

# Quick Start Guide

version 5.0



Create



Send



Measure

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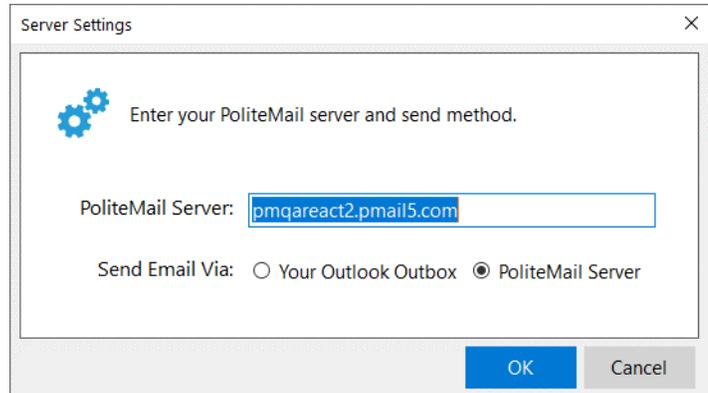
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# Get Connected

Before you can start sending and tracking email messages, you must first activate the PoliteMail software and connect to the PoliteMail Server. If you are using Single Sign-On as a connection method, please contact your IT department for help signing on. If you are connecting using Password Authentication, please follow these steps:

## Activating and Connecting

1. You will receive an email entitled, "Your PoliteMail Account is Ready." Click the client.exe file to download and install PoliteMail. Restart Outlook.
2. PoliteMail will then ask you to establish a connection with your server. If this does not happen automatically, select the PoliteMail tab and click Server Connection. The PoliteMail Server Settings dialog opens.
3. In the PoliteMail Server field, enter the URL for the server you are connecting to. Send Email Via should be set to PoliteMail Server. Click OK.
4. Enter the PoliteMail email address that was included in your welcome email. Click Next.
5. In the Password field, enter the password that you received from PoliteMail Customer Support. Click Sign in.
6. You will be brought to the My Profile Page and asked to change your password. If you are not brought to the My Profile page, please contact Support (serversupport@politemail.com)

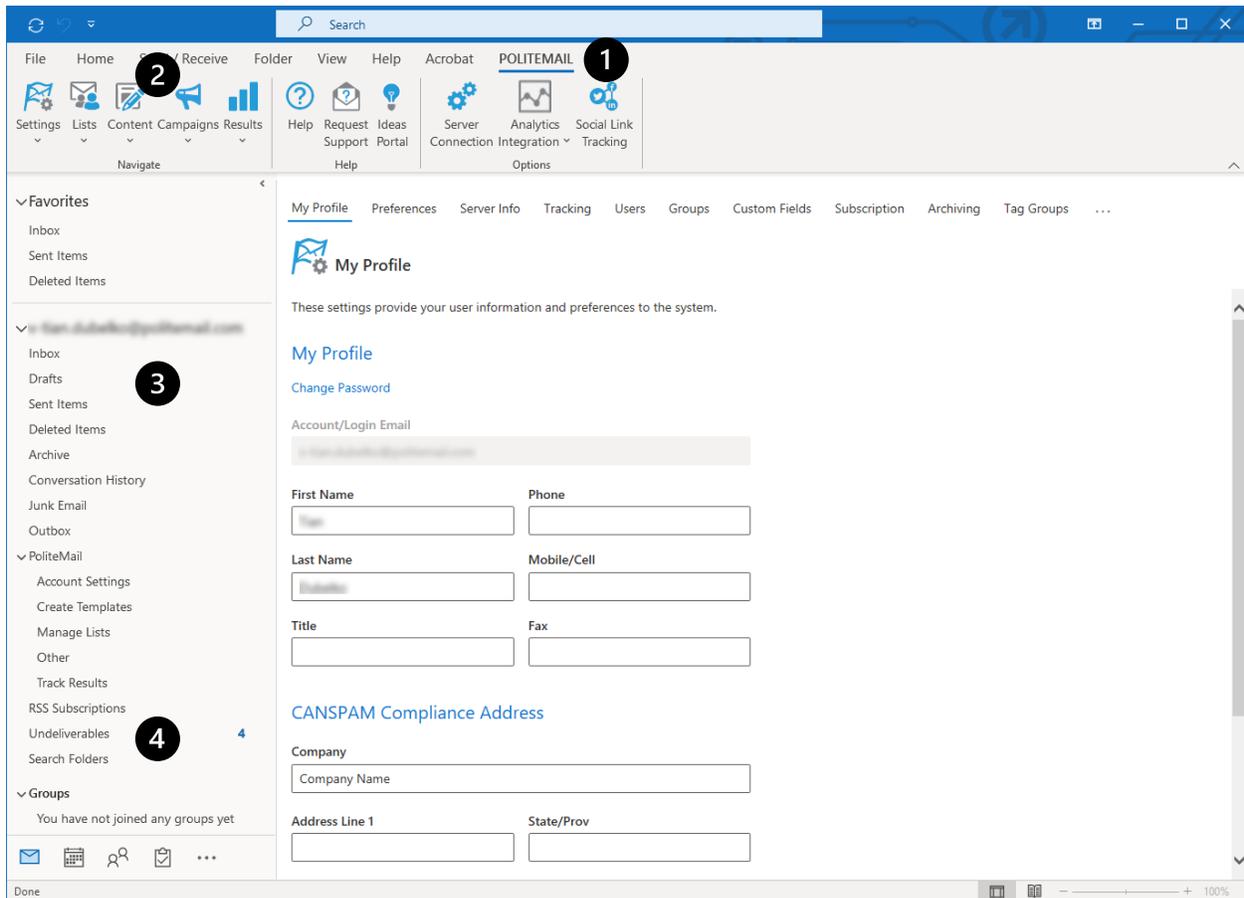


*Sending Email via the PoliteMail Server not only overcomes list size as well as ISP send volume limitations, but will send email much faster.*

# Set Your Preferences

PoliteMail will add a 'POLITEMAIL' tab to the Outlook interface on the Desktop version. In the Online version, a PoliteMail toolbar will appear above the composition window when you create a new message.

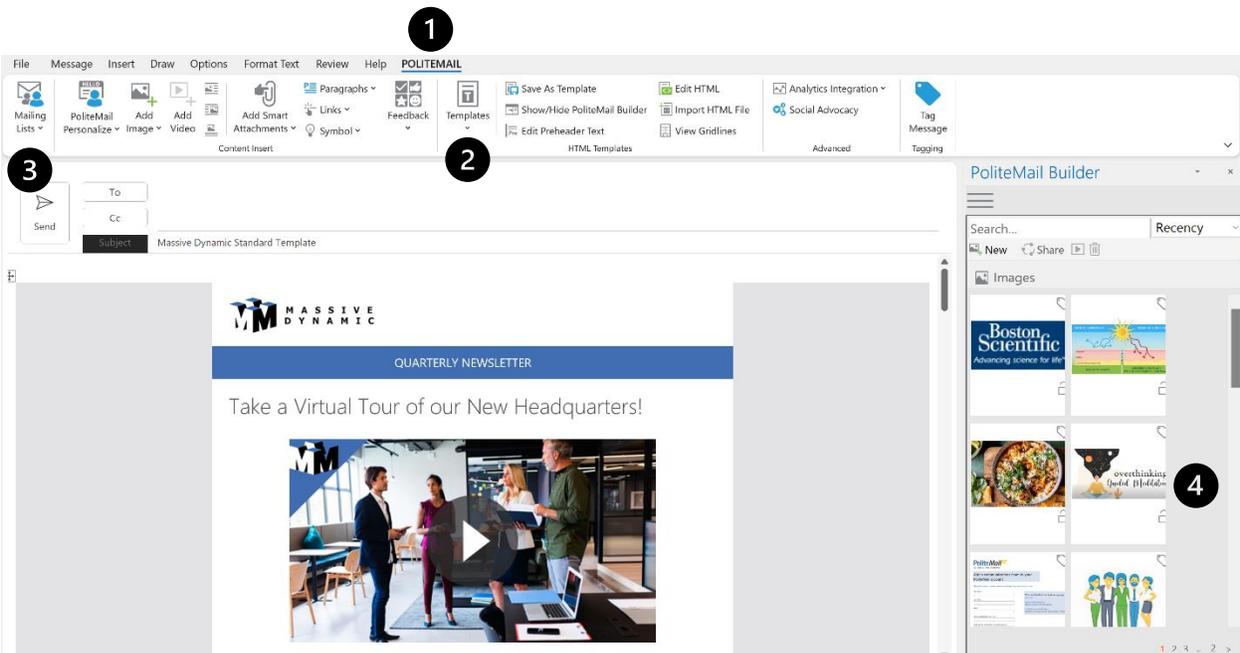
PoliteMail adds tools to the Outlook interface, making it easy for you to manage mailing lists, create and use professional email templates, track interactions and measure results, all from within your Microsoft Outlook and Exchange environment.



- 1 The POLITEMAIL tab provides access to account setup, list management, templates, and results reports.
- 2 Store all your images, templates, links, Smart Attachments and more on the PoliteMail server.
- 3 PoliteMail only sends from your Outbox or direct to Exchange, so your outgoing email is authentic.
- 4 PoliteMail automatically processes undeliverable messages, tracking any hard bounces.

# The Message Window

To send a tracked message with PoliteMail, click New Email in Outlook. Along the button bar at the top of the message, click the PoliteMail flag to track the message you are creating. Each recipient will receive an individualized message as if you had sent the message to each person one at a time. Only one email item is stored in your Sent Items folder to save space.



- 1 Click the PoliteMail tab while you are creating a message to use all the PoliteMail editing functions including personalization, graphics, creating and saving templates and more.
- 2 Easily reuse and share content with the Templates button for fast access to your saved email templates and content.
- 3 Click the Mailing Lists button to display mailing lists and select a PoliteMail list you have created or imported to add it to the To: field.
- 4 Storing your images, links, and attachments in PoliteMail keeps your email messages sizes nice and small. You can create your own professional-style HTML email using the drag-and-drop PoliteMail Builder.

# Creating an Email Message

To do this ...	... do this
<b>Add an Image</b>	<ol style="list-style-type: none"><li>1. Place the cursor where you want the image, then click <b>PoliteMail &gt; Add Image</b>.</li><li>2. Select one of the files in the list or browse to the file and click <b>Open</b>.</li><li>3. If you are working with an image placeholder in a template, it's helpful to resize your images to the dimensions specified.</li></ol>
<b>Personalize a Message</b>	<ol style="list-style-type: none"><li>1. Click the <b>PoliteMail Personalize</b> button.</li><li>2. Select Hi [RecipientFirstName]: (or any of the other choices) to add the merge fields to your email message.</li><li>3. PoliteMail automatically merges the data when you click <b>Send</b>.</li></ol>
<b>Add Trackable Links</b>	<ol style="list-style-type: none"><li>1. Type the URL into your message, or go to <b>PoliteMail &gt; Content &gt; Links</b></li><li>2. Click <b>New</b>.</li><li>3. Type the complete URL and give the link a name. It will now appear in the Links drop-down menu.</li></ol>
<b>Add Trackable Smart Attachments</b>	<ol style="list-style-type: none"><li>1. Click the <b>Add Smart Attachment</b> button.</li><li>2. Select one of the items on the list or browse to the file you want to attach and click <b>Open</b>. PoliteMail uploads the file and inserts it into your email message as a tracked link.</li></ol>
<b>Create an HTML Email from a Template</b>	<ol style="list-style-type: none"><li>1. Click  Show/Hide PoliteMail Builder. The PoliteMail Builder will open on the right-hand side. Click the  and select <b>Templates</b>.</li><li>2. Click the  and select <b>Template Sections</b>, and select parts of a template to add, instead of the entire thing.</li></ol>
<b>Save and Reuse your Templates</b>	<ol style="list-style-type: none"><li>1. In the PoliteMail Builder, click  Save and save your template. Assign it to a Business or Region Group, or share it with other users.</li><li>2. To re-use a template, Click the  and select <b>Templates</b>. Your saved template will appear in the list.</li></ol>
<b>Use Existing Formats</b>	<ol style="list-style-type: none"><li>1. Start a new email and copy and paste content from Word.</li><li>2. Select Import HTML file in the PoliteMail Builder to load an HTML page created using an HTML editor.</li><li>3. Forward an existing HTML message from your Inbox and edit the headers to remove them.</li></ol>

# Using Mailing Lists

## Importing a Mailing List

From Excel	From Outlook Contacts / Folders
1. Open the file in Excel and select <b>File &gt; Save As</b> to save the file in a .csv (comma delimited) format.	1. Select <b>Lists &gt; Mailing Lists</b> from the PoliteMail toolbar.
2. In PoliteMail, select <b>Lists &gt; Mailing Lists</b> .	2. Select <b>Import &gt; Outlook / Exchange</b> .
3. Click <b>Import</b> . Browse to your .csv file, select it, and click <b>Open</b> .	3. Select the Outlook Contacts folder or any Outlook folder (such as your Inbox or Sent Items), and click <b>OK</b> .

### To complete the import process:

4. Name the new list or select an existing list to import into.
5. Ensure that all the data fields map correctly to PoliteMail fields and click Import. Click Close.
6. Double-click the list name to view all contacts on the list.

### To manually add contacts to or remove contacts from a list:

1. Select Lists > Mailing Lists from the PoliteMail toolbar.
2. Double-click the list name to view/edit/add/remove contacts.
3. Click New to enter a name and email address.
4. To remove a contact, select it and click the Delete button.

## Sending to a Mailing List

To a PoliteMail List	To an Outlook / Exchange Group
1. Create a new email in Outlook.	Click the To: button.
2. Select the POLITEMAIL tab, then click on  Mailing Lists 	Select your distribution group and click OK.
3. Select the list you want to send to. PoliteMail will add the list to the To: field.	Make sure the list appears with a [+] before the name, indicating PoliteMail will send the message to the individual addresses.

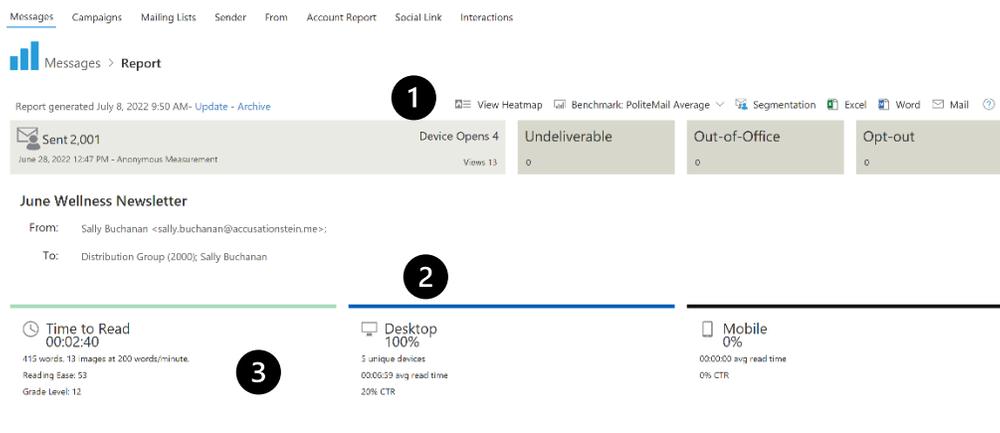
**Important Note for Corporate Communications:** If your distribution group appears in the To: field as an email address (e.g., groupname@yourdomain.com) or without the [+] symbol, then it is an Exchange Alias (group email address) or a Dynamic Distribution Group/Active Directory list. You must have a PoliteMail Server Corporate Account to access/send to the individual members of Dynamic/Active Directory lists.

# Email Analytics

PoliteMail analytics are powerful!



1. From the POLITEMAIL tab, click on **Results**.
2. Select messages, campaigns, mailing lists, senders, social links, or interactions to report on.
3. A list of all messages appears. Double-click on the one to report on, or click on it and then click Email Metrics.



- 1 The top contains several options, including the ability to export or email the report.
- 2 This section contains general delivery information, such as opens and opt-outs.
- 3 This section analyzes the complexity of the message, and breaks down the devices on which the message was viewed.

- 4 A series of pie graphs shows various metrics.

## Open Rate

3 individuals displayed message



- The outer circle represents the value on the message you are viewing.
- The inner circle represents this value against your company average.
- The large center percentage is the metric for the message.
- The smaller percentage is the metric for the company average. A triangle pointing up (▲) indicates the message performed better than the average, and a triangle pointing down (▼) indicates the email performed below the average.
- The percentage to the right of the triangle shows the amount of the variance.

## Stuck?



Help



Request  
Support



Ideas  
Portal

Help

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.

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 via email at [serversupport@politemail.com](mailto:serversupport@politemail.com).

