Getting Started with PoliteMail365

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Applies To: ☐ PoliteMail Desktop ☐ PoliteMail Online ■ PoliteMail O365

Version: ☐ 4.94 ☐ 4.97 ■ **5.0+**

Using PoliteMail for Microsoft 365

The Politemail365 Add-On is designed to give users quick access to PoliteMail measurement tools without leaving Outlook online. A user can access any content that has been stored on the PoliteMail Server, as well as import new content such as templates and smart attachments. Please note that your user role and Group assignments will carry over into PoliteMail365. If a user cannot find a piece of content within the add-on, it's likely that it wasn't shared, or you they do not have permission to view the content because of their user role.

- There is no reporting capability in the add-on. A user will need to access the results of messages in either the Desktop version or PoliteMail Online.
- If you are using the latest version of Outlook and have multiple Outlook profiles, the PoliteMail 365 Add-On will only work with your primary profile.

To launch the add-on, open the Office365 version of Outlook and click New Message. If the add-on doesn't launch automatically, click the 3 ellipses at the bottom of the New Message next to the Discard button. The PoliteMail add-on window will open to the right.

Creating a Message

Users can begin writing messages directly into the email body and use any of Outlook's message tools. They can also use saved PoliteMail templates, create a new PoliteMail template, or import an HTML file.

Once the message has been written, the user will then choose whether to send via the PoliteMail Server, or through Outlook Outbox. For best performance, it's recommended to use the PoliteMail Server for sending. Some send functions, such as Scheduled Sends, will not work with Outbox sending.

Under Send via, the user can choose which Measurement Mode to apply to the message. The user can also assign a message to a Campaign before sending. The Add-on does not allow the user to create Campaigns. The Campaign needs to be created in either the Desktop version or PoliteMail Online. Messages can be added to Campaigns after sending.

The next drop-down is for Personalization options. If the user has created custom fields upon importing mailing lists, they will be listed here.

Finally, the user can choose when to send the message. Click on the different options to select a date and time zone for the message to be sent.

Once this information is filled out, the user can then add recipients. Clicking on the To: field will show the user available mailing lists from their Global Exchange book. If there are mailing lists stored on the PoliteMail Server, these can be accessed by clicking on the hamburger menu and then choosing Mailing Lists.

Sending a Measured Email

There are a few tools under the Send and Measure button the user has access to before sending a message. The first is Preflight Test Send, which allows users to send out a test message to themselves or other colleagues. This is a great way to test out links and make sure the images and text are laid out how you want them.

Clicking on the To: field will allow access the Global Exchange Address Book. If the user has created any PoliteMail lists, these can be accessed by clicking on the Mailing Lists option in the hamburger menu. Double-clicking on an imported list will add it to the To: field.

When the email is finished, click the Send and Measure button to send.

PoliteMail Measurement Tools

Under the hamburger menu is a list of PoliteMail tools you can add to your message:

Message: Will return the user back to the main Send and Measure window.

Templates: Add any saved PoliteMail templates to the message. Clicking on templates will also allow the user to create new templates.

Tags: Add tags to messages. Admin users can only set tags in the Desktop version or PMOnline. These tags can then be searched and organized under the Results tab.

Paragraphs: Paragraphs must be created in the Desktop version or the Online version. To add one to a message, double-click on the Paragraph's name.

Images: Any images stored on the PoliteMail Server will appear here. To add an image, click on the plus symbol, and then navigate to the saved image. Choose to make it either a shared or secured image. To add it to a message, the user would place the cursor where they want to insert an image, and then double-click or drag the image. If the user is inserting an image into a template piece, PoliteMail will ask if the image needs to be resized and then attempt to fit the image into the placeholder. For best performance, it's recommended to resize images before importing. Clicking on the share icon will share the image. The user can choose to edit the image with the pencil icon, or trash it with the trash icon.

Links: Any links stored on the PoliteMail Server will appear here. To add a link, click on the plus symbol, and then enter in the name and URL of the link. To add it to a message, the user would place the cursor where they want to insert the link, and then double-click or drag the link. Clicking on the share icon will share the link. The user can choose to edit the link with the pencil icon, or trash it with the trash icon.

Smart Attachments: Any smart attachments stored on the PoliteMail Server will appear here. To add a Smart Attachment, click on the plus symbol, and navigate to where the file is. To add it to a message, the user would place the cursor where they want to insert the Smart Attachment, and then double-click or drag the Smart Attachment. Clicking on the share icon will share the Smart Attachment. The user can choose to edit the image with the pencil icon, or trash it with the trash icon.

Mailing Lists: Any mailing lists stored on the PoliteMail Server will appear here. To send to a mailing list, double-click on the name of the mailing list and it will be added to the To:field Clicking on the share icon will share the list. The user can choose to edit the image with the pencil icon, or trash it with the trash icon.

Buttons: Add call to action buttons to the email such as “Read More” or Add to Calendar. Place the cursor where the button is going to be inserted, and then double-click or drag the button to the message. Click the add hyperlink button in Outlook to make it a clickable link. The user can choose to edit the button with the pencil icon, or trash it with the trash icon.

Template Sections: Add template sections such as headers, body sections and footers. Double-click on drag the template section onto the new message. Use the edit buttons to duplicate, delete or move the template piece.

Brand: A brand theme stores the organization’s specific colors and fonts and applies them to template sections.

Ai/B: Ai/B will compare two subjects and let the user know which will generate more engagement. Enter in two subjects and then click the Compare button.

Navigate to Portal: This will bring you to the online version of PoliteMail.