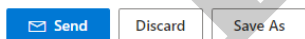# Saving a Message as a Draft

Last Modified on 05/01/2024 8:31 pm EDT

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

Save As / Drafts

Your browser does not support HTML5 video.

A 'Save As' button has been added to allow saving the message as a draft. Anyone can view a saved message, similar to a shared mailbox. For PoliteMail for the Desktop, the 'Save As' button in the PoliteMail Builder gives you the option of saving the message as a Draft or as a Template.

Use Clarifications

Templates	Use Templates to save a completed, approved, and ready to use message indefinitely. Templates can also be shared and support Groups.
Scheduled Sends	The Schedule Send feature lets you schedule a fully completed message, including messages created from Templates, to be sent at a later date/time. Scheduled Sends can also accommodate various time zones of recipients.

Save As / Drafts	Drafts should be used to save an incomplete message, or a message pending approval, for a short period of time. Administrators can access all Drafts, and Managers can view all Drafts in their Business/Region. Users can view only the Drafts they have created. Drafts will only be retained for a specified period of time before being automatically deleted.
Preflight Test Send	Preflight Test Sending is for a completed and approved message, allowing the sender to receive a copy of the message in their Inbox so they can preview how it will look when received.

Accessing Drafts

- Drafts will appear under Campaigns data grid, under Campaigns and Scheduled Sends. Double-click on the one to open.
- Once opened, there will be both a 'Save' button, which will overwrite the current item, and a 'Save As' button, which will save the item as a new item with a different name.

Drafts

Saved drafts of unsent messages.

Send D... ↑	Subject	From Name	From Email	Campaign	Recipients
8/23/2022	rgergregerg	Vince Caldwell	vince.caldwell@politemail.com		0
8/23/2022	100884	Marlena Cahill	marlena.cahill@accusationstein.me		1
8/23/2022	template 100884	Marlena Cahill	marlena.cahill@accusationstein.me		1
8/23/2022	test from PM ONline2	sally.buchanan@accusationstein.me	sally.buchanan@accusationstein.me		2
8/23/2022	mySubject	Sally Buchanan	sally.buchanan@accusationstein.me		0
8/25/2022	Test Draft	Ian Meredith	ian.meredith@politemail.com		0
8/15/2022	campaign draft 8/15	Marlena Cahill	marlena.cahill@accusationstein.me	Marlena	1

Other Notes

- PoliteMail for Microsoft 365 can create drafts but not access them; use the PoliteMail panel and select the option in the menu to switch to PolitelMail Online to view them there.
- System Admins (not standard Administrators) can set the period for how long a Draft will be retained before being automatically deleted under **Account > Settings > Server > Sending > Drafts Retention Period**.
- **Switching from Desktop to Online.** If a message is saved as a Draft in the desktop version of Outlook and contains content (images, attachments, etc) that were added using Outlook and not PoliteMail, those content items will NOT display if you access the Draft from PoliteMail Online.