Collaborative Editing

Last Modified on 10/01/2026 4:13 pm EDT

Applies To: ■ New PoliteMail ☐ Legacy PoliteMail

Version: ☐ 4.9x ☐ 5.0 - 5.4 ■ 5.45+

Collaboration in the Beefree Editor

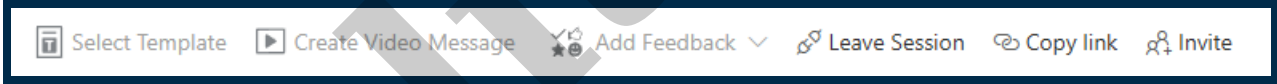
The Beefree Editor in PoliteMail allows for up to 20 users to edit a message concurrently! Each user can see which Content block each other users is currently in, and what is being entered, making group edits faster and more convenient.

Starting a Collaboration Session

A 'Start co-editing' button added to right of the toolbar at the top of the message, next to Feedback.



Once clicked, buttons display to end the session, copy the link, or invite others.



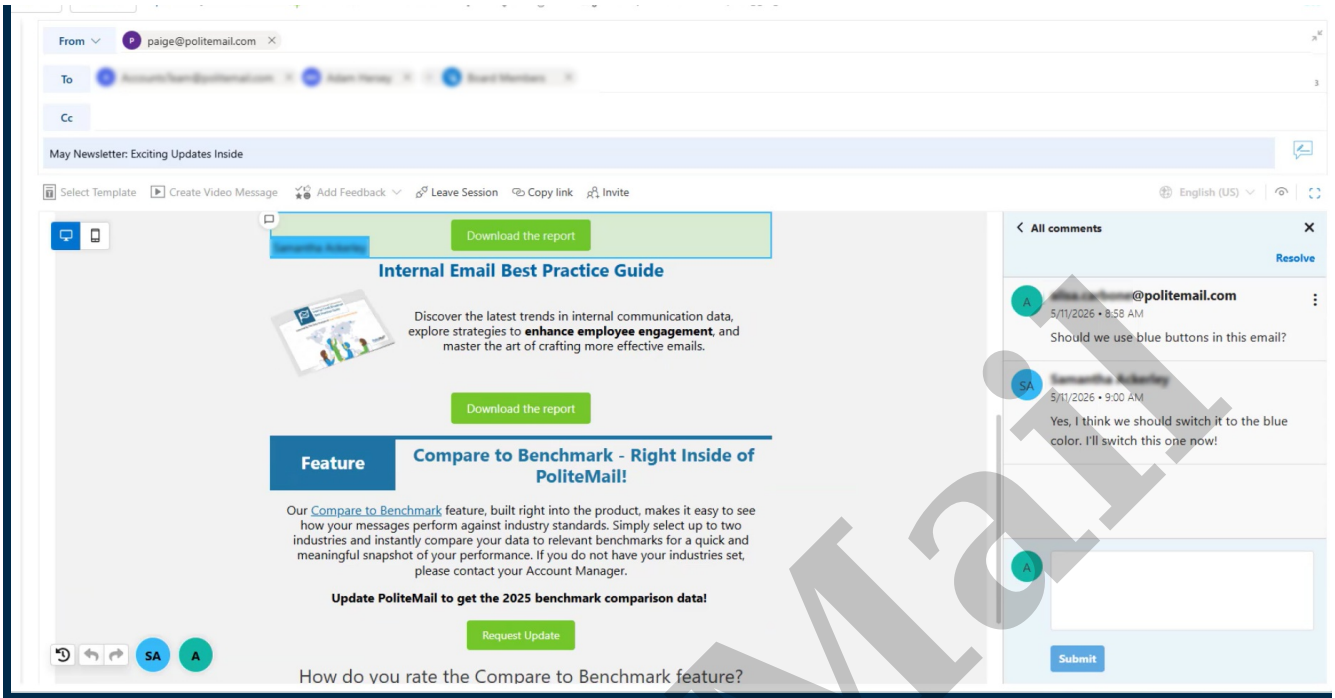
A user can start a collaboration session by copying and sharing a session link, or clicking 'Invite', which sends an email with a join button and a personalized note.

Users who join a session with have their avatars display next to the 'Start co-editing' button, at the bottom of the screen next to the History button, and their user name or email address will display in the row they are current editing.

Edit Tracking

In a collaborative session, click the History button in the bottom left corner to view a list of all actions, including who did what.

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Ending a Session

Any user participating in a collaboration can exit by clicking the 'End Session' button. PoliteMail will then save the Message as a Draft for that user in its current state. Some notes:

- Any other users in the collaborative session will continue in that session.
- Changes made after one person leaves the session will not be reflected in their message, and the collaborative history will no longer be visible (although they could be @mentioned in a Comment to see the latest version).
- Collaborative editing does not alter existing content sharing. Users save their own templates, and only those with appropriate permissions can continue editing or overwrite shared templates.

Features Temporarily Disabled During Collaboration

During an active collaboration session, some message-level features are temporarily disabled to prevent conflicts between users and ensure a stable co-editing experience. While collaborating, users will not be able to modify Tracking Mode, Campaign settings, Importance, Attachments, Send Options, or Tagging.

Additional features including Select Template, Create Video Message, Add Feedback, and Translation are also unavailable until the collaboration session has ended.

Once all users have exited the session, these features will become available again.

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