Previewing Emails

> **Note**
> Using the preview mode lets you see how the emails are viewed on different desktop and mobile providers.

1. On the left navigation, click **Email Marketing > Emails**.
2. Locate the email you would like to test then click **Actions > Edit**.
   - A new page appears.
3. On the right side, click **Settings**.
4. Verify the following:
   - ☐ The email has the correct thumbnail.
   - ☐ The correct tags are listed.
   - ☐ The email is in the correct folder(s).
   - ☐ Make sure the name of the email and description are spelled correctly.
   - ☐ Your subject line is correct.
   - ☐ Your pre-header text is correct.
   - ☐ Verify that the co-marketing partner is able to be selected if it is a co-marketing email.
   - ☐ Any editable/non-editable areas for the user are defined.
5. At the top of the page, click **Preview > Enter** preview mode.
   - A new page appears.
6. On the left side of the page, click between Basic and Inbox previews.
   - **Basic –** Test the email, view as a PDF, and allows you to set testing variables.
   - **Inbox –** Shows you how your email looks when opened on both desktop and mobile email providers.
7. At the top of the page, click **Set Test Variables**.
   - A pop-up box appears.
8. Fill out the settings and click **Save Test Variables** once complete.
9. At the top of the page, click **Send Test Email**.
   - A pop-up box appears.
10. Choose the recipient of the email and click **Send Preview**.

Double-Check Your Email

Before sending, verify the following:

- ☐ If there is an approval needed:
  - o All parties that need to approve the email get the approval notification email after it is scheduled to send.
  - o Verify that the email gets sent and the approval has been completed.
  - o Make sure the email does not get sent if the approval is not confirmed.
- ☐ Check the subject line for content, spelling, and grammar.
- ☐ Verify any dynamic templates (recipient first name, last name, phone numbers) are working correctly.
- ☐ Make sure the images are correct, including any hyperlinks and alternate text.
  - o Check images to make sure that they are not blurry.

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- ☐ Proofread the text for spelling and grammar errors.
    - o Ensure headlines, fonts, and text sizing are all correct and email-safe.
    - o Verify that all fonts are email-safe fonts.
- ☐ Make sure any/all hyperlinks are active.
- ☐ Check the email signature to make sure it is pulling in the user's information properly.
- ☐ Verify that the co-marketer information is at the bottom of the email if it is a co-marketing email.
- ☐ Check for the correct brand colors.
- ☐ Check alignment of all assets in the email.
- ☐ Disclaimers are correct at the bottom of the email.

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