

Setting PoliteMail Preferences

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Applies To: PoliteMail Desktop PoliteMail Online PoliteMail M365

Version: 4.9 5.0 5.1+

With **version 5.x** of PoliteMail, Admins can set Global Preferences and lock them by using the padlock and globe icon next to the setting.



- Clicking the globe applies the setting to every user on the account by default.
- Clicking the padlock prevents all other users from changing the setting.

Accessing Settings

Version 5.0: Go to **Account > Settings > User Preferences**.

Version 4.9x: Go to **PoliteMail > Account Settings > Preferences**.

5.0 User Preferences Overview

The User Preference listed are shown as displayed in Version 5.0. **To see a list of settings in Version 4.9, click** .

The table below shows the settings for Users and Admins. To see a list of settings for System Admins (SysAdmins), click [here](#).

Addressing

Preference	Global/Locked	Description	Recommended Setting
Group Member Display	Yes	In PoliteMail Online, this sets the maximum number of recipients that will display in the To: field.	Default value is 1000. The setting is more for clarity when viewing and does not impact performance.

Auto Save

Preference	Global/Locked	Description	Recommended Setting
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Auto Save	Yes	In PoliteMail Online, this sets how often the message being composed with auto-save . Note that Auto-save (API or Server > Sending > Auto Save) must be enabled by an Admin first.	Default value is 5 minutes. Options are for 10, 15, or 30 minutes.
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Editing

Preference	Global/Locked	Description	Recommended Setting
Default Campaign	Yes	Automatically assigns all measured messages to this campaign. May be overridden by user unless locked.	Use as the default if one campaign is used very often.
Default Template	Yes	Loads the current template when a new template is created with the PoliteMail Builder.	Use as the default if one template is used very often.
Embed Images	Yes	Embeds images into messages. Loads images with no connection but increases email size.	Keep this turned off for faster and smaller emails.
Enable Subscription	Yes	Writes a CAN-SPAM compliant footer into every new measured email message.	Use if required to add a footer to emails.
Override Word Count	Yes	Allows you to manually insert the number of words in a message, and bases metrics off this word count. If on, the overwrite word count prompt will appear every time before the message is sent.	Turn on when emails are written in multiple languages.

List Handling

Preference	Global/Locked	Description	Recommended Setting
Use Expansion Cache	Yes	Cache distribution lists, making them expand faster on subsequent openings.	Turn on for faster data retrieval.
Clear EWS Cache	Yes	Remove all entries from EWS cache. The cache is used to store list membership for 24 hours, without having to expand the list using Exchange Web Services.	Clear the cache for better performance.
List Expansion Methods Enabled	Yes	Sets the methods for expanding distribution lists.	Set by System Admin based on requirements.

Individual Settings

Preference	Global/Locked	Description	Recommended Setting
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Forget Client Credentials	No	Clears stored credentials for the next user.	Clear this for better performance and security.
Re-establish List Warnings	No	Re-enables previously suppressed warning dialogs for invalid list operations.	Keep on to be warned of failed or error operations.
Reset All Table Views	No	Restores column configurations and removes all filters.	User preference.
Monitor Multiple Inboxes for Undeliverables and Auto-Replies	No	If more than one inbox is used, click the Scan Inboxes button and select the inbox folders PoliteMail will monitor for auto-replies.	Recommended if more than one inbox is utilized.

Options

Preference	Global/Locked	Description	Recommended Setting
Delete any preflight messages older than... (new in v5.0)	Yes	Automatically deletes preflight test messages after the specified duration.	Preflights count in the final measurement reports and can create inaccurate data if many are sent. Turn on for the most accurate data.
Use Edge	Yes	Opens Edge browser instead of Internet Explorer for pop-up windows.	Turn off if Internet Explorer is used as the default browser.

Reporting

Preference	Global/Locked	Description	Recommended Setting
Report Maximum Comparison	Yes	Sets the maximum number of reports to compare in Comparison view.	Default is 10, but more than 3-4 becomes unwieldy.
Hide "Interactions by Geographic Location" section from reports.	Yes	Will remove the map from Metrics reports, hiding the locations of recipients.	Check if privacy is a concern, or if VPNs may make the location data inaccurate.

Sending

Preference	Global/Locked	Description	Recommended Setting
Allowed from address required	Yes	If the company requires approved senders for emails, the user receives a notification and a PoliteMail admin can approve the sending address.	Set by admin based on sending requirements.

Remind me to enable PoliteMail meas. when sending to lists with members >	Yes	Displays a warning with messages without measurement if the recipient count is greater than the specified number.	Recommended to prevent messages being sent with no measurement.
Measurement Default	Yes	Sets the default measurement mode. Can be changed by user unless locked.	Set to most commonly used measurement method.
Email me when large broadcasts complete and on the interval specified	Yes	Select how often to be notified on the progress of large sends.	Turn on to monitor large sends.
Suppress Auto-Replies limit	Yes	Automatically suppress auto-replies, such as out of office messages, when sending to a number of recipients greater than the selected limit.	Set based on your sending requirements and size of your lists.

Shared Mailbox Access

Preference	Global/Locked	Description	Recommended Setting
Shared Mailboxes Access (new in v5.2)	Yes	View the access to, and select from the list to access others.	Available mailboxes set by Admin.

4.9 User Preferences

Go to **PoliteMail > Account Settings > Preferences**. Please keep in mind that PoliteMail Preferences are user specific, and must be adjusted by each user before using PoliteMail.

Adjust as needed. PoliteMail recommends the following settings:

- **Tracking Default:** Set to the one you'll be using the most. If the Administrator has removed a tracking option, it will not appear here.
- **Enable Opt-Out (Subscription in v. 4.9+):** Uncheck this. You have the option to set specific DLs to have opt-out options in the sending mail settings.
- **Use Exchange Web Services to expand distribution lists:** Check this for fast data retrieval. If you are using PoliteMail v. 4.954+ you have the option to enable Fallback Expansion. Click all the options used to expand distribution lists.
- **Use Exchange Web Service Cache Files or Allow PoliteMail to cache distribution files?:** Check this for Fast Expand. PoliteMail will hold cached data for 24 hours, resulting in faster data retrieval.
- **Use EWS Server** if applicable.
- **Re-establish List Warnings:** In later versions of PoliteMail you have the option to disable list warnings. PoliteMail will send list warnings if it can't expand a distribution list, or if there are discrepancies with contacts.
- **Embed Images with Message:** Keep this unchecked, otherwise, attachments will increase your email size. Use PoliteMail's Add Image instead.

- **Hide PoliteMail Panel:** Keep unchecked for easy access to the PoliteMail Panel.
- **Language:** : Keep this unchecked unless you are planning to compose emails in more than one language.
- **Set a Default Template:** This optional feature will allow you to make one of your templates the default. When the user creates a new template with the PoliteMail Builder, the default template will be loaded. The Default Template will be denoted with a green box in the PoliteMail Builder.
- **Assign to Default Campaign:** If you have all your emails going to a specific campaign, it may be helpful to check this box. However, if you are planning on sending many different types of PoliteMail emails, keep it blank. You can always assign specific emails to a campaign in the PoliteMail New Mail settings.
- **Prevent Unintentional Sends:** This is very helpful in making sure you don't accidentally send an email without tracking on. By checking this and setting the recipient count parameter, PoliteMail will automatically scan your outgoing PoliteMail messages and ask you if you want to put tracking on if the recipient count is greater than the parameters you have set.
- **Automatic Undeliverable Contact Deletion:** Check this if you want contacts removed after a specified number of bounces.
- **Using More Than One Inbox?(Monitor Other Inboxes)** By default, PoliteMail will monitor your primary Outlook inbox folder for any replies, out-of-office messages and undeliverables related to tracked sends. If you are managing or sending from multiple mailboxes, you have the ability to let PoliteMail know to monitor those inboxes for incoming messages. Scroll down to **Using More Than One Inbox? > Add.** Select the secondary Inbox folder > **OK**

Note: This procedure will also work for those who have set-up Outlook rules to automatically move messages from the Inbox into designated folders. You can set your designated folder as one PoliteMail should monitor (instead of the Inbox).

If you have existing undeliverables you want tracked from those folders, select that secondary Inbox folder within Outlook, and use the PoliteMail > Process Undeliverables option to start the process.

After a bit of processing time, those messages should be removed from the inbox, tracked by PoliteMail, and moved to the PoliteMail Undeliverables folder.