

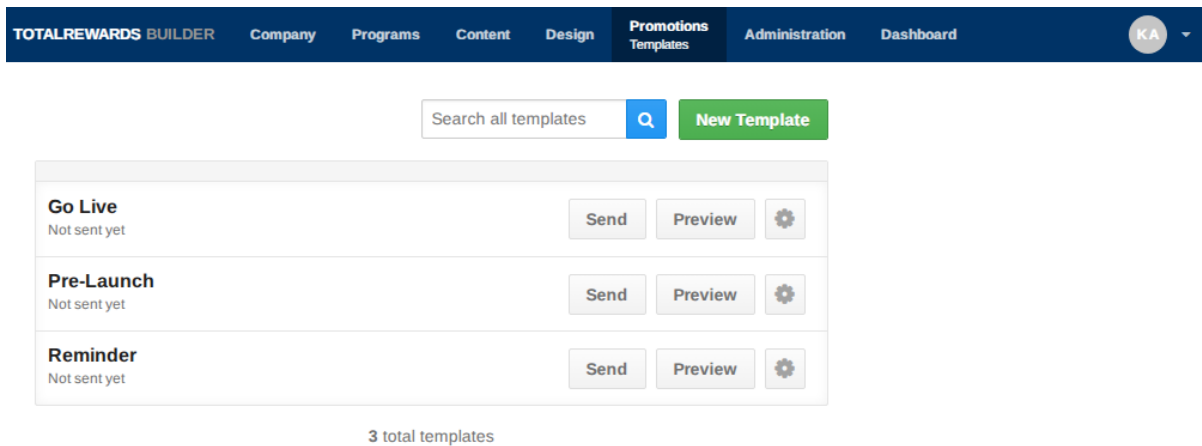
# Preview and Send Promotions

Last Modified on 12/15/2025 3:54 pm PST

## Preview and Send Promotions:

Your browser does not support HTML5 video.

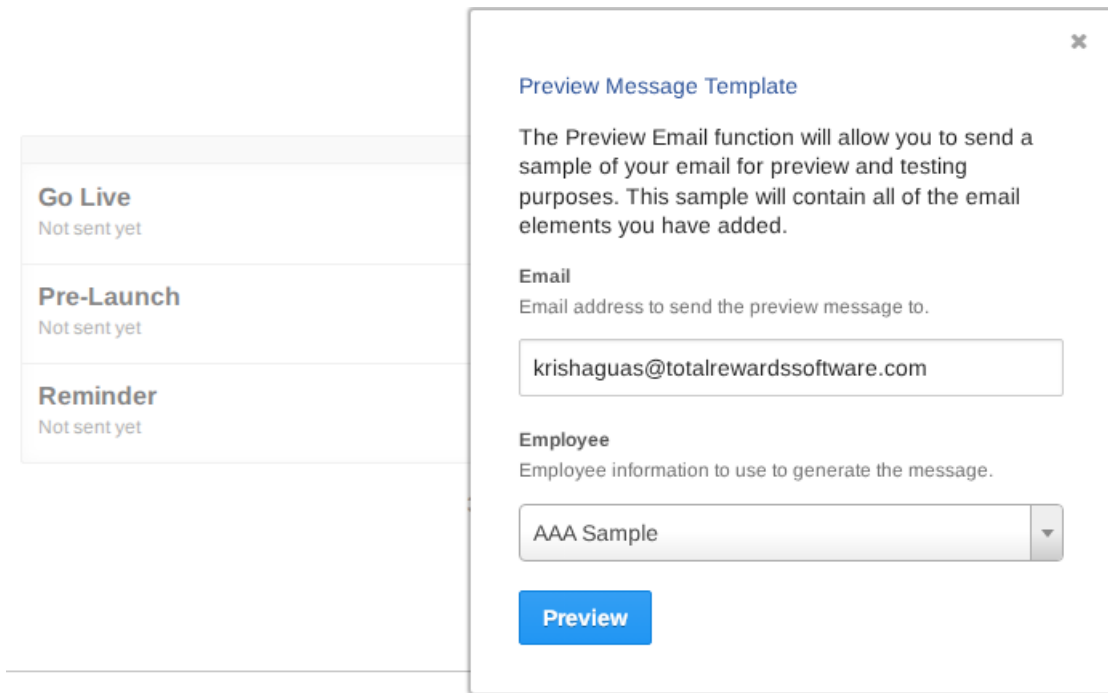
1. Go to **Promotions**.
2. Select **Templates** from the dropdown menu.
3. To receive a sample promotion email in your inbox, click the **Preview** button.



Template Name	Status	Send	Preview	Settings
Go Live	Not sent yet	Send	Preview	⚙️
Pre-Launch	Not sent yet	Send	Preview	⚙️
Reminder	Not sent yet	Send	Preview	⚙️

3 total templates

4. In the pop-up window, use the drop-down menu to:
  - Select any employee name, or
  - Scroll to find a specific name, or
  - Type the name in the blank field to search.
5. Once a name is selected, click **Preview** button.



**Go Live**  
Not sent yet

**Pre-Launch**  
Not sent yet

**Reminder**  
Not sent yet

**Preview Message Template**

The Preview Email function will allow you to send a sample of your email for preview and testing purposes. This sample will contain all of the email elements you have added.

**Email**  
Email address to send the preview message to.

krishaguas@totalrewardssoftware.com

**Employee**  
Employee information to use to generate the message.

AAA Sample

**Preview**

6. Update the template if needed (see **Create or Edit Promotions** for the steps).
7. To send promotions, click the **Send** button.
  - For **Pre-Launch and Go Live**, select **All**.
  - For **Follow-Up**, select **Not Signed In**, or
  - Use the dropdown menu to choose a **group** if available or **specific employee**.

<b>Go Live</b> <small>Not sent yet</small>
<b>Pre-Launch</b> <small>Not sent yet</small>
<b>Reminder</b> <small>Not sent yet</small>

×

**Send Message**

There are a few different delivery options available. Click your desired option below to send the message.

**All**

This option will send the email to all **1 employee** in the system.

**Signed In**

This option will send the email to all **0 employee** who have already logged into their online statement.

**Not Signed In**

This option will send the email to all **1 employee** who have not yet logged into their online statement.

**Group**

This option will send the email to all employees of a specific group.

▼

**Employee**

This option will send the email to a specific employee.

▼

8. Change **Timezone** if needed (select from the dropdown, scroll or type the correct time zone).
9. Click **Send Now** to send immediately.

totalrewardscsmteam.totalrewards.io says

You are going to send to `all` right now

OK Cancel

This option will send the email to all employees of a specific group.

**Employee**

This option will send the email to a specific employee.

**Timezone**

Select the timezone to use for sending the email

US/Pacific

**Send When**

Select a date and time to send the email.

◀ ⬆ August 2025 ⬆ ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

12:00am

01:00am

02:00am

03:00am

04:00am

05:00am

▼

Send now Scheduled send

10. A confirmation message will appear, click **OK** and the promotion will be sent **real time**.
11. To schedule a promotion, select the **Time and Date** on the calendar.
12. A confirmation message will appear, click **OK**.

**totalrewardscsmteam.totalrewards.io says**

You are going to send to `all` on 2025/08/19 11:00 US/Pacific timezone

**OK** **Cancel**

specific group.

**Employee**  
This option will send the email to a specific employee.

**Timezone**  
Select the timezone to use for sending the email

US/Pacific

**Send When**  
Select a date and time to send the email.

August 2025							
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
27	28	29	30	31	1	2	11:00am
							12:00pm
3	4	5	6	7	8	9	01:00pm
10	11	12	13	14	15	16	02:00pm
17	18	19	20	21	22	23	03:00pm
24	25	26	27	28	29	30	04:00pm
31	1	2	3	4	5	6	

**Send now** **Scheduled send**

13. Review **scheduled promotions**, go to **Activity** under Promotions.

All
All Time

<b>Pre-Launch</b> Sending: August 19, 2025 11:00 AM to all employees Sent by: Krish Aguas	0 Sent	0 Delivered	0 Failed	0 Opened	0.00% Rate	<b>Edit</b>
<b>Go Live Promotion</b> Sent: August 15, 2023 12:12 PM Sent by: Krish Aguas	1 Sent	1 Delivered	0 Failed	1 Opened	100.00% Rate	

- To edit a scheduled promotion, click **Edit**, update the date/time, then click **OK** and **Save**.

totalrewardscsmteam.totalrewards.io says  
You are going to update the sending to 2025/08/20 11:00 US/Pacific timezone

OK

Cancel

US/Pacific

**Send When**  
Select a date and time to send the email

August 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat	11:00am
27	28	29	30	31	1	2	12:00pm
3	4	5	6	7	8	9	01:00pm
10	11	12	13	14	15	16	02:00pm
17	18	19	20	21	22	23	03:00pm
24	25	26	27	28	29	30	04:00pm
31	1	2	3	4	5	6	

Save

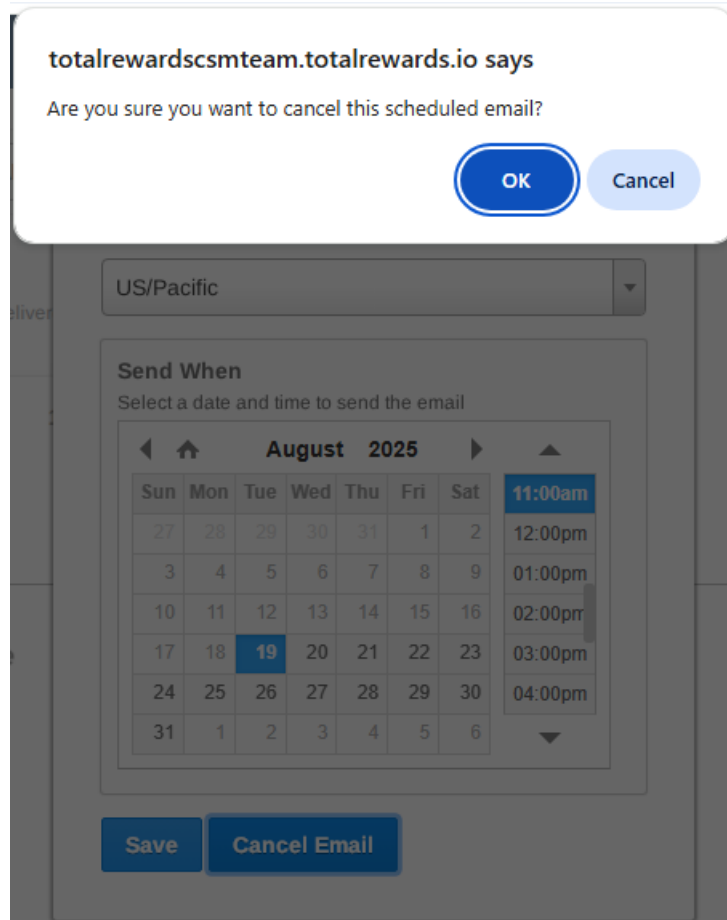
Cancel Email

- Activity will show the **new schedule**.

All
All Time

<b>Pre-Launch</b> Sending: August 20, 2025 11:00 AM to all employees Sent by: Krish Aguas	0 Sent	0 Delivered	0 Failed	0 Opened	0.00% Rate	<b>Edit</b>
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- To cancel scheduled promotions, click **Cancel Email** then **OK** on the pop-up window.
  - Cancelled promotions will no longer appear in **Activity**.



The image shows a confirmation dialog box from 'totalrewardscsmteam.totalrewards.io' asking 'Are you sure you want to cancel this scheduled email?'. Below the dialog is a 'Send When' section with a calendar for August 2025. The calendar has columns for days of the week and rows for dates. A time selector on the right shows times from 11:00am to 04:00pm. At the bottom are 'Save' and 'Cancel Email' buttons.

totalrewardscsmteam.totalrewards.io says

Are you sure you want to cancel this scheduled email?

OK Cancel

US/Pacific

Send When

Select a date and time to send the email

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

11:00am  
12:00pm  
01:00pm  
02:00pm  
03:00pm  
04:00pm

Save Cancel Email

#### 14. Review the delivered promotions **status**.

- **Sent / Delivered** – The message has been successfully sent and delivered
- **Failed** – The message could not be delivered
- **Opened** – Only shown if email tracking is enabled; may not reflect all open

	All		All Time		
<b>Go Live Promotion</b> Sent: August 15, 2023 12:12 PM Sent by: Krish Aguas	1 Sent	1 Delivered	0 Failed	1 Opened	100.00% Rate
<b>Sample Statement</b> Sent: January 20, 2022 2:54 PM Sent by: Krish Aguas	1 Sent	1 Delivered	0 Failed	1 Opened	100.00% Rate
<b>Go Live Promotion</b> Sent: July 15, 2021 1:41 PM Sent by: Leslie Liu	1 Sent	1 Delivered	0 Failed	0 Opened	0.00% Rate
<b>Go Live Promotion</b> Sent: April 6, 2021 4:06 PM Sent by: Leslie Liu	1 Sent	1 Delivered	0 Failed	1 Opened	100.00% Rate
<b>Go Live Promotion</b> Sent: January 19, 2021 3:41 PM Sent by: Leslie Liu	1 Sent	1 Delivered	0 Failed	1 Opened	100.00% Rate
<b>Go Live Promotion</b> Sent: March 26, 2020 11:17 AM Sent by: Krish Aguas	1 Sent	1 Delivered	0 Failed	1 Opened	100.00% Rate
<b>Go Live Promotion</b> Sending: December 20, 2019 1:44 PM Sent by: Krish Aguas	0 Sent	0 Delivered	0 Failed	0 Opened	0.00% Rate

7 total promotions

□ **Note:** Scheduled promotions default to **Pacific Time** but can be changed. Keep subject lines clear and simple. Once a message is sent, review **Activity** to ensure it has been sent, delivered, or failed. “Opened” is not fully reliable due to privacy settings; focus on **login metrics** instead, as they are 100% accurate and the ultimate measure of candidate engagement.

□ **Quick Steps:** Go to Promotions → Select Template → Preview test email → Send or Schedule → Change Timezone if needed → Review or Edit in Activity