

Testing your email

Preview

Previewing a message is a great way to verify the message you are about to use is correct and to instantly see the changes you have made to the message without the editor in the way.

This step is especially useful if you are using personalization/dynamic content as it provides a great way to verify that the logic and variables you used will work with the data you have collected for your contacts.

You can also view your envelope information by clicking on the "Envelope" expanding area above the preview pane.

If you **do not have** any personalization/dynamic content in your first email, simply use this step to proofread your content and move on to "Send Test Emails" below.

If you **do have** personalization/dynamic content, trying the following options:

Enter test values manually

We recommend trying to type in a few different values, some in ALL CAPS, some in all lowercase, to see how your content reacts to the data.

Click "Refresh Preview" to apply the data to the template.



Try selecting a contact you have to use real data



When selecting contacts, you have access to the following options:

DataMart fields - Add/remove different DataMart fields from the contact grid on the right side of the screen to see additional data and use filtering/sorting to find the contacts you

need.

Select contacts - Click the checkbox next to the contacts you want to use for previewing.

Click "Done" when you have selected the contacts you want. Then click the contact you want to use for previewing and it will load their data into the fields.

Click "Refresh Preview" to update the template.

Send Test Emails

Testing your messages is a very important process in quality assurance. We recommend thoroughly testing every message that you set up. Below are the steps necessary to send out test messages.

Selecting your recipients

By default, CONNECT allows you to send a copy of your email to the email address associated to your user account. You can also add in additional recipients to receive the test message.

We recommend starting with "Test recipients" as you can set them up right within the message instead of navigating to the Target screen (Stakeholders/Test Accounts)

Managing test recipients

To get started, we'll add one test recipient for you to test with.

1. Click the "Manage test recipients" button
2. In the pop-up window, click "Add recipient"



3. Fill in the fields provided (Some fields can be left blank if required. The email field is required.)
4. Click "Finish" (Or feel free to keep adding more if needed)
5. Click "Done"
6. Select the recipient(s) you added to receive the test message



Ignore the other settings for now. They will be covered in greater detail later.

Type in a Prefix for the Subject Line to Track Versions

Although this step is technically optional, it's a step we recommend you get in the habit of using, especially if you are sending test messages to multiple people and expecting feedback.



- This option allows you to save a value in the Test step so that if you make changes later, you can change the version and that version will appear in the subject line.
 - **Example:** Test - V1 - Subject line goes here

Finish by clicking Send



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