



User Training Manual

PoliteMail v4.7

Welcome to PoliteMail

This training manual is designed for users new to PoliteMail. It provides a basic overview for each function within the tool. For more detailed coverage on specific topics refer to our [PoliteMail Knowledge Base](#) site.

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What is PoliteMail

PoliteMail enables you to measure and improves your internal Outlook email communications programs. With PoliteMail for Outlook, you may create, send and measure Outlook broadcasts to any distribution group, including corporate newsletters, executive and leadership messages, HR and benefits email, employee education and training, or any other communications program.

Getting Connected

When you receive your welcome email to PoliteMail it will include a link to the software for installation, account password and unique PoliteMail Server host name (needed for your first server connection).

Close Outlook and install the software. When you re-open Outlook you will need to make a one-time connection to the PoliteMail Server account. The PoliteMail Server provides the analytics data processing, reporting, and sharing functionality of PoliteMail.

The screenshot shows a dialog box titled "PoliteMail Server Connection" with a close button (X) in the top right corner. The dialog has a "Registration" tab. Below the tab are four input fields: "Email Address:" containing "rose.censullo@politemail.com", "Password:" with a masked password of 12 dots, "PoliteMail Server:" containing "comms.pmail4.com", and "Send Email Via:" with a dropdown menu set to "PoliteMail Server". Below these fields is a text block: "To activate your PoliteMail software, enter your account email address and the password key, emailed to you from support@politemail.com or your PoliteMail administrator". At the bottom left is a checkbox labeled "Windows Authenticate". At the bottom right are "OK" and "Cancel" buttons.

Input your email address with the password and server name provided.

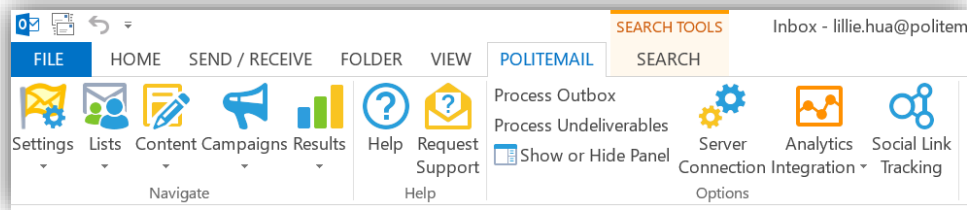
When sending individually and anonymous tracked messages, especially to large distribution lists (> 1,000), it is suggested that you set Send Mail Via: **PoliteMail Server**. This will send the emails through the PoliteMail Server, enhancing the speed of the send and not bogging down the Outlook outbox.

After Installation

You will see a new PoliteMail tab within your Outlook interface. These tabs should appear in two places 1) In the ribbon of your main Outlook inbox and 2) In the ribbon of a new Outlook email message. If you do not see the PoliteMail tabs after installation, restart Outlook. If at any point PoliteMail disappears from your Outlook, please see [PoliteMail missing or disappeared? PoliteMail toolbars gone? Here's how to get them back.](#) You can also click on the Help icon to access the complete PoliteMail Knowledge Base site.

Exploring the PoliteMail tab in Outlook

Click the PoliteMail tab to view the tools that make up the PoliteMail add-in.



Settings

Settings contains your user preferences and other PoliteMail settings. Admin users gain additional functionality to manage users and groups, tracking options, custom fields, opt-out settings, brand themes and archiving settings.



Lists

Lists enables you to import or manage mailing lists created outside of your Exchange global address book. It also provides lists of undeliverable email addresses, and view a list of contacts who have opted out or unsubscribed.



Content

Content Library allows you to view, edit and manage email templates, paragraphs, images, tracked links and smart attachment content.



Campaigns

Campaigns enable you to create and manage campaigns, which are simply named reporting contains for groups of messages. The view of scheduled sends is also available from the campaigns page.



Results

Results is how you access your email metrics and analytics reporting tools. Metrics reports may be viewed by message, campaign, list, sender, account, or sender and for trackable social media links.



Help

Help will direct you to the PoliteMail Knowledge Base site. This is a resource to search for common questions and answers.



Request Support

Request Support will generate an email with data to send to your support team to request assistance including all your pertinent system information. Just add a brief description of the problem to the top of the email, include any helpful attachments, and send a support request directly to the PoliteMail server support team. A PoliteMail support representative will be in touch to follow up on your request.



Server Connection

Server Connection makes the authenticated connection between your PoliteMail for Outlook software and the PoliteMail Server for your account. Check your server connection, account email address, password, server, and send via option.



Analytics Integration will enable your web analytics tool to report on traffic coming from your email messages and campaigns.



Social Link Tracking is a tool which will allow you to track links used outside of an email, by creating a tracked URL which you may copy and post on web sites or Social Media.

Exploring the PoliteMail features in a new Outlook message

Click the **New Email** button in Outlook to create a new Outlook message. You will notice the addition of a PoliteMail Tracking icon in the Message tab.



Tracking Mode will let you set the mode to Individual, Anonymous or Aggregate. See Types of tracking on page 10 for further information.



Preflight Test Send will create an exact copy of the current message addressed to yourself, as a test that will allow you to verify the content, layout and links. The subject will be preceded with PREVIEW.



Suppress Auto-Replies will suppress all automatic email responses for this message only.



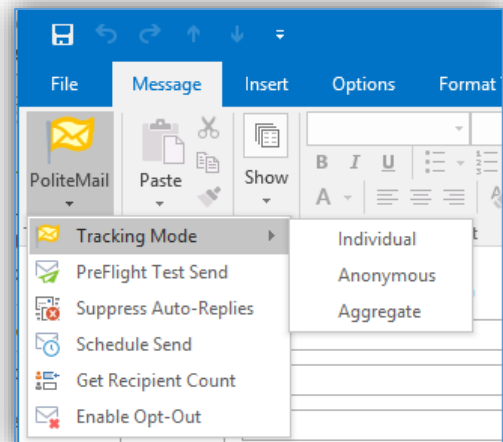
Schedule Send will enable you to set a future date and time for this message to actually be sent. You will still click Send, and the message will be queued on the PoliteMail Server. The Scheduled message(s) may be viewed, rescheduled or deleted from the Campaigns > Schedule Sends POLITEMAIL tab.



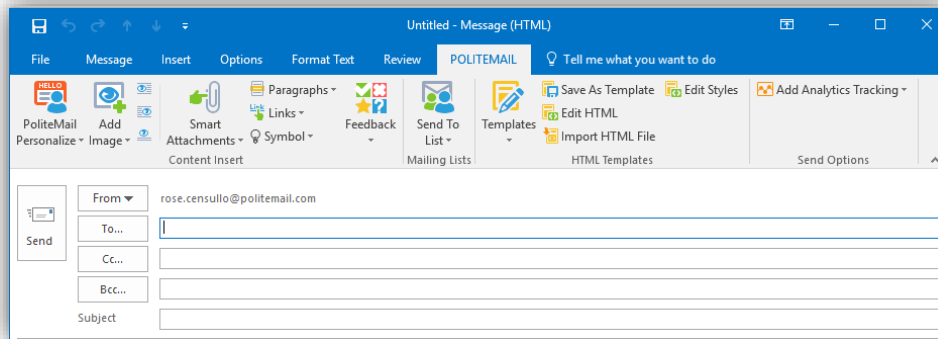
Get Recipient Count will provide a count of total recipients for the email.



Enable Opt-Out will insert an opt-out footer into your email that allows recipients to opt-out or unsubscribe from future mailings. (Unsubscribe when sending to a subscription list).



There will also be a tab for POLITEMAIL with the following tools related to content creation.



Personalization will place automated merge field into your email message. Personalized fields added to your message will be replaced with actual data when you send with Individual Tracking selected. If the data does not exist for this contact, it will be left blank. Name personalization works for Exchange distribution lists. Any other fields must be imported into PoliteMail and associated with an email address to work.



Add Image is a tool which will place an image such as a logo or picture into your email. When using PoliteMail templates, Add Image will automatically size and replace the selected placeholder image with the image you are adding. In settings, if you uncheck [] Embed Pictures, unlike Outlook's Insert Picture, Add Image will not increase the size of your email, as the image is placed into the email message as a web reference, keeping the email size smaller and faster.












Smart Attachments enable you to place any file attachment into your email as a trackable link. Unlike Outlook's Attachment, a Smart Attachment does not increase the size of your email message, and enables you to measure when the file is viewed.



Paragraphs are sections of content which can be saved and reused. You can select/highlight sections of an email, right-click to save as a paragraph, then use this Paragraphs tool to load that content into the current message at the cursor selection.



Links will insert a commonly used link that you would like to be tracked. Note that PoliteMail will track any and all URLs included within an email message, not just those added using this Links tool. To store a commonly used link set the UserLink field to true within the PoliteMail Content Links tab.

 Symbol ▾	Symbol allows you to insert a variety of symbols into your email message.
 Feedback ▾	Feedback enables simple surveys and polls to be included within your email message.
 Send To List ▾	Send to List enables you to select from any lists you have imported, and have that list included within the recipient addressing. By default the list will be added to the To: field, but can be copied to the Bcc: field if desired.
 Templates ▾	Templates enables you to build a new HTML template page, or select from a list of standard template sections included with PoliteMail to create your own custom template.
 Save As Template	Save As Template will save the current email as a template page in the Content Library (stored name will match the subject line). You may reuse that template by selecting it from the Templates pull-down menu, or use the Content tool from the inbox to select it and use the Actions menu to share it with other people on your team.
 Edit HTML	Edit HTML will allow you to view and edit the underlying HTML code of the message. Not for novices. Even experienced HTML coders may have difficulty reading the word-compatible HTML, so you may simply copy the HTML from here, paste it into an editor like Dreamweaver, make changes and paste it back in. Click Edit HTML again will switch back to the HTML view mode.
 Import HTML File	Import HTML File will enable you to load an HTML page into the Outlook editor. Note that all CSS should be inline, and that Outlook does not support all HTML tags (no floating divs, no background images, limited css, etc.).
 Edit Styles	Edit Styles allows you to modify the standard Outlook message styles.
 Add Analytics Tracking	Add Analytics Tracking allows you to enable analytics integration for this particular send with Google Analytics, Webtrends, or Adobe Analytics.

User Account Settings

Recommended User Account Settings

It's important to check your settings prior to your first send. There are three suggested settings for optimal PoliteMail use 1) Send Via PoliteMail Server, 2) Use Exchange Web Services to expand distribution lists and 3) Setup Monitoring of Alternate Inboxes.

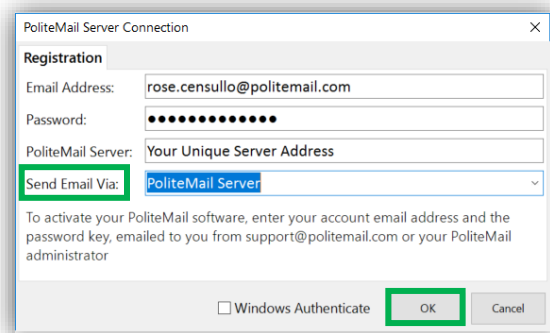
Send via PoliteMail Server

This setting allows you to send a message directly to our server to be distributed rather than sending a message directly from your outbox. It enhances the speed of sent emails. Typical send rate for regular Outlook outbox is 100 messages a minute. When sending via the PoliteMail server, the typical send rate is 1000-1500 messages a minute. It also does not hold up your outbox from any other outgoing messages.

To enable this setting, go to the **PoliteMail** tab in your Outlook inbox and click on **Server Connection**.

Next to **Send Email Via**, click the drop down menu and select **PoliteMail Server** from the list.

Click **OK**.

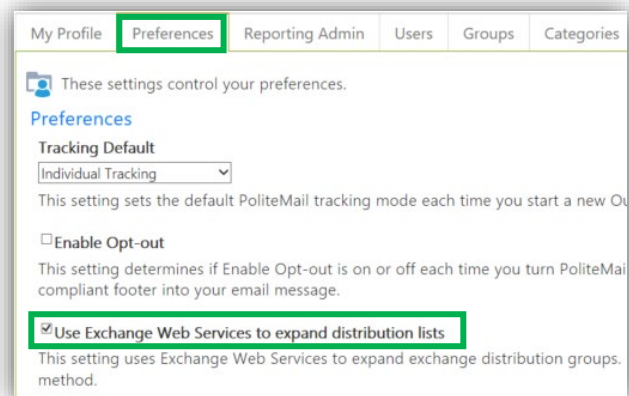


Use Exchange Web Services to Expand Distribution Lists

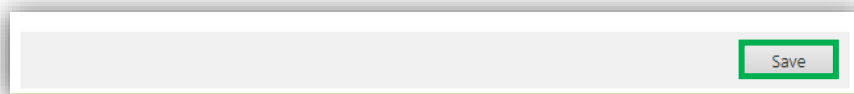
This setting is recommended for those who send to dynamic distribution groups. It will use Exchange Web Services which tends to be faster and more reliable to make sure that the dynamic lists expand and that the send goes out smoothly as opposed to MAPI which is Outlook's default list expansion method.

To access these settings, go to the **PoliteMail** tab in your Outlook inbox and click on **Settings**, and then click on the **Preferences** tab.

Check the second check box next to **Use Exchange Web Services to expand distribution lists**.



Be sure to scroll to the bottom of the **Preferences** and click on **Save**.



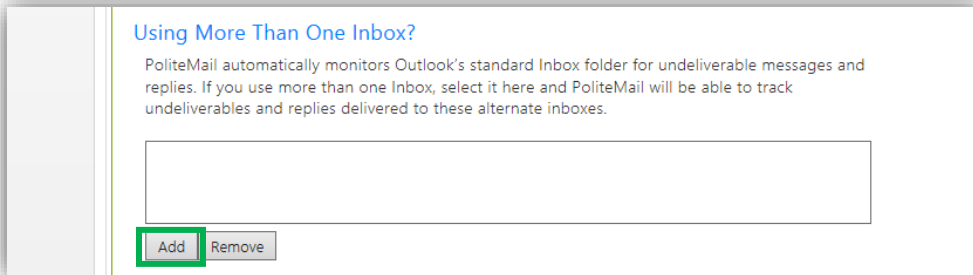
Setup Monitoring of Alternate Inboxes

If you have more than one inbox that you use to send from or monitor, you are going to want to add them here to get any undeliverable replies or out of office messages that come back to that inbox. Up to three alternate inboxes may be added.

To enable this setting, go to the PoliteMail tab in Outlook and click Settings.

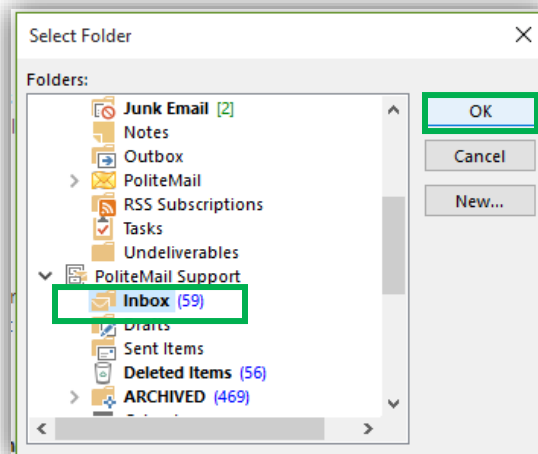
Click the **Preferences** tab and **scroll down** to the bottom of the screen.

Under **Using More Than One Inbox**, click **Add**.

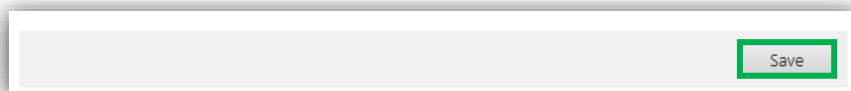


Select the **inbox** you would like to monitor.

Click **OK**.



Be sure to scroll to the bottom of the **Preferences** and click on **Save**.

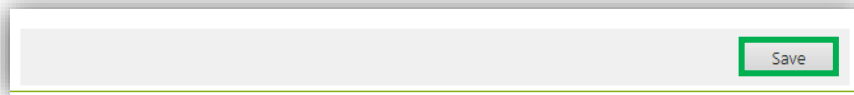


Other Helpful User Account Preferences

There are several other preference settings that can be very helpful. They are outlined below and can be accessed by going to the **PoliteMail** tab, clicking on **Settings**, and then selecting the **Preferences** tab.

Tracking Default	This sets the default PoliteMail tracking mode each time you start a new Outlook email message. If you are always using the same tracking mode, you may want to set it as the default.
Embed Images with Messages	It is recommended that this not be selected. If this is selected images will be embedded in each email sent and cause the email messages to increase in size which could affect the timing of the send(s).
Assign to Default Campaign	This will set an automatic default campaign that all tracked emails will be assigned to. It can be easily changed when sending emails.
Prevent Unintentional Sends	This will trigger a <i>reminder message</i> if you send an email to multiple contacts and forget to enable tracking, allowing you to set it prior to completing the send

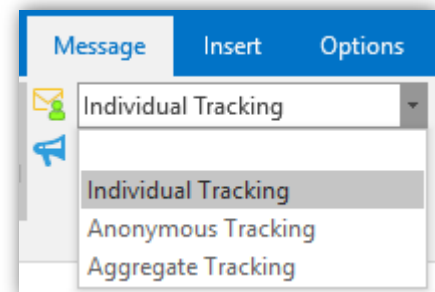
Be sure to scroll to the bottom of the **Preferences** and click on **Save**.



Types of Tracking

PoliteMail, like all email marketing software, uses standard web-page image tracking to determine opens. Email **open tracking** is a result of the invisible tracking image being viewed within the email. This enables measurement of the open, and no other user interaction is required (unlike a read-receipt, which interrupts the user and requires input).

PoliteMail offers three types of tracking. When PoliteMail tracking is enabled in a new message, select a tracking type by clicking the drop down menu next to Individual Tracking to show other options. These options may be enabled or disabled by admin users.



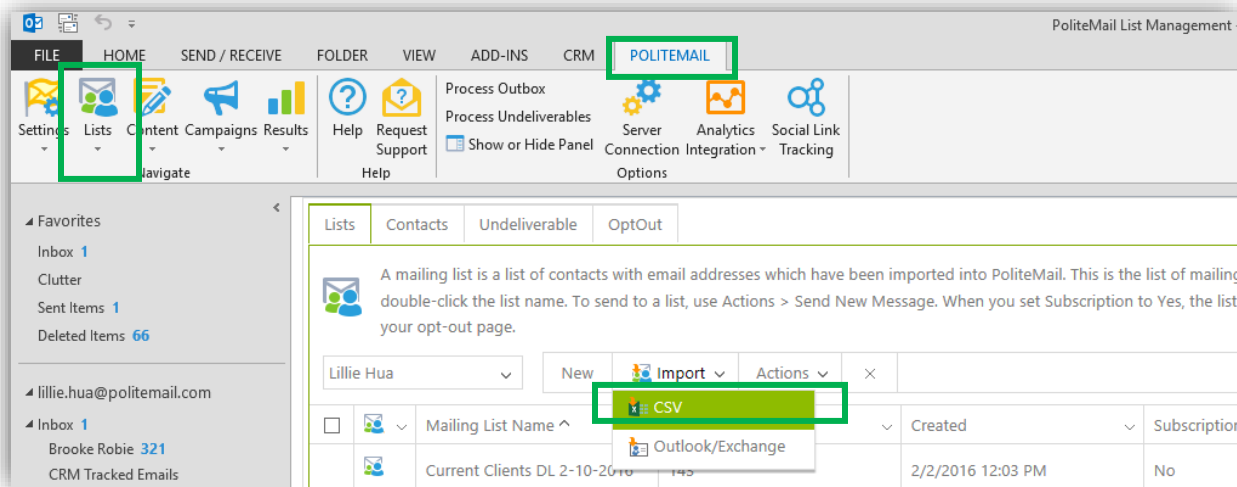
Individual Tracking	Tracks unique individual interactions with the email message. Stores the recipient name and email.
Anonymous Tracking	Tracks unique individual interactions with the message, anonymizes the name, stores email address as a one-way hash.
Aggregate Tracking	Tracks overall interactions with the email message. Tracks at device level, not by individual.

Features

PoliteMail offers many added features that enhance the functionality of email communications. These features include importing mailing lists, an easy-to-use template builder, and in-depth reporting capabilities.

Mailing Lists

You can upload contact lists from other resources such as a CRM system or other contact management systems in CSV format. To do this, go to the PoliteMail tab in Outlook and go to **Lists**. Click **Import** and select **CSV or Outlook/Exchange** to select a list from your Active Directory.

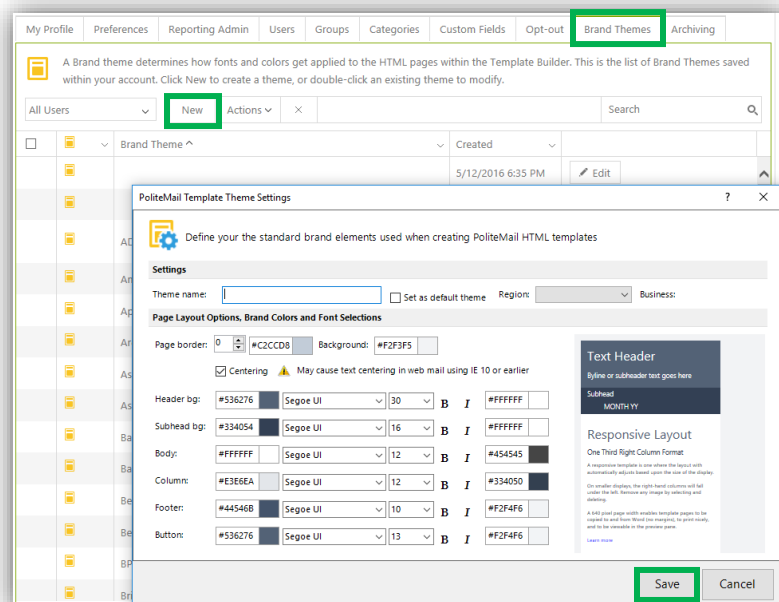


Managing Brand Themes

A Brand Theme is the colors and font scheme that will serve as the base of your templates.

To manage your Brand Themes, go to the **PoliteMail** tab in Outlook and click on **Settings**. Click on the **Brand Themes** tab and click **New**. Give the brand theme a name. You can set a Page Border, Background Color and section colors and fonts.

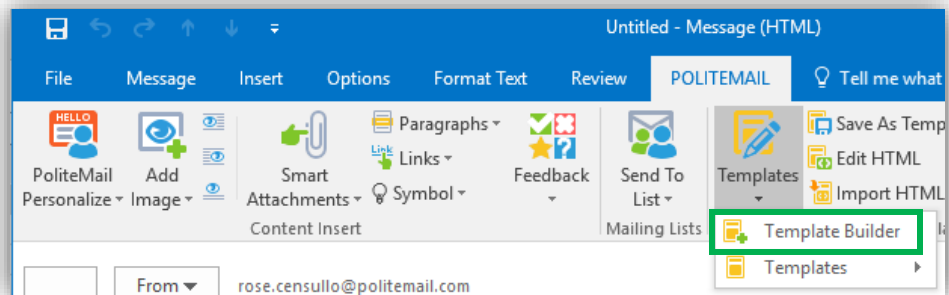
Save the Brand Theme when done. You can also share the Brand Theme by **selecting it** from the list, and from **Actions** select **Set Sharing > Shared**.



Template Builder

Any message you create may be saved as a template. However, PoliteMail offers the ability to create and save templates using the PoliteMail Template Builder.

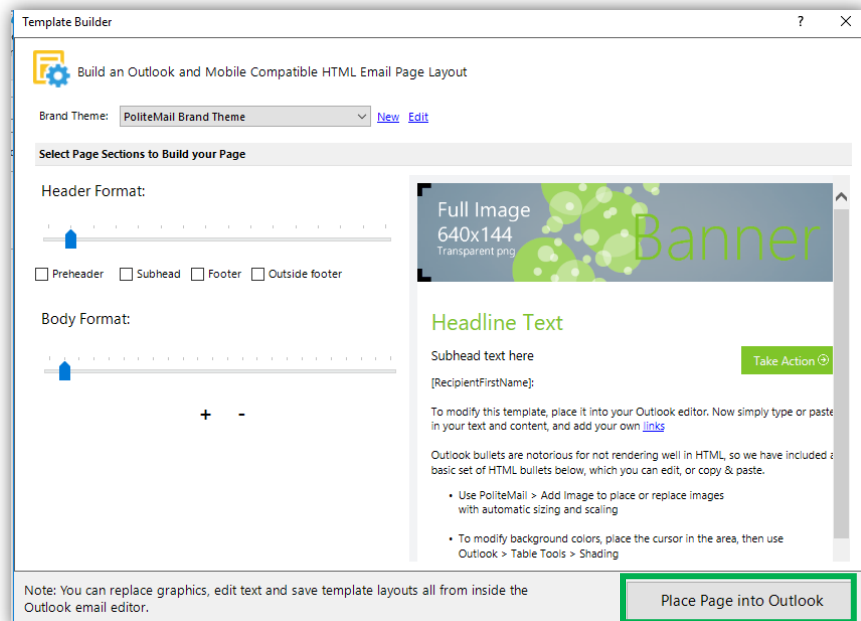
To do this, open a new Outlook message. Click the **PoliteMail** tab and click **Templates** and select **Template Builder**.



Select your Brand Theme from the drop down menu.

Move the slider control under **Header Format** to select a header format and choose additional elements by checking the boxes below.

Move the slider control under **Body Format** to select sections for your body. You can click the + symbol to add multiple sections. When building complex templates, it is easier to have more sections and delete what is not needed.



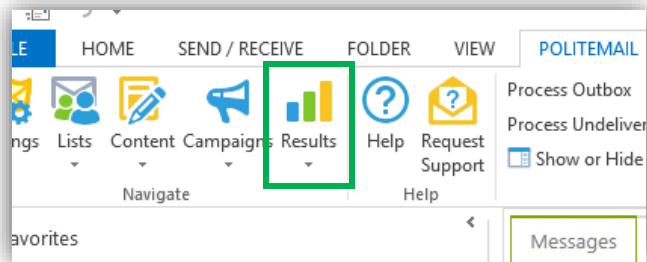
Once all selections have been made, click **Place Page into Outlook**. You can then modify elements and save the template for future use. To save the template enter a **Subject** which will be the name of the template and click on **Save as Template**.

You can also share the template via PoliteMail > Content > Templates > Select > Actions > Set Sharing > Shared.

Reporting

One the most impactful features of PoliteMail is the reporting capability. After sending your tracked PoliteMail message, you will be able to see results within the Results Library.

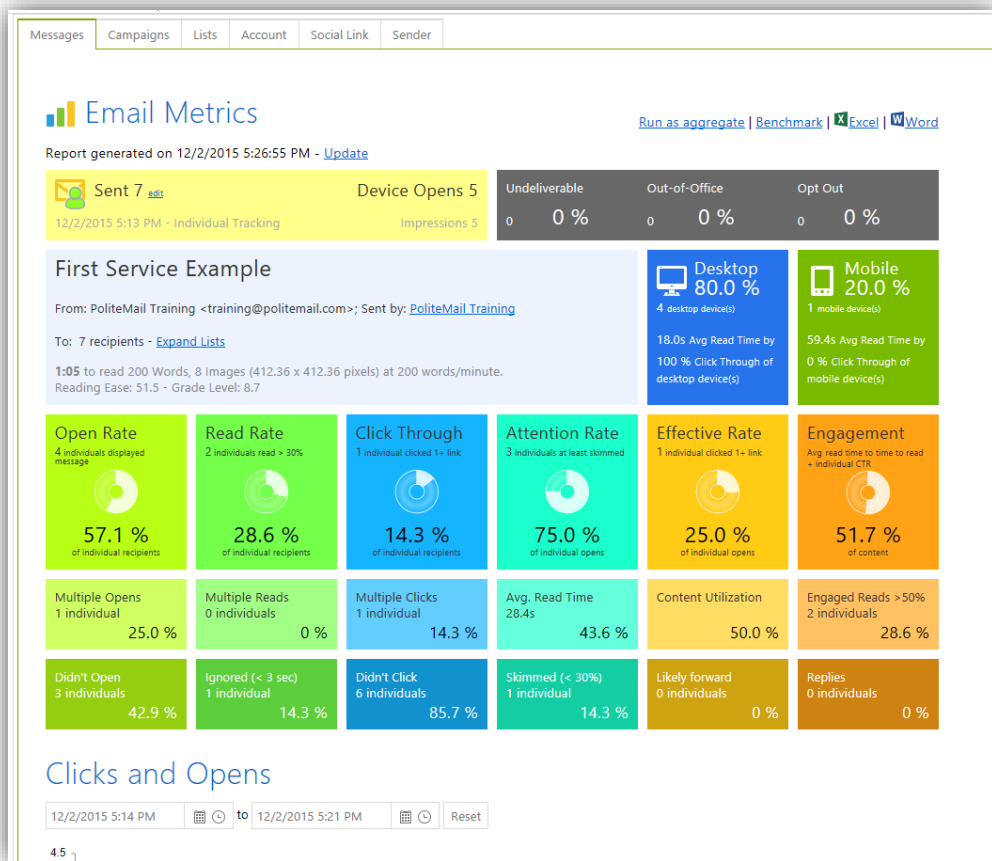
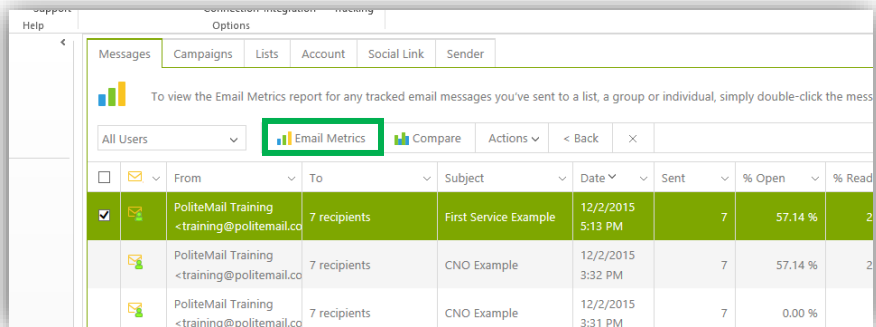
To view reports, select the **PoliteMail** tab in Outlook and click **Results**.



Go to the **Messages** tab and click the **selection box** to highlight the email message you want to view results for.

Click **Email Metrics**.

View the report.



Metrics Definitions

See the table below for PoliteMail metrics definitions. This list may also be accessed by clicking on Report Definitions located at the bottom of the metrics window.

Sent	Total recipients message was addressed to [count of members in list(s)]
Devices	Unique devices tracked (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 tracking
Out of Office	Out-of-office replies (returned to a mailbox PoliteMail is monitoring) Does not work with Aggregate tracking
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 (tracking 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 and 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)
Read Rate (30%+)	A read is an individual recipients 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)
Engaged Reads (50%+)	Individual recipients who had the message open for over 50% of the content length (in time). Sums all non-ignore opens by individual recipient.
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 = (Skimmed + Reads) / Opens 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	Tracked messages which were opened by 3+ unique devices
Replies	Individuals who replied to the message

User Management

You must have a User Type of **Admin** to utilize this function.

Types of Users

Admin	Admin users may see all content created by all users. Admin users have capabilities to apply settings to the entire account, change user settings, modify and delete users.
Manager	Manager user may see what they create, content that is shared with them, and any content created by users in the group that they manage.
User	General user can only see content that they themselves created or content that has been shared with them. Users may be organized into groups and managed by a manager user.

Creating a New User

Go to the **PoliteMail** tab in **Outlook**, select **Settings** and go to the **Users** tab.

Click **New** to create a new user.

Enter the first name, last name, and email address of the new user. Click **Save**.

This will queue up a message to be sent to the email address with a welcome message, a link to download the software, user credentials, and a link to the PoliteMail Quick Start Guide.

The screenshot shows the 'Create/Modify User' dialog box with the following fields and values:

- Authentication Mode: Password Authentication
- First Name: [Empty]
- Last Name: [Empty]
- Email Address: [Empty]
- Password: zcCNu-styjQ-yZBvr-3e0P9-o8kTI (with a Reset button)
- User Type: Admin
- Business: All
- Region: All
- Phone: [Empty]
- Send Setup Email?: Yes, HTML format with download link (highlighted with a green box)

Buttons at the bottom: Save, Cancel, Clear.

Deleting a User

To delete a user, click the selection box for their name and click the “**X**”. This will delete the user’s account, any historical data tied to their account, as well as any content created by them.

Modifying a User/Reassigning a User Account

To modify a user, double click the row for the person and modify the information.

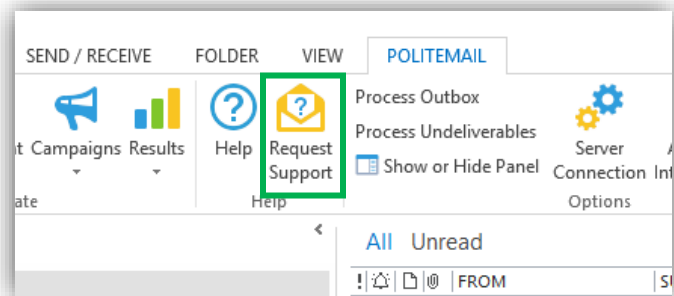
To reassign a user account, click the selection box for the name, scroll over and select **edit**, change the name fields and select **update**.

Support

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

Click on the **Request Support** icon in the PoliteMail tab in Outlook.

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 to our directly via:

Email: serversupport@politemail.com

Phone: 603-610-6111 ext. 3

