

# Quick Start Guide



Create



Send



Measure

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# The PoliteMail Interfaces

Starting with version 5.0 of PoliteMail, you have three different ways to use the PoliteMail application:



**PoliteMail for the Windows desktop** is the original edition of PoliteMail, accessed directly from within Microsoft Outlook, using the original COM add-ins.



**PoliteMail for Microsoft 365** is an edition of PoliteMail that is built into the “new Outlook”, also known as Outlook for M365 or Outlook.com which uses a Modern add-in instead of a COM add-in.



**PoliteMail Online** allows you to send measured messages outside of the Outlook environment, while still accessing your distribution lists.

Find out more about the capabilities of each edition of PoliteMail [here!](#)

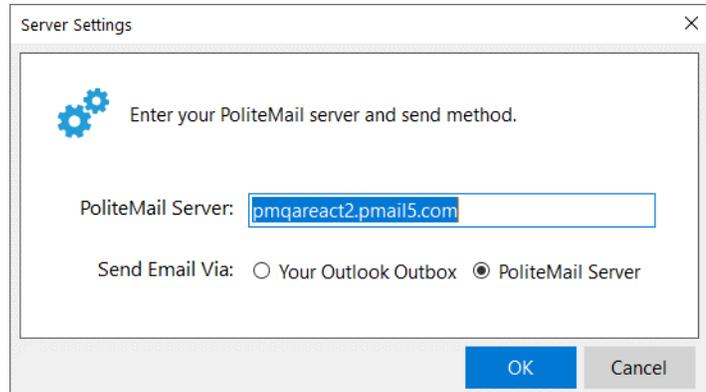


# Get Connected

**DESKTOP** Before you can start sending and measuring email messages, you must first activate the PoliteMail software and connect to the PoliteMail Server. If you are using Single Sign-On as a connection method, please contact your IT department for help signing on. If you are connecting using Password Authentication, please follow these steps:

## Activating and Connecting

1. You will receive an email entitled, "Your PoliteMail Account is Ready." Click the client.exe file to download and install PoliteMail. Restart Outlook.
2. PoliteMail will then ask you to establish a connection with your server. If this does not happen automatically, select the PoliteMail tab and click Server Connection.



The PoliteMail Server Settings dialog opens.

3. In the PoliteMail Server field, enter the URL for the server you are connecting to (if you have multiple servers, you can select the one you want from the drop-down). Send Email Via should be set to PoliteMail Server. Click OK.
4. Enter the PoliteMail email address that was included in your welcome email. Click Next.
5. In the Password field, enter the password that you received from PoliteMail Customer Support. Click Sign in.
6. You will be brought to the Account page and asked to change your password. If you are not brought to the Account page, please contact Support ([serversupport@politemail.com](mailto:serversupport@politemail.com))

**ONLINE** Accessing PMO is as simple as entering your PoliteMail server name in your browser! Your server name is what you enter when logging into PoliteMail, such as <https://yourcompany.pmail5.com>.

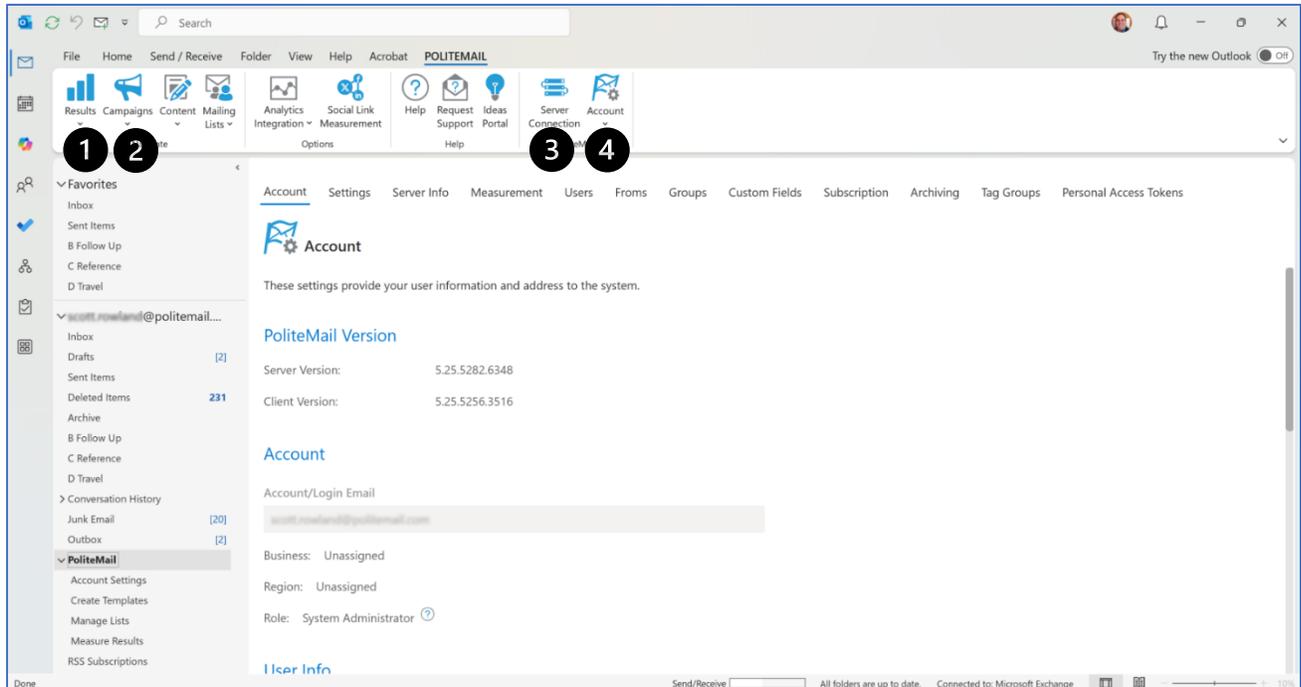
From there, a window will appear for you to enter your credentials like normal. Note that your organization must make PMO available for you to access it. Contact your PoliteMail admin if you have any questions.

**M365** Your organization's IT team will create a manifest to deploy PoliteMail to you. This is coordinated between IT and PoliteMail, so if you do not have access, please contact your IT team.

*Sending Email via the PoliteMail Server not only overcomes list size as well as ISP send volume limitations but will send email much faster.*

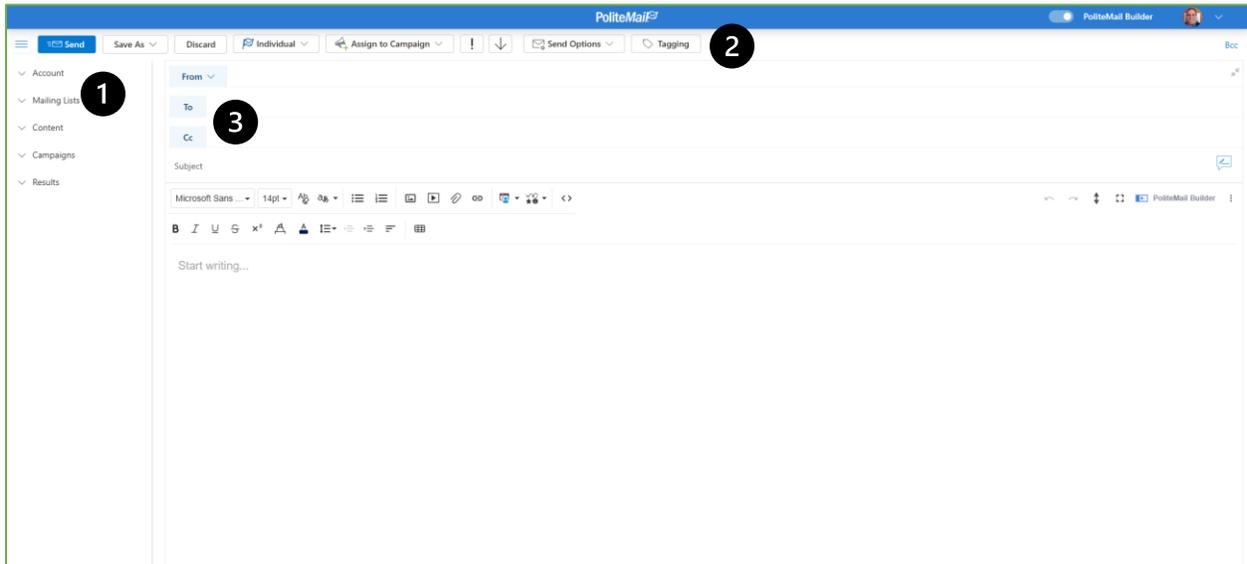
# The PoliteMail Layout

**DESKTOP** PoliteMail will add a 'POLITEMAIL' tab to the Outlook interface, which provides access to account setup, list management, templates, and results reports.



- 1 View in-depth metrics reports on your messages and campaigns!
- 2 Store all your images, templates, links, Smart Attachments and more on the PoliteMail server using the Content button.
- 3 PoliteMail only sends from your Outbox or direct to Exchange/Graph, so your outgoing email is authentic.
- 4 View your PoliteMail settings and set your preferences.

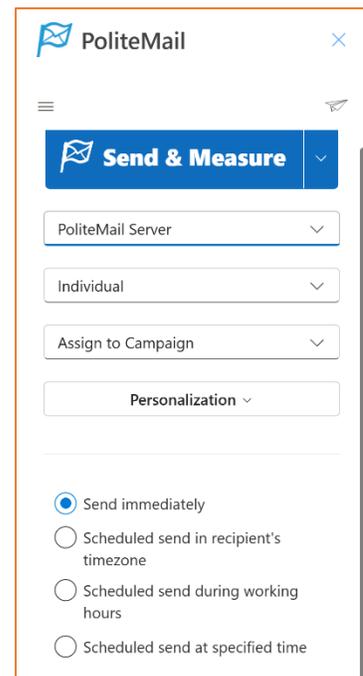
**ONLINE** PMO is not constrained to the Outlook structure and so has a different layout that makes the PoliteMail functionality easier to access:



- 1 Your account preferences, mailing lists, content, campaigns, and results can be found along the left panel, instead of in a Ribbon like in Outlook for the Desktop.
- 2 The top bar contains options that you would find when creating a message in Outlook for the Desktop.
- 3 Clicking the To or Cc button accesses your distribution lists.

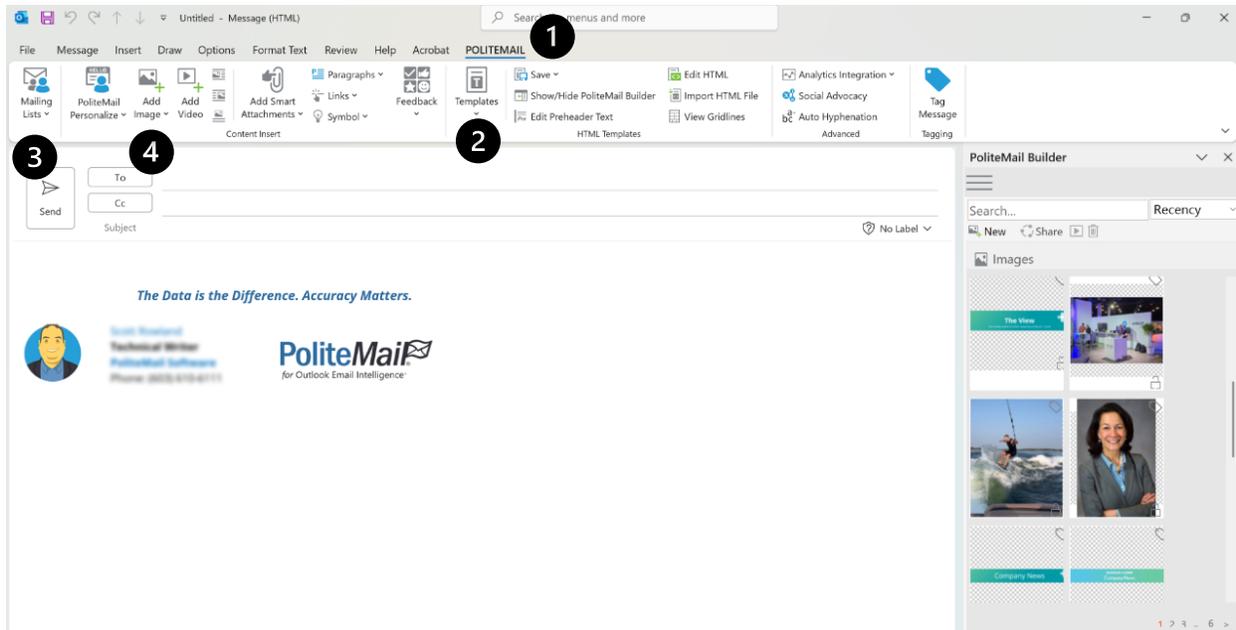
**M365** All PoliteMail functions are in the right panel, which can be opened by clicking the PoliteMail icon in the Add-Ins section of the Ribbon toolbar.

- 1 Access your content by clicking on the hamburger button (≡) in the top left.
- 2 Select your server (PoliteMail, Outlook Outbox, or Graph) to send with – we recommend PoliteMail for the best speed of delivery.
- 3 PoliteMail for M365 does not currently display metrics, but you can find an option to easily switch over to PoliteMail Online to access these features when you need them.



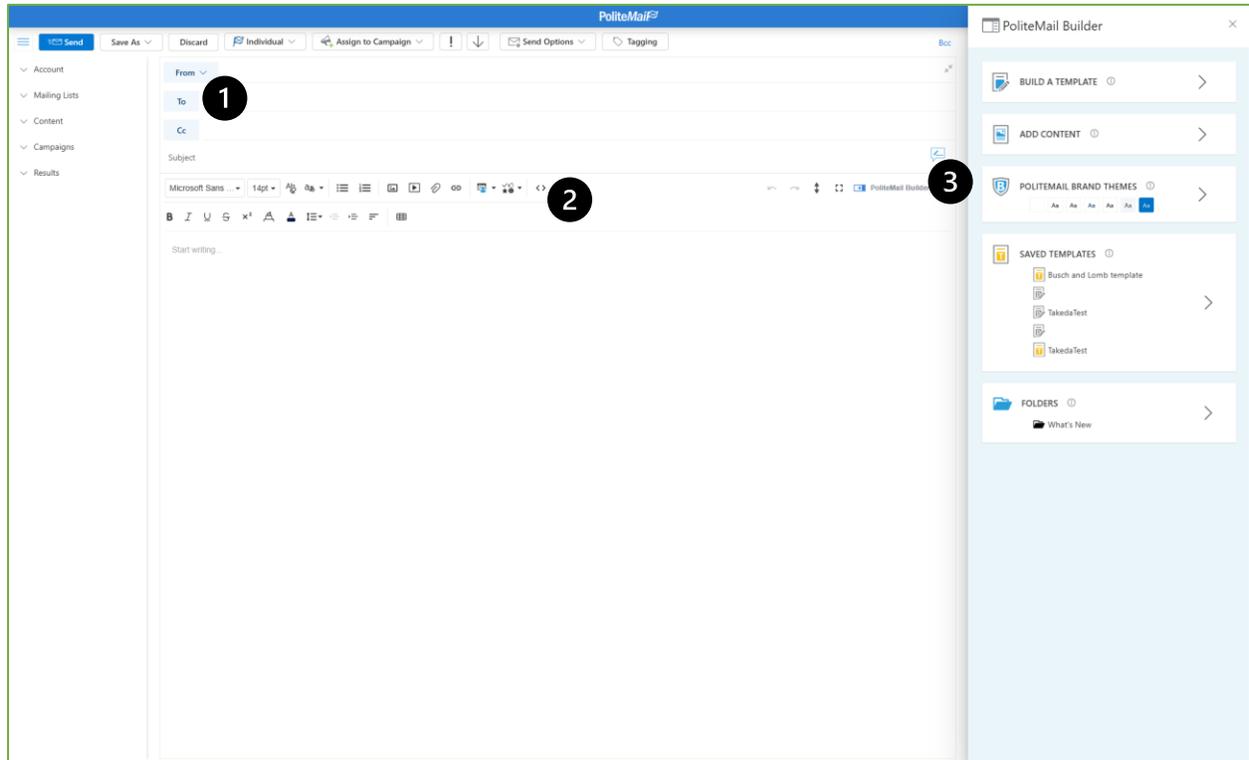
# Creating & Sending a Message

**DESKTOP** Click the button to compose a new message in Outlook, just like you always do. Click the PoliteMail flag in the Ribbon to measure the message you are creating. Each recipient will receive an individualized message as if you had sent the message to each person one at a time. Only one email item is stored in your Sent Items folder to save space.



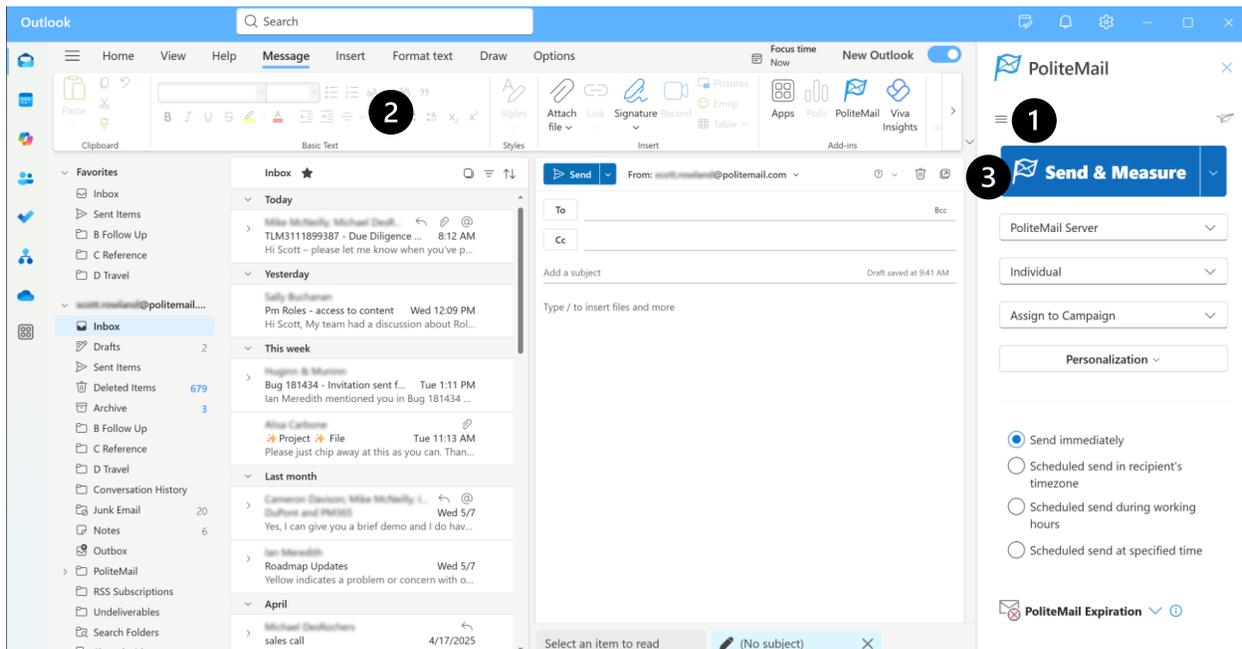
- 1 Click the PoliteMail tab while you are creating a message to use all the PoliteMail editing functions including personalization, graphics, creating and saving templates and more.
- 2 Easily reuse and share content with the Templates button for fast access to your saved email templates and content.
- 3 Click the Mailing Lists button to display mailing lists and select a PoliteMail list you have created or imported to add it to the To: field.
- 4 Storing your images, links, and attachments in PoliteMail keeps your email message sizes nice and small. You can create your own professional-style HTML email using the drag-and-drop PoliteMail Builder.

**ONLINE** When PMO opens, you can start entering in your recipients and/or lists and simply start typing your message right away. Just as with the desktop edition of PoliteMail, each recipient will receive an individualized message as if you had sent the message to each person one at a time.



- 1 Access your address book and distribution lists by clicking the To button.
- 2 Use the toolbar to format your text and add your elements such as images, video, links, and Smart Attachments.
- 3 The PoliteMail Builder button gives you fast access to your content and Templates. The PoliteMail Builder in PMO has a newer look and a few more features than the desktop edition, but you'll still be able to access your content.

**M365** Click the button to create your message just like you always do. Click the PoliteMail button in the Add-Ins section of the Ribbon to open the PoliteMail pane.



- 1 Access your content and Templates by clicking on the hamburger button (≡) in the top left.
- 2 Format your message using the Outlook tools you always use.
- 3 When you're ready to send, use the big blue Send & Measure button in the PoliteMail pane instead of the send button in Outlook.

## What Else Can I Do?

A lot, really, and we are always adding more and making the platform more refined. Here's a list of the most common tasks, with a link to the most recent information in our Knowledge Base:

Action	Link	
Add an Image	<a href="https://help.politemail.com/help/adding-images">https://help.politemail.com/help/adding-images</a>	
Personalize a Message	<a href="https://help.politemail.com/help/adding-personalization">https://help.politemail.com/help/adding-personalization</a>	
Add Measurable Links	<a href="https://help.politemail.com/help/links">https://help.politemail.com/help/links</a>	
Add Measurable Smart Attachments	<a href="https://help.politemail.com/help/smart-attachments">https://help.politemail.com/help/smart-attachments</a>	
Use a Template	<b>Desktop:</b> <a href="https://help.politemail.com/help/how-do-i-create-a-template-in-politemail">https://help.politemail.com/help/how-do-i-create-a-template-in-politemail</a> <b>PMO:</b> <a href="https://help.politemail.com/help/politemail-builder-2">https://help.politemail.com/help/politemail-builder-2</a>	
Import HTML into a Template	<a href="https://help.politemail.com/help/html-import">https://help.politemail.com/help/html-import</a>	
Test a Message Before you Send It	<a href="https://help.politemail.com/help/preflight-test-send">https://help.politemail.com/help/preflight-test-send</a>	
View a Metrics Report	<a href="https://help.politemail.com/help/understanding-metrics">https://help.politemail.com/help/understanding-metrics</a>	
Import and Send to a Distribution List	<a href="https://help.politemail.com/help/distribution-lists">https://help.politemail.com/help/distribution-lists</a>	

## Stuck?

If you are experiencing technical issues with your PoliteMail account, please reach out to our technical support team.



Request  
Support

**DESKTOP** Click the Request Support button in the PoliteMail tab of the Ribbon toolbar.

**ONLINE** Click on your avatar in the top right corner, and then click the **Request Support** icon.

**M365** Open the PoliteMail panel by creating a new message and clicking the PoliteMail button in the Message tab of the Ribbon. Click the hamburger button in the PoliteMail pane on the right. Go to **Settings > Request Support**.

This will generate an email with your account information and an error log for our technical support team to use in troubleshooting the issue. Enter a brief synopsis of the issue you are experiencing and screenshots if applicable.

Once you send the message, a case will be created for your support request and our support team will respond.

You can also reach out via email at [serversupport@politemail.com](mailto:serversupport@politemail.com).

