



a *Jonas* Software Company

Email Marketing Training

Send Your First Email

Email Marketing Training

Courses

1. Managing Contacts and Lists in the Email Marketing Tool
2. Create your First Email
- 3. Send your First Email**
4. View tracking reports for your First Email

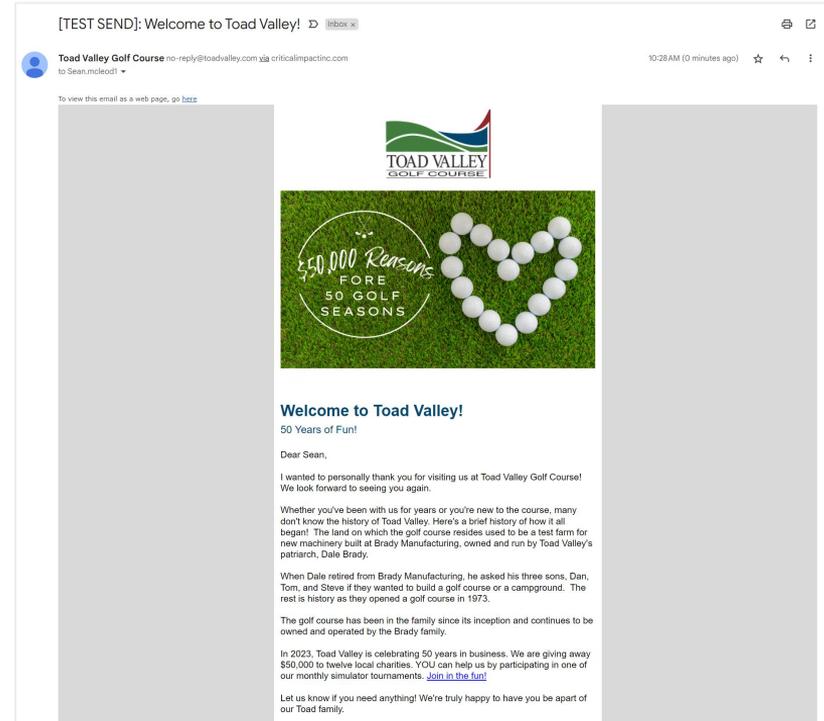
Send Your First Email



Send Your First Email

Test Send

Please make sure to test before making a live send. Different email clients render HTML in different ways, so you'll want to send yourself test emails before sending a live email message to your subscribers.

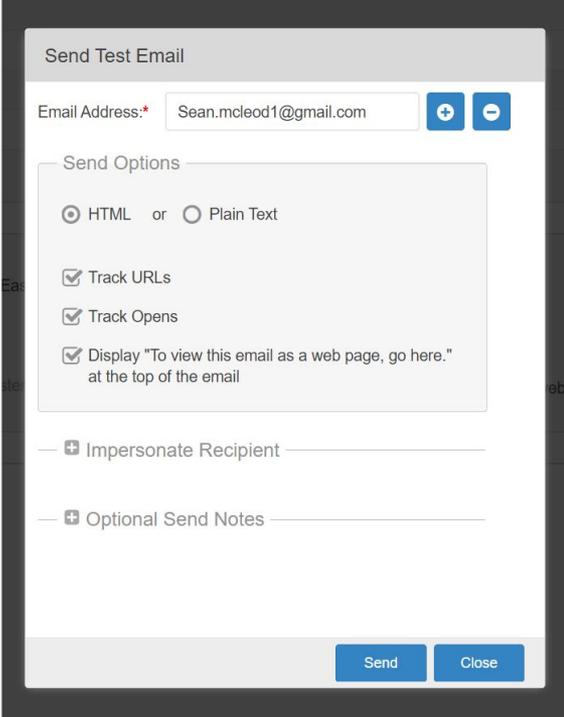


Send Your First Email

Test Send

To send yourself a test message:

1. Open the message in the Messages folder
2. Click the Test button in the top right corner of the message editor
3. Enter your email address (up to 5 test emails can be sent from this window)
4. Optional Features
 1. Impersonate Recipient: enter a subscriber's email address in order to receive this test send as if you were that subscriber. It will populate the mail merge variables with this subscriber's information
 2. Add a Note that will be added to the top of the test messages
5. Click Send



The screenshot shows a 'Send Test Email' dialog box with the following elements:

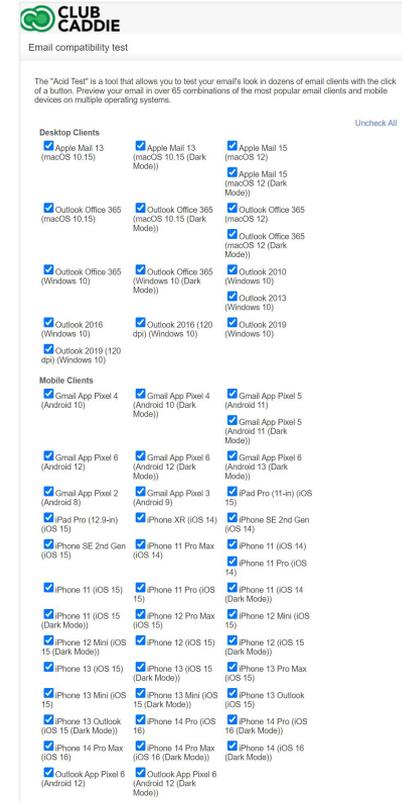
- Title:** Send Test Email
- Email Address:** A text input field containing 'Sean.mcleod1@gmail.com' with '+' and '-' buttons to the right.
- Send Options:** A section with a title bar and a light gray background containing:
 - Radio buttons for 'HTML' (selected) and 'Plain Text'.
 - Checkboxes for 'Track URLs', 'Track Opens', and 'Display "To view this email as a web page, go here." at the top of the email'.
- Impersonate Recipient:** A text input field with a '+' icon on the left.
- Optional Send Notes:** A text input field with a '+' icon on the left.
- Buttons:** 'Send' and 'Close' buttons at the bottom right.

Send Your First Email

Run an Inbox Preview

The Inbox Preview tool lets you view screenshots of your email in 65 combinations of the most popular email clients and mobile devices.

Unlike web browsers, email clients are far more strict when it comes to HTML and CSS standards. Just because your email renders properly in a web browser does not mean it will render correctly in every inbox. Our service allows you to preview your email in 8 operating systems, 6 web browsers, and 32 email clients - all within one click.



The "Acid Test" is a tool that allows you to test your email's look in dozens of email clients with the click of a button. Preview your email in over 65 combinations of the most popular email clients and mobile devices on multiple operating systems.

Uncheck All

Desktop Clients

- Apple Mail 13 (macOS 10.15)
- Apple Mail 13 (macOS 10.15 (Dark Mode))
- Apple Mail 15 (macOS 12)
- Apple Mail 15 (macOS 12 (Dark Mode))
- Outlook Office 365 (macOS 10.15)
- Outlook Office 365 (macOS 10.15 (Dark Mode))
- Outlook Office 365 (macOS 12)
- Outlook Office 365 (macOS 12 (Dark Mode))
- Outlook Office 365 (Windows 10)
- Outlook Office 365 (Windows 10 (Dark Mode))
- Outlook 2010 (Windows 10)
- Outlook 2013 (Windows 10)
- Outlook 2016 (Windows 10)
- Outlook 2016 (120 dpi) (Windows 10)
- Outlook 2019 (120 dpi) (Windows 10)

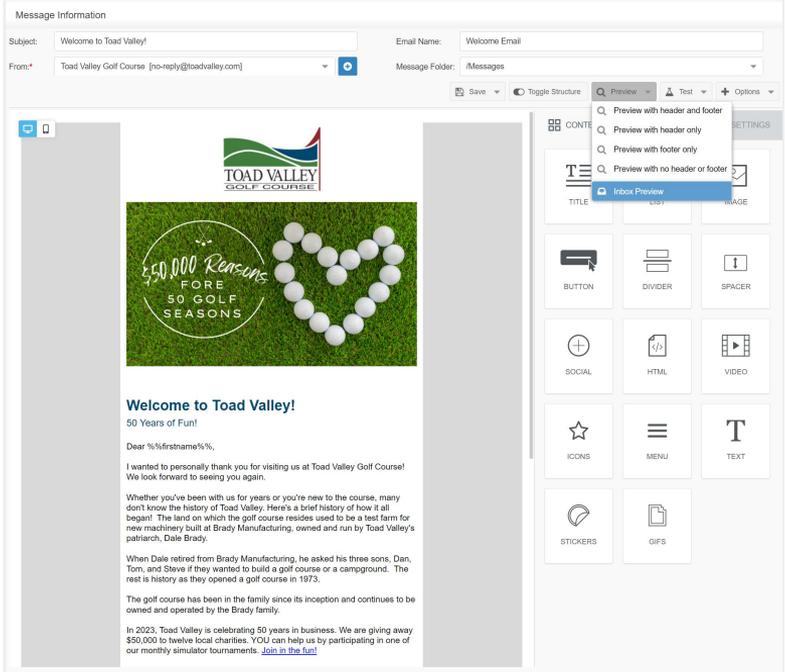
Mobile Clients

- Gmail App Pixel 4 (Android 10)
- Gmail App Pixel 4 (Android 10 (Dark Mode))
- Gmail App Pixel 5 (Android 11)
- Gmail App Pixel 5 (Android 11 (Dark Mode))
- Gmail App Pixel 6 (Android 12)
- Gmail App Pixel 6 (Android 12 (Dark Mode))
- Gmail App Pixel 6 (Android 12 (Dark Mode))
- Gmail App Pixel 2 (Android 9)
- Gmail App Pixel 3 (Android 9)
- iPad Pro (12.9-in) (iOS 15)
- iPad Pro (12.9-in) (iOS 15)
- iPhone XR (iOS 14)
- iPhone SE 2nd Gen (iOS 14)
- iPhone SE 2nd Gen (iOS 15)
- iPhone 11 Pro Max (iOS 14)
- iPhone 11 Pro (iOS 14)
- iPhone 11 (iOS 14)
- iPhone 11 (iOS 15)
- iPhone 11 Pro (iOS 15)
- iPhone 11 (iOS 14 (Dark Mode))
- iPhone 11 (iOS 14 (Dark Mode))
- iPhone 12 Mini (iOS 15)
- iPhone 12 Mini (iOS 15 (Dark Mode))
- iPhone 12 (iOS 15)
- iPhone 12 (iOS 15 (Dark Mode))
- iPhone 12 Pro Max (iOS 15)
- iPhone 12 Pro Max (iOS 15 (Dark Mode))
- iPhone 13 (iOS 15)
- iPhone 13 (iOS 15 (Dark Mode))
- iPhone 13 Pro Max (iOS 15)
- iPhone 13 Pro Max (iOS 15 (Dark Mode))
- iPhone 13 Mini (iOS 15)
- iPhone 13 Mini (iOS 15 (Dark Mode))
- iPhone 13 Outlook (iOS 15)
- iPhone 13 Outlook (iOS 15 (Dark Mode))
- iPhone 14 Pro (iOS 16)
- iPhone 14 Pro (iOS 16 (Dark Mode))
- iPhone 14 Pro Max (iOS 16)
- iPhone 14 Pro Max (iOS 16 (Dark Mode))
- iPhone 14 (iOS 16)
- iPhone 14 (iOS 16 (Dark Mode))
- Outlook App Pixel 6 (Android 12)
- Outlook App Pixel 6 (Android 12 (Dark Mode))

Send Your First Email

Run an Inbox Preview

1. Open a message in the Messages folder
2. Click the arrow next to the Preview button at the top right of the Message Editor
3. Click Inbox Preview
4. Check the box next to the email clients you would like to view the email with - all available options are checked by default
5. Click Run Test. Note: it can take a few minutes depending on the email selected
6. Click on any email client to view the screenshot of the test email

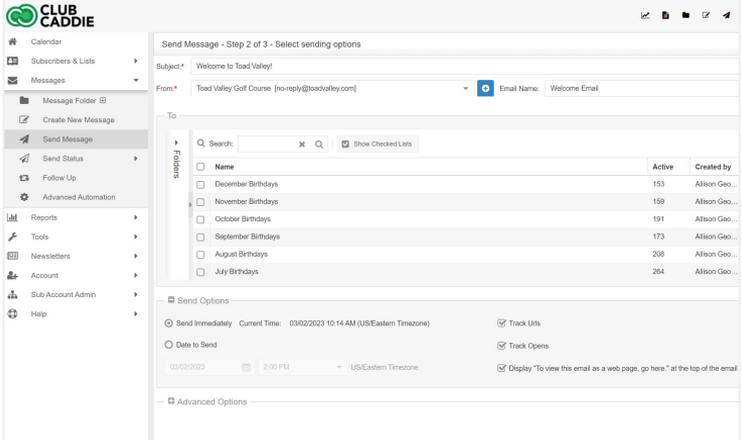


The screenshot displays the 'Message Information' section of the Club Caddie email editor. The subject is 'Welcome to Toad Valley!' and the email name is 'Welcome Email'. The 'From' field is 'Toad Valley Golf Course (no-reply@toadvalley.com)' and the 'Message Folder' is '/Messages'. A dropdown menu is open next to the 'Preview' button, showing options: 'Preview with header and footer', 'Preview with header only', 'Preview with footer only', 'Preview with no header or footer', and 'Inbox Preview' (which is highlighted). Below the dropdown, a grid of icons for various email clients and features is visible, including 'BUTTON', 'DIVIDER', 'SPACER', 'SOCIAL', 'HTML', 'VIDEO', 'ICONS', 'MENU', 'TEXT', 'STICKERS', and 'GIFS'. The main content area shows a preview of the email with a green header, a circular graphic with '50,000 Reasons FOR 50 GOLF SEASONS', and text about the 50th anniversary of Toad Valley Golf Course.

Send Your First Email

Send an Email Message

1. Click the Messages folder in the left-side menu
2. Click the Message Folder
3. Click the message you want to send from the list shown on the right
4. Click the Send Message button
5. Select the desired "From Name" from the drop-down
6. Choose the desired list(s) by checking the box(es)
 - a. Note: Each subscriber will only receive one copy of an email message, regardless of the number of selected lists that subscriber may be on
 - b. Lists are pulled at the time the email is actually sent. This means that the estimated send size can change if new people are added to the list, subscribers unsubscribe, etc.



The screenshot shows the 'Send Message - Step 2 of 3 - Select sending options' interface. The left sidebar contains a navigation menu with options like Calendar, Subscribers & Lists, Messages, Message Folder, Send Message, Send Status, Follow Up, Advanced Automation, Reports, Tools, Newsletters, Account, Sub Account Admin, and Help. The main content area is titled 'Send Message - Step 2 of 3 - Select sending options' and includes the following fields:

- Subject:** Welcome to Toad Valley!
- From:** Toad Valley Golf Course [no-reply@toadvalley.com]
- Email Name:** Welcome Email

The 'To' field shows a list of folders with checkboxes for selection:

Folder	Active	Created by
<input type="checkbox"/> December Birthdays	153	Allison Geo...
<input type="checkbox"/> November Birthdays	159	Allison Geo...
<input type="checkbox"/> October Birthdays	191	Allison Geo...
<input type="checkbox"/> September Birthdays	173	Allison Geo...
<input type="checkbox"/> August Birthdays	208	Allison Geo...
<input type="checkbox"/> July Birthdays	264	Allison Geo...

Below the folder list, there are 'Send Options' including:

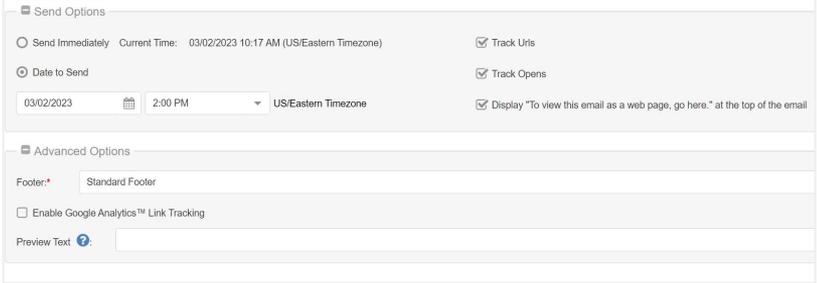
- Send Immediately (Current Time: 03/02/2023 10:14 AM (US/Eastern Timezone))
- Date to Send (03/02/2023, 2:00 PM, US/Eastern Timezone)
- Track Hits
- Track Opens
- Display "To view this email as a web page, go here" at the top of the email

At the bottom, there is an 'Advanced Options' section.

Send Your First Email

Send an Email Message

7. Click Send Immediately or select a date and time to send
8. Optionally edit the Advanced Options by clicking the arrow next to "Advanced Options": select a Footer or enable [Google Analytics™ Link Tracking](#)
9. Click Next
10. Check the box to confirm your selections are correct
11. Click Send Email



The screenshot shows the 'Send Options' and 'Advanced Options' sections of an email configuration interface. The 'Send Options' section includes radio buttons for 'Send Immediately' (selected) and 'Date to Send'. The 'Date to Send' is set to 03/02/2023 at 2:00 PM in the US/Eastern Timezone. There are three checked checkboxes: 'Track Urls', 'Track Opens', and 'Display "To view this email as a web page, go here." at the top of the email'. The 'Advanced Options' section includes a dropdown for 'Footer' set to 'Standard Footer', an unchecked checkbox for 'Enable Google Analytics™ Link Tracking', and a 'Preview Text' field with a help icon.