

Version
5.30

User Guide



Create



Send



Measure

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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, there is a blue header with the PoliteMail logo, a search bar, and a 'Logout' link. Below the header, a large banner reads 'Welcome to the PoliteMail Knowledge Base!' with a search bar and a magnifying glass icon. To the right of the banner is an illustration of a person sitting at a desk with a laptop. Below the banner, there is a yellow box announcing the 'Latest version: 5.20' and a link to 'View the Quick Start Guide or Release Notes.' Below this, there is a grid of 12 icons representing different topics: Upgrade FAQ, Getting Started, Sending w/PoliteMail, Measuring Results, Managing Content, Managing Lists, User Administration, Reference Material, Troubleshooting, Complytics, PoliteMail Ideas Portal, and Contact Support. On the right side, there is a sidebar with three sections: 'Most Popular' (listing articles like 'How do I resize images in Paint and Paint 3D?', 'How do I add a bookmark in an Outlook email?', 'Getting Started and Logging In with PoliteMail Versions 4.7 - 4.9', 'How To Repair Your Outlook Data File To Resolve Recurring Outlook Crashing, Hanging Or Stuck In Outbox Issues', and 'Configuring Internet Email Accounts (Gmail, Yahoo, Hotmail) in Outlook'), 'Newest' (listing articles like 'What is the difference between Simple Implementation and Technical Implementation?', 'How do I perform the Simple Implementation of PoliteMail?', and 'How do I install PoliteMail?'), and 'Recently Updated' (listing articles like 'Where can I find the latest release notes for PoliteMail?', 'What are the system requirements for On-Premises installations of PoliteMail?', and 'Where can I find a list of PoliteMail features by version?').

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

Requires app Installation			
Tools Reside Inside Outlook			
Social Advocacy			
Appointment Metrics			
Web Analytics Integration			
Account Settings			
Metric Results			
Access Templates			
Save as Draft			
Brand Themes			
Paragraphs			
Links			
Images			
Smart Attachments			
Buttons			
Subject Suggester			
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.

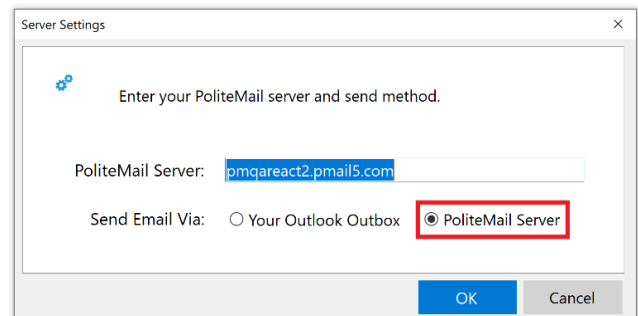
- If you are using Single Sign-On, your IT department will set up your login credentials.
- If you are using Password Authentication, you will receive an email entitled, "Your PoliteMail Account is Ready," which will include a link to the software for installation, your account password, and your unique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



PoliteMail for the Outlook Desktop

Installation

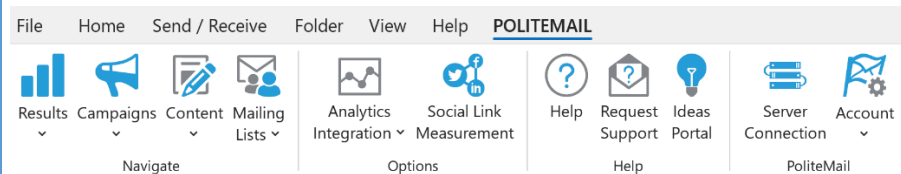
1. Click the download software link and close Outlook.
2. Double-click on the .exe file you just downloaded to launch the installer.
3. Re-open Outlook. You will be asked to make a connection to the PoliteMail Server account.
4. The Server Settings window appears.
 - a. Enter in the **PoliteMail Server** host name contained in the welcome email.
 - b. You can send messages either via the Outlook Outbox or the PoliteMail server. through the PoliteMail Server will increase the speed of the send while not bogging down the Outlook outbox. If you are on version 5.2 or later, you also have the option to send via Graph; if you have this enabled, the 'Send Email Via' options will not display here.
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.



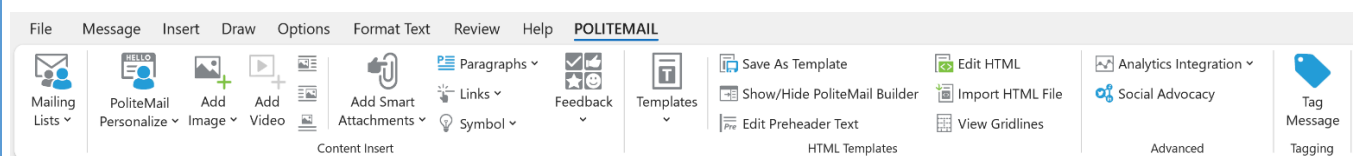
If you are using Single Sign-On, you may see a different login screen depending on what your IT Administrator has set up.

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



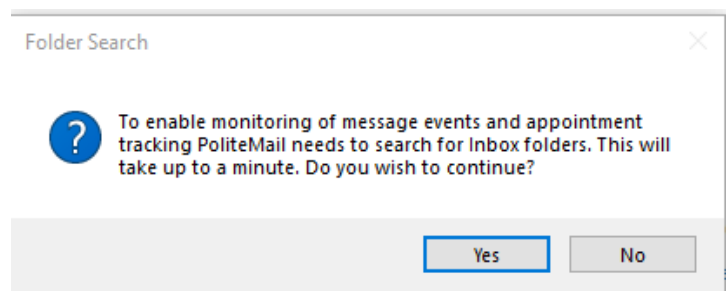
PoliteMail tab in a new Outlook email message

➔ 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.

A screenshot of the PoliteMail Online login page. The page has a dark blue background. At the top left is the PoliteMail logo. Below it is a white icon of an envelope with a person silhouette. To the right of the icon are two input fields: 'Username' and 'Password'. The 'Password' field has a toggle icon (an eye) to its right. Below the input fields is a 'Login' button. At the bottom right, there is a link 'Can't sign in to your account?' followed by 'Visit the website' and 'Privacy' links.

PoliteMail

Username

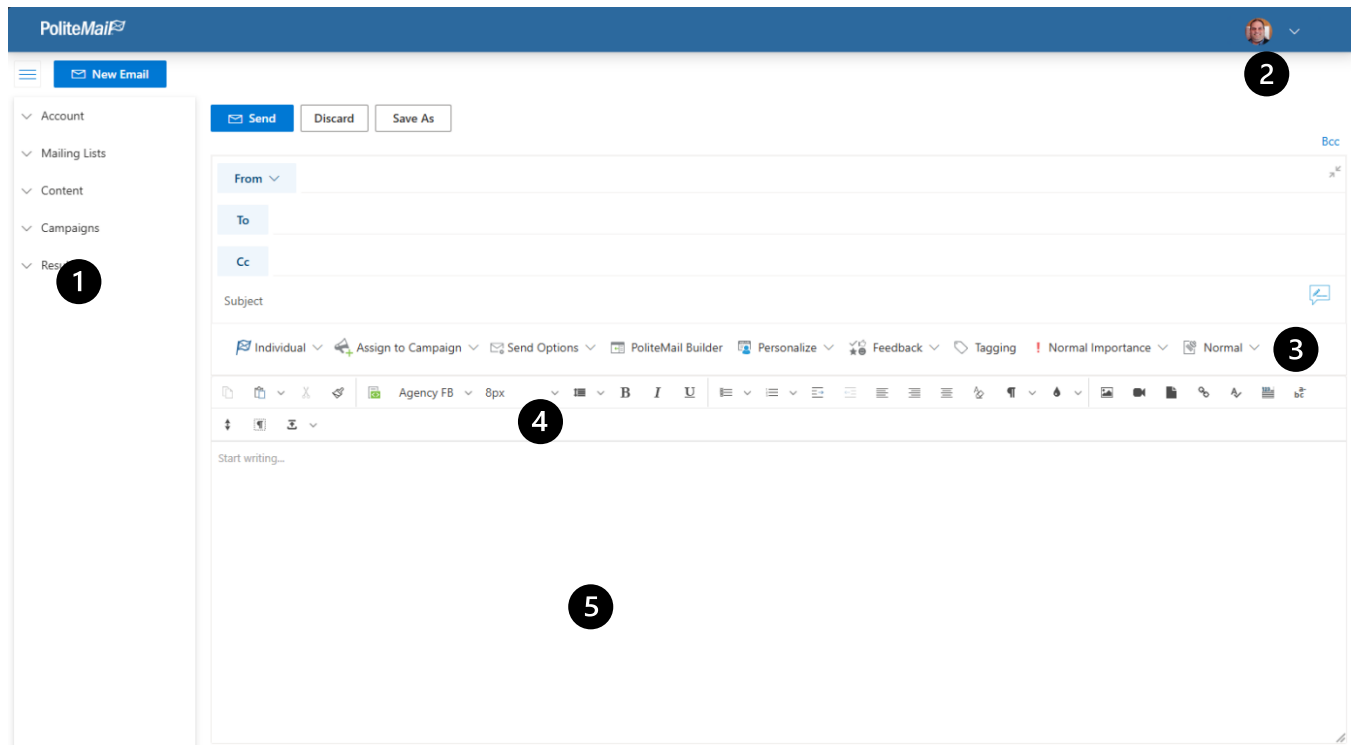
Password

Login

Can't sign in to your account?
[Visit the website](#)
[Privacy](#)

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 The other **toolbar** contains the typical formatting options you might see in Outlook or Word, such as the font, size, and alignment, as well as the ability to add content to your message.
- 5 This is the **composition window**, where you will type your message just like you would in Outlook®.



PoliteMail for Microsoft 365

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.

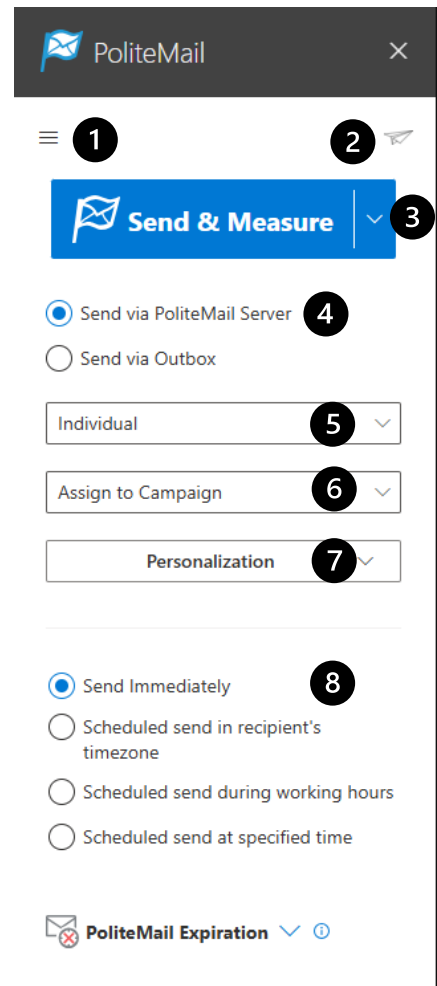
- Reporting metrics is available only on the desktop version or PoliteMail online.
- While you can create some content such as Templates, Paragraphs or Links, it is recommended to do those functions in the desktop or online version of PoliteMail for ease of use.
- Adding or creating PoliteMail Lists 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.
- 9 Use the drop-down to add an expiration date to your message.






 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 some high-level 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.	Disable the add-on	User icon in upper right.	☰ > Account
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	Under the big blue Send button.
Switch between Outlook, PoliteMail Server, and Graph	Switch between send via the Outlook Outbox or the PoliteMail Server. We recommended staying with the PoliteMail Server for best performance.	POLITEMAIL > Send Method (Measurement must be turned on)	Send Options > Send Method	Under the big blue Send button.

User Settings




**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.



Check [here](#) for a description of all settings available to Users and Admins.



Check [here](#) for a description of all settings available only to System Admins.
BEWARE: Changing settings at this level can brick your instance of PoliteMail if you
don't know what you're doing!



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.

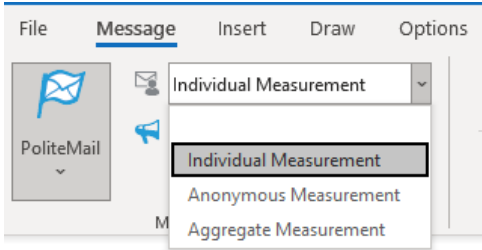


M365

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.










Learn more about [PoliteMail Measurement Modes!](#)



PoliteMail Features Overview

The table below lists the many features you can take advantage of in PoliteMail:

Feature	Description	More Information
Preflight Test Send	Allows you to test a completed message prior to sending. Users can check the design and flow on both desktop and mobile, as well as links and smart attachments within the message.	
Save as a Draft	Allow other PoliteMail users to view a message prior to sending, for example if you want someone else to review the message first.	
Enable M365 Measurement	Obtain more accurate measurement data on iOS and other devices that use Mail Privacy Protection (MPP).	
Mailing Lists	Create your own mailing lists or import them from either Outlook/Exchange or as a .csv file.	
Scheduled Sends	Schedule messages to go out when you want, even specific to the recipient's time zone!	
From Management	Have a message come from another address, such as 'Corporate Communications' or 'Office of the President'.	
Message Expiration	Set an expiration date for a message so it cannot be viewed after a specific time.	

Managing Content

“Content” refers to items that can be inserted and measured in PoliteMail, such as Templates, Images, 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.

The PoliteMail Builder

The PoliteMail Builder is used to manage all of your content within PoliteMail. Content stored there can be accessed by you (and anyone you share content with) from any instance of PoliteMail and any device you log into!



Desktop

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



Online

When composing a message, click ‘PoliteMail Builder’ in the toolbar.



M365

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

Note that PoliteMail Online uses a different Builder interface than PoliteMail for the Desktop, but you will still be able to view and access Templates created on either platform.









Beefree Support

Starting in version 5.3, PoliteMail Online also supports integration with Beefree™! Beefree is a popular third-party email and landing page creation application with an interface that is very similar to PoliteMail. You also gain access to over 1000 pre-designed templates as well as thousands of stock images provided by Pexels™.



- Beefree integration is not available for PoliteMail for the Desktop, M365, or on-premises installations.
- Content and templates created with the PoliteMail Builder are not available in Beefree, and vice versa.
- More information about Beefree support can be found [here](#), and Beefree’s own documentation can be found [here](#).

PoliteMail offers a number of different content types, listed below:

Feature	Description	More Information
Templates	Create a standard look for your messages coming from a specific group or mailbox! Save all the components for easy retrieval at any time.	
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.	
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.	
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.	
Links	With the Links function in PoliteMail, you can save links and easily pull them into new messages without having to retype it. 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.	
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.	
Ai/B Testing & Subject Suggester	PoliteMail will allow you to test subject line alternatives and automatically identify which will likely gain the highest attention. PoliteMail Online version 5.1 and later offers the Subject Suggester, which brings the power of Ai/B testing and embeds it directly into the subject line of your message instead of using the Builder.	
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.	

Secured Content

Some PoliteMail content, most commonly images and smart attachments, can be secured so they cannot be accessed by users off your internal network, or forwarded or copy and pasted to another email. This is primarily used for On-Premises (self-hosted) clients, and is shown with a padlock icon next to the item.

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 is 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.

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.

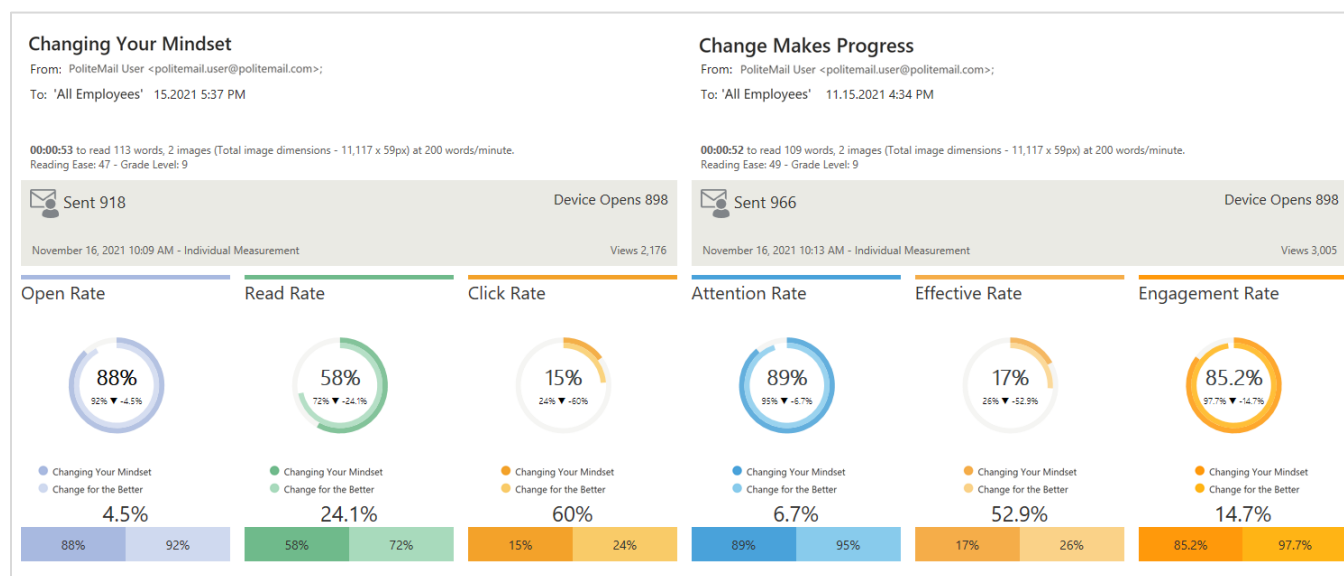


A detailed description of the Metrics Report and what the many data points mean may be found [here](#).



Comparing Different Messages

You can also select multiple messages to compare results! Select the message to compare and use the Multi-Compare button in the toolbar.



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.



[Multi-Compare](#)



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).

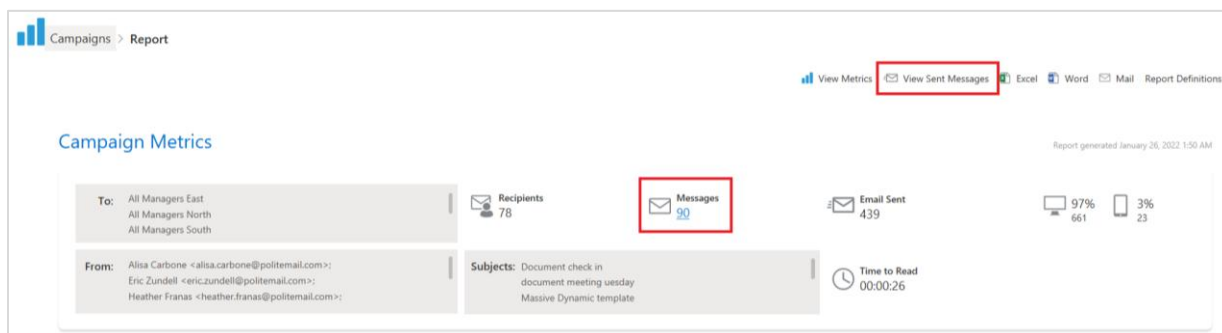
To open Campaign metrics, go to the Navigation Pane and select **Results > Campaigns**. Double-click on the Campaign to open the metrics page.

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.

Messages

Campaigns

Mailing Lists

Sender

From

Social Link

Interactions

Recent Interactions

View real-time updates on recipient interactions with your sends.

Actions

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.