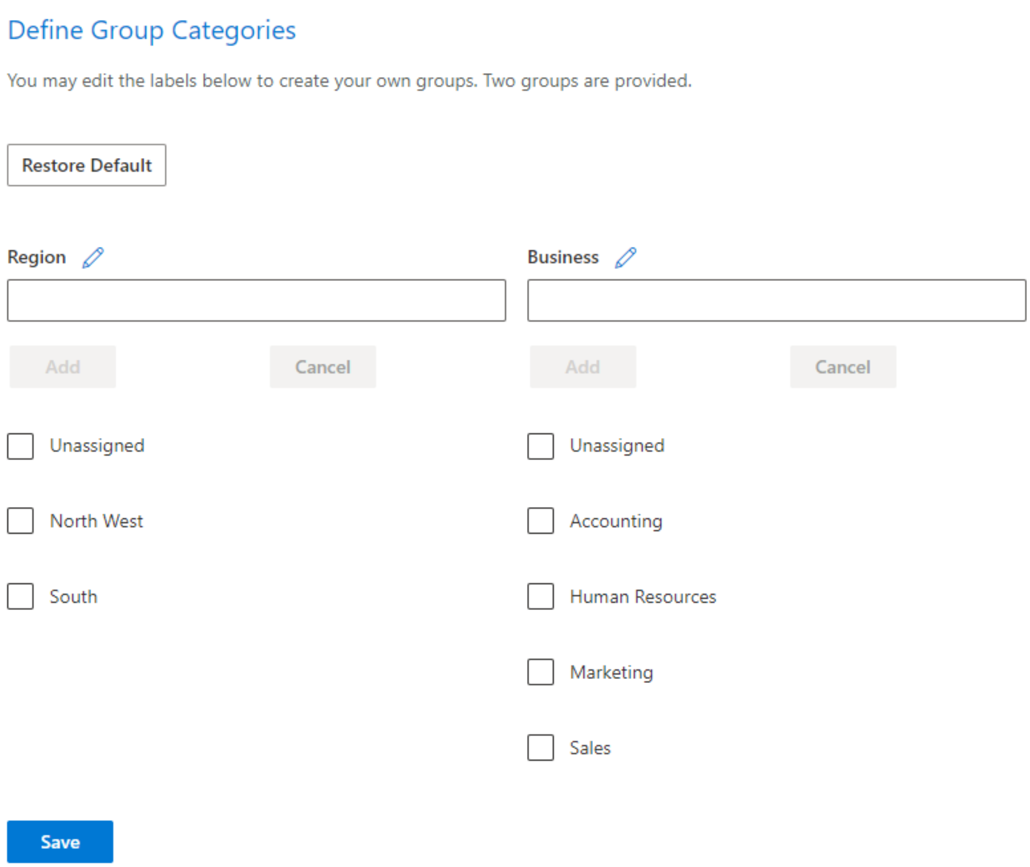
Group Categories

PoliteMail provides two categories of Groups – Business and Region by default. These can be renamed by clicking the pencil icon to edit the name.

- Add a Group to a Region or Business by typing the name of the new Group in the respective field and clicking ‘Add’.
- Edit or Remove a Group by checking the box next to it and then clicking either ‘Edit’ or ‘Remove’, respectively.

Content that is not assigned to a Group is labelled “Unassigned” and may be accessed by any user regardless of which Business or Region they are in (provided the content is shared).

[Creating Groups]

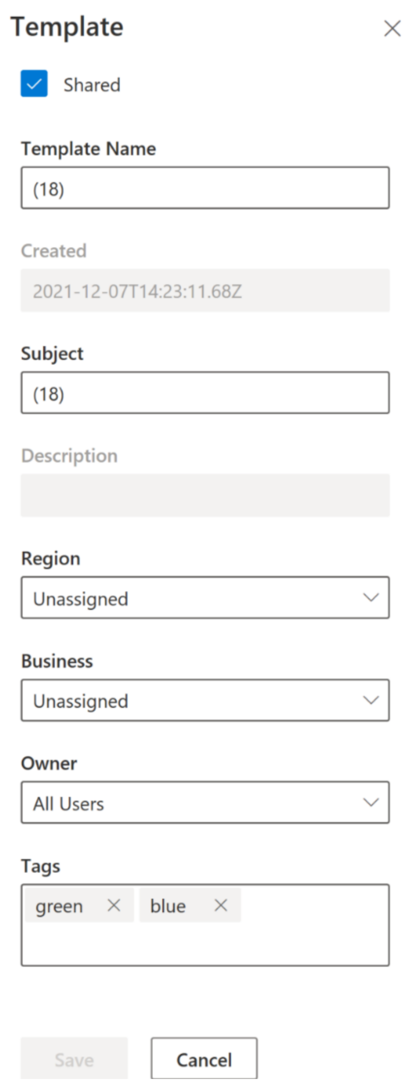


Assigning a Group to a Content Item

To assign a Region or Business unit to a content item (template, image, attachment):

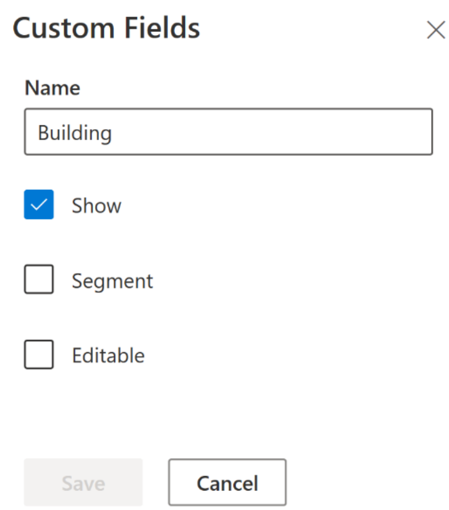
1. From the Navigation Pane, and click **Account > Content.**
2. Click on the content type you want to assign that appears under the Content branch.
3. Navigate to the template, image, or attachment to assign and click on it.
4. A panel will appear on the right. There are several things you can do, but scrolling down shows fields for the Business and Region that you can select from.

[Sharing PoliteMail Templates and Email Content within Groups]



Account: Custom Fields

Each mailing List allows you to add unlimited Custom Fields. You can add assign any data field from a .csv file or Exchange mailing list to a custom field. This can be particularly helpful when sending messages to branches in different locations, or to address recipients by their job title (managers, district managers, etc.)

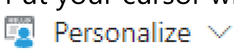


Adding a Custom Field

1. To add a custom field, navigate to **Account**> **Custom Fields**.
2. Click on an un-named Custom Field. A panel will appear on the right.
3. After you have named your Custom Field and added display options, you now have it ready to use. As long as that field correlates to a field on your imported list, it will be available to use under Personalization.

Adding a Custom Field to a Message

1. To add a Custom Field, click on 

2. Put your cursor where you want the custom field to be in your email and click 
.
3. Choose the field to insert. PoliteMail will automatically insert the information when the message is sent.

To verify the custom field is displaying the correct information, use the PreFlight Test feature to send a copy to yourself or a colleague.

[PreFlight Tests]

[Custom Fields]

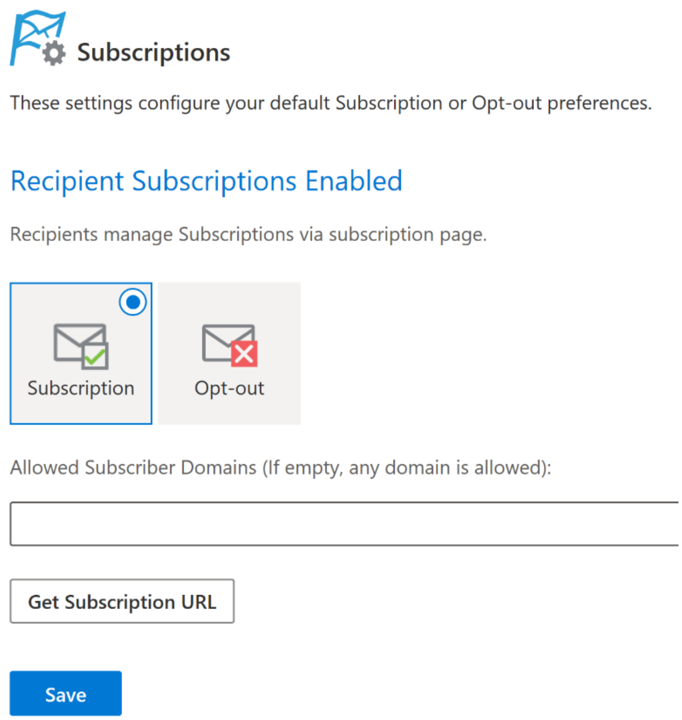
Account: Subscription

The Subscription page is used to change your default settings for allowing users to subscribe and/or opt-out of emails. You can also upload a company logo which will be used on the landing page of your **PoliteMail Feedback** feature, as well as any subscription or opt-out pages.

Subscription Settings

If you'd like to create mailing lists recipients may subscribe to, you must first specify which email domains are allowed. If no subscriber domain is chosen, any domain is allowed to subscribe to the list.

1. Under the "Recipient Opt-Out Enabled" menu, choose Subscription.
2. Type in your list of allowed domains under Add a New Allowed Domain and click the Add Domain button. From this window, you can also get the Subscription URL link.
3. Click **Save** when finished.



[Subscriptions]

Opt-Out Settings

Uploading a Logo

1. From the Subscription page, click the Opt-out button.
2. A **Browse** button will appear. Click on it and select the logo to upload from your device.
3. Once loaded, a preview will show. Click **Save**.

Other Opt-Out Settings

User Type	Description
Opt-Out Page Title	Set the name of the page that appears when a user opts out. This will display in the title bar of the user's web browser.
Subscription Management	The text entered here will display in the page that appears when a user elects to subscribe.
Opt-Out	The text entered here will display in the page that appears when the user elects to opt-out.
Opt-Out Button	Set the name of the button to Opt-Out.
Opt-In Button	Set the name of the button to Opt-In.
Confirmations	These three fields display the message that will show to confirm the user has opted out, opted in, or subscribed, respectively.

[Creating a Subscription List with Opt-Out Options]

Account: Archiving

Admins should set up archiving upon initial connection to PoliteMail to allow your database to remain optimal over time. Archived messages will no longer collect new data.

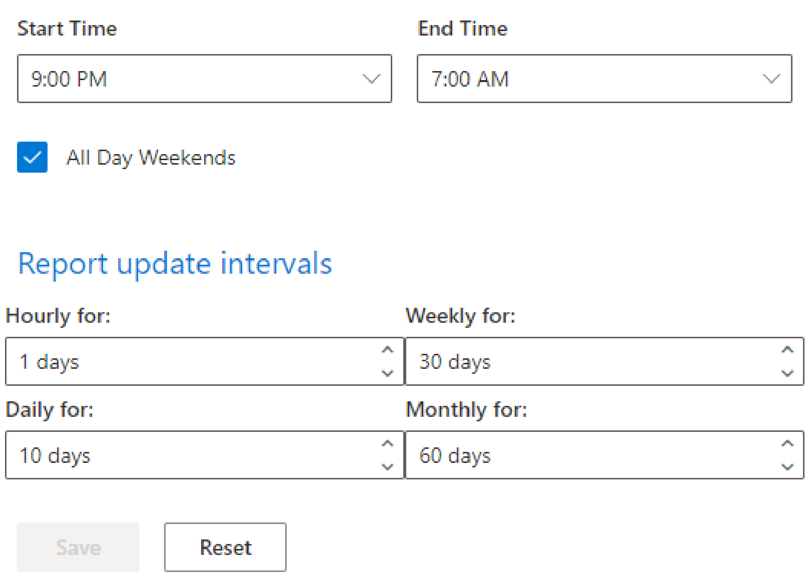
When all sent message metrics remain in an active state collecting data, it may delay retrieval of metrics from more recent messages. We suggest an archive age of 60-90 days as best practice.

Messages can be restored to active at any time. The links and images within these sent messages will continue to appear for recipients in these archived messages.

Report Cache

This setting enables PoliteMail to generate reports at specific times, such as during the night. When the report is actually run, PoliteMail only needs to generate new data from the time of the last cache, make report generation much quicker.

To enable report caching, just specify the time period to run the caching, as well as how often to run it.

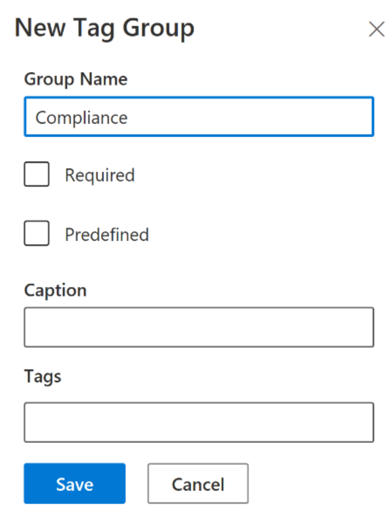


Account: Tag Groups

Administrators can create and add Message Tags to emails. Message tagging lets you add tags to messages to categorize them. When making this a required field, all senders will be prompted to add this tag to outgoing messages.

Creating a Tag Group

1. From the Navigation Pane, go to **Account** > **Tag Groups**. Then click New. A panel will appear for you the enter the Name.
2. You may choose if this Group will be Required or Predefined.
    a. Setting a Group to **Required** will force all outgoing PoliteMail measured messages to have a value set for that tag group. The user will receive a prompt before the message is sent to assign Tags to the email.
    b. Setting a Group to **Predefined** will force users to select a tag from a list you have already created and prevent senders from adding in a tag.

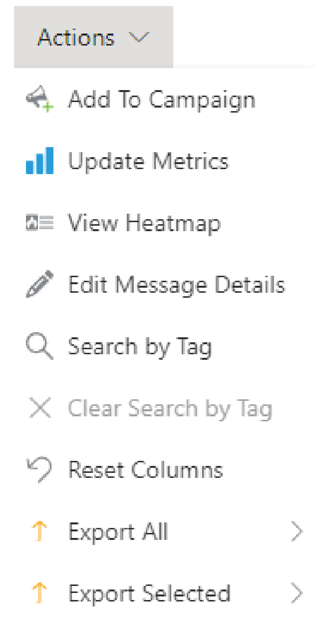


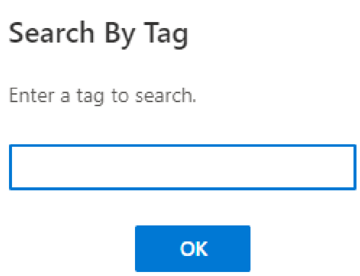
3. Entering a **Caption** will determine what text will appear in the dialogue window when prompted to set a tag for that message.
4. Add which tags you would like to make available for the senders, by adding them individually in the Tags section.
5. Click **Save**.

Now when a user sends a message, a prompt will appear to enter a tag for the message based on the tag values you have entered.

Searching by Tag

1. From the Navigation Pane, go to **Results > Messages**.
2. Under 'Actions', select 'Search by Tag'. A window will appear for you to enter the tag to search.





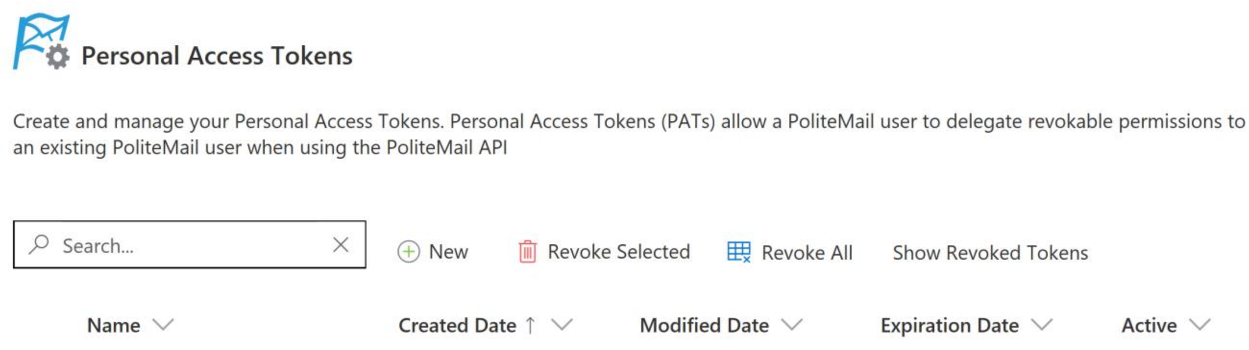
[Message Tagging]

Account: Personal Access Tokens

Personal Access Tokens (PATs) allow a PoliteMail user to delegate revokable permissions to other users for use with the PoliteMail API. By using a Personal Access Token (sometimes also called an API Token), a user can authenticate as an existing PoliteMail user when using the PoliteMail API.

1. From the Navigation Pane, go to **Account > Personal Access Tokens**, and click New.
2. Give the PAT a name and set an expiration date.
3. Click the Copy button to copy the PAT.

PATs can be revoked by clicking the Revoke button.



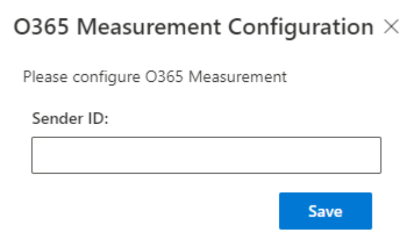
[PoliteMail API Entity Directory]

Account: O365 Measurement

Starting in iOS15, Apple introduced Mail Privacy Protection, 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, for your employee audience using Macs and iOS devices, your email data will most likely be non-existent or a lot less accurate. By implementing the Outlook365 Measurement feature, PoliteMail addresses the "open inflation" issues by effectively filtering out proxy opens, as well as offering new measurement technologies which rely on authentication data instead of image requests 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**.
- O365 Measurement must be configured and your Sender ID entered into PoliteMail for measurement to take effect. This is entered under **Account > Settings.**



Removing Outlook365 Measurement

- To remove O365 Measurement, open a new email and disable the measurement(s) under the 'Send Options' button.

Note that this should already be configured upon implementation. If it is not implemented, please contact your Customer Success Manager.

Content Management

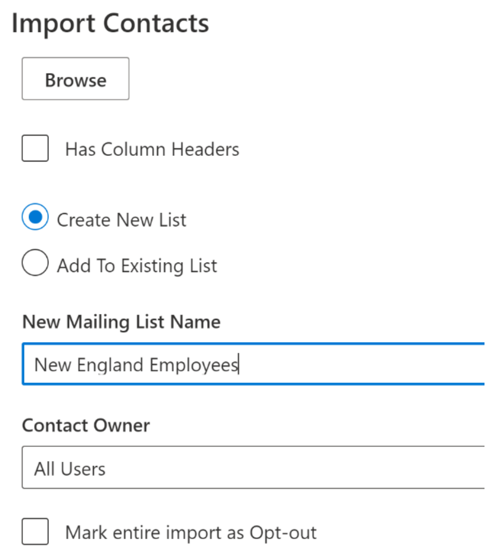
Administrators have account-wide access to all users, content (templates and images), and lists. Admins may access any other user's reports, view and may edit any content or lists, regardless of whether it has been shared.

By default, PoliteMail users, unlike Admins, must specifically share any content or lists they create to make it accessible to any other user.

Sharing Content

Share Type	Description
Sharing All Content with All Users	Also known as an "Open Sharing" environment, this can be done by setting all users to Administrators. All reports, content, and lists will be shared and accessible to all Users.
Sharing Specific Content with All Users	By assigning ownership to 'All Users' and sharing the content, the Admin can make that item available to every other user in the system.
Sharing Specific Content with Specific Groups	By assigning an item to a specific Region or Business Unit, the Admin limits sharing and access to just that group. Any User within the group may view the item and use it, but no User may modify or delete the shared item unless the ownership of that item is also assigned.

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 **Lists > Mailing Lists**. Click Import and select either CSV or Outlook/Exchange.
2. The Import Contacts window opens. Click 'Browse' to find the file you wish to import.
3. Check the box if the file has column headers, and choose if this is a new list or the contacts will be added to an existing list.
4. Select the Contact Owner. Only this person will be able to see the contacts and the metrics associated with them. The default, **All Users**, allows the contacts to be viewed by everyone when shared.
5. Clicking **Next** will bring you the second page, where you can map your CSV data to corresponding columns. Make sure the information you have entered matches the data fields. 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**.

Adding to an Existing List does not remove old contacts. If you need to remove old contacts as well, it's recommended you do an import of an all-new list.

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Removing and Deleting Contacts

As a best practice, it is recommended that you verify the contact is no longer actively collecting metrics before you delete it. Once you delete a contact, you lose all metrics that contact has collected.

- **Removing** a contact will delete that contact from a single list.
- **Deleting** a contact will delete the contact from ALL lists.

Removing a Contact

1. To remove a contact, go to **Lists** > **Mailing Lists**. Double-click on the list to open it.
2. Now find the contact and then single click it to select it.
3. Click the **Remove** button. This will delete the contact from this particular list but keep them on any other list they are a part of.

Deleting a Contact

1. To delete a contact, go to **Lists** > **Contacts**.
2. Choose the contact by single clicking on it. Now click the Delete button, next to Actions pull down menu. This will remove the contact from all mailing lists.

Results: The Account Report

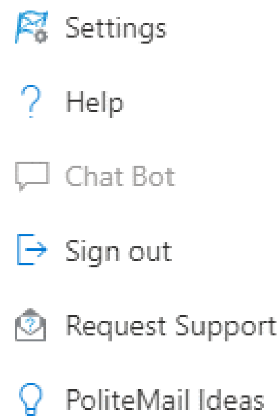
As the Admin, you can see metrics for the entire account. The Account Report shows you overall metrics for your entire account, and is broken down in Email Reach, Email Readership, and Email Engagement.

There are many reports available under **Results**; this Guide highlights the Account Report, which is specific to Admins. For information on the other reports, please see the User Guide.

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.

Getting Help

Request Support



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

Click on the user profile in the top right corner. Then click the **Request Support** icon.

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 via email at [serversupport@politemail.com.](mailto: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.