01 / SET UP THE TEST

Give your freebie a test drive.

A practical check of what happens between “I’d like that” and actually opening the resource.

Use one copy per subscriber scenario. Follow the public signup route with an email address you control. A preview email does not test the signup trigger.

Resource / offer and version:

Public signup URL:

Test date and tester:

Device / browser and test email address:

First, name the promise.

What should they receive, where, and when? Include any configured delay.

Is email confirmation required? What help is offered if delivery fails?

Choose the subscriber scenario.

Mark one: New subscriber / Existing subscriber new to the resource’s group, tag or workflow / Existing subscriber already included or previously received the resource.

Check the starting position before submitting. Use your platform’s terms. Do not use customer addresses.

Expected list, group or tag, and how this person should receive the resource:

02 / FOLLOW THE ACTUAL ROUTE

Test what the reader gets.

Mark Pass, Issue or N/A and record what happened. N/A means the step is not part of the promised route.

Keep the scenario and expected result from page 1 in view. Test every delivery route you promise.

CHECK / EXPECTED RESULT	RESULT / OBSERVATION
Public page. Open the published page on your phone, outside the editor. The offer and form are readable, and you can complete and submit the required fields.	Pass / Issue / N/A
Success message. The message explains the next step accurately. If a download is promised here, the link is present.	Pass / Issue / N/A
Subscriber record. Find the address in the intended list, group or tag. Check status before and after confirmation, if required, against your platform’s delivery requirements.	Pass / Issue / N/A
Confirmation, if required. The actual confirmation email arrives, its link works, and the next step matches the signup page’s instructions.	Pass / Issue / N/A
Delivery email, if promised. The real signup generates the expected email within the promised timing. Sender, subject and instructions are clear; the email is readable on your phone.	Pass / Issue / N/A
Resource access. Follow every promised route, including page and email links. The correct resource opens without unexpected permission requests.	Pass / Issue / N/A
Phone usability. The resource is readable and usable on your phone.	Pass / Issue / N/A
Links inside the resource. Open each link. It reaches the intended current page, and the next-step instructions still make sense.	Pass / Issue / N/A

For access checks, sign out of the file owner’s account. A private window helps only if you have not signed into that account there. If login is intended, test with an ordinary user account and the intended permissions.

03 / RESOLVE AND RETEST

Keep the result. Fix the gap.

A working button is a start. Keep going until the promised resource is accessible.

Times: Signup submitted / Confirmation completed / Delivery email received:

If something stops, record where.

Check spam or junk, the subscriber record, and available workflow activity or sending reports. For broken links, check the destination and access permissions. Keep notes before changing settings and consider how changes affect existing subscribers.

ISSUE 1

Step, expected result and what happened:

Owner and next action:

Retest date and result:

ISSUE 2

Step, expected result and what happened:

Owner and next action:

Retest date and result:

Fix or escalate the issue, then repeat the affected checks. If the form connection, trigger or delivery route changed, follow the signup through to the resource again. A missing email does not automatically mean you need a new platform.

04 / KEEP THE RECORD

Ready for this scenario?

Keep the evidence, note what remains, and make the next check easier.

Record the outcome.

Overall result: Passed for this scenario / Issues remain / Test incomplete

What still needs attention?

Who checks this journey after future changes?

Where will you keep this test record?

Repeat with a separate copy for each other applicable subscriber scenario. Another device, browser or inbox can give you more coverage.

One successful test confirms that scenario under those conditions. It does not guarantee future delivery, qualified leads or sales. Follow platform guidance for your configuration.

Another job on your list?

If the emails, updates and follow-up keep coming back to you, let’s talk about the support your business needs. **stellarstreamline.com/contact**

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