

How do I connect my PoliteMail data to an Excel file?

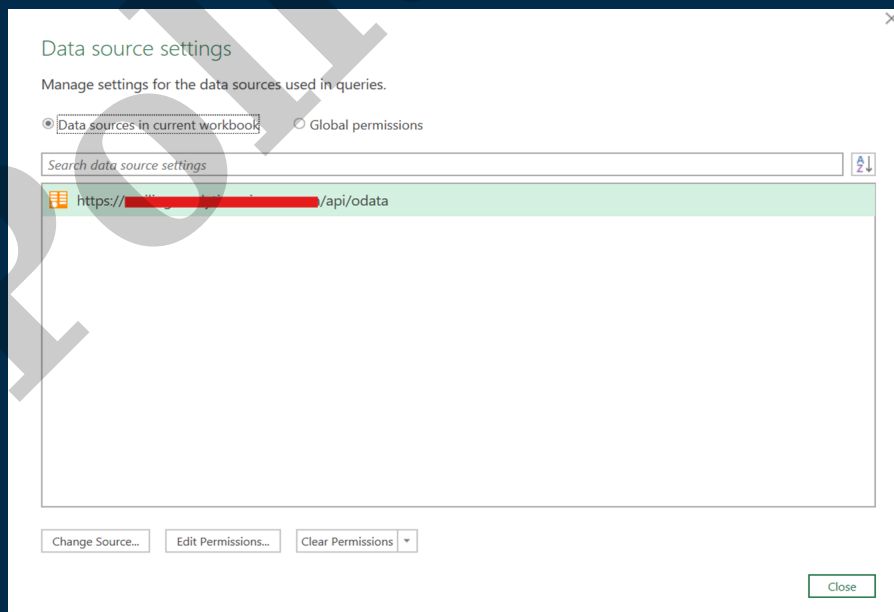
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Applies To: PoliteMail Desktop PoliteMail Online PMUA PoliteMail M365

Version: 4.9 5.0 5.05+

Currently, if you log into Excel your work account via Azure and SAML, the live data connector to PoliteMail will not function. This is because the certificate is inside the SAML50 Enterprise app in Azure, whereas Excel uses OAuth.

1. Log in to your PoliteMail for Outlook or PoliteMail Online account.
2. From Excel, open the [Data Source Settings](#) Excel file. If you do not have this file, contact your friendly PoliteMail sales representative and they can provide it for you.
3. In Excel, go to the Data tab under the Ribbon and select **Get Data > Data Source Settings**. A data source window will appear.



3. The window will list your available data sources.
 - The data source will be your PoliteMail service account hostname, which is a URL in the format `<https://hostname/api/odata>`, where "hostname" is the name of your PoliteMail server. Your

PoliteMail server name can be found on (and copied from) the PoliteMail app menu, under Server Connections.

- If the PoliteMail source is not listed, click the "Change Source" button and input your PoliteMail host name in the correct format as shown above, being sure to use the "https://" prefix, along with "/api/odata" at the end.

4. Click the 'Edit Permissions' button. You have three options to enter your credentials:

- [Preferred]** Effective with version 5.4 of PoliteMail, you can click on 'Organizational account', and then click "Sign In", which will use your Windows credentials to authenticate to the API. PoliteMail will receive your Microsoft token, and then verify the user of the token also has access to PoliteMail. Note, then, that your PoliteMail tenant must match the Microsoft user you are using.
- Login to PoliteMail and go to Account > Settings > [Tokens](#). Create a (+) new token, give it a name like AA-XLS File and set the expiration time (note, once it expires, you must create and input a new token to keep using the Excel file). Now copy this token, and return to Excel. Click on 'Basic' and paste the token in as your password. For the user name, input something like Advanced Analytics File, then click Save.
- If you login to PoliteMail with an email address and password, you can click 'Basic' and input your PoliteMail account email address and password as the credentials, then click Save. Note **this is not recommended if you are sharing the Excel file with others**, as anyone with the Excel file will be able to see your PoliteMail account credentials.

5. In Excel, go back to the 'Data' tab and click 'Refresh All' (or press Ctrl-Alt-F5) to load the data. It may take several minutes to load, or more if the data is large and the account has been active for several years.

That's it, you're connected!

The spreadsheet has three worksheets for Messages, Campaigns, and Business/Region data, so be sure to look around!

