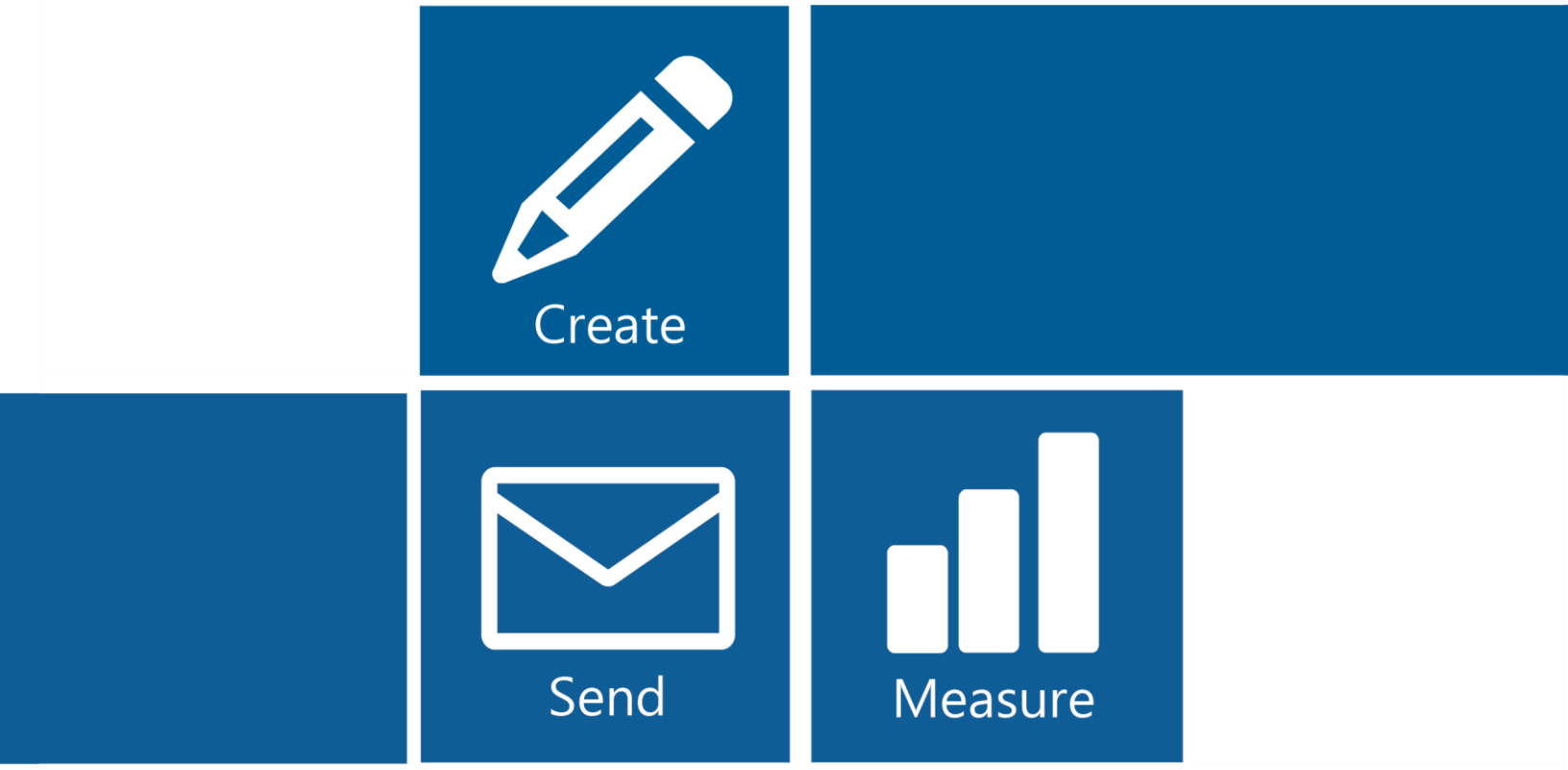
PoliteMail®

Version 5.45

User Guide



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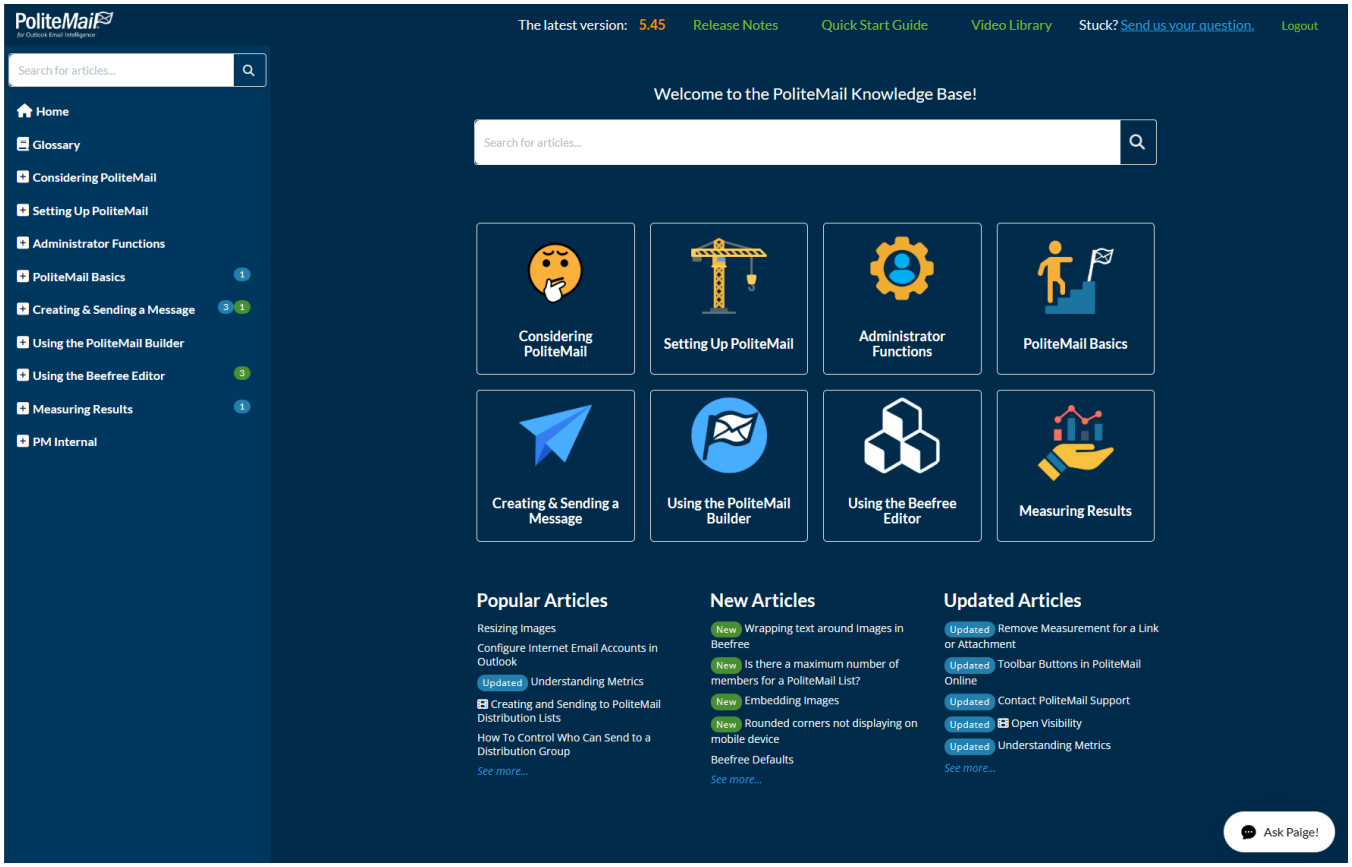
Welcome to PoliteMail!

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.



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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 "new" Outlook: PMUA

Using the "new" Outlook? The PoliteMail Unified App (PMUA) 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!

	Desktop	Online PMUA
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	✓	✓
Approval Workflow	✓	✓
Multilanguage Translation		✓
Commenting		✓
Live Collaboration		✓
Beefree Editor		✓
Folders		✓

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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 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.

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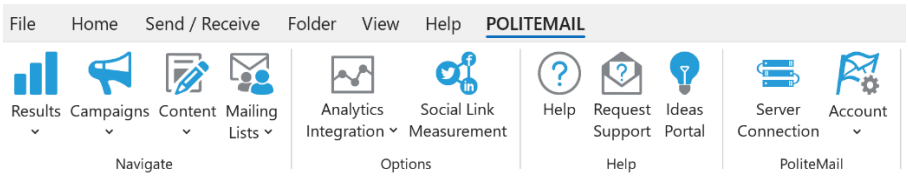
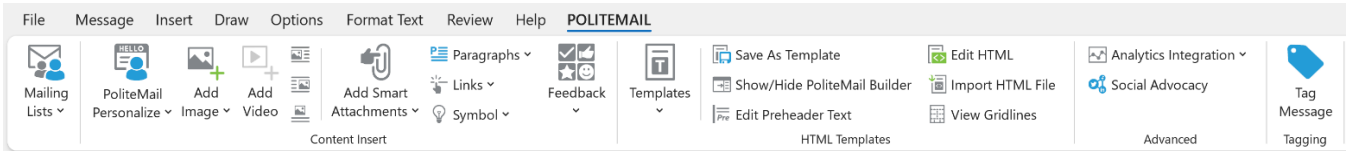
The User Interface

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.



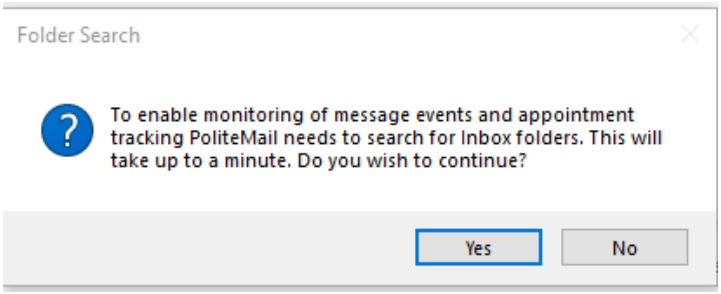
PoliteMail tab in the Outlook window



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.

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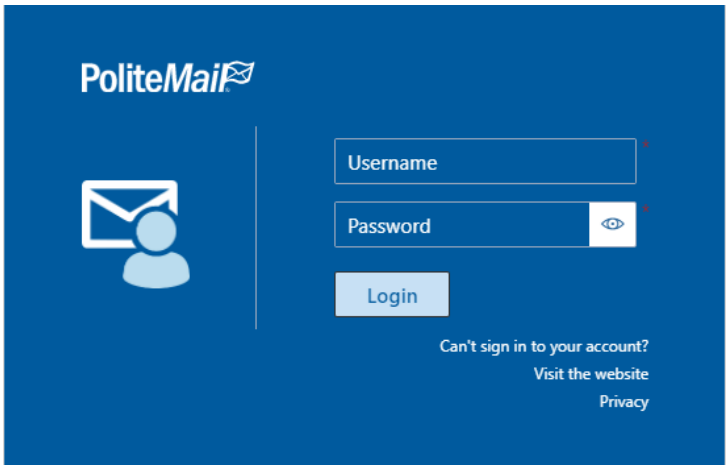
PoliteMail Online

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.

PoliteMail Unified Application

Access

PMUA is designed to give users quick access to PoliteMail measurement tools without leaving either edition of Outlook – classic or new! PMUA is a Modern Addin that, once made available by your IT team, is available as an Outlook app in the left panel. Opening it opens the PoliteMail Online interface *within* Outlook, allowing you to easily switch between it and your Inbox at any time. You can even open additional PMO windows!

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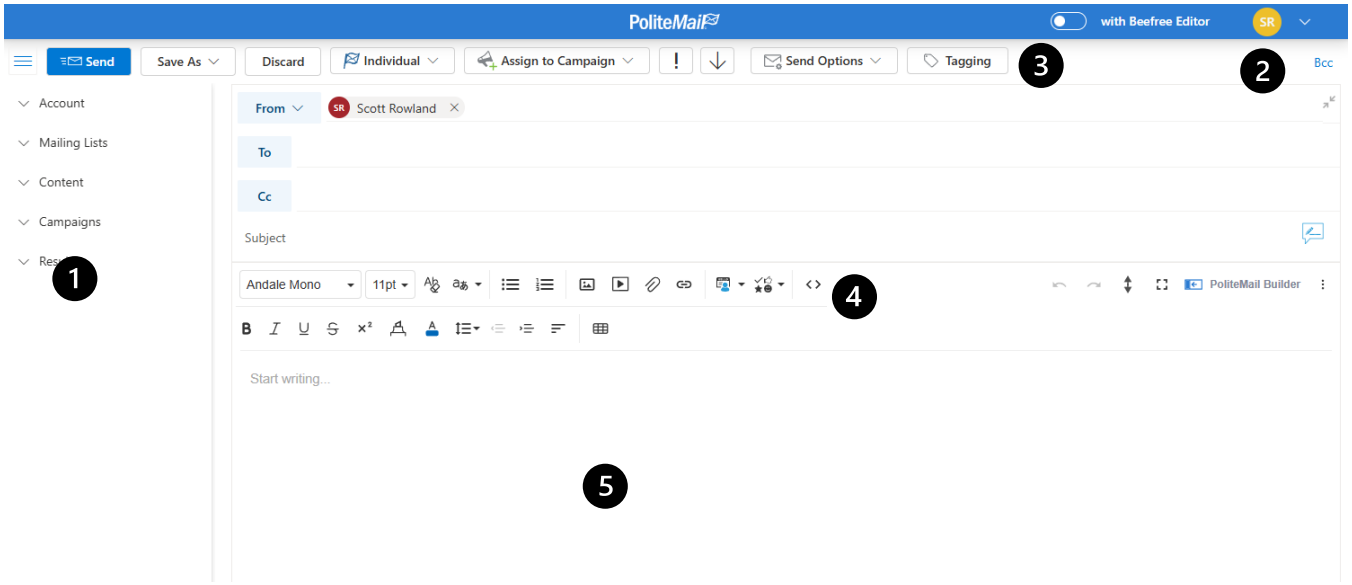
Interface

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. The toggle allows you to switch to the Beefree Editor and back.
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®.

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User Settings

Desktop	Online PMUA
PoliteMail > Account > Settings > User Preferences	'Settings' in the left pane, or in your User Menu in the upper right under 'Settings'.

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. We suggest looking around at the settings to get a feel of what's available to you, and check the following settings at the very least:

Item	Description
Addressing > Direct Replies To	Sets the default email address where replies will be sent
Editing > Default Template	Sets the default Template that will open, if set.
Editing > Embed Images	Forces Images to be embedded rather than linked. This can significantly increase message size, so use with caution.
Options > Preflight Interval	Sets the amount of time after which Preflight messages will be deleted.
Sending > Measurement Default	Sets the default Measurement Mode for all messages.

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!

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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	PMUA
Settings	Brings you to your user preferences.	POLITEMAIL > Account > Settings	Account drop-down, or user icon in upper right.	
Help	Brings users to the PoliteMail Knowledge Base.	POLITEMAIL > Help	User icon in upper right.	
Sign out	Sign out of PoliteMail.	Disable the add-on	User icon in upper right.	
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.	
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.	
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	
Switch between Outbox, PoliteMail Server, and Graph	Switch between send via the Outlook Outbox or the PoliteMail Server. We recommended staying with the PoliteMail Server for best performace.	POLITEMAIL > Send Method (Measurement must be turned on)	Send Options > Send Method	

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Sending a Measured Message

Sending a Measured Message in PoliteMail basically consists of four steps:

1. Compose your Message
2. Set your Measurement Mode and Send Options
3. Do a Preflight Test Send
4. Send!

1: Compose Your Message

You can start typing your message in the compose area of your screen just like you would with any email message.

- In **Outlook desktop**, you can use the formatting buttons you would use with any message, as well as the buttons available in the PoliteMail tab of the Ribbon toolbar or the PoliteMail Builder.
- If using **PMUA** or **PoliteMail Online**, the PoliteMail interface has all the formatting buttons and options in the toolbar, as well as access to both the PoliteMail Builder or Beefree Editor.

More information on managing your content using the Editors is later in this manual.

2: Set Your Measurement Mode & Send Options

Desktop	Online PMUA
Click the PoliteMail Flag to enable measurement. Select a measurement mode from the drop-down.	Measurement is automatically enabled. Click on the flag button in the PoliteMail toolbar to select a measurement mode.

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!

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Send Options

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

Feature	Description
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. By default, PMO and PMUA will auto-save your message as a Draft every 5 minutes.
Personalization	If you've ever used Mail Merge in Word, Personalization works the same way. PoliteMail can take the user name and other fields and insert them in a message to personalize it. You can even define your own with Custom Fields!
Enable M365 Measurement	Obtain more accurate measurement data on iOS and other devices that use Mail Privacy Protection (MPP).
Mailing Lists	You already have access to your Exchange address book, but you may need to make a narrowed-down or filtered list on the fly. 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.
Approval Workflow	Have your message reviewed by others for approval prior to send – even non-PoliteMail users or external sources.
Multilanguage Translation	[Beefree only] Set your messages to display in the default language of the recipient.
Commenting & Collaborative Editing	[Beefree only] Have other PoliteMail users leave comments on your Message, or work together at the same time.

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3: Preflight Test Send

Although you don't have to, we recommend sending a test message to yourself and a colleague before pushing out a large message or campaign.

The Preflight Test Send feature allows users 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.

Desktop	Online PMUA
PoliteMail Flag > Preflight Test Send	Send Options in upper menu bar.

- The 'To" field will change to your email address. That way, any auto-replies will not be received by anyone else.
- PoliteMail will create a duplicate of the message in a separate window.
- Distribution Lists will be removed and the only recipient will be the user/sender.
- The subject line will begin with "PREVIEW".
- You can add as many recipients in the To: field if you want multiple recipients to preview your message before sending it.

Starting with version 5.45 of PoliteMail, you can also send your Message for Approval (as a drop-down option under the Send button) if you need final approval from others – even non-PoliteMail users or users outside your organization.

4: Look Good? Send it!

If the Preflight looked as intended, you're ready to send it! Click Send, or schedule it to be sent at a later date and time.

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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	Online PMUA
When composing a Measured Message, go to **Message > PoliteMail > Show / Hide PoliteMail Builder**.	When composing a message, click 'PoliteMail Builder' in the toolbar.

PoliteMail Online uses a newer Builder interface than PoliteMail for the Desktop, with a more intuitive interface and folder support. However, you can view and access Templates created on either platform.

Beefree Support

Starting in version 5.3, PoliteMail Online and PMUA also support 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, thousands of stock images provided by Pexels™, commenting, live collaboration, multilanguage translation, and more!

- Beefree integration is not available for PoliteMail for the Desktop.
- 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.

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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.	

If using Beefree: Beefree does not save content, only Templates. However, you can access Smart Attachments and Links in Beefree for use in Title, Paragraph, or List blocks.

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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.

In any edition of PoliteMail, just 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'.

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.

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Results

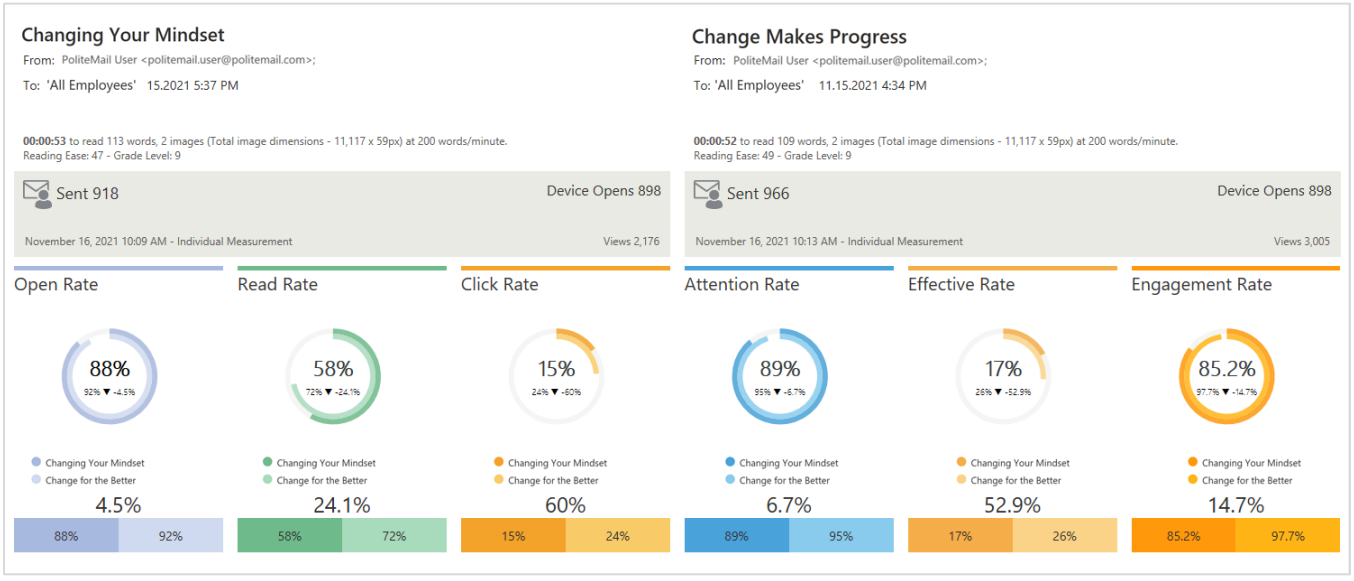
Desktop	Online PMUA
Go to **POLITEMAIL > Results > Messages.**	From 'Results' in the left pane, select **Results > Messages.**

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

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Segmentation Reporting

With PoliteMail, you can create 'segments' as a way to break down your reporting. For example, you can view a Metrics report broken down by Region for a Message that was sent to all employees, or view Metrics just for people with a specific title.

To get started with Segmentation, your Admin needs to set up the segments. By default, PoliteMail comes with Business and Region segments (your Admin can re-name them if desired), but you can also create any number of Custom Fields that can be made available for segmentation as well.

Campaign Metrics

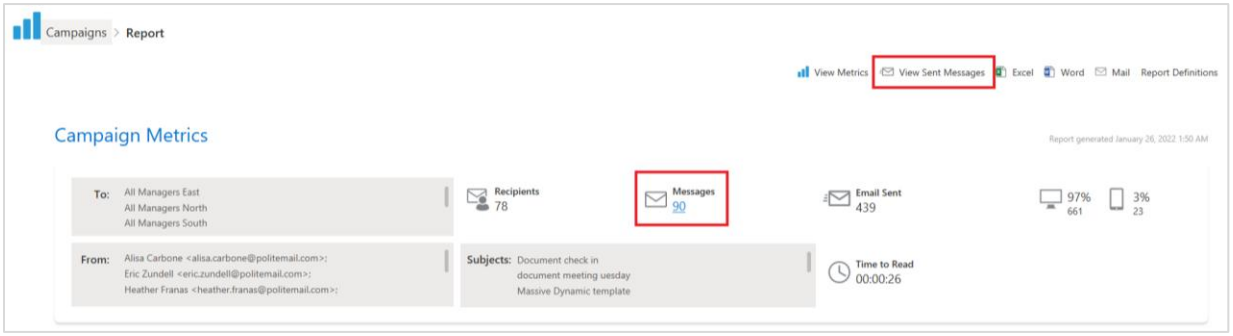
A Campaign is a series of messages that you may have put together as part of an overall message. Campaigns are a great way to group messages, providing you with key insights and the ability to measure metrics over time. Any measured message can be added to a Campaign, including those with different measurement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

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Mailing Lists, Sender, and From Reports

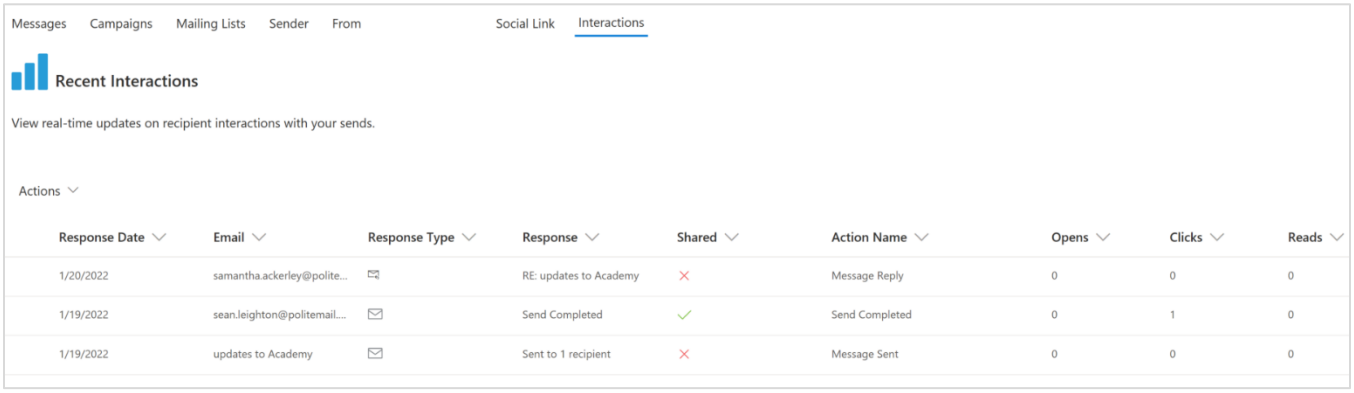
The options for Mailing Lists, Sender, and From under Results works just like that for Messages and Campaigns. Select your item from the data grid to see detailed metrics for a specific Mailing List, Sender, or email address, respectively.

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.



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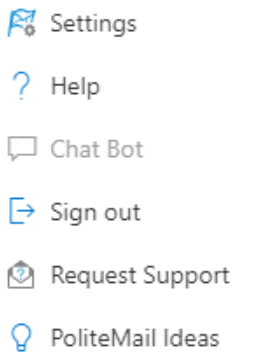
Getting Help

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. If you cannot access PoliteMail, just go to www.politemail.com/support.

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 support@politemail.com.

Training Resources

PoliteMail Academy is your source for both self-paced training on PoliteMail as well as live Instructor-Led Training that is offered monthly! If you haven't been registered, go to https://learn.training.politemail.com and do so today.

Course	Monthly Schedule (barring holidays)
PM 100: PoliteMail for Administrators	1*st* Monday or 2*nd* Tuesday (pick one)
PM 101: PoliteMail Basics	1*st* Tuesday or 3*rd* Wednesday (pick one)
PM 201: PMB for Desktop	1*st* Wednesday
PM 202: PMB for PMO	2*nd* Wednesday
PM 203: Using Beefree	3*rd* Monday
PM 301: Metrics	3*rd* Thursday

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.

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