ContactMonkey Sending Checklist

Before you hit "Send" and distribute your important communications, use this checklist to ensure everything is perfect.

Before you send:

☐ **Select your Email Design:** Import the finalized, reviewed, and approved email into your email using the arrow.
  - **Remember**: Changes made in Outlook will *not* be saved when sending.

☐ **Insert Subject Line:** Is your Subject Line clear, compelling, and ready to go? A subject line is always required.

☐ **Select Tracking Type:** Make sure you've selected the appropriate tracking type for your email. Click here to read more about tracking.

☐ **Send a Test:** Click "Preview" to send a test to yourself and/or colleagues before sending to your recipient list. This gives you the chance to preview the layout without tracking engagement.

☐ **Add your Recipients:** Once you're satisfied with your test, add your distribution list(s) to the "To" field in Outlook, or import your CSV file. You can also add contacts individually.

☐ **Verify your "From" field:** If you're sending as another user or shared mailbox, ensure your "From" field is correctly set.

Ready to send!

☐ **Click "Send":** This is the most important step! Your email's HTML is automatically preserved, and trackers are inserted.

☐ **Or, Schedule for Later:** Click here for instructions.

Contact Monkey