

ContactMonkey Sending Checklist

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

Before you send:

- ☐ **Select your Email Design:** Click "Choose from library" to import the finalized, reviewed and approved email into your email.
- ☐ **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.
- ☐ **(Optional) Insert Attachments:** Select files totaling up to 10MB from your computer to include in your communication.
- ☐ **Select Tracking Type:** Make sure you've selected the appropriate tracking type for your email in the "Additional Settings" section. [Click here to read more about tracking.](#)
- ☐ **Add your Recipients:** Select how you want to add your recipients: individual address(es), CSV upload, List Management Contact List(s), or Azure list(s)
- ☐ **Verify your "From" field:** If you're sending as another user or shared mailbox, ensure your "Send from" field is correctly set.

Ready to send!

- ☐ **Click "Send now":** This is the most important step!
- ☐ **Or, Schedule for Later:** This option allows you to set a future send date and time. Your email will send automatically, even if you've closed your dashboard.

