

# Surveys

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Applies To: ■ PoliteMail Desktop ■ PoliteMail Online ■ PoliteMail M365

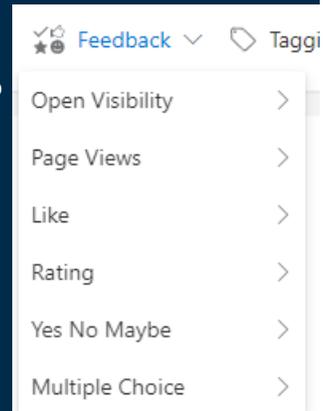
Version: ■ 4.9 ■ 5.0 ■ 5.1+

PoliteMail's feedback options include Open Visibility, ratings, and questions for simple polls. This article will discuss the rating, yes no maybe, and multiple choice options.

If you get an error saying "open visibility is not supported with the embed images feature", it means you have the "Embed Images" preference turned on. Go to **PoliteMail > User Preferences** and set "Embed Images with message" to False (in version 4.9 and lower, go to **Account (Settings) > Preferences** and uncheck "Embed Images with message"). Restart Outlook, and Feedback options should now be available.

## Adding a Simple Survey or Poll

1. Open a **New Message**.
2. Place your cursor in your new message where you want the feedback option to go. You can add feedback at any time.
3. From the PoliteMail ribbon, select **Feedback**. If you are using PoliteMail online, this is located in the toolbar next to Personalize.
4. Select which type of survey you would like to use (rating, yes no maybe, multiple choice).
5. You will be presented with a survey question dialog box. Type your question into the **Question** text box that pops up.
6. Click Add. You will receive a pop up that asks if you would like to make the survey a poll.
  - If using the poll function, the message recipient can see the vote tally immediately after clicking on the poll link within the message and will be able to change their response.
  - If you choose No, the user will be directed to a thank you page with no results shown. After making your choice, the survey option will be placed where your cursor is.
7. To change the text for the question or any of the answers, place your cursor within the text you want to change, **right-click** and select **Edit Hyperlink**. You can also highlight the text and change the font or color.
  - By default, you are limited to three (3) choices in surveys, but if you are comfortable modifying



HTML, you can adjust this accordingly.

8. Change the **Text to Display** field at the top of the menu.
9. Select **OK**.

**Note: DO NOT** change the Address at the bottom of the Edit Hyperlink menu. It will break the PoliteMail link.

## Viewing Survey Results

1. Select **Results > Messages**
2. Locate the sent message and **double-click** on the line to bring up the metric report. Scroll to the bottom of the report to view the survey/poll results

## Notes

- Message recipients can change a survey or poll answer at any time and the results will adjust accordingly. This won't count as an additional vote, it will simply override their previous answer.
- At this time, the survey feature does not include the ability for users to write in responses or comments. As the sender, you will be not be able to see how each user voted, even when using Individual measurement. PoliteMail keeps this information anonymized in order for this feature to be used with all 3 measurement modes.