PoliteMail v. 19.4.91 FAQ

General Questions

Q: Is PoliteMail v. 19.4.91 now available?

A: Yes, it is available. Upgrading to a new PoliteMail build is a company-wide decision and should only be requested by the primary PoliteMail account holder.   Please contact your Account Manager to schedule your upgrade if you meet these requirements.

Q: Is the upgrade free?

A: Yes.

Q: What features are new in this version?

A: The PoliteMail Builder, Single Sign-On, Override Word Count, Enhanced Filtering options and Message Tagging

Q: Are there release notes available?

A: Yes, release notes can be downloaded here. Included in the release notes are user guides for each feature.

Q: Where can I find out more about PoliteMail and this new feature?

A: Visit our Knowledge Base site at support.politemail.com. You can also hit the Request Support button for questions.

Q: I have an idea/feedback for PoliteMail. Where can I submit those?

A: You can visit our brand-new Ideas Portal at

https://ideas.politemail.com/ideas

Single Sign-On

Q: What is Single Sign-On?

A: SSO allows for automatic user account authentication based on your company's own Office365 identity and security groups.

Q: Will our user accounts still exist after switching to SSO?

A: Yes, accounts will be mapped based on email address. If an SSO user has the same email as an existing PoliteMail user, they will inherit that user's profile.

Q: How do I set up SSO?

A: Single Sign On requires that your PoliteMail users are registered in an Active Directory Service. Typically, this is managed through Azure or Office 365. If this is the case for your business and you would like to set up SSO, please contact your PoliteMail account representative and they will schedule a time to set up this feature.

Q: Do I need to be on-premise to use SSO?

A: No, any account can be configured for Single Sign on.

The PoliteMail Builder:

Q: What is the PoliteMail Builder?

A: The PoliteMail Builder is PoliteMail's new template builder. We've made creating and most importantly, changing responsive email pages easier with more intuitive tools, and still right inside your Outlook editor.

Q: Is the old template builder still accessible?

A: When you upgrade to 4.91, the old template builder will no longer be accessible. However, the templates you have already created in previous builds will still be accessible and can be modified with the new PoliteMail Builder.

Q: How is content, Brand Themes, and Templates shared and saved?

A: When you save or share anything in the PoliteMail Builder, it automatically defaults to the Business/Region Group you belong to. When you click on the Share or Save icon, you will be presented with a pull-down menu of all the Business and Region Groups available to you, depending on your User settings.

Q: Do I need to resize my images before dragging them in?

A: For best results, we do recommend resizing before adding in images. When you use the new PoliteMail Builder, the program will attempt to resize an image using the width size of the placeholder. This may disrupt the template table structure of the template.

Q: How do I add/move/delete template sections?

A: At the top of Template Sections in the Content tab you will see a small toolbar with some arrows. This toolbar allows you to add, subtract, duplicate, or move template sections. When you add a template section, it will automatically be added to the bottom of the template. Simply click within the row you want to edit and use the toolbar to move or edit the row.

Q: Can I set a default template?

A: There are two ways to set a template as a default. Right-click on the name of the template in the Pages tab and choose Set Default. Or, go to PoliteMail > Settings > Preferences. Under Set Default Template, use the pull-down menu to select the default template from your saved templates. The default template will be highlighted green.

Q: When I use the Search feature does it search by name or by tags?

A: It searches by both name and tag. For example, you have a file named "headshot" and an image tagged with "headshot", both will appear in the Search results.

Q: Am I able to use HTML with the PoliteMail Builder?

A: Yes. In the toolbar on top of the Template Sections you'll see options for saving and importing HTML.

Q: What does Build it for me mean?

A: PoliteMail offers a fee-based template design service called Page Worthy. When you click on that link, you'll be brought to the Page Worthy website and can get more information on our services.   You can visit https://page-worthy.com for more info.

Messaging Tagging

Q: What is Message Tagging?

A: Messaging Tagging adds a tag to tracked messages and allows messages to be categorized.

Q: What is the purpose of Message Tagging?

A: There are many use cases depending on your organizational needs. Message Tagging is primarily used to sort and organize

message results. You can then get metrics for messages sorted by Message Tagging.

Q: Will my recipients know the message has been tagged?

A: Message tagging has no effect on the recipient's side. They will see the message as usual.

Q: What is the difference between Message Tagging and Campaigns?

A: Campaigns and Message Tagging are indeed similar, but with some key differences. With Message Tagging, you can assign multiple tags to a single message. If you make your message tag "Required", the user will not be able to send the message without a tag attached. For Campaigns, the onus is on the user to remember to assign the message to a campaign, unless you choose "Assign to a Default Campaign" in the PoliteMail Preferences.

Q: Can other Users see Message Tagging results from other Groups?

A: Tag search results are filtered by Business and Region. Admins will be able to see all messages when they search by tag. Users will only be able to see messages that were sent from their Business/Region group. This article explains Groups and sharing.

https://support.politemail.com/hc/en-us/articles/360025884494

Q: Does checked the "Required" box mean all PoliteMail users will be required to tag the message?

A: By clicking the "Required" field, ALL users, regardless of Business or Region Group, will be prompted to use Message Tagging. This cannot be changed at this time. If you do not make your message tag "Required", then users will not be prompted and can choose Message Tags from the PoliteMail toolbar.

Q: Can users add tags to messages without being prompted?

A: Users can only add tags if there is a Tag Group created by an Admin user. All tags must belong to a Tag Group. If the Admin user has NOT checked the "Predefined" setting, users may add tags by clicking the Tag Message icon in the PoliteMail toolbar. Users can then add their own tags which will be added to a Tag Group they have chosen. Admin users have the ability to edit or delete these tags.

Enhanced Finding and Filtering

Q: How has your filtering improved?

A: Users now have the ability to filter by date range and time. We've also added enhanced filtered for Business and Region groups.

Override Word Count

Q: What is override word count?

A: For users who are writing emails in multiple languages, the metrics are often inflated because it's counting all the words in the emails while your readers are only reading the content in their native language. Override word count allows you to manually change the word count, so the read time and other metrics are adjusted.

Q: Does PoliteMail count the words?

A: No, you will need to use a third-party program like Microsoft Word to perform the word count. Copy and paste the entire email into Word, and then delete the language you don't want. You will get a word count based on one language.

Q: When you turn Override Word Count on, is it applied to every message?

A: Yes. You will need to turn it off in the Preferences. However, you don't need to enter a word count if you leave it on by mistake. Just hit Cancel and your email will be sent.