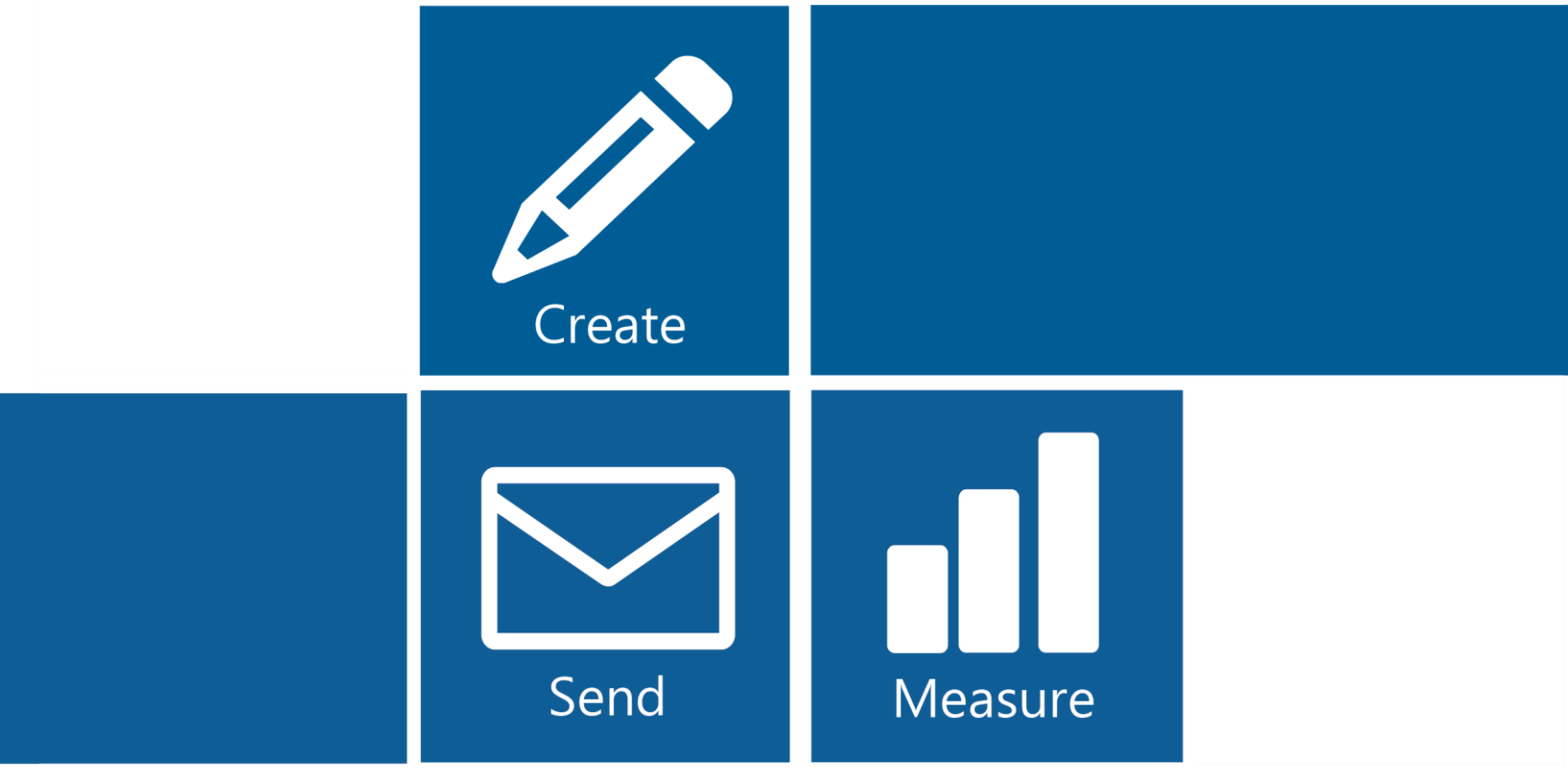
PoliteMail User Training Manual

version 5.0



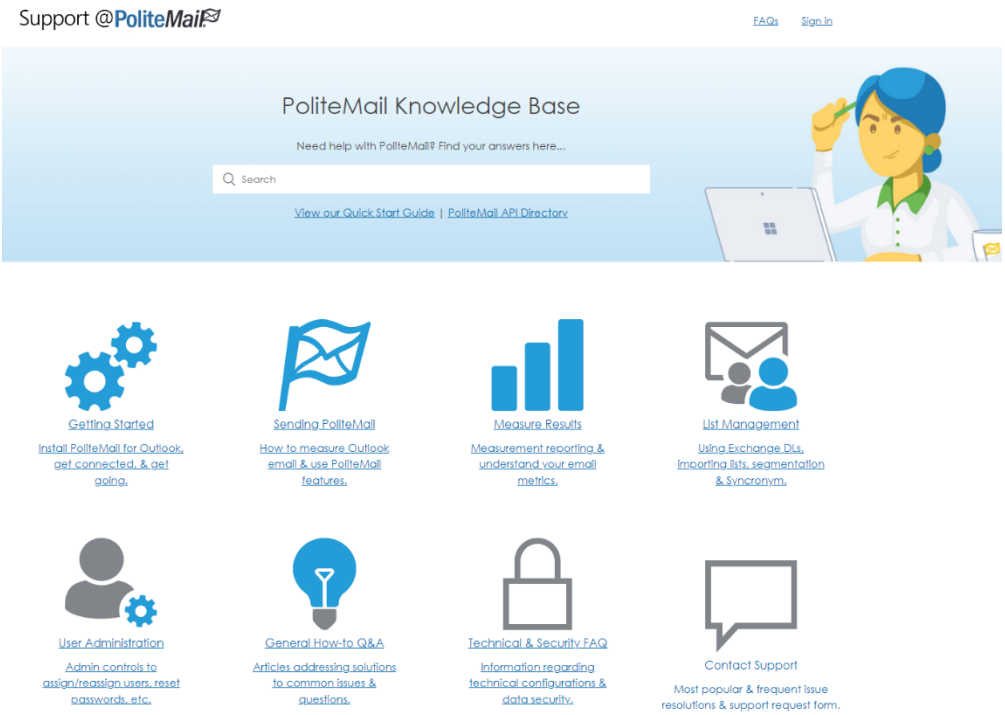
Contents

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.

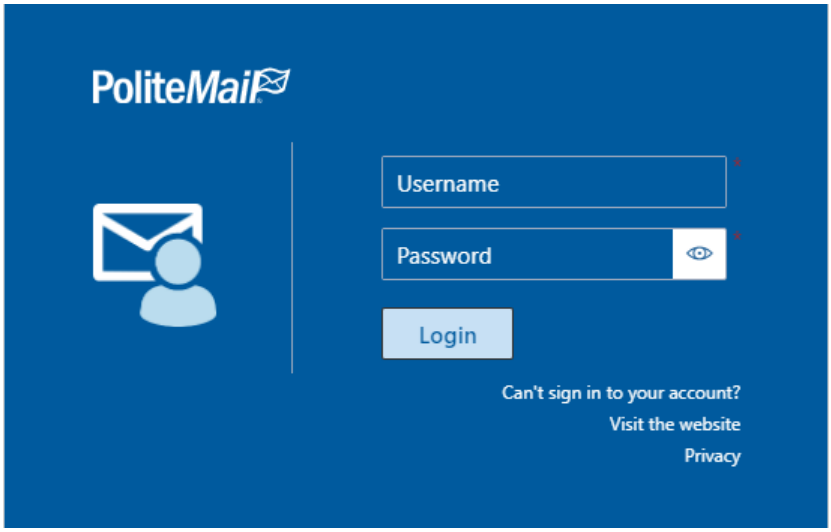


What is PoliteMail Online?

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.

Getting Connected

There are two possible ways to log in to PoliteMail Online 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.

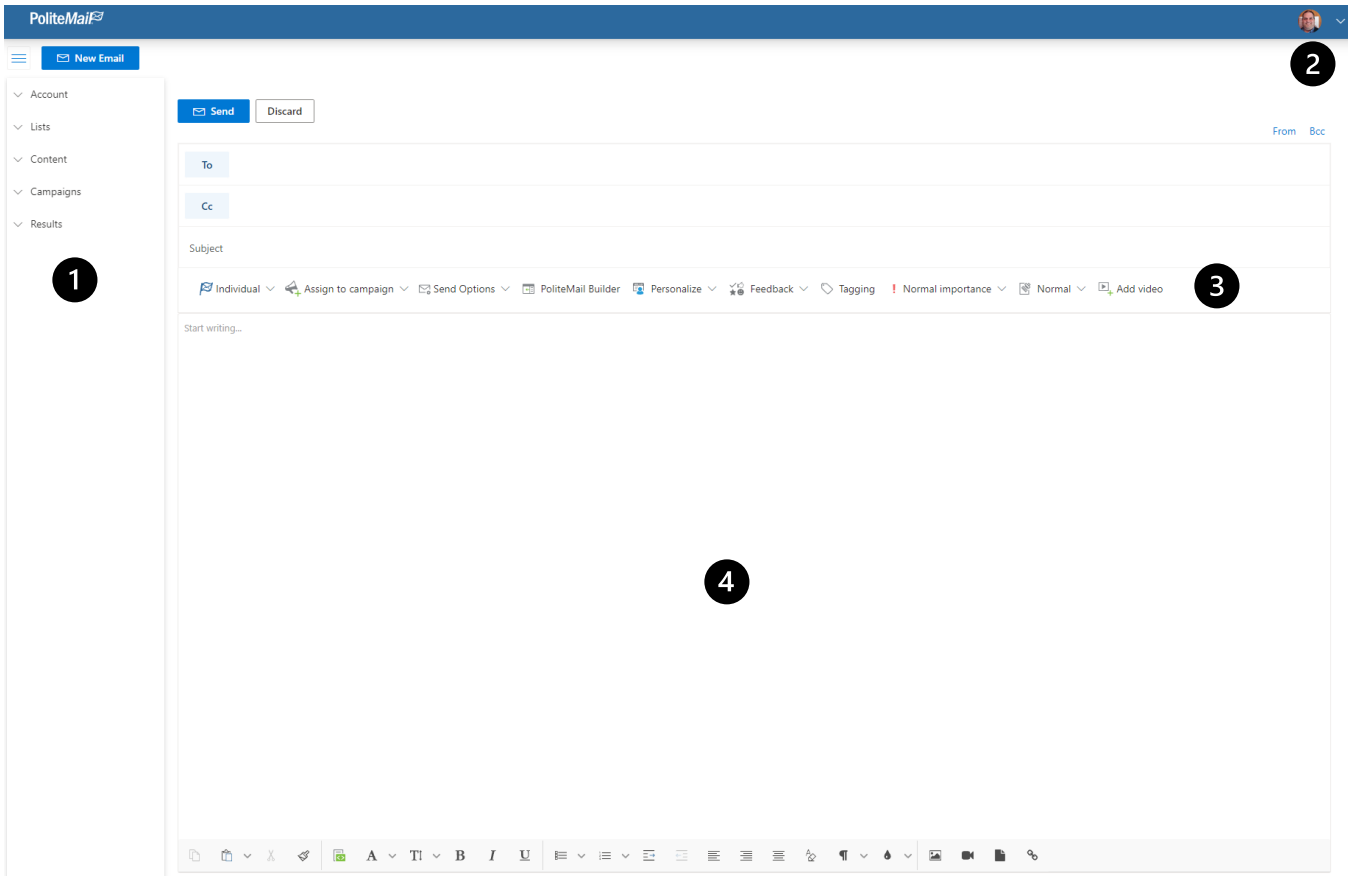


- If you are using Single Sign-On, your IT department will set up your login credentials.
- If you are using Password Authentication, you will receive an email entitled, "Your PoliteMail Account is Ready," which will include a link to the software for installation, your account password, and your unique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

To begin, open your Internet browser and go to the link contained in the email or given to you by your IT department. Log in with your email credentials and password. Once you are logged in, you be taken to your **Account** page.

Getting Connected

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.

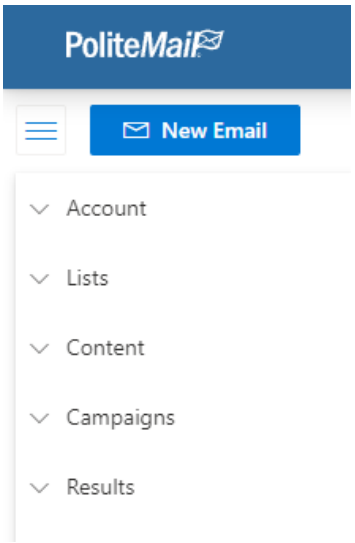
❷ Your **User Menu** is accessed by clicking on your initials or avatar. Use it to access your personal settings, get help from the Knowledge Base or from our chat bot, request support, submit an idea, or log out of PoliteMail Online.

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®.

The Navigation Pane

Click the Navigation Pane to view the tools and components of PoliteMail Online.



Overview

Item	Description
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.
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.
Content	View, edit and manage email templates, brand themes, paragraphs, images, measured links and Smart Attachment content.
Campaigns	Create and manage mailing campaigns. Group messages into Campaigns for bundled metric details. Also view Scheduled Sends.
Results	Email metrics and analytics reporting tools. View metrics reports by message, campaign, list, sender, from, account, measurable social media links, and interactions.

User Settings

It is important to check your settings prior to your first send. You can find your settings in the Navigation Pane under 'Settings', or in your User Menu under 'Settings'.

Settings marked "Admin-Only" can be locked by Admins, preventing 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.

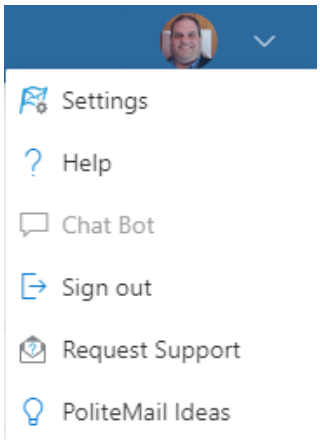
O365 Measurement

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

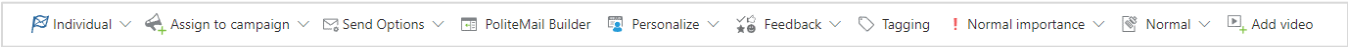
The User Menu



The User Menu located on the right-hand side contains support and preferences.

Item	Description
Settings	Brings you to your user preferences. You can also access in the Navigation Pane under Account > Settings.
Help	Brings users to the PoliteMail Knowledge Base.
Chat Bot	Launches Paige, our interactive chat bot.
Sign out	Sign out of PoliteMail online.
Request Support	Generates an email with pertinent system configuration information and error log data to send to the Support Team for assistance. Type your issue and hit send to get 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.

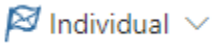
The PoliteMail Bar



If it's not there already, clicking 

will create a panel to compose your message, and the PoliteMail Bar displays between the subject line and the body of your message.

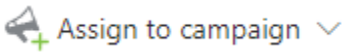
Measurement Mode



This drop down lets you select from Individual, Anonymous, or Aggregate Mode for measurement. By default, the measurement mode is set to Individual.

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.

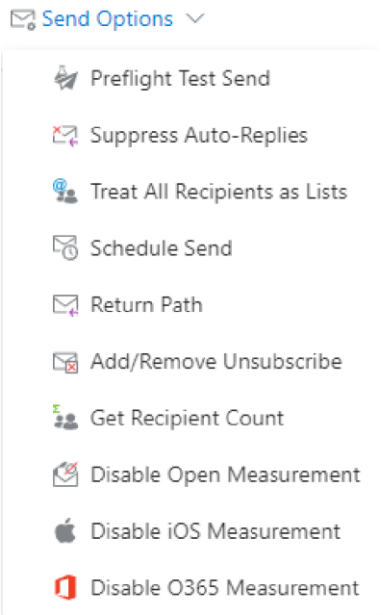
Assign to Campaign



This button assigns the current email message to a Campaign. Just click the button and a list of available campaigns will appear for you to select from.

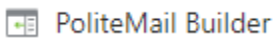
Send Options

The 'Send Options' button contains a number of settings under it.



- **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.
- **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.
- **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.
- **Schedule Send** enables you to set a specific future date and time for this message to be sent, including if the recipient is in a different time zone. enables you to set a specific future date and time for this message to be sent, including if the recipient is in a different time zone.
- **Return Path** allows you to specify a different inbox where bounced emails will return.
- **Add/Remove Unsubscribe** inserts or removes an opt-out footer into your email that allows recipients to opt-out or unsubscribe from future mailings.
- **Get Recipient Count** provides a count of total recipients for the email.
- **Disable Open Measurement** still measures links in messages but omits the measurement beacon. Used for sending PoliteMail messages to mobile devices.
- **Disable iOS Measurement** turns off iOS Measurement.
- **Disable O365 Measurement** turns off O365 Measurement.

PoliteMail Builder



The PoliteMail Builder is used to create, share, or access saved PoliteMail components. This includes Templates, Template Sections, Paragraphs, Images, Links, Smart Attachments, Buttons, Brand Themes, and Ai/B testing.

Personalize

Personalize will place 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.

Feedback

The Feedback button lets you add surveys or polls of various types. You can also allow the recipient to view results in near real-time if you wish.

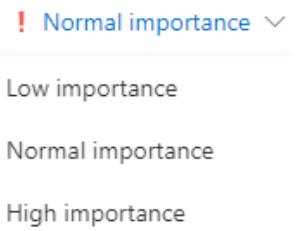
Menu Item	Description
Open Visibility	Allows recipients to see interaction data in near real-time, including likes, page views, read time, mobile opens, and clicks. This information will appear at the top of your template or message, and recipients will be able to view and refresh the data.
Page Views	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.

Open Visibility

Tagging

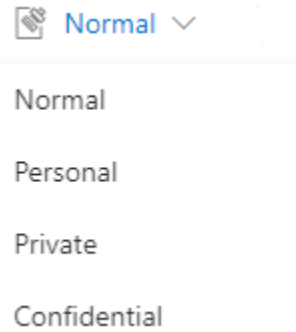
Tagging allows you to add tags to a message so they can be categorized and/or searched for easily in the future.

Importance



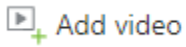
The Importance button lets you assign Low, Normal, or High Importance to your message.

Sensitivity



The Sensitivity button lets you mark your message as Normal (the default), Personal, Private, or Confidential, similar to the functionality offered in Outlook®.

Add Video



Video can be added to your message. You will need to configure Office365 Measurement and enter your Sender ID for this functionality to be enabled.

Content

In PoliteMail, content is defined Templates, Images, Brand Themes, Links, Paragraphs, and Smart Attachments. Content can be imported in two ways – either through the data grids, or through the PoliteMail Builder.

The Data Grid

When you go to **Content** in the Navigation Pane and select an item, you will go to the data grid, which is a table that shows a list of all those saved items. Clicking on any one of the items in the list will open a panel on the right where you can change various options, such as the name, the Region and/or Business it is assigned to, sharing options, and tags. You can also do this by clicking on the item and then clicking on the Actions button.

PoliteMail Builder

The PoliteMail Builder offers the ability to create and manage content all from within the Create Email window.

1. Click on New Email and then click on PoliteMail Builder to open the PoliteMail Builder.
2. Use the button to select the type of content you want to create, manage, or insert. Each content item is covered in greater detail below.

Groups and Sharing

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

Groups

Once the user imports/creates a content piece, they may choose to share the content so more users will have access to it. 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, then all Users and Managers in that Group will have access to the content, while Users and Managers in other Groups will not. Admins can access any imported or new content regardless of Group or sharing. Let's look at how each content behaves when importing.

Sharing Content

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	●	

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 Outlook 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.

Paragraphs

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

Creating a new Paragraph can only be done from the PoliteMail Builder. However, if you want to change options on a Paragraph, such as its name, sharing, or export it to Excel, you can do that from the data grid.

Creating a Paragraph

1. Click on New Email and then click on PoliteMail Builder to open the PoliteMail Builder.
2. Use the button to select 'Paragraphs'. A list of current Paragraphs displays.
3. Click + New. A dialog box will open where you can name your Paragraph, enter a description, and then type your Paragraph.
   - If you have already typed your Paragraph in the Composition Window, you can copy and paste it into the Paragraph window.

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

Inserting a Paragraph

1. Place the cursor where you want the paragraph placed.
2. With the list of paragraphs showing in the PoliteMail Builder, double-click on the paragraph you want to place it where your cursor is, or drag it to where you want it placed in your email.

Images

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

Importing an Image

To import from the data grid:

1. Go to **Content** >**Images**.
2. Click ⊕ New. This will open a window for you to browse for an image on your device, then click 'Open'.
    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 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		●

Image Options

You can set sharing, secured status, name, Business, Region, Owner, and tags from the data grid by clicking on the item. This will open a panel on the right.

Links

With the Links function in PoliteMail, you can save links and easily pull them into new messages without having to retype the content. In a measured message, PoliteMail will automatically measure any link, whether you use the Save Links feature or not.

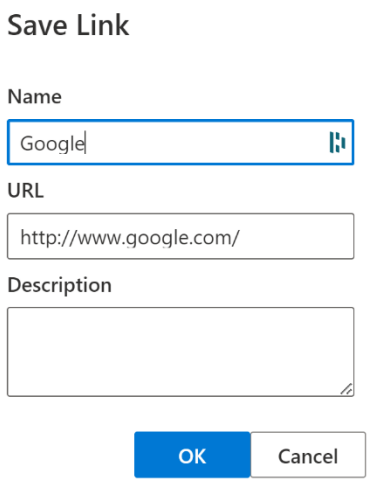
Creating Links

To create a Link from the data grid:

1. To create from the data grid, go to **Content** >**Links**.
2. Click ⊕ New. A panel opens on the right.
3. Give your link a name and the URL. You can also share the link from this window, and set a Business and/or Region.

To create a Link from the PoliteMail Builder:

1. Click on New Email and then click on PoliteMail Builder to open the PoliteMail Builder.
2. Use the ☰ button to select 'Links'. A list of current Links displays.
3. Click + New. A dialog box will open where you can name your Link, enter the URL, and give a description for future reference.



Using a Link

Double-clicking a Link in the PoliteMail Builder will insert it at the location of your cursor. You can also click a Link and then drag it to the location in your message where you want it.

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

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

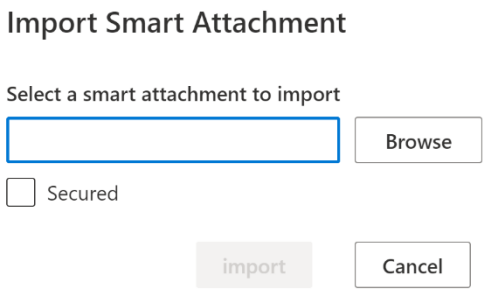
Smart Attachments can be imported either through the data grid or through the PoliteMail Builder.

To import from the data grid:

1. Go to **Content** >**Smart Attachment**.
2. Click New. A window will appear for you to browse to the attachment on your device and click 'Open'.

To import from the PoliteMail Builder:

1. Click on New Email and then click on PoliteMail Builder.
2. Use the button to select 'Smart Attachments'. A list of current Smart Attachments displays.
3. Click New. A dialog box will open where you can browse to the file, then click 'Import'.



Clicking the 'Secured' checkbox will prevent users from forwarding it or copying and pasting it to another email.

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

Buttons

The Buttons feature allows you to insert a button into your message to direct the user elsewhere. It works just like a Link, but is more graphical in appearance.

Inserting a Button

1. Click on New Email and then click on PoliteMail Builder.
2. Use the button to select 'Buttons'. A list of current Buttons displays.
3. Select the Button you want by either double-clicking it to insert it at the cursor, or click and drag it to the location on your message where you want it.

Buttons

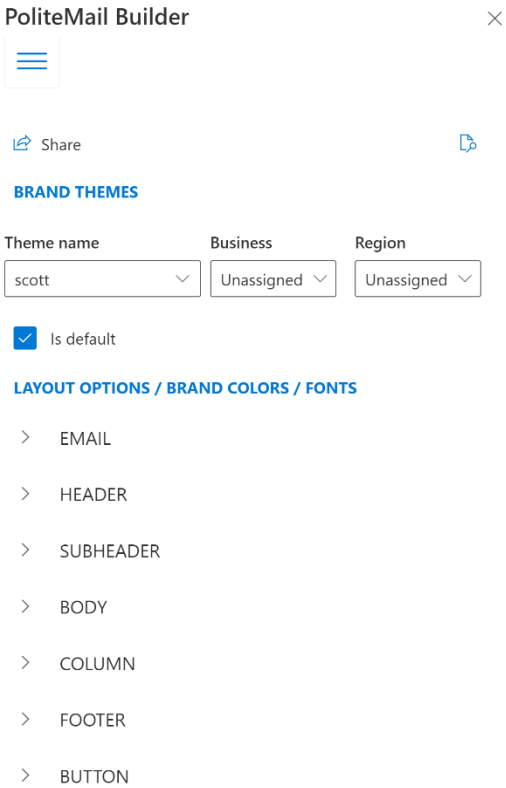
Brand Themes

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. Click on New Email and then click on PoliteMail Builder.
2. Use the button to select 'Brand Themes'. A list of current Themes displays.
3. Type the name of your new Theme in the 'Theme Name' field. When you click 'Save', you will be asked to overwrite the current theme or to create a new one.
4. You can choose whether to share the theme, as well as specify a Business or Region.
5. Select your formatting options. You can customize any component you wish from the list.
6. Click Save.

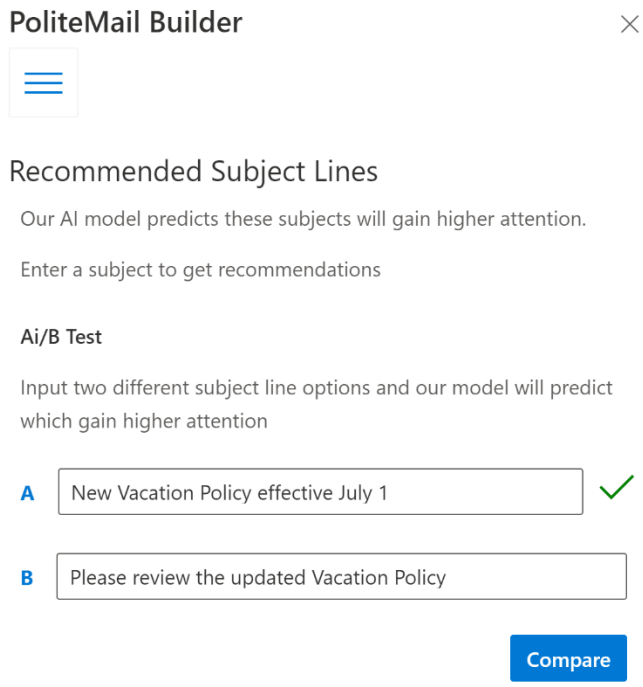


Editing a Brand Theme

Editing a Brand Theme works that same way as when creating a new one. Select the Theme to edit and click 'Save'. If prompted to either overwrite the current theme or create a new one, select 'Overwrite'.

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

Ai/B Testing



PoliteMail will allow you to test subject line alternatives and automatically identify which will likely gain the highest attention.

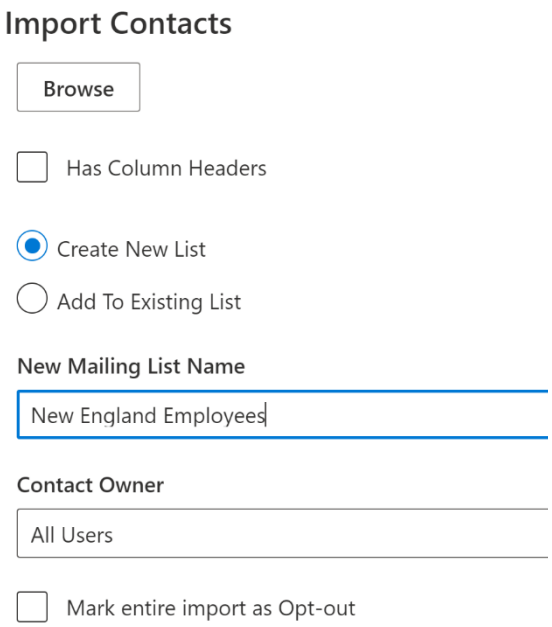
How does PoliteMail know? The AI model is drawn from over 1.5 billion internal emails. PoliteMail uses modern AI text analysis and language process tools to determine the best subject line.

1. Click on New Email and then click on PoliteMail Builder.
2. Use the button to select 'Ai/B Testing'.
3. Enter your two possible subject lines in fields A and B, and then click 'Compare'.

Ai/B Testing

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.

Mailing Lists

Results

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

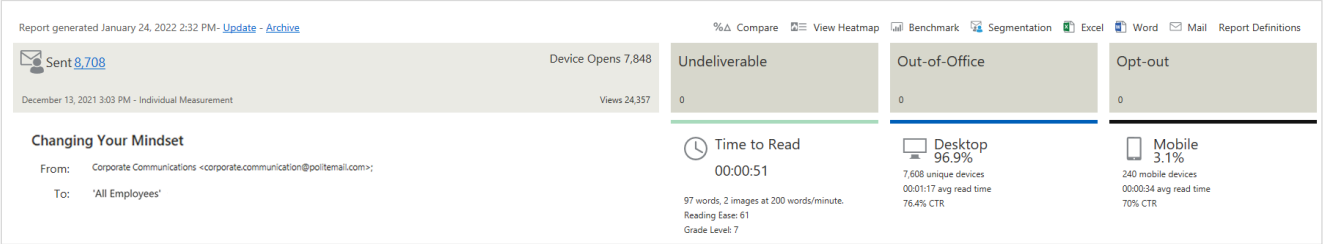
1. From the Navigation Pane, click **Results** and select 'Messages'. A list of all your messages appears.
2. Double-click on the one you want, or click on it once and the click on Email Metrics.

The Top Menu

View Heatmap | Benchmark: PoliteMail Average | Segmentation | Excel | Word | Mail

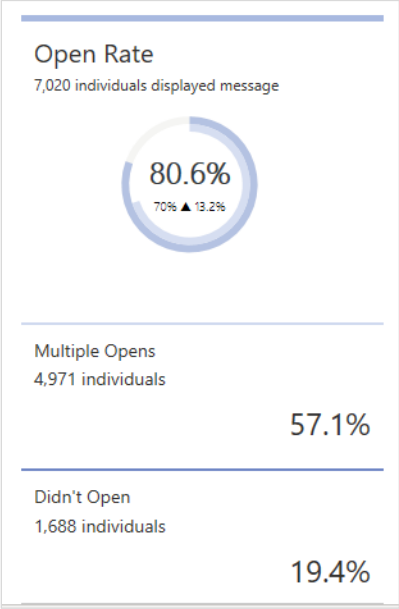
Item	Definition
View Heatmap	Gives a cool to warm overlay which shows read-time and click metrics visually. This data can be used to see how your readers are viewing your content, and where you should be putting key messages and links.
Benchmark	Select between viewing message metrics to your PoliteMail 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.

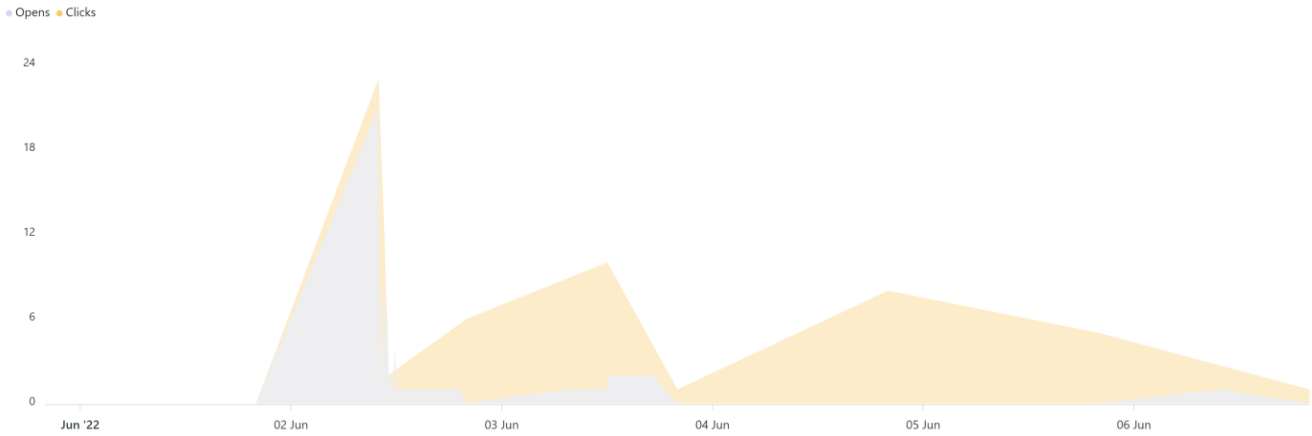
Metric	Definition
Sent	Total recipients the message was addressed to [count of members in list(s)]
Devices	Unique devices measured (devices identified via browser agent)
Impressions	Total number of all previews/opens (non-unique, total open count)
Undeliverables	Hard bounces (returned to a mailbox PoliteMail 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 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)

Continues on next page →

Cont. from previous page

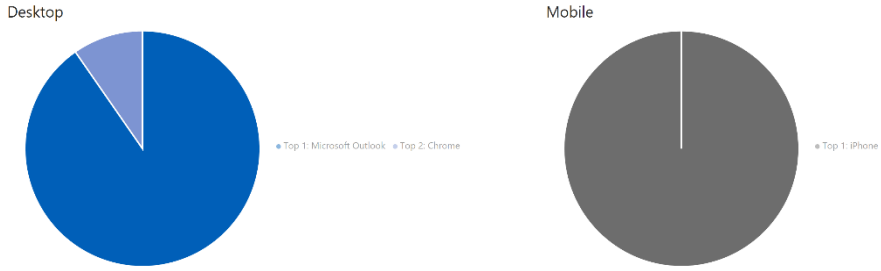
Metric	Definition
Read Rate (30%+)	A read is an individual recipient who had the message open for at least 30% of the content length (in time). Sums all non-ignore opens by individual recipient. Read Rate = Reads / (Sent – Undeliverable)
Multiple Reads	Individual recipients who had more than one read (>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

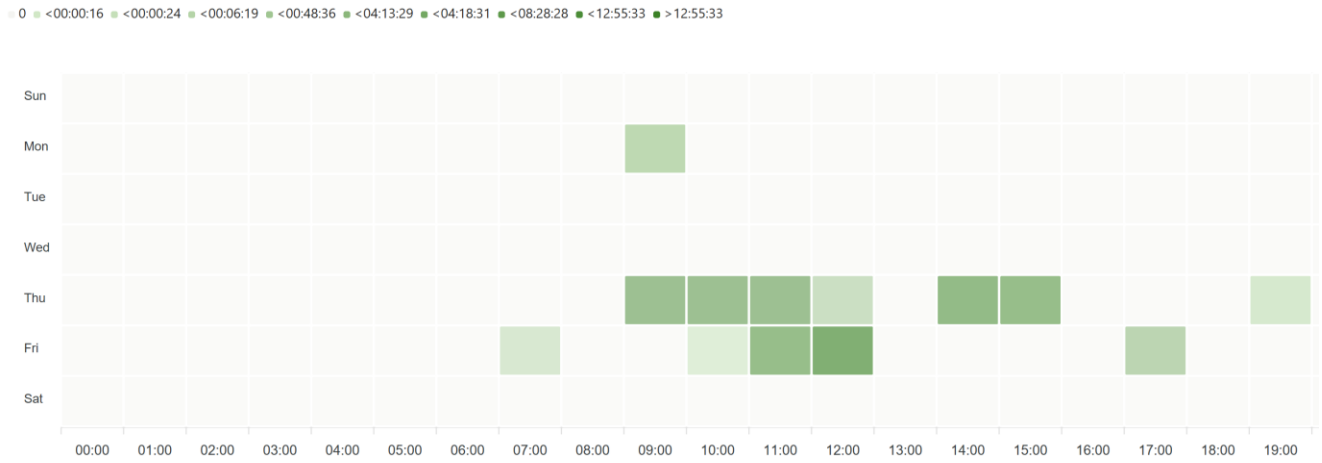


A visual representation of opens by desktop and mobile devices. Hovering over any section will give you precise counts.

Reads

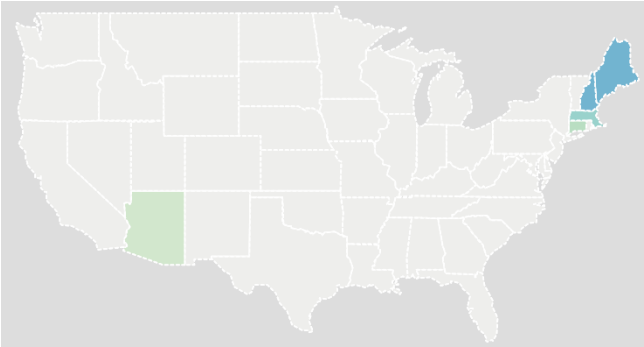
Reads is a tree map showing your read data by Ignored, Skimmed, Read, Engaged and Left Open. The size of each box represents the value, and it shows proportions between each part and the whole. In this example, the message was mostly Read and Engaged with.

Total Read Time By Hour of Day



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

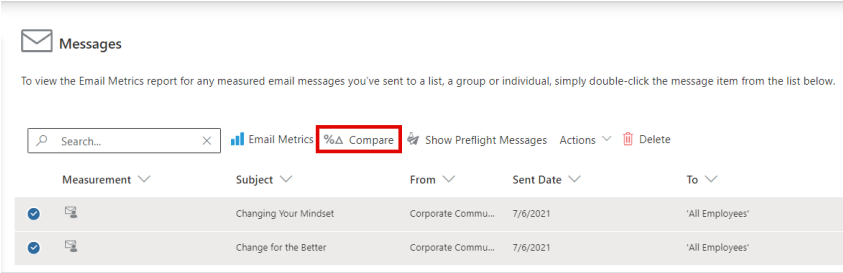
This section gives a summary of all the links in the email, and their individual click rates.

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

Group By Link

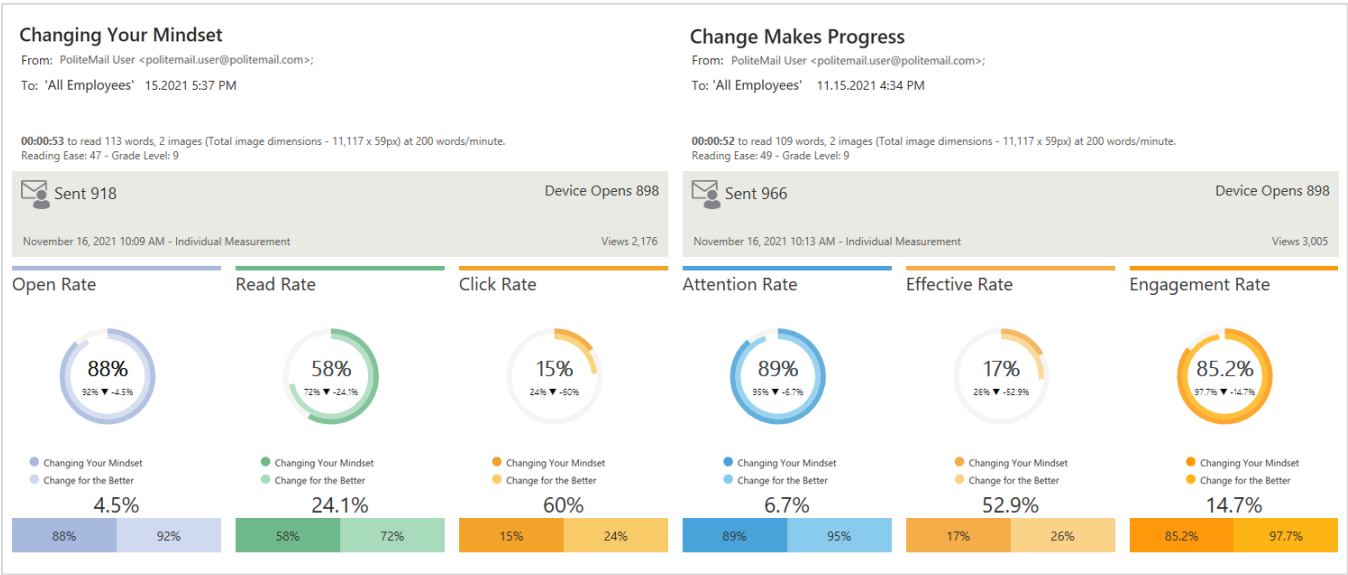
Name	URL	Total Clicks	Unique Clicks	Click Rate
[IMAGE LINK](3)	https://www.saltandlavender.com/mediterranean-vegan-meal-prep-bowls/	3	3	8.33%
[IMAGE LINK]	https://www.youtube.com/watch?v=L4oFJRDAU4Q	2	2	5.56%
[IMAGE LINK] shareIconFacebook-footer_white.png	https://www.facebook.com/politemailsoftware/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

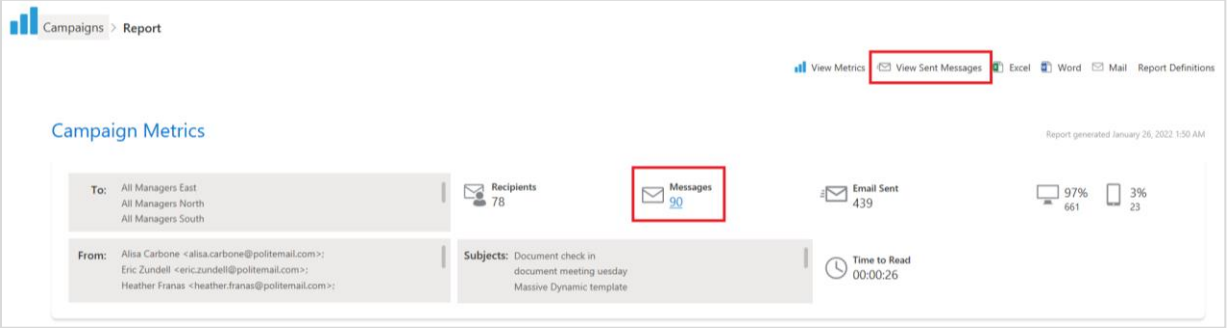
A Campaign is a series of messages that you may have put together as part of an overall message. Campaigns are a great way to group messages, providing you with key insights and the ability to measure metrics over time. Any measured message can be added to a Campaign, including those with different measurement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

To open Campaign metrics, go to the Navigation Pane and select **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.

Campaigns

Mailing Lists, Sender, and From Reports

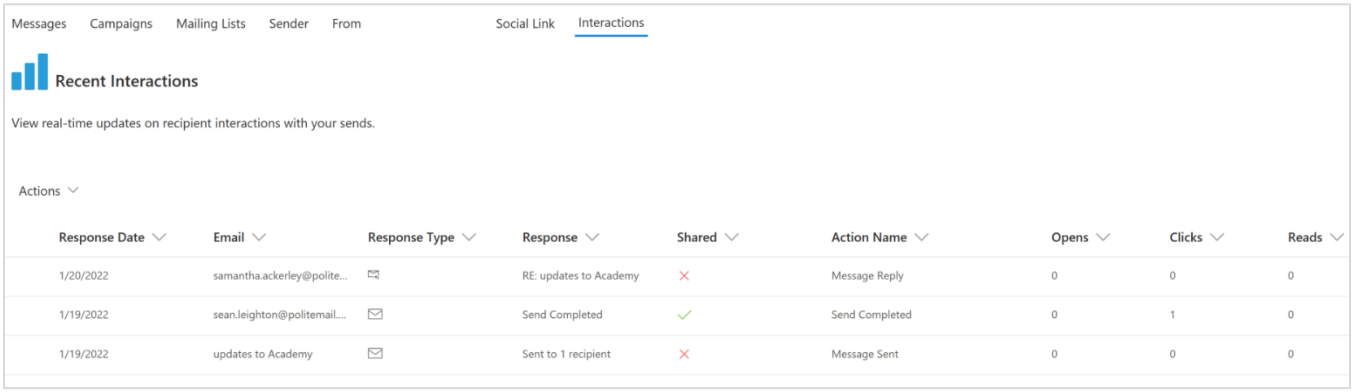
The options for Mailing Lists, Sender, and From under Results works just like that for Messages and Campaigns. Select your item from the data grid to see detailed metrics for a specific Mailing List, Sender, or email address, respectively.

Social Link and Interactions Reports

The Social Link report will list all external links that have been used to measure clicks outside of email messages. As with any other report, double-click on the desired link to view the actual report.

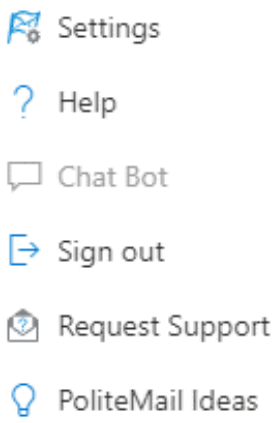
- You can also use the Actions button to view the URL, set sharing, set the owner, Business, Region, or export the list to Excel or as a CSV file.
- Each link in the list also has a generated QR Code to view the link more easily with a mobile device.

Interactions will show you results in near-real time. After sending a message, click on Interactions to see how your recipients are reacting to the message. You can see if users are opening, clicking or forwarding your message. This information will display for seven days after the send.



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.