

PoliteMail User Guide



Create



Send



Measure

version 5.05

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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 found at <https://help.politemail.com>, 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.



The screenshot shows the PoliteMail Knowledge Base homepage. At the top left is the PoliteMail logo. The main header says "Welcome to the PoliteMail Knowledge Base!" with a search bar below it. A banner below the search bar indicates the latest version is 5.05 and provides links to the Quick Start Guide and Release Notes. Below this are several categories of articles: Getting Started, Sending w/PoliteMail, Measuring Results, Managing Content, Managing Lists, User Administration, Reference Material, and Troubleshooting. On the right side, there are sections for "Most Popular" and "Newest" articles, with a "Recently Updated" section at the bottom of the right sidebar. A QR code is visible in the top right corner of the screenshot.

The PoliteMail Interfaces



PoliteMail for Outlook Desktop

PoliteMail for the desktop allows you to create powerful measured emails for your internal communications, without ever leaving the Outlook application. Use the PoliteMail Builder to create Templates, manage your Content, manage users, view Measurement reports and more. At the same time, you can use the many tools and add-ins that Outlook has to offer.



PoliteMail Online

For maximum flexibility, PoliteMail Online offers the same great features as the Desktop edition in an online interface – no downloads required. PoliteMail Online is not a part of Microsoft Outlook, and so the interface is slightly different, and no other Outlook components (such as the Outlook Calendar) or add-ins are included. A great choice for those on the road!



PoliteMail for Microsoft 365

If your organization uses Microsoft 365 to access Outlook online, the PoliteMail 365 edition allows users to send or schedule measured messages from the Outlook.com interface and can access their PoliteMail Content. Users cannot access any reporting or a few other features, but there is a handy link to quickly go to PoliteMail Online to use those features when needed.

Desktop Online M365

	Desktop	Online	M365
Requires app Installation	✔		
Tools Reside Inside Outlook	✔		
Social Advocacy	✔		
Appointment Metrics	✔		
Web Analytics Integration	✔		
Account Settings	✔	✔	
Metric Results	✔	✔	
Access Templates	✔	✔	✔
Brand Themes	✔	✔	✔
Paragraphs	✔	✔	✔
Links	✔	✔	✔
Images	✔	✔	✔
Smart Attachments	✔	✔	✔
Buttons	✔	✔	✔
Ai/B Testing	✔	✔	✔
Tags	✔	✔	✔
Personalization	✔	✔	✔
PoliteMail Builder	✔	✔	✔
Campaigns	✔	✔	✔
Scheduled Sending	✔	✔	✔
Video	✔	✔	✔
Uses Existing Distribution Groups	✔	✔	✔

Getting Started

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

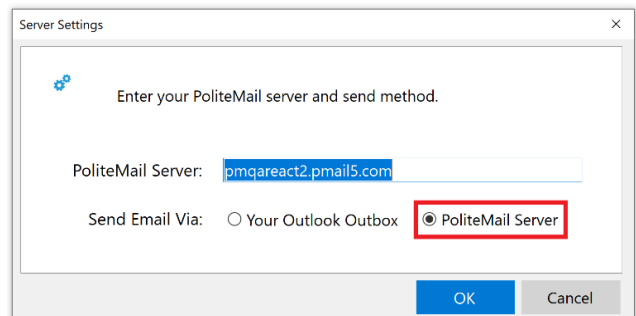
- If you are using Single Sign-On, your IT department will set up your login credentials.
- If you are using Password Authentication, you will receive an email entitled, "Your PoliteMail Account is Ready," which will include a link to the software for installation, your account password, and your unique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



PoliteMail for the Outlook Desktop

Installation

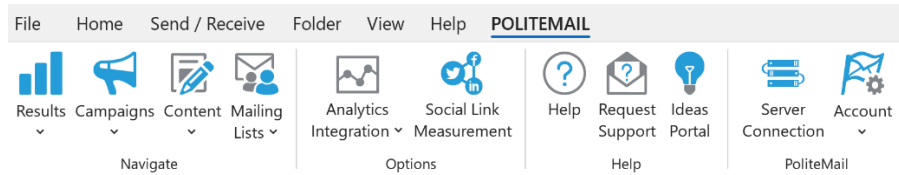
1. Click the download software link and close Outlook.
2. Double-click on the .exe file you just downloaded to launch the installer.
3. Re-open Outlook. You will be asked to make a connection to the PoliteMail Server account.
4. The Server Settings window appears.
 - a. Enter in the PoliteMail Server 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.
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.



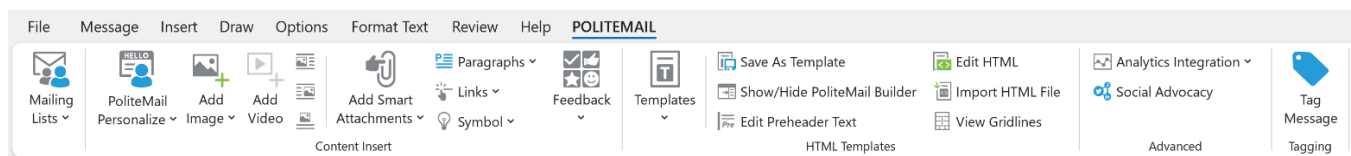
If you are using Single Sign-On, you may see a different login screen depending on what your IT Administrator has set up.

The User Interface

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



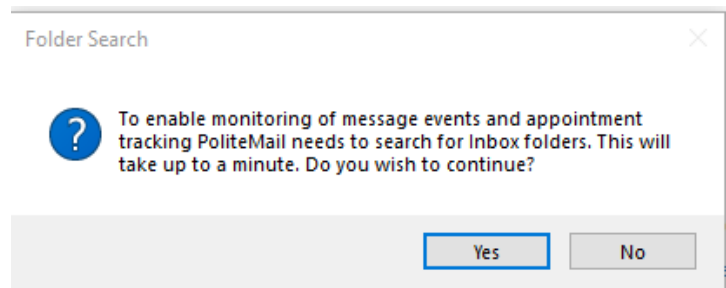
PoliteMail tab in a new Outlook email message

→ 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.



After Installation

Upon your first log in to PoliteMail, you may 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.



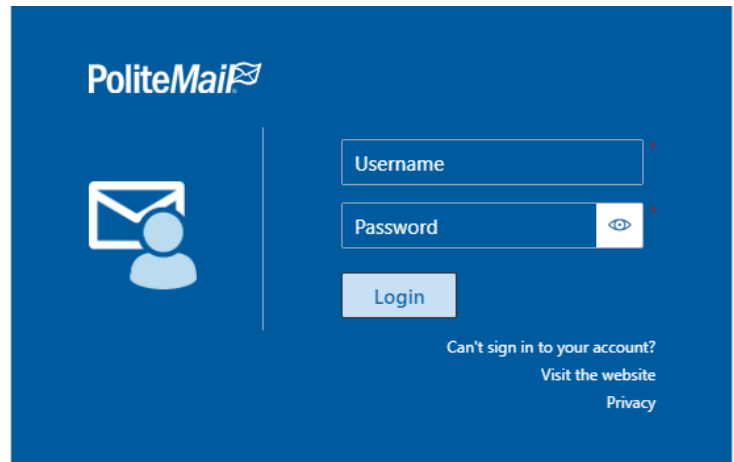


PoliteMail Online

Access

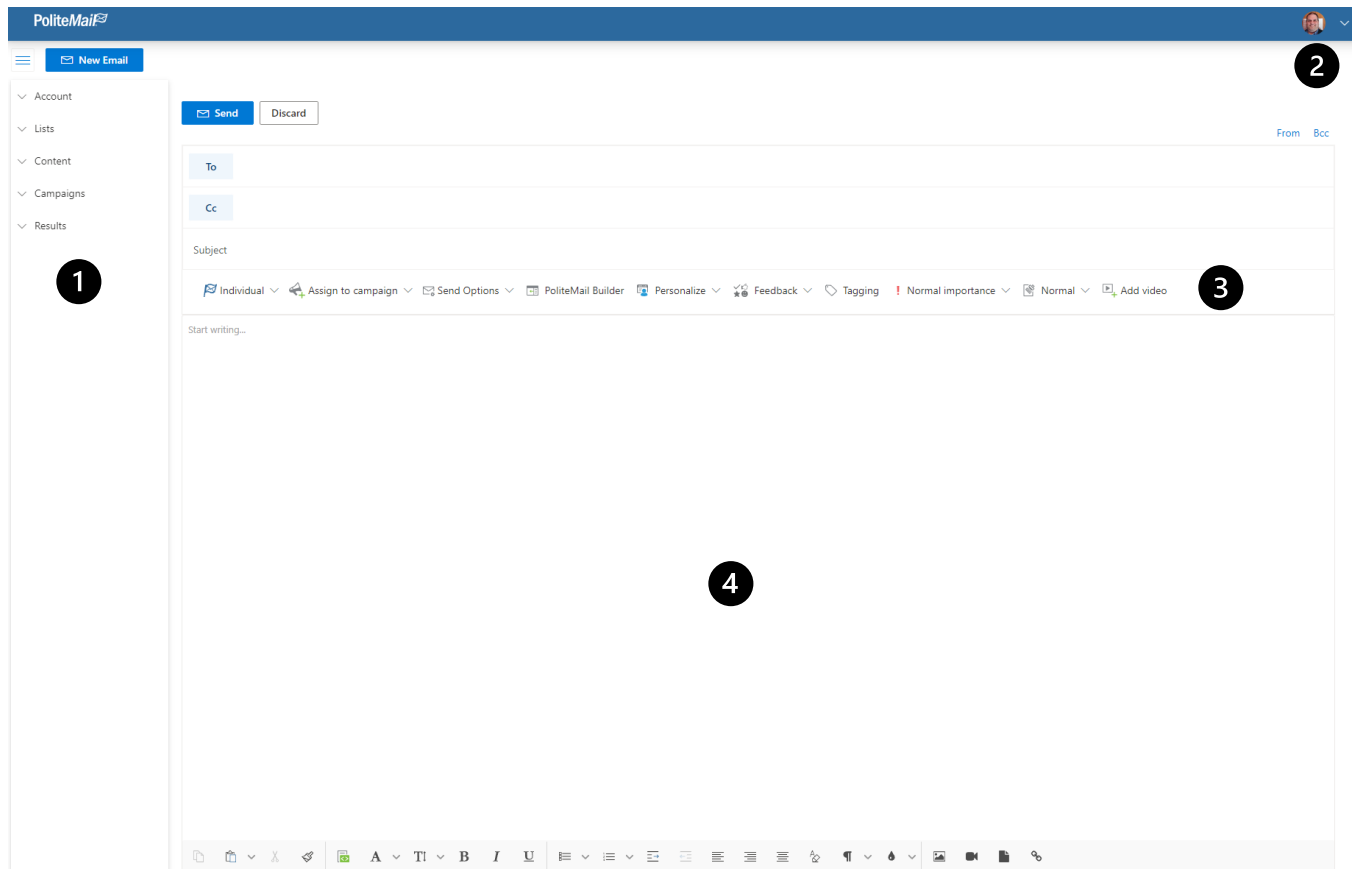
PoliteMail Online gives you the full functionality of PoliteMail in an intuitive, online interface that can be accessed from anywhere, with no installation.

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



Interface

The PoliteMail Online interface is designed to look very familiar to users of Outlook, and composing messages in PoliteMail Online is very intuitive.



- 1 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.
- 2 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.
- 3 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.
- 4 This is the **composition window**, where you will type your message just like you would in Outlook®.



Access

The Politemail365 Add-In is designed to give users quick access to PoliteMail measurement tools without leaving Outlook365. Users can access any content that has been stored on the PoliteMail Server, as well as import new content such as templates and Smart Attachments.

Your user role and Group assignments will carry over into PoliteMail365.

1. Download the software. This is usually from a manifest, but may be from the store, depending on your organization's implementation.
2. Login to Microsoft365 and open Outlook.
3. Click New Message. You will see the PoliteMail icon in the Outlook ribbon.
4. You will be asked to login to the PoliteMail Server.
5. The PoliteMail panel will open on the left-hand side.

Limitations



PoliteMail 365's main function is to add PoliteMail features and tools to emails being composed. There are many more PoliteMail capabilities, however, that can only be taken advantage of in the desktop version of PoliteMail, or in PoliteMail Online.

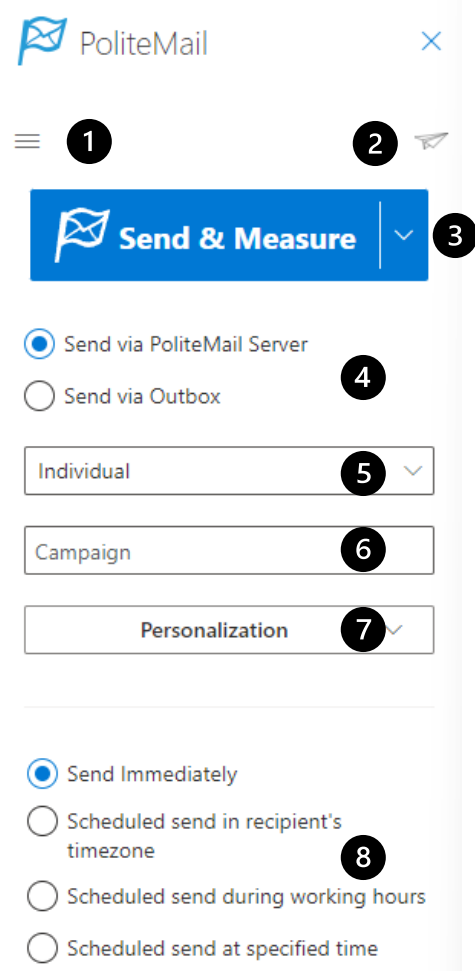
- Reporting metrics is available only on the desktop version or PoliteMail online.
- While you can create some content such as Templates, Paragraphs or Links, it is recommended to do those functions in the desktop or online version of PoliteMail for ease of use.
- Adding or creating PoliteMail Lists or Tag Groups must be done in either the desktop or online version.


Interface

The PoliteMail Pane is where you can access your saved content, personalize your email messages, and send your message via PoliteMail so it can be measured.

Click the PoliteMail button  at the bottom of the email window to open the PoliteMail pane on the right.

- 1 Click the  menu to view and insert PoliteMail content, such as Templates, Paragraphs, Images, Links, Smart Attachments, and more. You can also find some settings here, as well as the ability to switch to PoliteMail Online.
- 2 The  button will send your message via PoliteMail right away. Clicking the blue 'Send & Measure' button below it does the same thing.
- 3 Clicking the drop down in the big 'Send & Measure' gives you the option of doing Preflight test send, which sends a test email to yourself, disabling Open Measurement, O365 or iOS measurement, or to get a Recipient Count.
- 4 It's a best practice to have 'Send via PoliteMail Server' selected; this option is much faster than sending via Outlook.
- 5 Select your type of [measurement](#) from the list:
- 6 Click the 'Campaign' field to associate your email with Campaign that you select.
- 7 The 'Personalization' lets you insert various standard and custom fields to make each email specific to the recipient.
- 8 Select from the options to send the email right away or schedule it for later.









You must click the 'Send' or  button to measure the email via PoliteMail 365; the standard Send button in the Outlook window will **not** measure the email.






PoliteMail Commands




The chart below lists the many commands available in PoliteMail and where they can be found on the different PoliteMail interfaces.

Item	Description	 Desktop	 Online	 M365
Settings	Brings you to your user preferences.	POLITEMAIL > Account > Settings	Account drop-down, or user icon in upper right.	Not available
Help	Brings users to the PoliteMail Knowledge Base.	POLITEMAIL > Help	User icon in upper right.	Not available
Sign out	Sign out of PoliteMail.	Not available; Add-In will need to be disabled.	User icon in upper right.	Not available
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.	POLITEMAIL > Request Support	User icon in upper right.	☰ > Settings
Ideas Portal	Directs users to the PoliteMail idea submission site. Request new features or improvements that you would like to see in future releases.	POLITEMAIL > Ideas	User icon in upper right.	Not available
Server Connection	Makes the authenticated connection between your PoliteMail instance and the PoliteMail Server for your account. Check your server connection, account email address, password, server, and send via option.	POLITEMAIL > Server Connection	Automatically connected. Change your password at ☰ > Account	Not available
Switch between Outbox and PoliteMail Server	Switch between send via the Outlook Outbox or the PoliteMail Server. We recommended staying with the PoliteMail Server for best performance.	POLITEMAIL > Server Connection	Messages are sent via PoliteMail server only.	Radio buttons in the PoliteMail pane.
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 > Account > Settings	☰ > Account > Settings	Not available

Item	Description	 Desktop	 Online	 M365
Results	Email metrics and analytics reporting tools. View metrics reports by message, campaign, list, sender, from, account, measurable social media links, and interactions.	POLITEMAIL > Results	Account drop-down, or user icon in upper right.	Not available
Campaigns	Create and manage mailing campaigns. Group messages into Campaigns for bundled metric details. Also view Scheduled Sends.	POLITEMAIL > Campaigns	☰ > Campaigns	Not available
Content	View, edit and manage Content items via a list (data grid).	POLITEMAIL > Content	☰ > Content	Not available
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.	POLITEMAIL > Mailing Lists	☰ > Mailing Lists	Not available
Analytics Integration	Enables your web analytics tool to report on traffic coming from your email messages and campaigns.	POLITEMAIL > Analytics Integration	Not Available	Not Available
Create a Social Link	Create a measured URL to copy and post on external web sites or social media.	POLITEMAIL > Social Link Measurement	☰ > Results > Social Link. Click the 'New' button.	Not Available
Social Link Measurement	Review results of created social media links .	POLITEMAIL > Results > Social Link	☰ > Results > Social Link	Not Available

Item	Description	 Desktop	 Online	 M365
Measurement Mode	Select mode for measurement . Default is Individual.	PoliteMail Flag button, select mode from drop-down.	PoliteMail Flag drop-down from PoliteMail toolbar.	Drop-down in PoliteMail pane on right.
Assign to Campaign	Assigns the current email message to a Campaign .	Campaigns button in Ribbon.	Assign to Campaign drop-down from PoliteMail toolbar.	Drop-down in PoliteMail pane on right.
Preflight Test Send	Creates an exact copy of the current message addressed to yourself as a test to verify content, layout, and links. The subject will be preceded with PREVIEW.	PoliteMail Flag button.	Send Options from PoliteMail toolbar.	'Send & Measure' drop-down menu.
Suppress Auto-Replies	Suppresses all automatic emails for this message only; works when using Global contacts from your Exchange Server within your internal domain.	PoliteMail Flag button.	Send Options from PoliteMail toolbar.	Not available.
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.	PoliteMail Flag button.	Send Options from PoliteMail toolbar.	Not available.
Schedule Send	Set a specific future date and time for this message to be sent, including if the recipient is in a different time zone.	PoliteMail Flag button.	Send Options from PoliteMail toolbar.	Radio button options on the PoliteMail pane.
Return Path / Direct Replies To	Specify a different inbox where bounced emails will return.	PoliteMail Flag button > Advanced	Send Options from PoliteMail toolbar.	Not available.
Add/Remove Unsubscribe	Inserts or removes an opt-out footer into your email that allows recipients to opt-out or unsubscribe from future mailings.	PoliteMail Flag button.	Send Options from PoliteMail toolbar.	Not available.
Get Recipient Count	Provides a count of total recipients for the email.	PoliteMail Flag button.	Send Options from PoliteMail toolbar.	'Send & Measure' drop-down menu.

Item	Description	 Desktop	 Online	 M365
Configure O365 Measurement	Set up unique technology to provide accurate measurement metrics on macOS and iOS devices.	Account > Settings	Account > Settings	☰ > Settings
Disable Open Measurement	Measures links in messages but omits the measurement beacon. Used for sending PoliteMail messages to mobile devices.	PoliteMail Flag button > Advanced	Send Options from PoliteMail toolbar.	'Send & Measure' drop-down menu.
Disable iOS Measurement	Turns off measurement in iOS	PoliteMail Flag button > Advanced	Send Options from PoliteMail toolbar.	'Send & Measure' drop-down menu.
Disable M365 Measurement	Turns off measurement for M365	PoliteMail Flag button > Advanced	Send Options from PoliteMail toolbar.	'Send & Measure' drop-down menu.

Item	Description	 Desktop	 Online	 M365
PoliteMail Builder	Opens the PoliteMail Builder to create, access, and edit content.	PoliteMail Flag button.	PoliteMail Builder button.	☰
Personalize	Place an automated merge field into your message. Personalized fields will be replaced with data when you send with Measurement selected. Fields with no data will be blank.	PoliteMail Personalize button in Ribbon.	Personalize drop-down in toolbar.	Personalize button in pane.
Feedback	Add surveys or polls of various types. You can also allow the recipient to view results in near real-time.	Feedback button in Ribbon.	Feedback drop-down in toolbar.	☰ > Feedback
Tag Message	Add tags to a message so they can be categorized and/or searched for easily in the future.	Tag Message button in Ribbon	Tagging button in toolbar.	☰ > Tags
Video	Add online video to your message. You will need to configure Microsoft365 Measurement and enter your Sender ID for this functionality to be enabled.	Add Video button in Ribbon	Add Video button in toolbar.	☰ > Video
Mailing Lists	Select from any lists you have imported, and have that list included added to the To: field.	Mailing Lists drop-down in Ribbon.	'To' button when composing message.	☰ > Mailing Lists
Sensitivity / Importance	Assign Low, Normal, or High Importance to your message.	Built into Outlook	Importance button in toolbar.	Built into Outlook

User Settings



Desktop




Online



M365

PoliteMail > Account > Settings > User Preferences

'Settings' in the left pane, or in your User Menu in the upper right under 'Settings'.

Settings are not found in PoliteMail 365; you will need to click on the  to switch to PoliteMail Online to access them.

It is important to check your settings prior to your first send. Settings marked "Global/Locked" can be modified and locked by Admins, preventing Users from changing them.

Editing

Setting	Global/Locked	Description	Recommended Setting
Default Campaign	Yes	Automatically 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 overwrite word count prompt will appear every time before the message is sent.	Turn on when emails are written in multiple languages.

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.

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.

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 browser instead of Internet Explorer for pop-up windows.	Turn off if Internet Explorer is used as the default browser.

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.

Sending a Measured Message



Desktop

Click the PoliteMail Flag to enable measurement.
Select a measurement mode from the drop-down.



Online

Measurement is automatically enabled.
Click on the flag button in the PoliteMail toolbar to select a measurement mode.

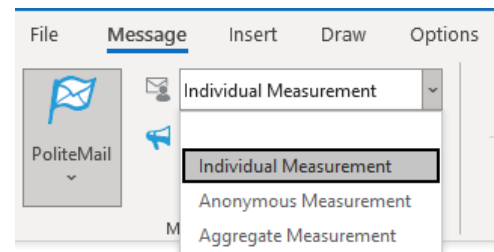


M365

Click the PoliteMail Flag button in the toolbar to open the PoliteMail panel on the right.
Use the drop-down menu by the large 'Send & Measure' button to select the measurement mode.

Understanding 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. 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.

Preflight Test Sending & Drafts

Preflight Test Sending

PoliteMail allows you to do a "Preflight Test Send", which will send your message to yourself without affecting the metrics, so you can see what your recipients will see firsthand.



Compose your Measured Message and then click on 'Preflight Test Send' under the PoliteMail button.

Compose your Measured Message and then click on 'Preflight Test Send' under 'Send Options'.

Open the PoliteMail pane. Compose your message and click the drop-down to the right of the 'Send & Measure' button to select 'Preflight Test Send'.

Saving as a Draft

Starting with version 5.05, you can also save a message as a Draft to allow user PoliteMail users to view it prior to sending, for example if you want someone else to review the message first.



POLITEMAIL > Save As > Draft

Click the 'Save As' button to the right of the 'Send' button.

Save As is not currently available. Use the ☰ to select to 'Open in PoliteMail Online'.

Once saved, other users with access can find your draft under **Campaigns > Drafts**.

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.



[O365 Measurement](#) must first be enabled and set up by your Administrator by going to **Account > O365 Measurement**.

- O365 Measurement must be configured and your Sender ID entered into PoliteMail for measurement to take effect.



Desktop




Online



M365

Click the **PoliteMail Flag > Advanced > O365 Measurement**

Click on **Send Options** from the toolbar and select O365 Measurement

Click  > Settings > O365 Measurement

Importing Mailing Lists



Lists > Mailing Lists

Select 'Mailing Lists' from the left, then select 'Mailing Lists' or 'Contacts'.

Contacts cannot be imported in PoliteMail for M365; however, you can access any existing mailing lists by going to ☰ > 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.

Import Contacts

Has Column Headers

Create New List

Add To Existing List

New Mailing List Name

Contact Owner

Mark entire import as Opt-out

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](#)



Managing Content

“Content” refers to items that can be inserted and measured in PoliteMail, such as Templates, Images, Brand Themes, Buttons, Links, Paragraphs, and Smart Attachments. When stored in PoliteMail, they can not only be shared with other users, but this can also speed up delivery in many situations.

Sharing & Groups

PoliteMail allows for the creation of [Groups](#), in which all Manager-level members of the Group will be able to see the imported content. Content can be shared with all users in the group as well.



PoliteMail supports two primary Groups, which by default are labeled as Business and Region. These names can be changed by Admins in the PoliteMail Settings. Any number of subgroups can be created under these Groups.

→ 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.

Sharing Content from the Data Grid

You can [share the content](#) you import or create either via the PoliteMail Builder, or from the data grid. The data grid will display a list of the content type you have selected, and allows you to change the name, sharing settings, or export the content list to Excel.





Viewing content lists from the data grid is not available on PoliteMail 365.



Go to **Content** and select the Content type to share. Select the item to open a panel on the right. Check the ‘Shared’ box, and the Group(s) from the dropdowns. Click ‘Save’.

Content can only be managed in the PoliteMail Builder.

Click the  in the PoliteMail pane on the right and select your content type to open a list of those items.

Click the  Share button to select the Groups from the drop-down.

→ 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.

Accessing the PoliteMail Builder

PoliteMail content is placed into your message via the PoliteMail Builder, which can be accessed in all editions of PoliteMail.



Desktop



Online



M365

When composing a Measured Message, go to **Message > PoliteMail > Show / Hide PoliteMail Builder**.

When composing a message, click the PoliteMail Flag button in the toolbar.


Click the PoliteMail Flag button to open the PoliteMail pane on the right, then click the hamburger button  .

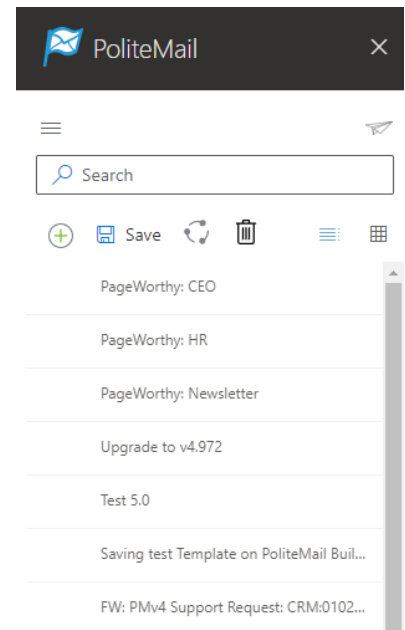
Templates

[Templates](#) are a great way to create a standardized format for all of your email communications. Templates in PoliteMail work just like templates you might create in Outlook, but allow you to measure your responses and send with greater efficiency.



Creating a Template

1. Open the PoliteMail Builder and select 'Templates' from the  menu.
2. Click the 'New' button. A list of Template Sections appears.
3. Select the Template Section you're looking for by double-clicking on it and a list of available types will display.
4. Drag (or you can double-click on the Outlook Desktop) your desired item over to the email window. From there, you can modify the text to suit your needs.
5. When finished, you can Save and/or Share the Template.

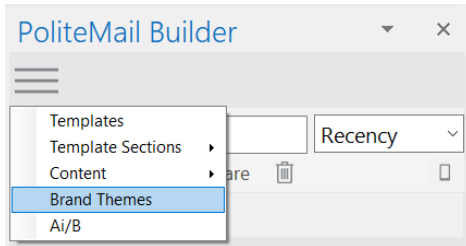


Brand Themes


[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. Select a Theme from the list.
3. select your Sharing options using the drop-down menus.
4. You will see options for the formatting of the header, sub-header, body, and other Template components. Adjust these as you see fit.
5. Click 'Save'. You will be prompted to either overwrite the existing Theme, or to create a new one.


Paragraphs

[Paragraphs](#) can either be written in an email message or created in an outside program like Word. They can then be saved in PoliteMail and accessed at any time. This can save a lot of time if, for example, you have a standard paragraph or disclaimer to be included in all official communication.



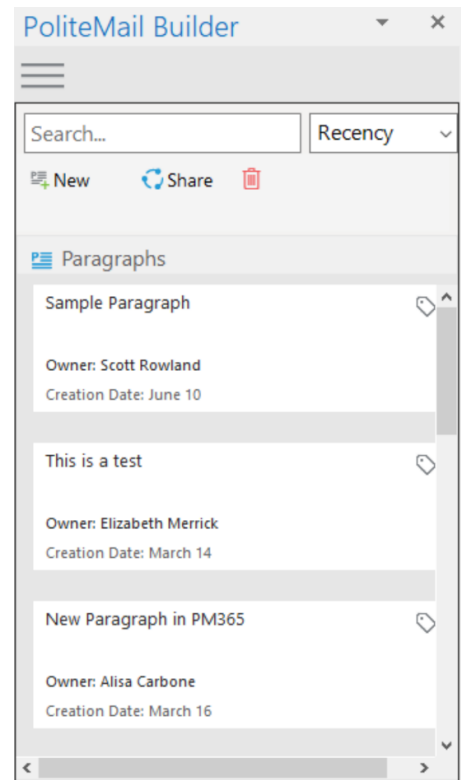
Creating or Inserting a Paragraph

To create a Paragraph:

1. Open the PoliteMail Builder. If Paragraphs are not listed, click the  and select 'Paragraphs'.
2. A list of existing Paragraphs appears.
 - a. To use an existing Paragraph, double-click on it, or drag it to your message.
 - b. To create a new Paragraph, click the 'New' button. A window appears for you to compose your Paragraph and save it.



The Outlook Add-In for the Desktop allows you to right-click on an existing Paragraph you typed to add it as a Paragraph in PoliteMail, or to insert an existing Paragraph from PoliteMail to your cursor's location in the current message.






Images

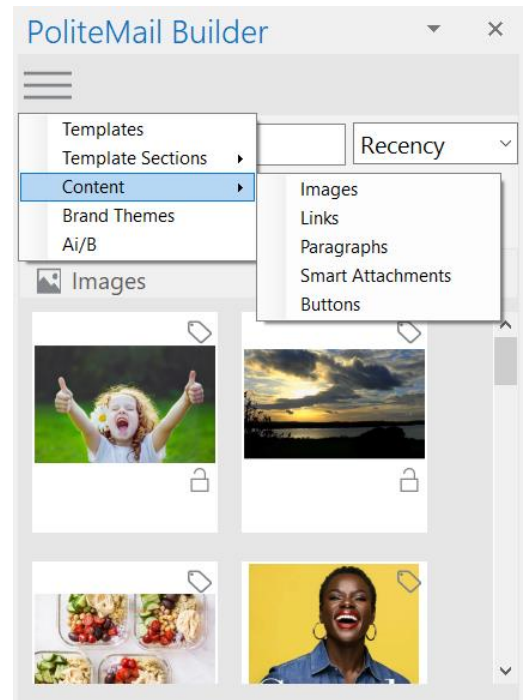
[Images](#) stored in PoliteMail allow you to access and share them easily and can speed up delivery as well, especially when you have many recipients.



Importing an Image

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.

 **Desktop Only:** When composing a message, you can also click on **POLITEMAIL > Add Image** to add an image directly.



Secured Images

Add Image

Select an image to import

Secured

Save



A secured image, shown with a checkbox or a padlock icon, cannot be accessed by users off your internal network and is primarily used for On-Premise (self-hosted) clients (Cloud clients will have set up a receive connector).


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

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 any link, whether you use the Links feature or not.

Smart Attachments

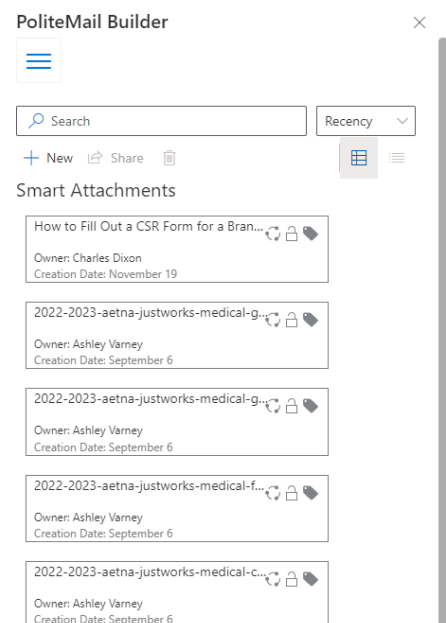
PoliteMail's [Smart Attachment](#) feature is a great way to keep your email message size down by hosting attachments on PoliteMail's server, versus using Outlook's Add Attachment feature. These attachments can also be measured and reported on.



Importing Smart Attachments

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.

 **Desktop** or  **Online**: Links may also be added via the data grid under **Content > Smart Attachments**, and clicking the 'New' button. You can also update the Link text, description, set sharing, and set security.



Secured Smart Attachments


Labelling a Smart Attachment as secured will prevent users from forwarding it or copying and pasting it to another email.


Buttons

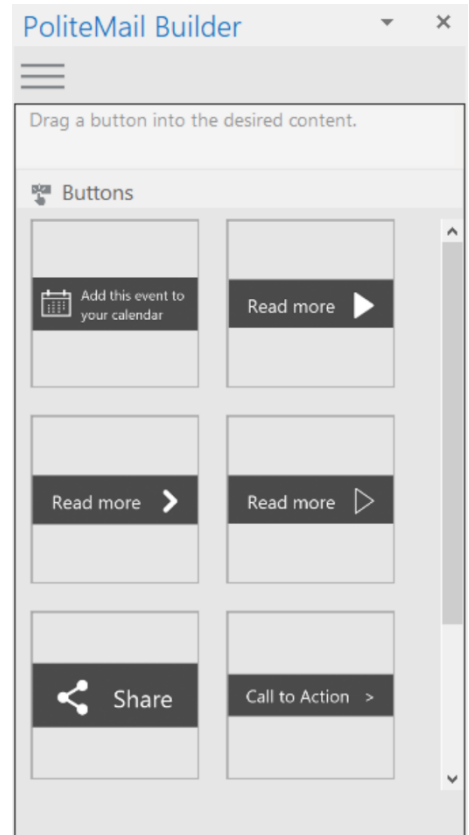


[Buttons](#) allow you to quickly and easily add a graphical element that users can click on to be directed elsewhere. Buttons work much like Links, but are more visual.

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.

 While you can change the size, text, and destination URL of a button, you are limited to the pre-made options shown. However, you can manually upload an Image into PoliteMail and assign a link to it.



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.

Ai/B Testing



PoliteMail will allow you to test [subject line alternatives](#) and automatically identify which will likely gain the highest attention.

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. Create a 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'.

PoliteMail Builder ×



Recommended Subject Lines

Our AI model predicts these subjects will gain higher attention.

Enter a subject to get recommendations

Ai/B Test

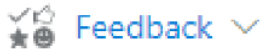
Input two different subject line options and our model will predict which gain higher attention

A ✓

B

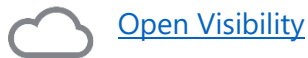
[Compare](#)

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.



Results



Desktop




Online



M365


Go to **POLITEMAIL > Results > Messages**.

From 'Results' in the left pane, select **Results > Messages**.

Metrics are not found in PoliteMail 365; you will need to click on the  to switch to PoliteMail Online to access them.

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

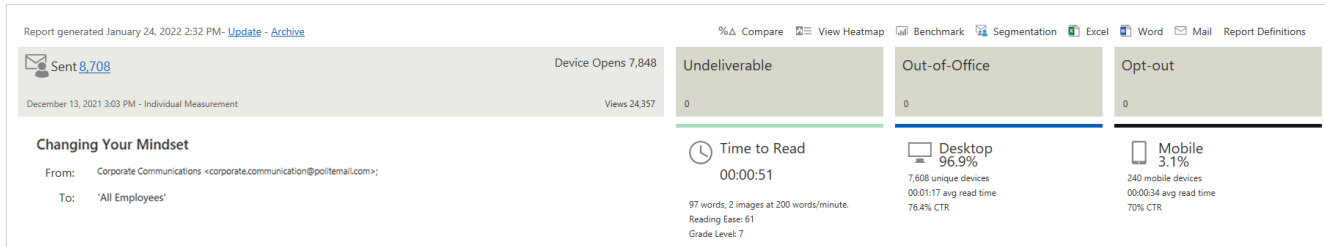
1. From the Navigation Pane, click **Results** and select 'Messages'. A list of all your messages appears.
2. Double-click on the one you want or click on it once and the click on  Email Metrics.

The Top Menu

 View Heatmap  Benchmark: PoliteMail Average  Segmentation  Excel  Word  Mail 

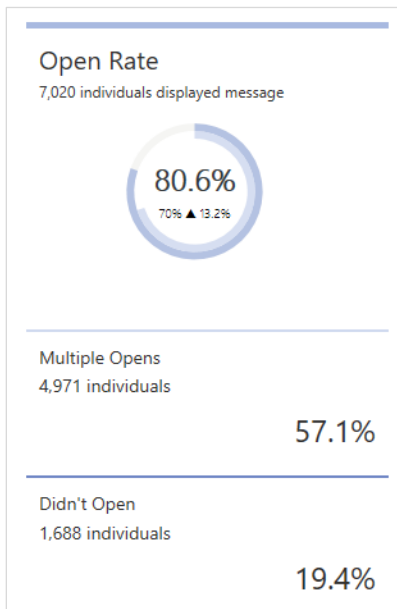
Item	Definition
View Heatmap	Gives a cool to warm overlay which shows read-time and click metrics visually. This data can be used to see how your readers are viewing your content, and where you should be putting key messages and links.
Benchmark	Select between viewing message metrics to your PoliteMail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

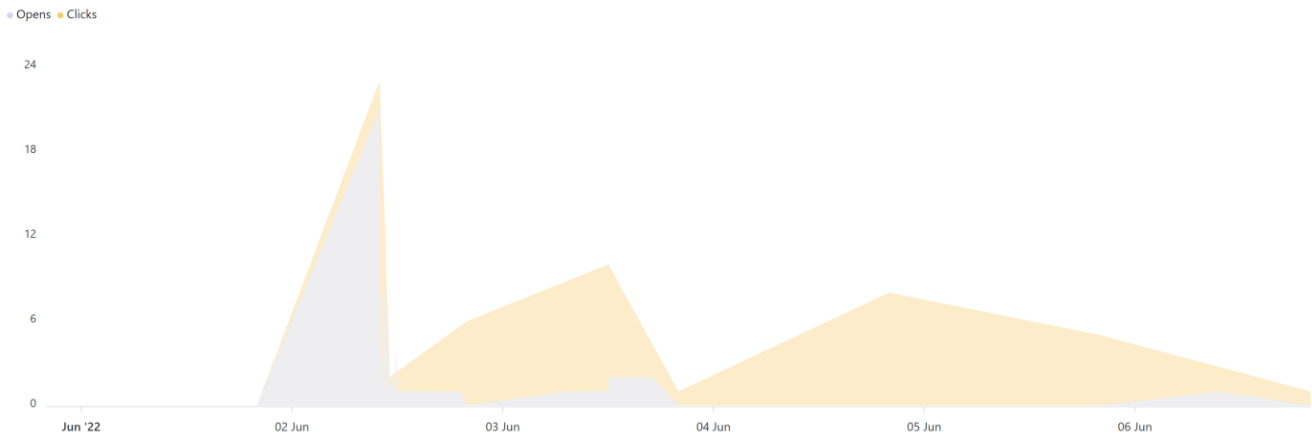
Metric	Definition
Sent	Total recipients the message was addressed to [count of members in list(s)]
Devices	Unique devices measured (devices identified via browser agent)
Impressions	Total number of all previews/opens (non-unique, total open count)
Undeliverables	Hard bounces (returned to a mailbox PoliteMail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

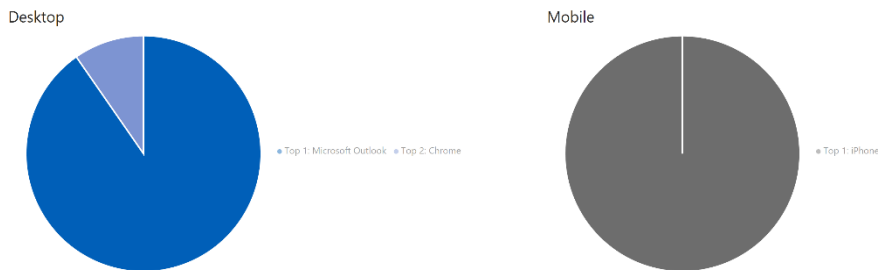
Metric	Definition
Read Rate (30%+)	A read is an individual recipient who had the message open for at least 30% of the content length (in time). Sums all non-ignore opens by individual recipient. Read Rate = Reads / (Sent – Undeliverable)
Multiple Reads	Individual recipients who had more than one read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

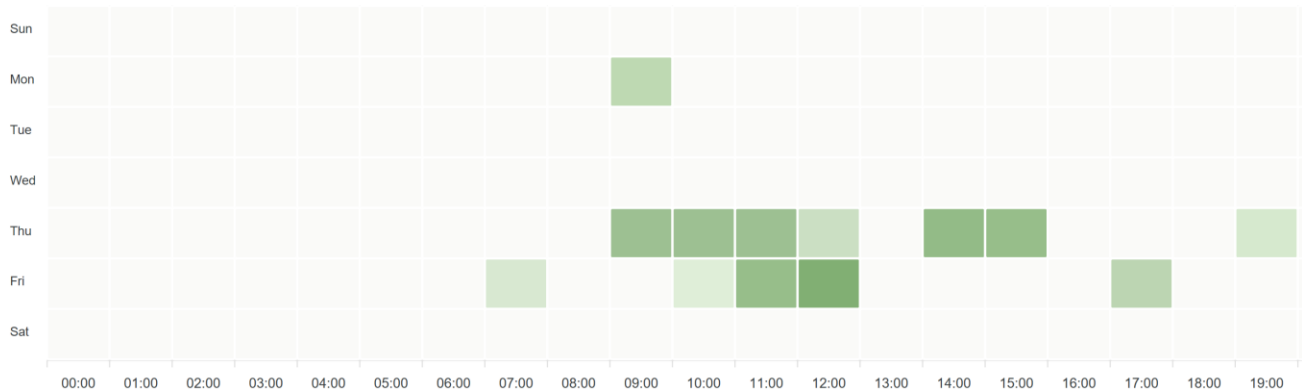
Reads

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.



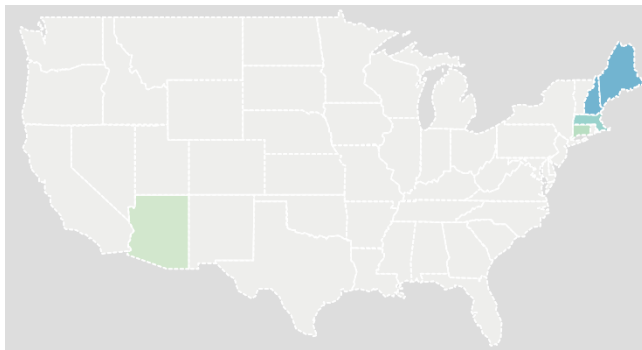
Total Read Time By Hour of Day

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.

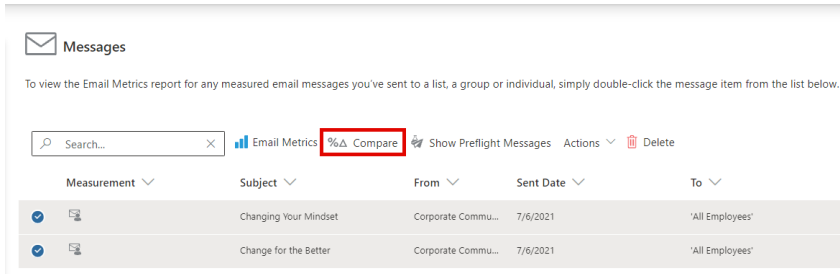
Total Clicks: 5 | Links: 21 | 2 of 21 URLs Clicked

Group By Link



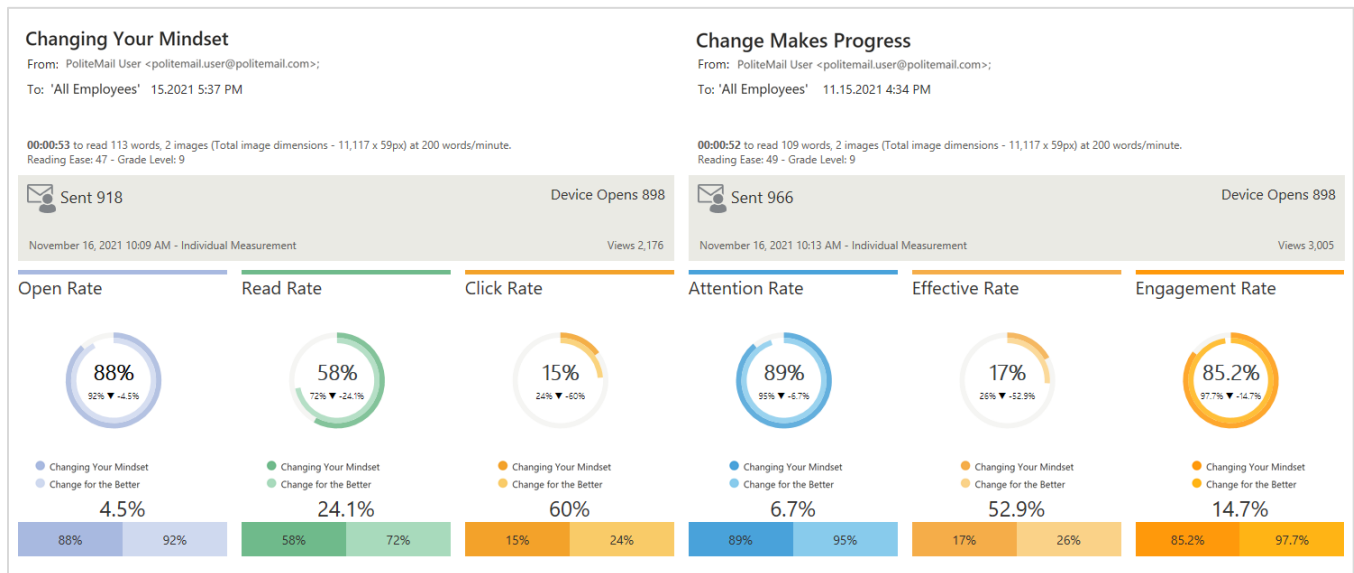
Name	URL	Total Clicks	Unique Clicks	Click Rate
[IMAGE LINK](3)	https://www.saltandlavender.com/mediterranean-vegan-meal-prep-bowls/	3	3	8.33%
[IMAGE LINK]	https://www.youtube.com/watch?v=L4oFJRDAU4Q	2	2	5.56%
[IMAGE LINK] shareIconFacebook-footer_white.png	https://www.facebook.com/politemailsoftware/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



Starting with version 5.05, you can select more than two messages to compare. Doing so will change the 'Compare' button to 'Multi-Compare'. Each message will be displayed in a column, and each metrics is a fully sortable row.



Campaign Metrics

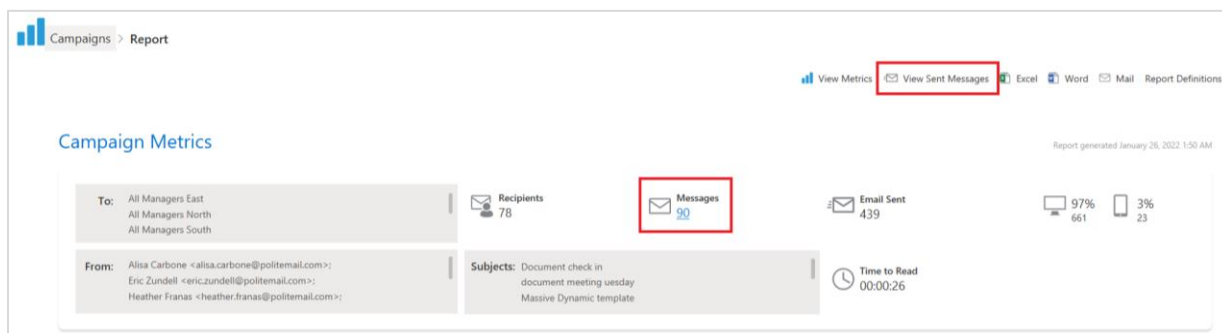
A Campaign is a series of messages that you may have put together as part of an overall message. Campaigns are a great way to group messages, providing you with key insights and the ability to measure metrics over time. Any measured message can be added to a Campaign, including those with different measurement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

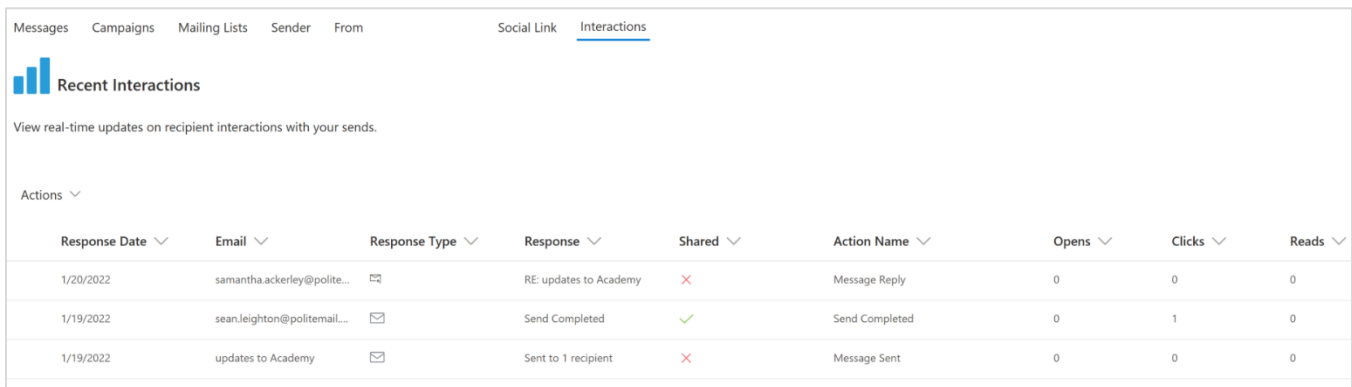
The options for Mailing Lists, Sender, and From under Results works just like that for Messages and Campaigns. Select your item from the data grid to see detailed metrics for a specific Mailing List, Sender, or email address, respectively.

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.



The screenshot shows a web interface for viewing interactions. At the top, there are navigation tabs: Messages, Campaigns, Mailing Lists, Sender, From, Social Link, and Interactions (which is selected). Below the tabs is a bar chart icon and the title 'Recent Interactions'. A subtitle reads 'View real-time updates on recipient interactions with your sends.' There is an 'Actions' dropdown menu. Below this is a table with the following columns: Response Date, Email, Response Type, Response, Shared, Action Name, Opens, Clicks, and Reads. The table contains three rows of data.

Response Date	Email	Response Type	Response	Shared	Action Name	Opens	Clicks	Reads
1/20/2022	samantha.ackerley@polite...	✉	RE: updates to Academy	✗	Message Reply	0	0	0
1/19/2022	sean.leighton@politemail...	✉	Send Completed	✓	Send Completed	0	1	0
1/19/2022	updates to Academy	✉	Sent to 1 recipient	✗	Message Sent	0	0	0

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.

-  Settings
-  Help
-  Chat Bot
-  Sign out
-  Request Support
-  PoliteMail Ideas



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.



PoliteMail Ideas

We want to hear from you! What features or improvements would you like to see in PoliteMail? Send us your ideas and we'll consider them for future releases.









[Home](#) / [New idea](#)
[Log in](#) / [Sign up](#)

Add a new idea

Your idea Required

One sentence summary of the idea

Please add more details

Paragraph **B** *I* U ~~S~~ `</>`        

Why is it useful, who would benefit from it, how should it work?

 Attach files

Tell us who you are Required

Enter email (name@example.com)

[Share idea](#)

You agree to our [Terms of service](#) by using the ideas portal. The application will send you email updates on ideas you have submitted. You can opt-out from the emails at any time. Read our [Privacy policy](#) to learn more.