

Creating and Sending to PoliteMail Distribution Lists

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Applies To: ☒ PoliteMail Desktop ☒ PoliteMail Online ☐ PoliteMail M365

Version: ☒ 4.9 ☒ 5.0 ☒ 5.1+

PoliteMail will send measured messages to any current mailing lists you have in your Exchange environment. However, you may want to create additional lists that are not in Outlook. PoliteMail gives you the ability to upload lists for this purpose, usually from a CSV file.

PoliteMail will automatically create a contact when you send a measured email to someone. **One of the most common use cases for PoliteMail mailing lists is when you have hundreds of individual e-mail addresses but they are not on a dedicated distribution list.** Instead of pasting them all in the **To:** field, which will increase the size of your e-mail, we recommend you create a PoliteMail list from these contacts. A PoliteMail list will reference the recipients from the PoliteMail server, which keeps the message header small and allows for larger recipient lists.

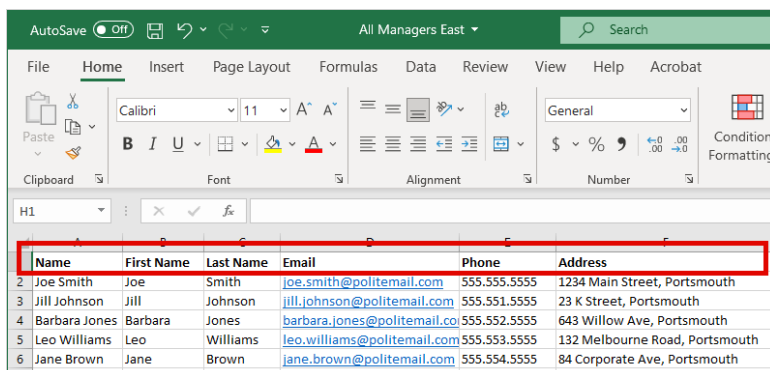
You can also create list segments, which can allow you to get metrics for and better analyze how your messages are read and received by segments that you have created.

Note: PoliteMail lists are created manually, and they are not updated automatically. Adding contacts to PoliteMail lists are discussed later in this article.

How Do I Create a PoliteMail List?

Importing from a CSV file

1. PoliteMail recommends creating a CSV file through a program like Excel with contact information for recipients.
2. **Save** this list as a CSV file.
3. Navigate to **POLITEMAIL > Lists > Mailing Lists** (in **Version 4.9x**, go to **Outlook > PoliteMail > Lists**). Once you're in the Data Grid, go to **Import** and then choose either CSV or Outlook/Exchange.
4. You will now be brought to the Import Contacts window. Select **Browse** to locate your CSV file.
- 5.



	Name	First Name	Last Name	Email	Phone	Address
2	Joe Smith	Joe	Smith	joe.smith@politemail.com	555.555.5555	1234 Main Street, Portsmouth
3	Jill Johnson	Jill	Johnson	jill.johnson@politemail.com	555.551.5555	23 K Street, Portsmouth
4	Barbara Jones	Barbara	Jones	barbara.jones@politemail.com	555.552.5555	643 Willow Ave, Portsmouth
5	Leo Williams	Leo	Williams	leo.williams@politemail.com	555.553.5555	132 Melbourne Road, Portsmouth
6	Jane Brown	Jane	Brown	jane.brown@politemail.com	555.554.5555	84 Corporate Ave, Portsmouth

The image shows two parts of the PoliteMail interface. On the left is the 'Import Contacts' dialog box, which has a 'Browse' button highlighted with a red rectangle. Below it are options for 'Has Column Headers', 'Create New List' (selected), and 'Add To Existing List'. There is a field for 'New Mailing List Name' containing 'All Managers East', a dropdown for 'Contact Owner' set to 'All Users', and a checkbox for 'Mark entire import as Opt-out'. A 'Next' button is at the bottom. On the right is the 'Mailing Lists' interface, showing a search bar, a 'New' dropdown, an 'Import' dropdown, and a table of mailing lists. The table has columns for 'Mailing List Name', 'Member', 'Sent', and 'Subscription'. Two lists are visible: 'CSV' and 'Outlook / Exchange'.

Selecting **Create New List** will create a brand new mailing list. By default, the new list name is the name of the CSV file with a timestamp. This can be helpful when working with lists that need to be updated often. If you choose **Add to Existing List**, this will append any new addresses onto the list, but it will not remove old contacts. If you need to remove contacts from a list, it's recommended to do a fresh import of the list with the autogenerated timestamp.

- **Version 4.9x:** Selecting New Mailing List Name will create a brand new mailing list. By default, its the name of the .csv file with a timestamp. If you choose Select Existing Mailing List, this will append any new addresses onto the list, but it will not remove old contacts. If you need to remove contacts from a list, it's recommended to do a fresh import of the list with the autogenerated timestamp.
 - When choosing the Contact Owner, when it's set to the default **All Users**, the contacts can be viewed and shared by everybody. However, if you change the contact owner to a specific person, [only this person will be able to see the contacts and the metrics associated with them](#).
 - Select the box for "Mark entire import as Opt-out" if you do not want emails to be sent to your imported email addresses. This is useful for importing suppression lists.
 - If your CSV file has column headers, selecting the box for "Has Column Headers" will automatically map the data fields to corresponding columns. If the box is unselected, you will need to manually map the data fields.
6. Clicking **Next** will bring you the second page, where you can map your CSV data to corresponding columns. You'll want to make sure the information you have entered matches the data fields. You can change them by using the pull-down menu.
 7. Clicking Save will create a list to use via PoliteMail.

Adding Existing Contacts to a PoliteMail Mailing List

1. Go to **POLITEMAIL > Lists > Contacts**.

2. Single-click on contacts to select them.

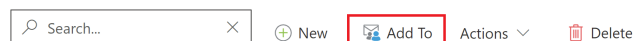
Holding down the CTRL key will allow you to select multiple contacts. You can narrow down your contact list by using Search or applying [filters](#).

3. Once you have all of your contacts selected, choose **Add To**. You can then choose which existing mailing list to add these contacts to.



Contacts

Contacts are created whenever you send a measured email to someone. You can view a contact profile add contacts to a mailing list or auto-sequence using the 'Add to' menu.



Adding New Contacts to a PoliteMail Mailing List

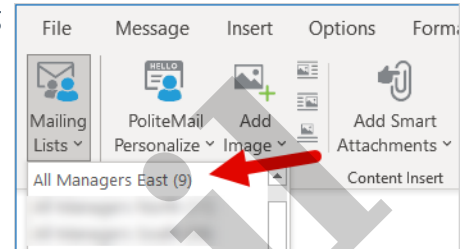
1. Go to **POLITEMAIL > Lists > Mailing Lists** and double-click on the list you want to add new contacts to.
2. Click the **New** button and then fill out the contact's information.

Using a PoliteMail Mailing List

When sending out communications, you can send to either a PoliteMail List(s), distribution lists already existing in your Global Address Book, or both.

1. Open a new email. Click the POLITEMAIL tab and choose **Mailing Lists**.
2. Choose your PoliteMail list.

Once selected, it will be placed in the **To:** field. It can then be moved into other fields such as the **CC:** field.



Notes

- You will notice the email address on the list references the hostname to connect to your PoliteMail Server. This means that it will only be recognized by PoliteMail.
- If you attempt to use a PoliteMail list on a message without measurement, it will fail and not deliver.
- For Distribution Lists not stored on your PoliteMail server, we recommend always clicking on **To:** and pulling the contacts or lists. While the contacts may populate in the field when manually entering them, they are locally cached versions of the list. If any updates or changes have been made to them, they may not be reflected.