

Creating a Campaign

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

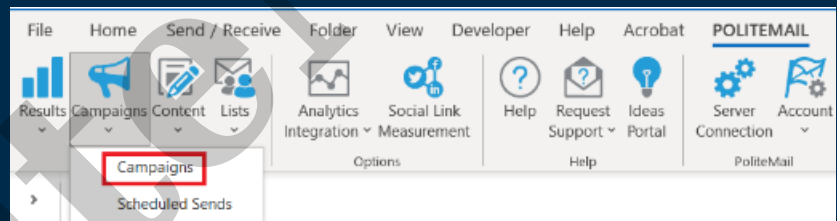
Version: ☒ 4.9 ☒ 5.0 ☒ 5.1+

Campaigns are a great way to group messages, providing you with key insights and the ability to measure metrics over time. For example, if you have multiple newsletters that you want to keep organized together, you can place them in a Campaign and measure the average of metrics from those messages in that Campaign over time. Any measured message can be added to a Campaign, including those with different measurement modes (Individual, Anonymous, Aggregate).

Creating a Campaign

You can create a Campaign either before or after you send a message.

1. To create a Campaign, go to the **PoliteMail** tab, click on the pull-down menu under Campaigns, and choose **Campaigns**.
2. Select **New** and then enter in a name for the Campaign. Then click the **Save** button.



Campaign

Campaign Name

Description

☒ Active

☐ Shared

Business

Unassigned

Region

Unassigned

Owner

Scott Rowland

Save

Cancel

Assigning Messages to Campaigns

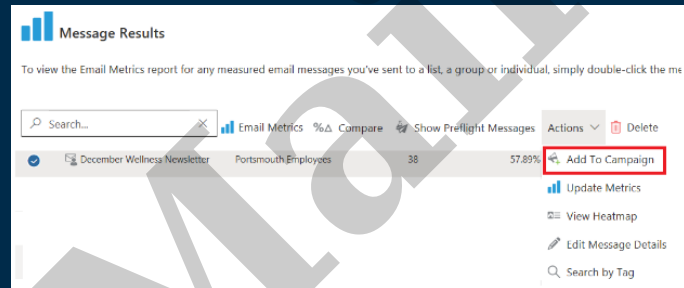
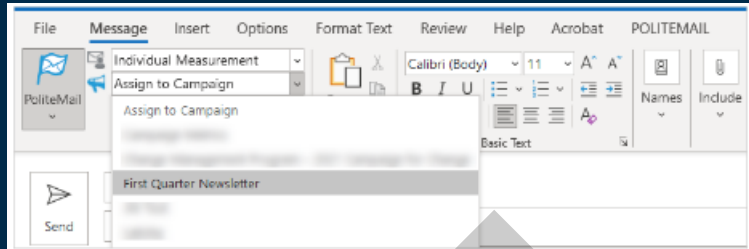
You can assign a message to a Campaign in two different ways:

1. Open a new e-mail. From the Message tab, turn measurement on and select **Assign to Campaign** to choose a campaign.

If you have set a default Campaign in your Preferences, this Campaign will appear when you turn measurement on. You are able to change it, if needed.

2. You can also navigate to **PoliteMail > Results** and select the message(s) you want to assign into a campaign. Select **Actions > Add to Campaign**

Select the campaign you want to add this message to, then click **Save**.



Sharing Campaigns

If you would like your Campaign to be available to all users, you will need to share it.

- **Version 5:** Click on the Campaign to open the Edit dialog window, and then check **Shared**. Click **Update** when finished. A circle icon now appears next to your Campaign, indicating that it is now shared. If you are using **Groups**, make sure you share the Campaign with your Group, or make it Unassigned if you'd like everyone to access it.
- **Version 4.9:** Click the **Edit** button on the far-right hand side. Now place a checkmark in the second column (bullhorn icon). Click **Update** when finished. A double arrow appears, indicating that the Campaign is now shared. If you are using **Groups**, make sure you share the Campaign with your Group, or make it Unassigned if you'd like everyone to access it.

Combining Campaigns

You can combine Campaigns by creating a new Campaign and adding the messages from each existing Campaign to the new one.

1. Create a New Campaign by going to **PoliteMail > Campaigns > Campaigns**. Now choose **New**. Name your Campaign. For this example, let's call it "Combined Campaigns."
2. Open your first Campaign. Select all the messages. Now go to **Actions > Add to Campaign** and choose "Combined Campaigns."
3. Now go to the second Campaign. Select all the messages. Now go to **Actions > Add to Campaign** and choose "Combined Campaigns." "Combined Campaigns" should show all messages from both Campaigns.