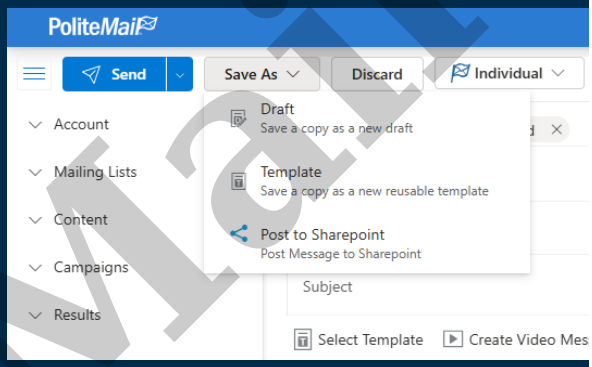
Post to SharePoint

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Applies To: ■ New PoliteMail ☐ Legacy PoliteMail

Version: ☐ 4.9x ☐ 5.0 - 5.45 ■ 5.50+

The **Post to SharePoint** feature lets you publish a PoliteMail Template or Draft to a SharePoint site as a site page. It is designed for sharing or archiving newsletter content with people who have access to the selected SharePoint site.



Overview

Use Post to SharePoint when you want to make a Message available outside the recipient's inbox. For example, you can publish a monthly newsletter to a SharePoint communications site, then share the resulting SharePoint link in an email, Teams message, or other internal communication.

When you export a Message:

- PoliteMail creates a self-contained exported version of the email content.
- The exported content is posted to the selected SharePoint site.
- PoliteMail provides a SharePoint link after publishing.
- Anyone with access to that SharePoint site can open the posted content.
- Images included in the export remain available even if the original images are later removed from PoliteMail.

> The export creates a **static snapshot** of the draft at the time it is posted. Changes made to the original PoliteMail draft after export do not automatically update the SharePoint version.

The Post to SharePoint feature is best suited to publishing an accessible, shareable copy of a newsletter or email draft. It is not a replacement for sending tracked email, managing SharePoint documents, or administering SharePoint audience permissions.

For content that requires analytics, personalization, attachments, or ongoing updates, consider maintaining the primary experience in the appropriate system and using the SharePoint export as an archival or supplemental publishing option.

Posting a Message to SharePoint

Either a Draft or a Template can be exported! To export a Message:

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1. Open the Message you want to publish.
2. Select **Post to SharePoint** under the 'Save As' button.
3. Choose the target SharePoint site.
4. Enter a name for the SharePoint page.
5. Complete the export.

After the export succeeds, PoliteMail displays or provides the link to the new SharePoint page. Copy that link to share the published content with your audience.

Export Formats

The file format used for the export depends on the email editor used to create the draft.

Email editor	Format	Notes
Beefree	PDF	The email is exported as a PDF, which helps avoid additional message metadata.
PMB for PMO	MSG	The email is exported as an Outlook MSG file, with HTML content included as needed.

PoliteMail converts the draft before posting it to SharePoint. The converted file includes the email content and embedded images so that it functions as a self-contained exported item.

Images

Images are embedded in the exported file whenever possible. As a result:

- Exported images should continue to display after publishing.
- Removing an image from PoliteMail after the export does not remove it from the SharePoint copy.
- Secure images are embedded to help prevent authentication-related image-display issues.

Requirements and Permissions

The SharePoint export uses delegated Microsoft Graph permissions. To post content successfully, the user must have sufficient rights on the destination SharePoint site.

Users need **edit-level permissions** for the selected site. View-only access is not enough.

Site permission	Expected result
Edit or higher	User can authenticate and publish content to the site.
View only	Export fails because the user cannot create or update content on the site.

If PoliteMail cannot access the selected site with the required permissions, it will inform the user during authentication or export. If you receive a permissions error:

1. Confirm that you selected the intended SharePoint site.
2. Verify that your SharePoint account has edit rights on that site.

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3. Ask the site owner or SharePoint administrator to grant the necessary access.

4. Reauthenticate in PoliteMail if prompted, then try the export again.

Both Microsoft Graph and SharePoint permission levels may affect the result.

Limitations

Attachments are not transferred from PoliteMail to SharePoint as part of the export. If an attachment should be available to SharePoint visitors, the attachment should be uploaded separately to the SharePoint library, and a link to it added in the exported message.

Dynamic Content will be replaced with a generic placeholder such as the field name.

Actionable cards and other dynamic or interactive email-only experiences are not supported in the SharePoint export. The posted content should be treated as a static PDF or MSG representation of the email.

Measurement and Tracking is not supported in SharePoint-posted content. This is by design since exporting sent content that contains tracking elements could create inaccurate or misleading measurement data, so tracking-related content should be reviewed before it is posted. This means:

- Views of the SharePoint-posted content do not create PoliteMail read metrics.
- Links in the export are not encoded for PoliteMail click tracking.
- No PoliteMail analytics are available for people who view the content from SharePoint.
- Exported content should not be used as a way to extend email measurement to SharePoint visitors.

Expired Messages will not be automatically removed from SharePoint. If content needs to be removed after publishing, a site owner or authorized user must manually delete or unpublish it from SharePoint.

Best Practices

Before publishing, use the following checklist:

- Confirm that the draft contains final, approved content.
- Verify that dynamic-content placeholders have been replaced where required.
- Check that all images display correctly in the draft.
- Confirm that the user performing the export has edit permissions on the destination site.
- Plan to upload any required attachments separately to SharePoint.
- Review links and measurement-related elements before exporting content derived from a sent item.
- Record or share the generated SharePoint page link after publishing.
- Remove SharePoint content manually if it later expires or becomes outdated.

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