ContactMonkey Sending Checklist

Before you hit "Send & Track" 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.
- [ ] **Send a Test:** 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.
- [ ] **Insert Subject Line:** Is your Subject Line clear, compelling, and ready to go? A subject line is required for your email to send.
- [ ] **Select Tracking Type:** Make sure you've selected the appropriate tracking type for your email. Click here to read more about tracking.
- [ ] **Add your Recipients:** Add your Distribution List to the "To" field in Outlook, import your CSV file, or select your Contact List(s).
- [ ] **Count Recipients:** Click "Count Recipients" to confirm the number of recipients ContactMonkey can detect. If you have inaccurate results, click here to read about List Expansion methods.
- [ ] **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 & Track":** This is the most important step! Always use the "Send & Track" button in the ContactMonkey sidebar. This ensures your email's HTML is preserved and trackers are inserted.
- [ ] **Or, Schedule for Later:** Select the clock icon and click "Schedule" to set a future send date and time. Your email will send automatically, even if Outlook is closed.

Contact Monkey