# Approval Workflow

Last Modified on 11/13/2026 7:34 am EST

**Applies To:** ■ New PoliteMail ■ Legacy PoliteMail

**Version:** ☐ 4.9x ☐ 5.0 - 5.4 ■ 5.45+

With approval workflow, users of PoliteMail can send requests for others to review their email message before they go out. This setting must be turned on by an Administrator to be made available.

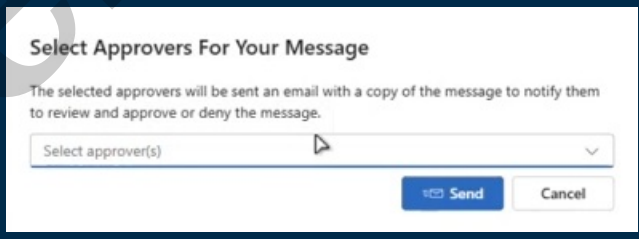
### Accessing the Approval Workflow

**NEW POLITEMAIL** The Send button has a drop-down that contains the option to Send for Approval.

**LEGACY POLITEMAIL** When composing a Message, a Send for Approval button may be found under the PoliteMail flag button.

### Sending for Approval

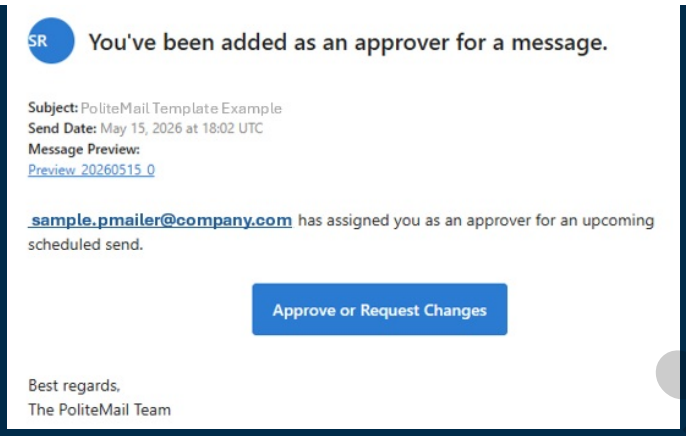
1. Once Sending for Approval is clicked, a window will appear to select the approvers. Any recipients can be added, even those outside of your organization or in a different domain.




> Approval workflow is intended as an easy way to get feedback from fellow users and increase confidence before sending, not to be some sort of compliance or corporate enforcement.

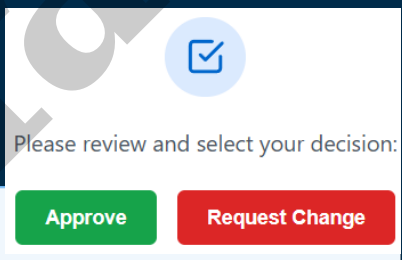
2. Select the users to send to for approval, and then click the Send button. Approvers will be notified via email, with the message included as an attachment for viewing. PM users will see a 'View Scheduled Sends' button to make the approval decision, while external approvers will instead see a 'Approve or Request Changes' button.

PoliteMail




## Approving or Denying a Message

**Internal Approvers.** Pending approvals may be found in the list of **Campaigns > Scheduled Sends**. To approve or request changes to a message, an 'Actions' column is available for view that contains an Approve or Request Change button.




If you don't see the 'Actions' column, click on any down arrow in a column heading to view all available viewable columns and select it.

**External Approvers.** Click the 'Approve or Request Change' button in the email you received. A window will then appear with a button for Approval or to Request Change.

- If Change Requested, a window will appear to enter any remarks and send to the requester.
- If Approved, no comments are needed, and a window will display showing the approval has been sent.

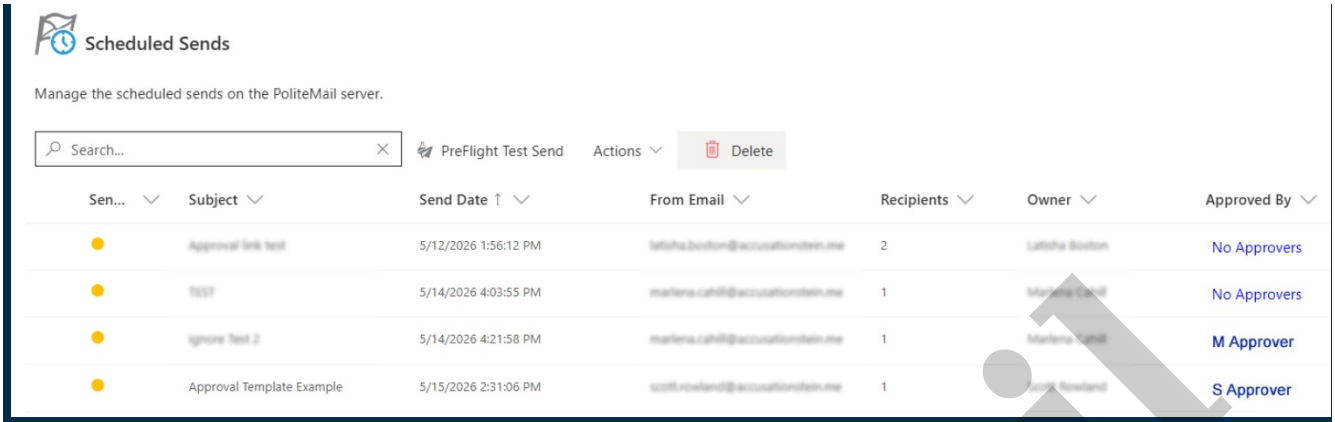
## Receiving Approvals or Denials

- The author is notified via email of any approval decision. In addition, the status of the approval workflow can be viewed at any time in the Scheduled Sends list.
- If changes are requested, the Status icon in the list will display in red. An approval update will then also show in the Scheduled Sends list for the author to read.
- If Approved, the Status icon will display green.
    - **If all reviewers have approved the message, the Message will automatically send if it is not Scheduled**. Otherwise, a message is sent to the author to let them know.
    - If not all reviewers have approved it yet, the Status icon will be grey to indicate partial approval, and no message will be sent to the author.

## Viewing the Audit Trail

- Both the Scheduled Sends and Results list have a 'Approved By' column that can be displayed. Clicking on the field in that column will open a full audit history that shows all approvals and denials, with all comments. This can even be exported as a .csv for more in-depth review if needed!
- The Metrics report also has a new Approved By field under the From and To fields.

PoliteMail




## Notes

- Approval workflow is available in any edition of PoliteMail, and on either the PoliteMail Builder or Beefree.
- Approval workflow works with both regular as well as Scheduled sends.
- Any edits or changes to the message will reset the approval workflow; all prior approvals are erased, and new approvers can be added and will be notified. If extensive edits need to be made, we suggest using Collaborative Editing first (if using Beefree).
- All approvers must approve the message before it can be sent. However, to ensure a message is not held up just because, for example, an approver is out on vacation, an author can always cancel the message and either resend to different approvers, or send without using the approval workflow at all.
- Approval workflow is available only when sending via PoliteMail server or Graph, not the Outbox.

PoliteMail