PoliteMail®
for Outlook Email Intelligence™

Quick Start Guide

Version 5.40

Create

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Welcome to PoliteMail!

If you're a brand-new user of PoliteMail, we're glad to have you aboard! PoliteMail is a very powerful application that allows you to create better internal email messages faster, more consistently, and with detailed metrics to monitor performance over time.

PoliteMail is a powerful platform with a range of tools that can be configured to match your organization's security requirements and your specific Exchange and Microsoft Outlook environment.

What Can You Do with PoliteMail?

Here's some of the things PoliteMail is capable of:

- Create email templates that can be easily shared among fellow users.
- Process large sends far faster than Outlook normally could.
- Create and share content such as images, attachments, and links.
- Create internal email campaigns and analyze performance.
- Use segmentation to analyze message performance by business, region, or other categories.
- Create Brand Themes for consistent fonts and formatting.
- Access your standard address book, as well as create your own custom mailing lists in PoliteMail.
- Have your choice of using two different editors, the PoliteMail Builder or Beefree.
- Get AI-powered suggestions on your subject line to maximize engagement.
- Expand distribution lists so your message doesn't look like a mass mailing.
- Test-send your message so you can see how it will look before it goes out.

… and much more!

Baby Steps

But let's start small. This guide is designed to walk you through the different interfaces of PoliteMail, logging in for the first time, understanding the general layout, sending your first message, and reviewing the metrics.

At any time, feel free to check the PoliteMail Knowledge Base at help.politemail.com for more in-depth information on any feature you want to learn more about.

The PoliteMail Interfaces

PoliteMail for Outlook Desktop

PoliteMail for the desktop allows you to use PoliteMail without ever leaving the Outlook application. At the same time, you can use the many tools and add-ins that Outlook has to offer.

You can always contact your PoliteMail Account Manager to find out which edition(s) you have.

How to install: PoliteMail for the desktop requires installation of a COM Addin and is available only for Microsoft Windows.

How it looks: You will you see a POLITEMAIL tab in the Outlook ribbon toolbar. A PoliteMail button will also be displayed when you start composing a new message.

PoliteMail for Microsoft 365

PoliteMail for M365 allows you to use PoliteMail if you're on the "new" Outlook or Outlook.com. Users cannot access metrics or settings, but you can easily toggle PoliteMail Online when needed.

How to install: PM365 requires installation of a Modern Addin, which is different from the older COM Addin.

How to tell if you're using it: A PoliteMail flag button in the Addins section of your toolbar will show when you compose a message. When you click on it, a PoliteMail pane will open on the right side of your screen.

PoliteMail Online

PoliteMail Online (PMO) offers a more modern interface and many newer features not found with the Outlook Desktop edition – no downloads required. You still have access to your address book, but it is not a part of Microsoft Outlook,

How to install: No installation is needed. Simply type in your server name as the url in your browser.

How to tell if you're using it: PoliteMail Online does not have a ribbon toolbar across the top of your screen like Outlook does. A hamburger button ≡ shows in the upper left to toggle your settings, content, and metrics.

PoliteMail Unified App

Starting with version 5.4 of PoliteMail, the PoliteMail Unified App (PMUA) is available, which embeds the PoliteMail Online interface in Outlook for the Desktop as well as Outlook for M365, so you have the same interface and features no matter what platform you are on!

How to install: PMUA requires installation of Modern Addin (this is different from the Modern Addin for M365).

How to tell if you're using it: PMUA allows you to use the PMO interface from the Outlook desktop as well as Outlook for M365.

Connecting for the First Time

Before you can start sending and measuring email messages, you must first activate the PoliteMail software and connect to the PoliteMail Server.

Desktop
COM Add-in must be installed on your PC. May be installed remotely by IT, or manually.

M365
Modern Add-in must be installed on your PC. May be installed remotely by IT, or manually via the app store.

Online, PMUA
No installation required, just open your browser and enter your server name as the URL.

If you're using a username and password to access PoliteMail, you may receive an email saying "Your PoliteMail Account is Ready". Your username and password in included in this email. You can then run the .exe file to download and install PoliteMail.

If prompted to establish a connection with your server, enter the URL of your server and how email will be sent. The PoliteMail Server is recommended and fastest; you may also have Graph as an option.

- If you are using **Single Sign-On** as a connection method, please contact your IT department for help signing on.

Sending Email via the PoliteMail Server not only overcomes list size as well as ISP send volume limitations, but will send email much faster.

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Sending Your First Message

Address

Clicking the 'To' button in any edition of PoliteMail gives you access to your full Exchange address book.

- You don't need to use Bcc's with PoliteMail; PoliteMail will automatically expand any distribution list you use, and all recipients will actually be sent the message individually, without seeing any other recipients.
- You can also [create your own lists in PoliteMail](#) for your own use!

Are you using the best subject line that might yield the best results? PoliteMail for the **Desktop** and **M365** feature [Ai/B testing](#) to get recommendations, and **PMO**/**PMUA** features an even more-powerful [Subject Suggester](#)!

Compose

You don't need to use any fancy features or a Template builder to send a message; just start typing your message in the message window just as you would any other email. You can use the same formatting buttons as you normally would

⚠️ You can add images or attach files as well, but keep in mind that if you add them using the Microsoft tools in Outlook, they will be embedded in the message, resulting in a much larger file size that can bog down send time or even crash your mail server, especially if it's going to thousands of recipients. That's why we recommend using the PoliteMail Builder tools instead.

Composing with Beefree

If you have toggled over to using Beefree, you cannot just type right away. You start with an empty Row, and you must select a content block (such as a Title, Paragraph, Image, etc) from the Content tab on the right, and drag it onto the Row before you can type anything.
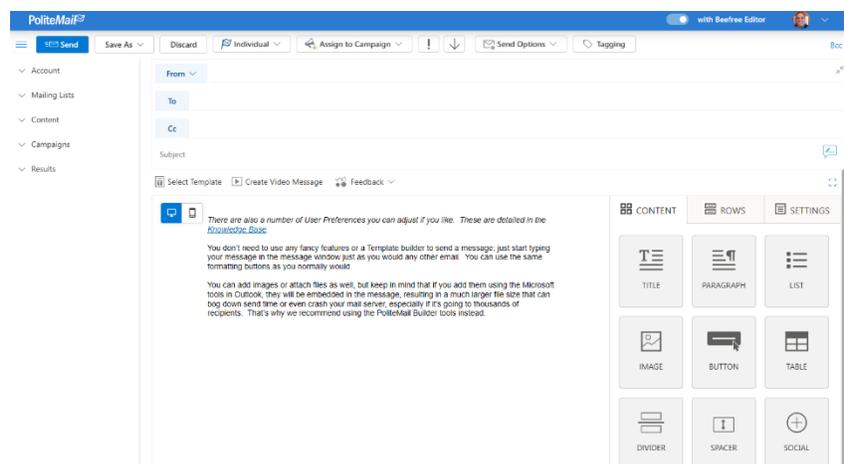
Turn On Measurement

Before you send your message, you need to enable PoliteMail measurement so you can get metrics on how your message is received.

Desktop
Click the PoliteMail Flag to enable measurement, and then select a Measurement Mode from the drop-down.

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.

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

Mode	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.

Other Options Before Sending

PoliteMail offers many options you can use with your message. Here's some of the most common:

Option	Description
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.
Edit Preheader Text	Allows you to change the text your recipients will see when the message is displayed in Outlook before it is actually opened.
Suppress Auto-Replies	Suppresses all automatic emails for this message. Works only when using Global contacts from your Exchange server within your internal domain and is not supported if sending via Microsoft Graph.
Schedule Send	Enables you to set a specific future date and time for the message to be sent. Works across time zones!
Expire Message	Allows you to set an expiration date for the message, after which it cannot be viewed. In PoliteMail for M365, this option is found in the center of the pane.
Direct Replies To	Allows you to specify a different inbox where bounced messages will return.

You can find out more details about these in our [Knowledge Base](#)!

What About the Builders?

Builders in PoliiteMail allow you to create Templates, Manage Content, create Brand Themes, share those with other users, and more! In addition, content in an editor that you insert in a message is stored on the PoliteMail server and is not embedded directly in the message like it is in Outlook, resulting in a much smaller file size and speeding up sending – especially with images and attachments.

PoliteMail offers two different Builders you can use, shown below. Each offers some things the other doesn't have, so we recommend you try both. Most new users find Beefree a little easier to use, but be warned: Templates you make in one Builder are not compatible with the other!

PoliteMail Builder (PMB)	Beefree Editor
- Available in all editions of PoliteMail - Template Sharing - Brand Themes - Folders (PMO/PMUA only)	- PMO/PMUA only (must be made available by your Administrator) - Large pre-made Template library - More flexible than PMB - Some items created in Beefree do not display when viewed from the Outlook desktop.

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

M365
Click the PoliteMail Flag button to open the PoliteMail pane on the right, then click the hamburger button ☰ .

Online, PMUA
When composing a message, click 'PoliteMail Builder' in the toolbar.

Information on how to use the Builders is provided in greater detail on our Knowledge Base, User Guide, and Flight School, our self-paced online training. We also have regularly scheduled live training on using the Builders that you can sign up for here.

Metrics

One of 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.

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

M365
Metrics are not found in PoliteMail 365; you will need to click on the ☰ to switch to PoliteMail Online to access them.

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

The report is laid out to allow you to quickly see who you sent the message to, opens, clicks, and much more. Don't worry about low numbers – you're just starting!

To provide you with as much insight as possible, the Metrics report contains a LOT of data. Here are some resources for more information:

- Use the ⓘ icon at the top right of the report to view a definition of the various metrics.
- The Knowledge Base has an in-depth article on Metrics as well.
- A 1-hour live training on Metrics is held on the 3rd Thursday of every month.

Stuck?

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

Request Support

Desktop
A Request Support button is in the POLITEMAIL tab of the ribbon toolbar.

M365
Click on the ≡ to open the Navigation pane, then go to **Settings > Request Support.**

Online, PMUA
Click on your avatar in the upper right of the screen and select 'Request Support'.

The Request Support button 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.

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