

User Training Manual

PoliteMail v19.4.9

Welcome to PoliteMail

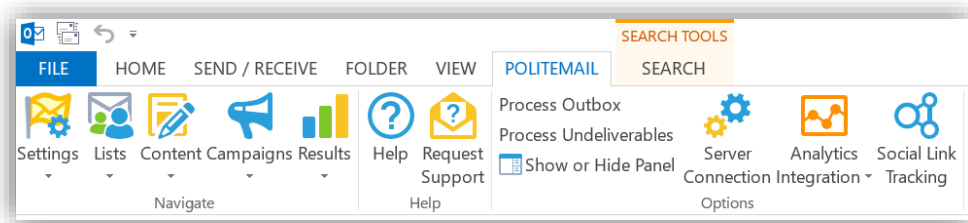
This training manual is designed for users new to PoliteMail. It provides a basic overview for each function within the tool. For more detailed coverage refer to our [PoliteMail Knowledge Base site](#).

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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, subscription 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, as well as 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 containers 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.



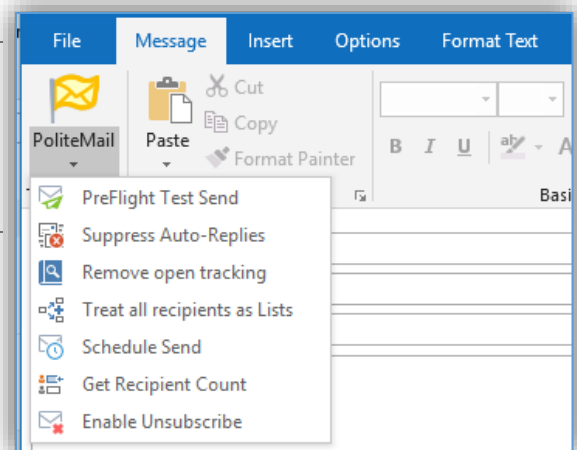
Analytics Integration will enable your web analytics tool to report on traffic coming from your email messages and campaigns.



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 emails for this message only and works when using Global contacts from your Exchange Server within your internal domain



Remove open tracking will still track links in messages but will omit the tracking image. This is used for sending PoliteMail messages to mobile devices.



Treat all recipients as Lists will attempt to expand each recipient as if it were a list. Useful when only the smtp alias of a list is available in the Global Address list.



Schedule Send will enable you to set a specific future date and time for this message to be sent, including if the recipient is in a different time-zone. 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.

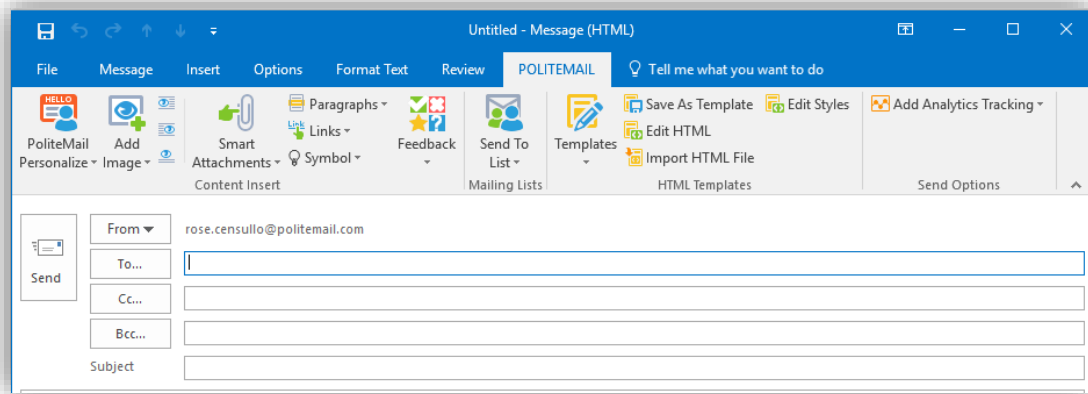


Get Recipient Count will provide a count of total recipients for the email.



Enable Unsubscribe 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.



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>Preferences**, 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.



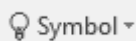
Smart Attachments enable you to place any file attachment into your email as a trackable link. Unlike Outlook's Attachment, a Smart Attachment does not increase the size of your email message and enables you to measure when the file is viewed.



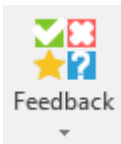
Paragraphs are sections of content which can be saved and reused. You can select/highlight sections of an email, right-click to save as a paragraph, then use this Paragraphs tool to load that content into the current message at the cursor selection.



Links will insert a commonly used link that you would like to be tracked. Note that PoliteMail will track 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 allows you to insert a variety of symbols into your email message.



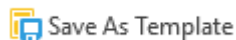
Feedback enables simple surveys, polls, and Open Visibility metrics to be included within your email message when using Individual or Anonymous Tracking.



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 CC: field if desired.



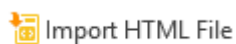
Templates enables you to build a new HTML template page or select from a list of standard template sections included with PoliteMail to create your own custom template.



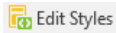
Save As Template will save the current email as a template page in the **Content Library** (stored name will match the subject line). You may reuse that template by selecting it from the Templates pull-down menu, or use the Content tool from the inbox to select it and use the Actions menu to share it with other people on your team.



Edit HTML 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 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 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.



Social Advocacy

Social Advocacy allows users to add a block of social media icons to messages composed in PoliteMail, so recipients can share stories to their own personal social media sites.

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.

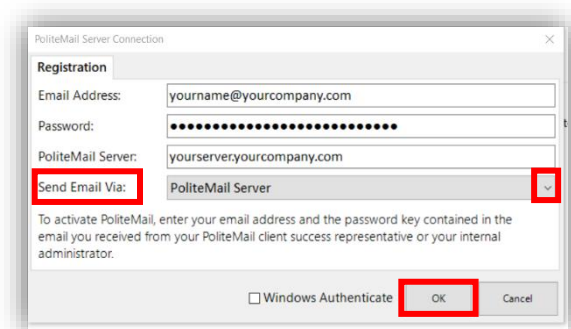
Send via PoliteMail Server

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

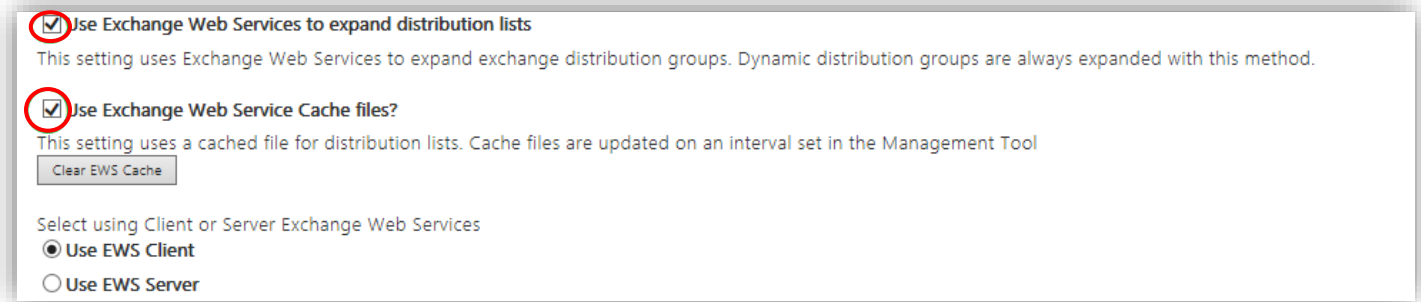
This setting is recommended for those who send to dynamic distribution groups. It will use Exchange Web Services which tends to be faster and more reliable to make sure that the dynamic lists expand and that the send goes out smoothly as opposed to MAPI which is Outlook's default list expansion method.

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**.

You can also **check Use Exchange Web Service Cache files** for even faster data retrieval. When selected, PoliteMail will then cache (save) list membership. The next time, within 24 hours, the same list is used, PoliteMail will immediately use the saved membership data, instead of asking Exchange to look it up again, making processing significantly faster. When expanding lists using the **EWS server** (default), the cached data is available to all PoliteMail users, and any user counting or sending to the same list will get the benefit of Fast Expand using the same cached data.

When expanding using the **EWS client**, the cached data is only available to that user.



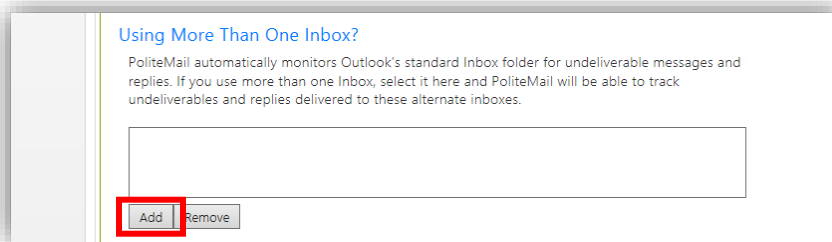
Setup Monitoring of Alternate Inboxes

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.

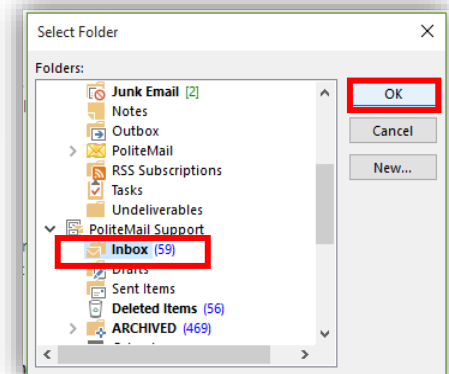
Under **Using More Than One Inbox**, click **Add**



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.

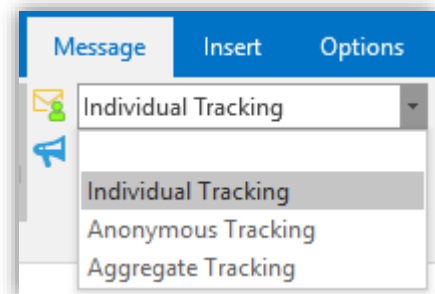
Tracking Default	This sets the default PoliteMail tracking mode each time you start a new Outlook email message. If you are always using the same tracking mode, you may want to set it as the default.
Enable Opt-Out	Enabling Opt-out writes a CAN-SPAM compliant footer into every new email message.
Embed 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
Automatic Undeliverable Contact Deletion	This setting will delete and remove from lists any contact that has the specified number of successive bounces.

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. Click on the **PoliteMail Flag** to enable tracking. 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.



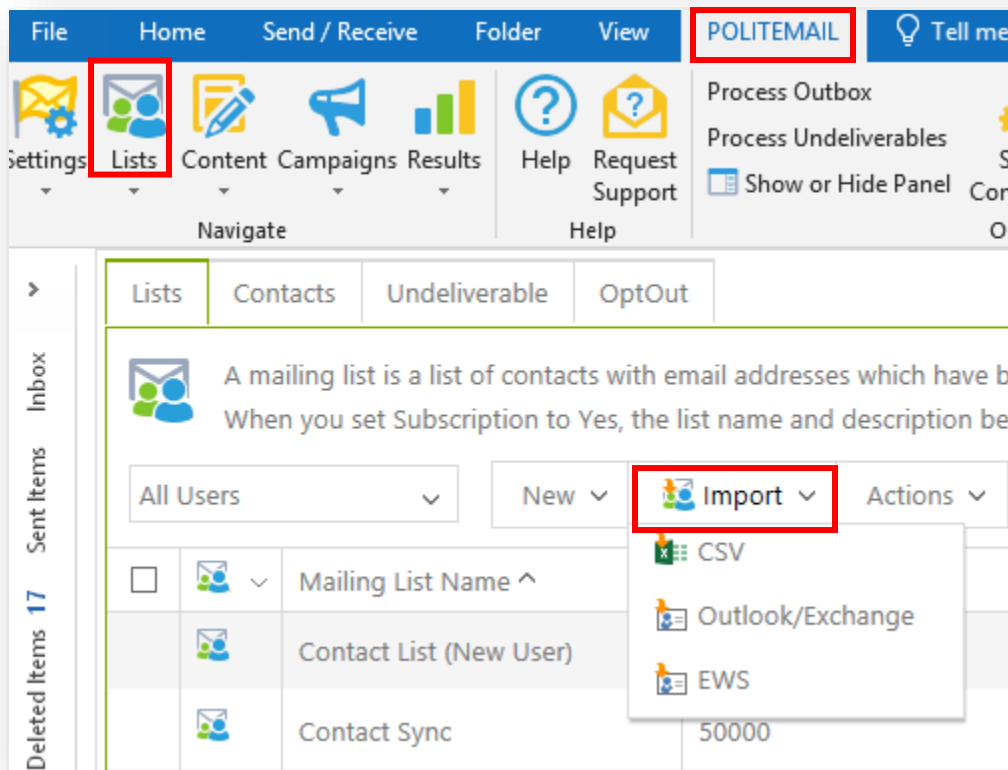
- Individual Tracking** Tracks unique individual interactions with the email message. Stores the recipient name and email.
- Anonymous Tracking** Tracks unique individual interactions with the message, anonymizes the name, stores email address as a one-way hash.
- Aggregate Tracking** Tracks overall 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

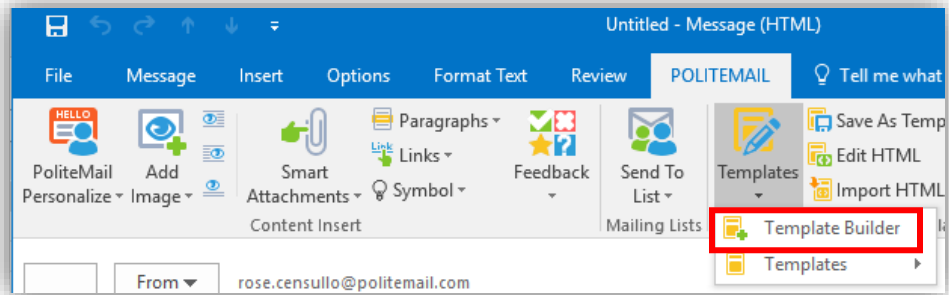
You can upload contact lists from other resources such as a CRM system or other contact management systems in CSV format. To do this, got to the PoliteMail tab in Outlook and go to **Lists**. Click **Import** and select **CSV, Outlook/Exchange, or EWS** to select a list from your Active Directory.



Template Builder

PoliteMail offers the ability to create and save templates using the PoliteMail Template Builder.

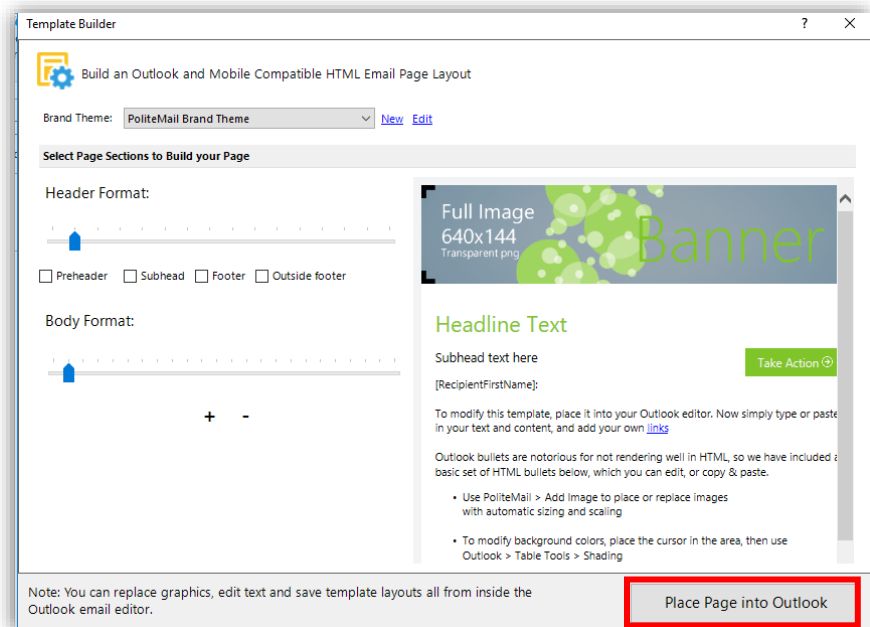
To do this, open a new Outlook message. Click the **PoliteMail** tab and click **Templates** and select **Template Builder**.



Select your Brand Theme from the drop-down menu. If no Brand has been designed, PoliteMail will use the Default brand theme.

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**.

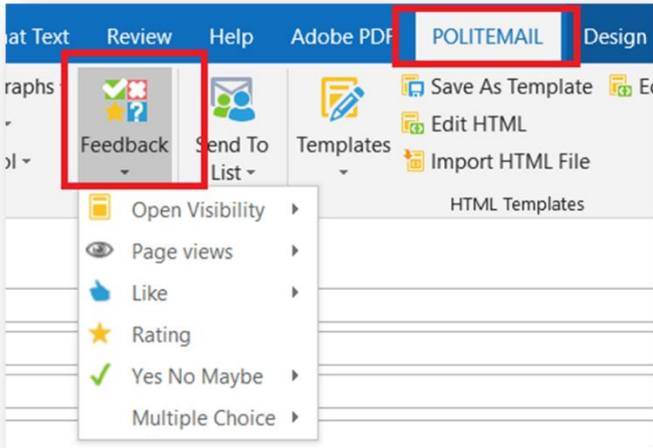
You can also share the template via **PoliteMail > Content > Templates > Select > Actions > Set Sharing > Shared**.

For more information about templates, visit this Knowledge Base article.

<https://support.politemail.com/knowledgebase/how-to-edit-template-content/>

Open Visibility

Open Visibility allows your recipients to see interaction data in near real-time, including page views, read time, mobile opens and clicks. This information will appear at the top of your template or email message, and recipients will be able to view and refresh the data.



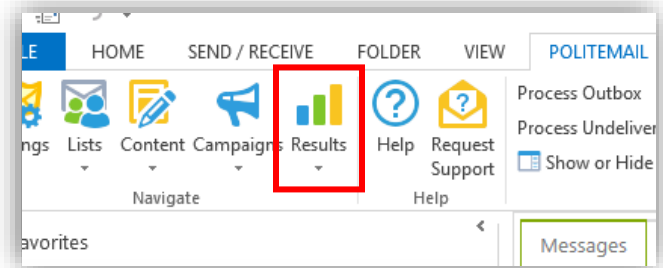
Visit the PoliteMail Knowledge Base to learn more about Open Visibility.

<https://support.politemail.com/knowledgebase/using-the-open-visibility-feature/>

Reporting

One of 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.

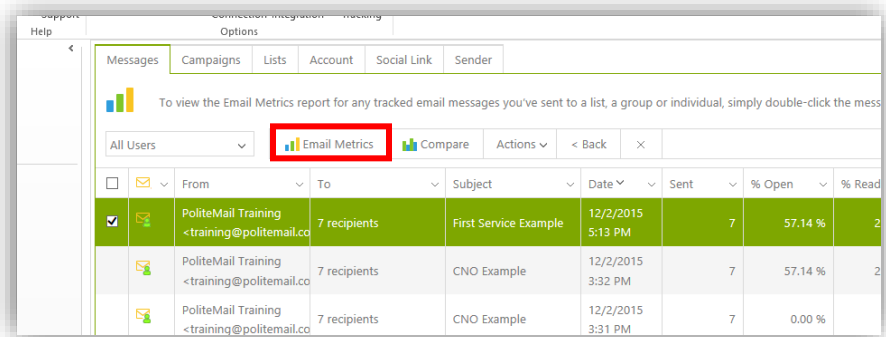
To view reports, select the **PoliteMail** tab in Outlook and click **Results**.



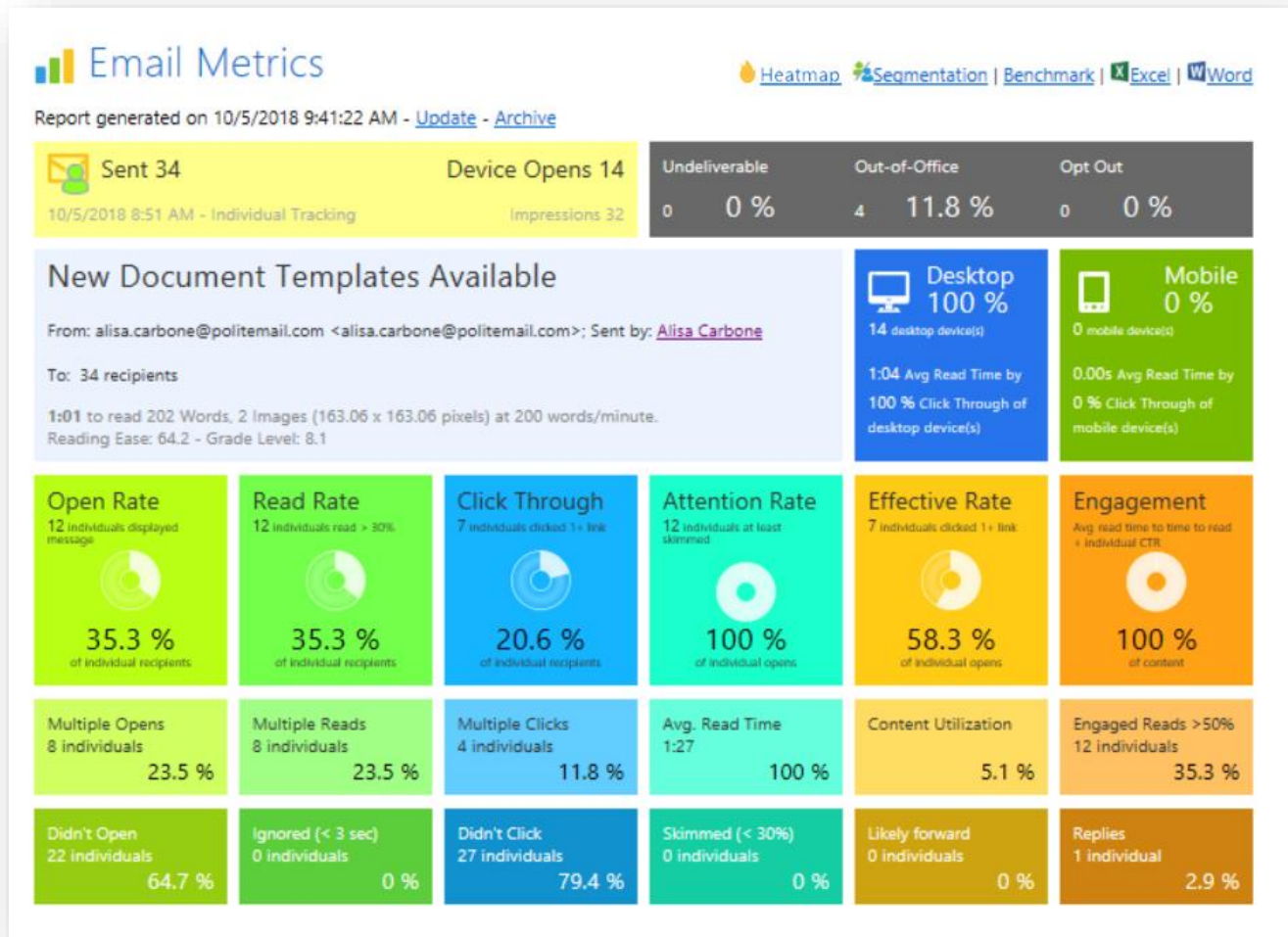
Go to the **Messages** tab and click the **selection box** to highlight the email message you want to view results for.

Click **Email Metrics**.

View the report.



Metrics



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

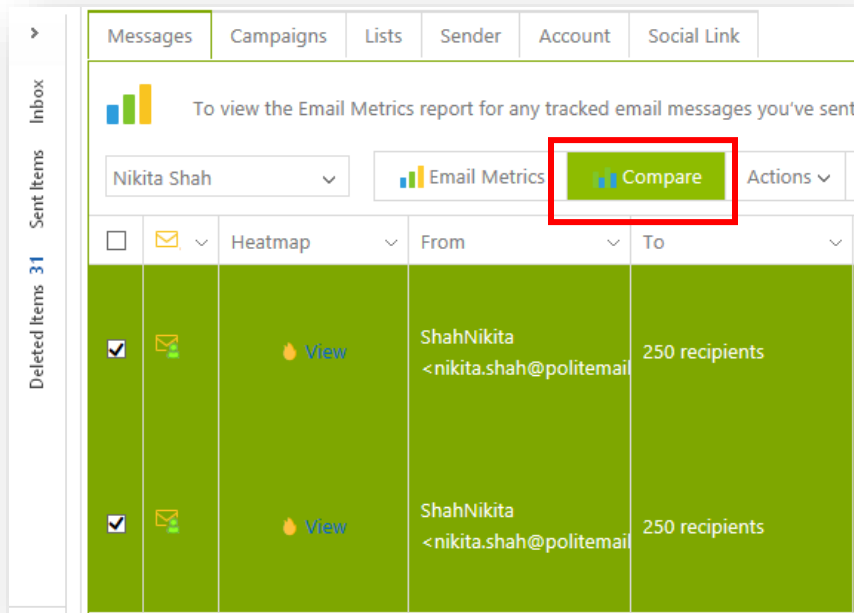
Out of Office	Out-of-office replies (returned to a mailbox PoliteMail is monitoring) Does not work with Aggregate tracking
Opt-Out	Opt-out or unsubscribe action taken on this message
Opt-In	Opt-in (to a PoliteMail subscription list)
Words	Word count in message
Images	Image count in message
Time to Read	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 recipient 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

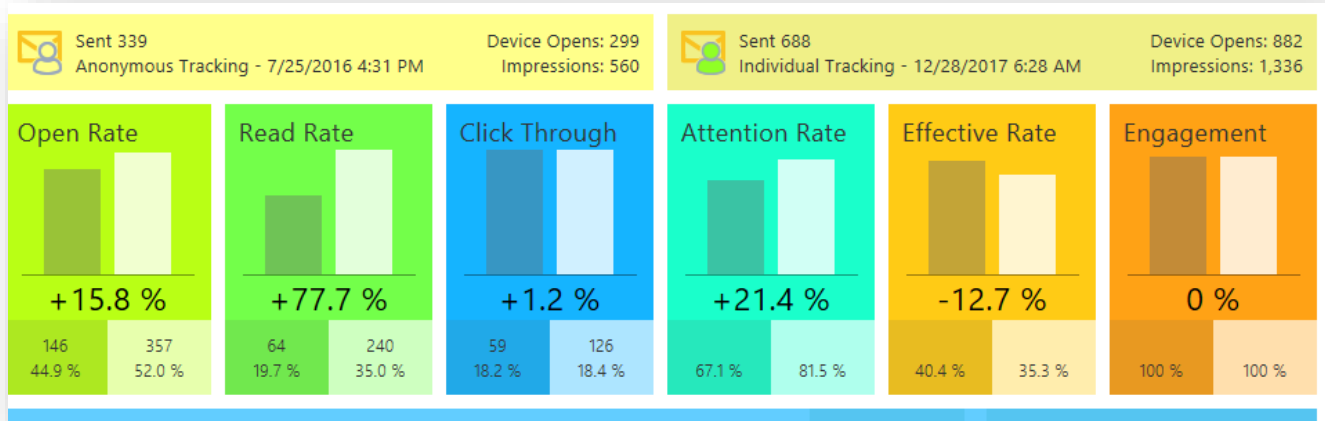
Likely Forward	Tracked messages which were opened by 3+ unique devices
Replies	Individuals who replied to the message

Comparison Metrics

From the Messages Data Grid, you can select two messages to compare results.

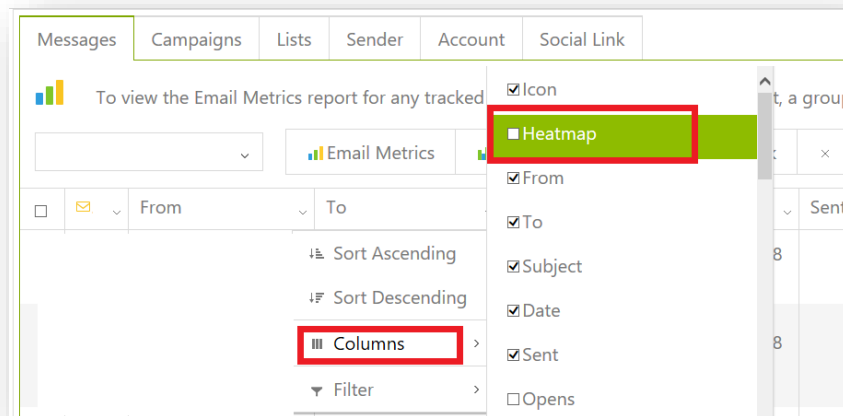
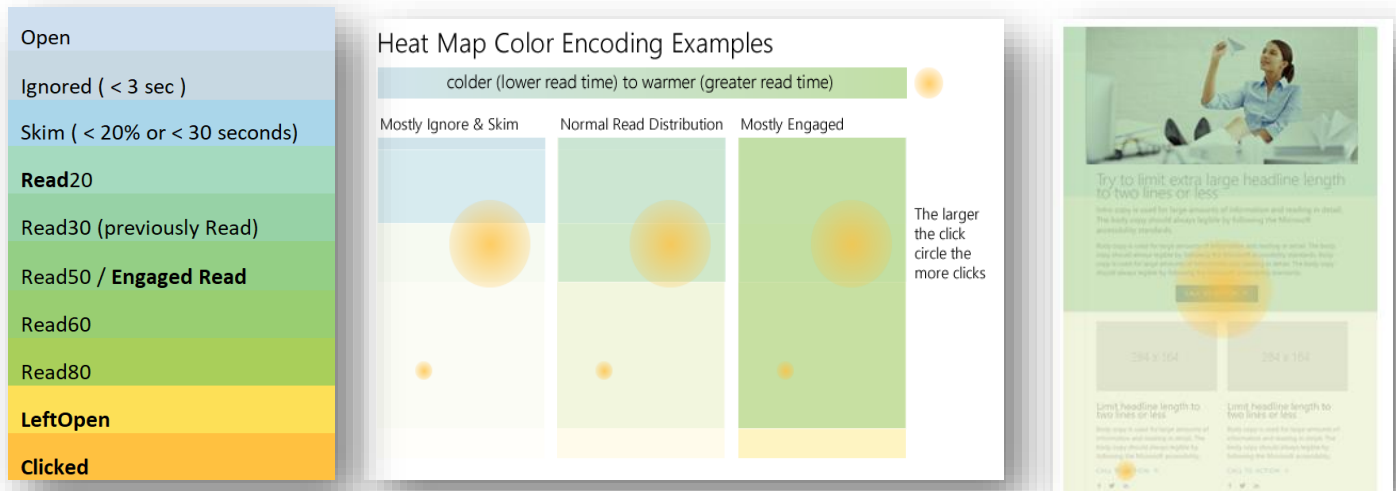


Metrics should be read from left to right. The number displayed is the differential between the first to the second, in percentage terms. In this example, the Open Rate has increased 15.8%, and the Read Rate has increased 77.7%.



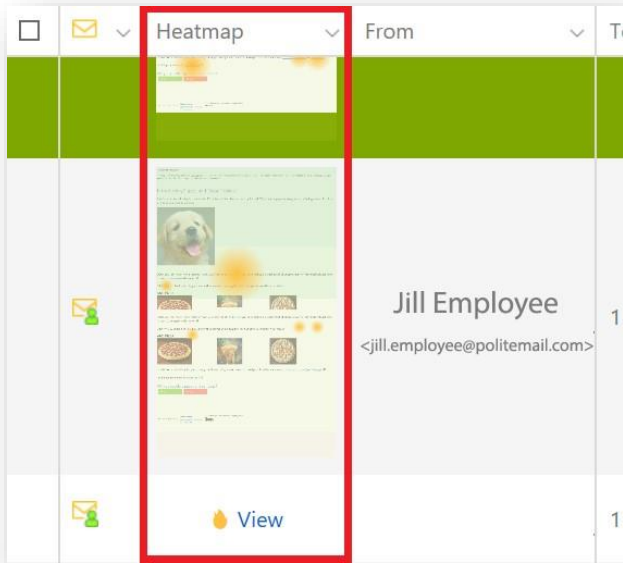
Heat Map

Like a weather map for your email message, PoliteMail will provide a cool to warm overlay which shows read-time and click metrics visually. This data can be used to see how your readers are viewing your content, and where you should be putting key messages and links.



Navigate to **POLITEMAIL** in the **Outlook Ribbon Header** and then click on **Results**. Choose **Messages**.

Now go to any data column and click the small arrow to the right to see the pull-down menu. Go to **Columns** > **HeatMap** to display the HeatMap column.



To generate a HeatMap for an existing or new message, click **View**.

Once a HeatMap has been generated (from this view or from within an email metrics report), you'll see the thumbnail in the HeatMap column.

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

