# FunnelSender User Manual

## Complete Setup & User Guide

**Version 1.1**

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## 1. Introduction

### What is FunnelSender?

FunnelSender is a powerful desktop email campaign automation software designed for sales professionals, marketers, and business owners who want to send personalized email campaigns at scale.

### Key Features

- **Multi-Step Email Sequences** - Create automated follow-up campaigns
- **Visual Flow Builder** - Design campaigns with drag-and-drop simplicity
- **Smart Conditions** - Route contacts based on opens and replies
- **Email Tracking** - Monitor opens, replies, and bounces in real-time

- **Template Personalization** - Use merge tags for personalized emails
- **Multiple Sender Accounts** - Rotate between email accounts automatically
- **Campaign Scheduling** - Send during specific hours and days
- **Offline Operation** - Your data stays on your computer

### How FunnelSender Works

```
1. CONFIGURE          2. CREATE           3. BUILD
┌──────────┐        ┌──────────┐        ┌──────────┐
│  Email   │   →    │  Email   │   →    │ Campaign │
│ Accounts │        │Templates │        │   Flow   │
└──────────┘        └──────────┘        └──────────┘
                                              │
                                              ▼
6. ANALYZE           5. TRACK            4. LAUNCH
┌──────────┐        ┌──────────┐        ┌──────────┐
│ Results  │   ←    │  Opens   │   ←    │  Start   │
│& Iterate │        │ Replies  │        │ Campaign │
└──────────┘        └──────────┘        └──────────┘
```

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# 2. System Requirements

### Minimum Requirements

| Component | Requirement |
|---|---|
| Operating System | Windows 10 (64-bit) or later |
| Processor | Intel Core i3 or equivalent |
| RAM | 4 GB |
| Storage | 200 MB free disk space |
| Display | 1280 x 720 resolution |
| Internet | Required for sending and tracking |

### Recommended Requirements

| Component | Recommendation |
|---|---|
| Operating System | Windows 11 (64-bit) |
| Processor | Intel Core i5 or better |
| RAM | 8 GB or more |
| Storage | 500 MB free disk space |
| Display | 1920 x 1080 resolution |

| Component | Recommendation |
| --- | --- |
| Internet | Stable broadband connection |

### Supported Email Providers

FunnelSender works with any email provider that supports SMTP and IMAP:

- ☑ Gmail / Google Workspace
- ☑ Microsoft Outlook / Office 365
- ☑ Yahoo Mail
- ☑ Zoho Mail
- ☑ Custom domain email (cPanel, Plesk)
- ☑ Any SMTP/IMAP compatible service

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## 3. Installation

### Step 1: Download FunnelSender

1. Visit the official FunnelSender website
2. Click **"Download"** to get the software
3. Save the file to your computer (e.g., Downloads folder)

### Step 2: Run the Installer

1. Locate the downloaded file: `FunnelSender.exe`
2. Double-click to run the software

   **Note:** Some antivirus programs may mistakenly block *FunnelSender.exe*. If the application does not run, please temporarily disable your antivirus or add FunnelSender.exe to the antivirus exclusion list, then run the file again.

3. If Windows SmartScreen appears:
   - Click **"More info"**
   - Click **"Run anyway"**

### Step 4: First Launch

When you first open FunnelSender:

1. The splash screen appears while the app loads
2. The main window opens with the Configuration tab
3. You'll see a prompt to register your license

# 4. License Activation

## Activating Your License

**Step 1:** Go to the **Settings** tab

**Step 2:** In the "License & Tracking Status" section, click **"Register with Email & License"**

**Step 3:** Enter your details:

- **Email:** The email address you used to purchase
- **License Key:** Your license key (format: XXXX-XXXX-XXXX-XXXX)

**Step 4:** Click **"Register"**

**Step 5:** Wait for confirmation

## License Status Types

| Status | Meaning |
|---|---|
| ☑ Approved | Full access to all features |
| ⏳ Pending | Awaiting admin approval (5-day grace period) |
| 🚫 Suspended | License temporarily disabled |
| ❌ Expired | License needs renewal |

## Grace Period

After registration, you receive a **5-day grace period** with full access while your license is being approved. Use this time to set up your campaigns.

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# 5. Quick Start Guide

Follow these steps to send your first campaign in under 15 minutes.

## Overview

```
Step 1: Add Email Account (5 min)
        ↓
Step 2: Import Contacts (2 min)
        ↓
```

```
Step 3: Create Template (3 min)
        ↓
Step 4: Build Flow (3 min)
        ↓
Step 5: Start Campaign (2 min)
```

### Step 1: Add Your Email Account

1. Go to **Configuration** tab
2. Click **"➕ Add Account"**
3. Fill in your email details:

| Field | Example (Gmail) |
|---|---|
| Email | yourname@gmail.com |
| Password | your-app-password |
| SMTP Server | smtp.gmail.com |
| SMTP Port | 587 |
| IMAP Server | imap.gmail.com |
| IMAP Port | 993 |
| Enabled | Yes |
| Daily Limit | 100 |

4. Click **"💾 Save"**
5. Click **"🔄 Test Connection"** to verify

**Important for Gmail:** You must use an App Password, not your regular password. See Section 6 for setup instructions.

### Step 2: Create a Campaign

1. Look at the top of the window for **"Active Campaign"**
2. Click **"➕ New Campaign"**
3. Enter a name (e.g., "Sales Outreach Q1")
4. Click **"Create"**

### Step 3: Import Contacts

1. Go to **Contacts** tab
2. Click **"📁 Import CSV"**
3. Select your CSV file with contacts
4. Verify the data appears in the spreadsheet
5. Click **"☑ Save"**

Your CSV should have columns like:

| Name | Email | Company |
| --- | --- | --- |
| John Smith | john@company.com | Acme Inc |
| Jane Doe | jane@example.com | Tech Corp |

### Step 4: Create an Email Template

1. Go to **Email Templates** tab
2. Click **"➕ New Template"**
3. Fill in:
   - **Name:** First Contact
   - **Subject:** Quick question, {name}
   - **Body:**
4. `Hi {name},`
5. 
6. `I noticed {company} and wanted to reach out...`
7. 
8. `Best regards,`
9. `Your Name`
10. Click **"💾 Save"**

### Step 5: Build Your Campaign Flow

1. Go to **Campaign Flow** tab
2. Click **"➕ Step"** to add an email step
3. Configure:
   - **Node ID:** Step1
   - **Template:** First Contact
   - **Wait Hours:** 0 (send immediately)
4. Click **"Save"**
5. Click **"🎯 Set Starting Point"** and select Step1

### Step 6: Start Your Campaign

1. Go to **Campaign Control** tab
2. Check the box next to your campaign
3. Click **"▶️ Start Selected"**
4. Monitor progress in the log panel

**Congratulations!** Your first campaign is now running.

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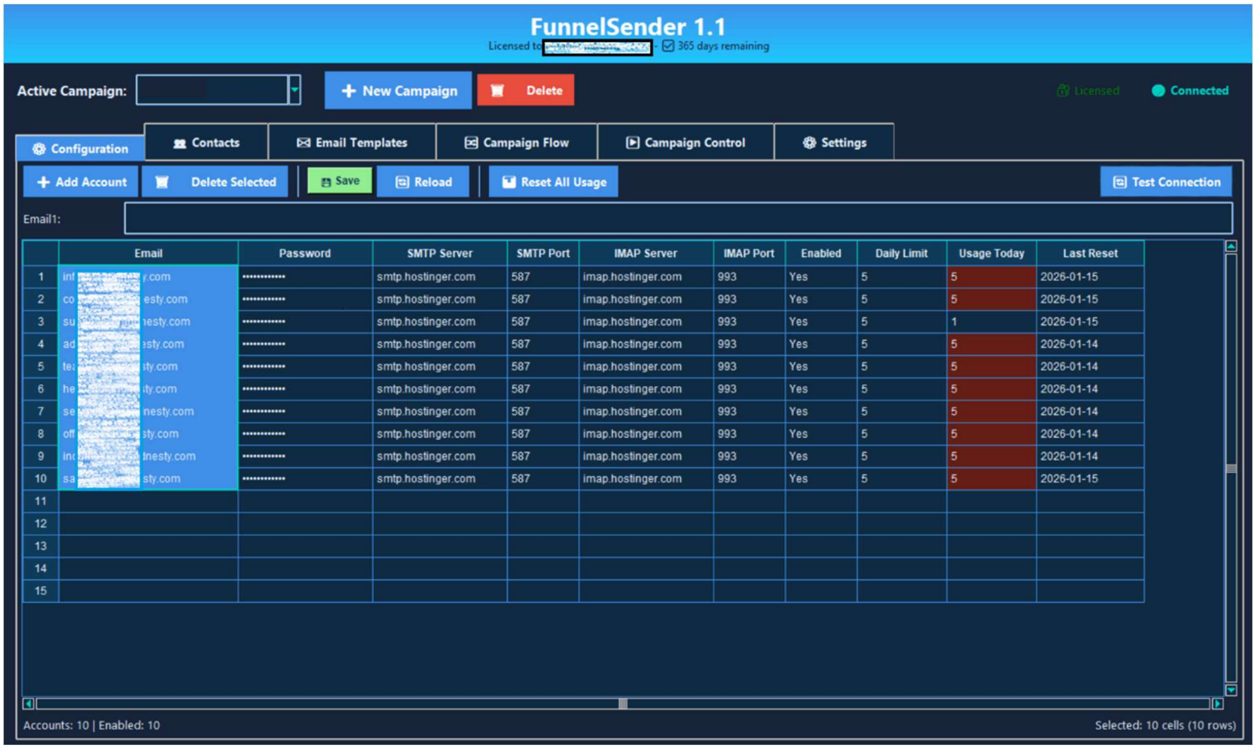
# 6. Configuration Tab - Email Accounts

The Configuration tab is where you manage your email sender accounts.




## Understanding the Spreadsheet

The configuration spreadsheet has these columns:

| Column | Description |
|---|---|
| Email | Your email address |
| Password | App password or email password |
| SMTP Server | Outgoing mail server |
| SMTP Port | Usually 587 or 465 |
| IMAP Server | Incoming mail server |
| IMAP Port | Usually 993 |
| Enabled | Yes/No - whether to use this account |
| Daily Limit | Maximum emails per day |
| Usage Today | Emails sent today (auto-updated) |
| Last Reset | Date when usage counter reset |

## Adding a New Account

1. Click "➕ **Add Account"**
2. A new row appears at the top
3. Fill in each cell by clicking and typing
4. Click "💾 **Save"** when done

## Gmail Setup (Detailed)

Gmail requires an **App Password** for third-party apps.

### Step 1: Enable 2-Factor Authentication

1. Go to myaccount.google.com
2. Click **Security**
3. Enable **2-Step Verification**

### Step 2: Create App Password

1. Go to myaccount.google.com/apppasswords
2. Select **Mail** as the app
3. Select **Windows Computer** as the device
4. Click **Generate**
5. Copy the 16-character password

### Step 3: Enter in FunnelSender

| Field | Value |
|---|---|
| Email | yourname@gmail.com |
| Password | xxxx xxxx xxxx xxxx (app password) |
| SMTP Server | smtp.gmail.com |
| SMTP Port | 587 |
| IMAP Server | imap.gmail.com |
| IMAP Port | 993 |

## Outlook/Office 365 Setup

| Field | Value |
|---|---|
| Email | yourname@outlook.com |
| Password | Your password or app password |
| SMTP Server | smtp.office365.com |
| SMTP Port | 587 |
| IMAP Server | outlook.office365.com |

| Field | Value |
| --- | --- |
| IMAP Port | 993 |

### Custom Domain Setup

For email hosted on cPanel, Plesk, or similar:

| Field | Value |
| --- | --- |
| Email | you@yourdomain.com |
| Password | Your email password |
| SMTP Server | mail.yourdomain.com |
| SMTP Port | 587 or 465 |
| IMAP Server | mail.yourdomain.com |
| IMAP Port | 993 |

### Testing Your Connection

1. Select the row with your account
2. Click **"🔄 Test Connection"**
3. Wait for results in the log panel

**Success message:**

```
✓ SMTP test passed for yourname@gmail.com
✓ IMAP test passed for yourname@gmail.com
```

**If test fails:**

- Verify your password is correct
- Check that SMTP/IMAP are enabled in your email settings
- Try different port numbers (587 vs 465)

### Managing Multiple Accounts

FunnelSender supports **unlimited email accounts**. Benefits:

- **Rotation:** Automatically switches between accounts
- **Daily Limits:** Respects each account's sending limit
- **Redundancy:** If one account fails, others continue

**Best Practice:** Use 3-5 accounts and set each to 50-100 emails/day.

### Daily Limits and Usage

- **Daily Limit:** Maximum emails FunnelSender will send per day per account
- **Usage Today:** Current count (resets at midnight UTC)
- **Rotation:** When one account reaches limit, switches to next

To reset usage manually:

1. Click **"📊 Reset All Usage"**
2. Confirm the action

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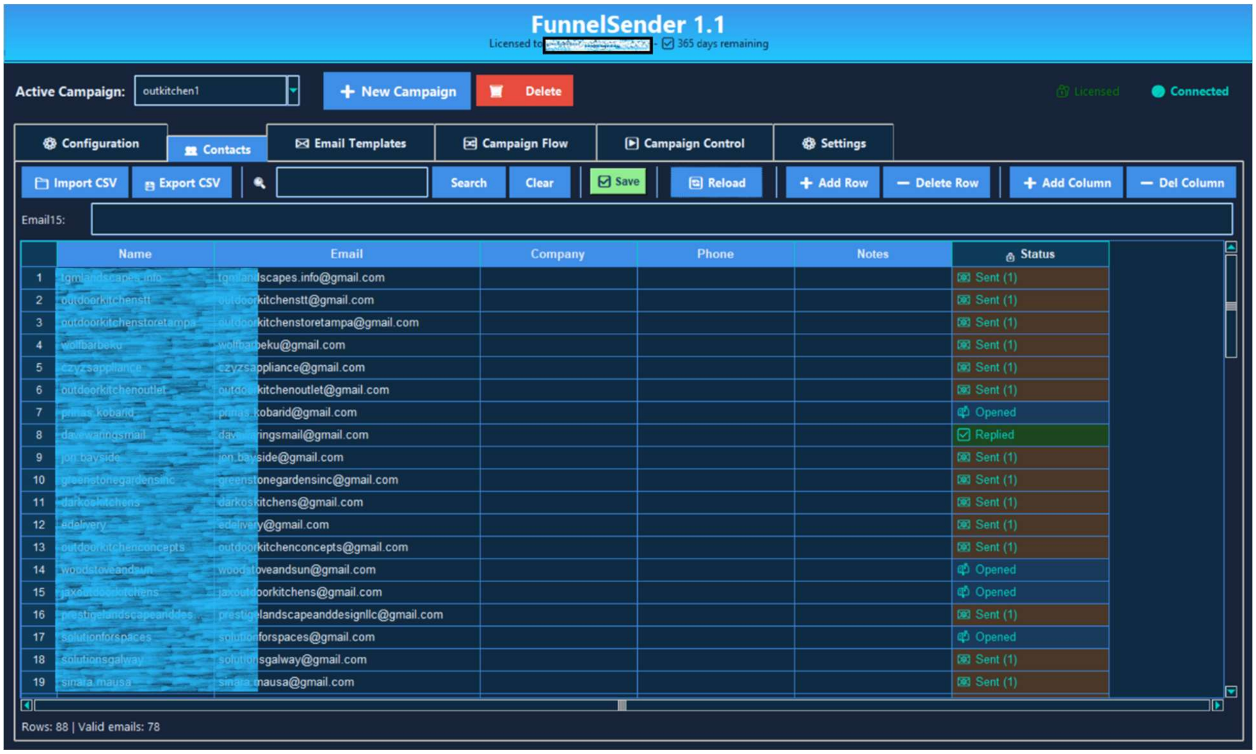
# 7. Contacts Tab - Managing Recipients

The Contacts tab provides a spreadsheet interface for managing your email recipients.




## Default Columns

| Column | Description | Required |
|---|---|---|
| Name | Contact's full name | Recommended |
| Email | Email address | **Required** |
| Company | Company name | Optional |
| Phone | Phone number | Optional |
| Notes | Additional notes | Optional |
| Status | Auto-updated status | Read-only |

## Importing Contacts

### Method 1: Import CSV File

1. Click **"📁 Import CSV"**
2. Select your CSV file
3. Data is appended to existing contacts
4. Click **"☑ Save"** to confirm

### CSV Format Example:

```
csv
Download
Copy code
Name,Email,Company,Phone
John Smith,john@company.com,Acme Inc,555-1234
Jane Doe,jane@example.com,Tech Corp,555-5678
```

### Method 2: Import Excel File

1. Click **"📁 Import CSV"**
2. Select your .xlsx file
3. FunnelSender reads the first sheet
4. Click **"☑ Save"**

### Method 3: Manual Entry

1. Click on any cell and type
2. Press **Tab** to move to next cell
3. Press **Enter** to move to next row
4. Click **"☑ Save"** when done

## Adding Custom Columns

1. Click **"➕ Add Column"**
2. Enter column name (e.g., "Industry")
3. Click **"Add"**
4. Fill in data for your contacts
5. Click **"☑ Save"**

Use custom columns as merge tags in templates: `{industry}`

## Understanding Status Column

The Status column is **read-only** and updates automatically:

| Status | Meaning |
| --- | --- |
| Ready | Contact ready to receive emails |
| 📨 Sent (2) | 2 emails sent to this contact |
| 📬 Opened | Contact opened an email |
| ☑️ Replied | Contact replied |
| ❌ Bounced | Email could not be delivered |
| 🚫 Unsubscribed | Contact requested to unsubscribe |

## Editing Contacts

**Edit Single Cell:**

1. Double-click the cell
2. Type new value
3. Press **Enter**

**Edit Multiple Cells:**

1. Select cells by clicking and dragging
2. Type to replace all selected
3. Or use **Ctrl+C/Ctrl+V** to copy/paste

**Delete Rows:**

1. Click row number to select entire row
2. Hold **Ctrl** and click to select multiple rows
3. Click **"➖ Delete Row"**
4. Confirm deletion

## Exporting Contacts

1. Click **"💾 Export CSV"**
2. Choose save location
3. File includes all columns and status

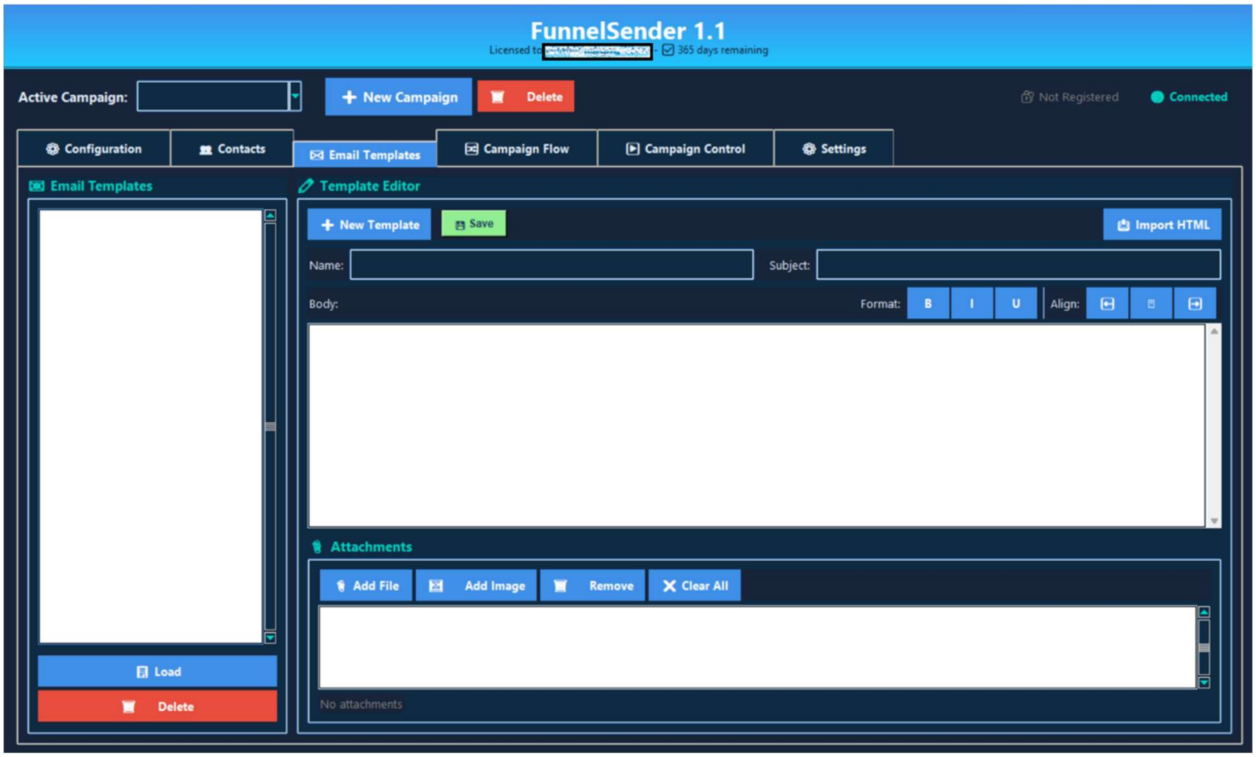
## Keyboard Shortcuts

| Shortcut | Action |
| --- | --- |
| Ctrl+C | Copy selected cells |
| Ctrl+V | Paste |
| Ctrl+X | Cut |
| Ctrl+A | Select all |

| Shortcut | Action |
| --- | --- |
| Delete | Clear cell contents |
| Tab | Move to next cell |
| Enter | Move to cell below |
| Arrow keys | Navigate cells |

# 8. Email Templates Tab

Create and manage your email templates in this tab.




## Creating a New Template

1. Click "➕ **New Template"**
2. Enter **Template Name** (e.g., "Initial Outreach")
3. Enter **Subject Line** (e.g., "Quick question about {company}")
4. Write your **Email Body**
5. Add **Attachments** if needed
6. Click "💾 **Save"**

## Using Personalization Tags

Insert these tags in your subject or body to personalize emails:

| Tag | Replaced With |
|---|---|
| {name} | Contact's full name |
| {first_name} | First name only |
| {last_name} | Last name only |

| Tag | Replaced With |
|---|---|
| {email} | Email address |
| {company} | Company name |
| {phone} | Phone number |
| {custom_field} | Any custom column |

**Example Template:**

```
Subject: {first_name}, quick question about {company}

Hi {first_name},

I came across {company} and noticed you might benefit from...

Would you be open to a quick call this week?

Best regards,
[Your Name]

P.S. If this isn't relevant, just let me know and I won't
follow up again.
```

## Formatting Options

**Text Formatting:**

- **Bold:** Click **B** button or Ctrl+B
- **Italic:** Click **I** button or Ctrl+I
- **Underline:** Click **U** button or Ctrl+U

**Text Alignment:**

- **Left:** Click ⬅ or Ctrl+L
- **Center:** Click ↔ or Ctrl+E
- **Right:** Click ➡ or Ctrl+R

## Adding Attachments

1. Click **"📎 Add File"** for any file type
2. Or click **"🖼️ Add Image"** for images
3. Select file(s) from your computer
4. Files appear in the attachments list
5. To remove: select and click **"🗑️ Remove"**

**Attachment Limits:**

- Maximum 10 MB per file
- Supported: PDF, DOC, DOCX, XLS, XLSX, PNG, JPG, GIF, ZIP

### Importing HTML Templates

1. Click **"📥 Import HTML"**
2. Select your .html file
3. Enter template name and subject
4. Click **"💾 Import"**

**Note:** HTML emails may have lower deliverability than plain text.

### Template Best Practices

**DO:**

- ✅ Keep subject lines under 50 characters
- ✅ Personalize with {name} and {company}
- ✅ Write conversationally
- ✅ Include a clear call-to-action
- ✅ Add a P.S. line (increases readability)

**DON'T:**

- ❌ Use ALL CAPS in subject
- ❌ Include too many links
- ❌ Use spam trigger words (FREE, ACT NOW)
- ❌ Write walls of text
- ❌ Attach large files unnecessarily

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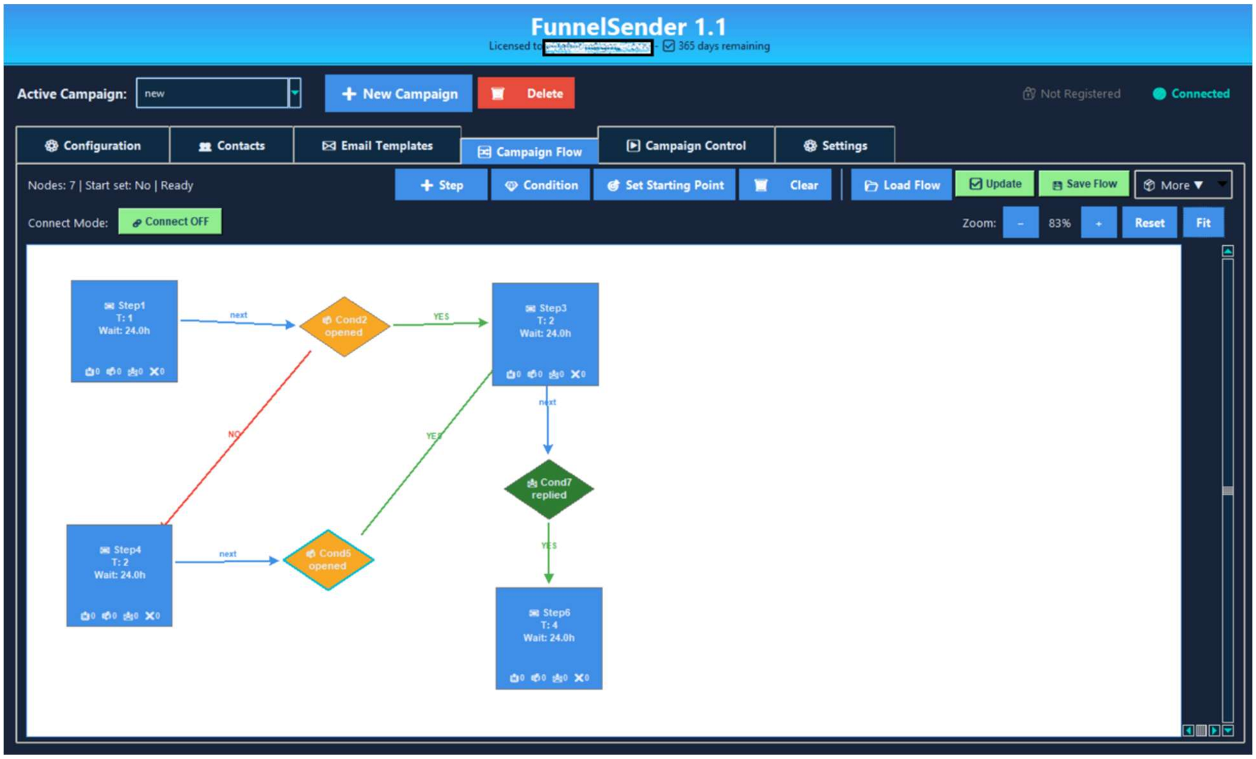
# 9. Campaign Flow Tab

The Campaign Flow tab lets you design your email sequence visually.




## Understanding the Flow Builder

## Node Types

### Step Node ( 📧 )

- Sends an email using a template
- Has a wait time before sending
- Connects to next node

### Condition Node ( 💎 )

- Checks if contact replied or opened
- Has two paths: YES and NO
- Routes contacts based on behavior

## Adding a Step Node

1. Click **"➕ Step"**
2. Fill in the dialog:

| Field | Description |
|---|---|
| Node ID | Unique name (e.g., "Step1", "FollowUp1") |
| Template | Select from your templates |
| Wait Hours | Hours to wait before sending |

3. Click **"Save"**

**Wait Hours Examples:**

- `0` = Send immediately
- `24` = Wait 1 day
- `48` = Wait 2 days
- `72` = Wait 3 days
- `168` = Wait 1 week

## Adding a Condition Node

1. Click **"💎 Condition"**
2. Enter **Node ID** (e.g., "CheckReply")
3. Select **Condition Type:**
   - **If replied** - Checks if contact responded
   - **If opened** - Checks if email was opened
4. Click **"Add"**

## Connecting Nodes

1. Click **"🔗 Connect"** (button turns green when active)
2. Click on the **source node** (where connection starts)
3. Click on the **target node** (where connection goes)
4. If source is a condition:
   - Choose **YES** or **NO** path
5. Connection line appears
6. Click **"🔗 Connect"** again to exit connect mode

## Setting the Starting Point

1. Click on a node to select it (blue border appears)
2. Click **"🎯 Set Starting Point"**
3. The start node shows ▶️ icon

Or:

1. Click **"🎯 Set Starting Point"**
2. Select node from dropdown

3. Click **"Set"**

## Editing Nodes

**Double-click** any node to edit its settings.

**Right-click** for context menu:

- Edit Node
- Delete Node
- Properties

## Moving Nodes

1. Click and drag any node
2. Release to drop in new position
3. Connections update automatically

## Zooming

| Action | Method |
|---|---|
| Zoom In | Click **+** or Ctrl+Scroll Up |
| Zoom Out | Click **−** or Ctrl+Scroll Down |
| Reset Zoom | Click **Reset** |
| Fit All | Click **Fit** |

## Example Campaign Flows

### Simple 3-Email Sequence:

```
[Step 1: Initial] → [Step 2: Follow-up 1] → [Step 3: Final]
   Wait: 0h            Wait: 48h               Wait: 72h
```

### With Reply Check:

```
[Step 1: Initial] → [Condition: If replied?]
   Wait: 0h                 ↓
                    YES ←───┴───→ NO
                     ↓            ↓
                   [END]    [Step 2: Follow-up]
                               Wait: 48h
                                  ↓
                            [Condition: If replied?]
                                  ↓
                         YES ←───┴───→ NO
                          ↓           ↓
                        [END]    [Step 3: Final]
```

```
Wait: 72h
```

## Saving Your Flow

Click "💾 **Save Flow"** to save changes.

Or click "☑ **Update"** to save and verify.

## Exporting/Importing Flows

**Export:**

1. Click "📦 **More ▼**"
2. Select "📤 **Export Flow + Templates"**
3. Choose save location
4. File saves as .json

**Import:**

1. Click "📦 **More ▼**"
2. Select "📥 **Import Flow + Templates"**
3. Select .json file
4. Choose to replace or merge

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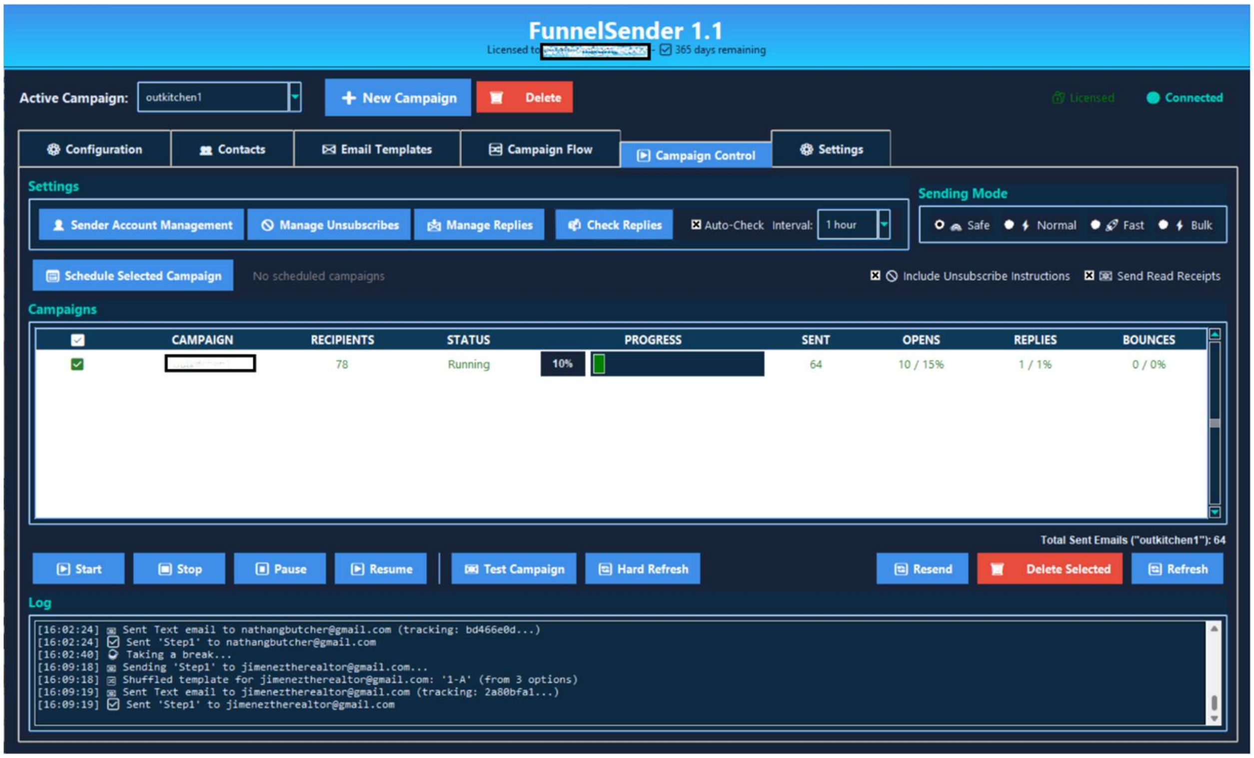
# 10. Campaign Control Tab

The Campaign Control tab is your command center for managing and monitoring campaigns.




## Campaign Actions

| Button | Action |
| --- | --- |
| Start Selected | Begin sending selected campaigns |
| Stop Selected | Stop campaigns completely |
| Pause Selected | Temporarily pause (can resume) |
| Resume Selected | Continue paused campaigns |
| Test Campaign | Send test email to yourself |
| Reset & Resend | Reset completed campaign to send again |
| Delete Selected | Permanently delete campaigns |

## Campaign Statuses

| Status | Meaning |
| --- | --- |
| Running | Campaign is actively sending |
| Paused | Temporarily stopped (can resume) |

| Status | Meaning |
|---|---|
| Stopped | Fully stopped |
| Completed | All contacts processed |
| Scheduled | Waiting for scheduled start time |
| Waiting (Outside hours) | Paused until working hours |
| Paused (No Internet) | Waiting for connection |

### Sending Speed Modes

| Mode | Between Emails | Best For |
|---|---|---|
| 🐢 Safe | 30-90 seconds | New accounts, warming up |
| ⚡ Normal | 15-45 seconds | Regular campaigns |
| 🚀 Fast | 10-30 seconds | Time-sensitive sends |
| ⚡ Bulk | 3-7 seconds | Large lists (use caution) |

**Warning:** Bulk mode may trigger spam filters. Use Safe or Normal for best deliverability.

### Scheduling a Campaign

1. Check the campaign checkbox
2. Click **"📅 Schedule Selected Campaign"**
3. Configure schedule:

| Setting | Description |
|---|---|
| Enable scheduled start | Turn on/off scheduling |
| Date | Start date (YYYY-MM-DD) |
| Time | Start time (hour:minute) |
| Timezone | Your local timezone (GMT+X) |
| Working hours | Only send during these hours |
| Working days | Only send on these days |

4. Click **"💾 Save Settings"**

### Managing Unsubscribes

1. Click **"🚫 Manage Unsubscribes"**
2. View list of unsubscribed emails
3. Options:
   - ➕ **Add Email** - Manually add to unsubscribe list
   - 🗑️ **Remove** - Remove from list

- 📁 **Import** - Import list from CSV
- 💾 **Export** - Export list to CSV

## Managing Replies

1. Click **"📩 Manage Replies"**
2. View contacts who replied
3. Options:
    - 🔓 **Re-enable** - Allow sending to them again
    - 💾 **Export** - Export reply list

## Checking for Replies/Opens

**Automatic:**

- Enable **"Auto-Check"** checkbox
- Set interval (15 min - 2 hours)
- FunnelSender checks automatically

**Manual:**

- Click **"📬 Check Replies"**
- Results shown in log

## Understanding Campaign Metrics

| Metric | Description |
|---|---|
| Recipients | Total contacts in campaign |
| Sent | Emails successfully sent |
| Opens | Contacts who opened emails |
| Replies | Contacts who replied |
| Bounces | Undeliverable emails |

## Testing Before Launch

1. Check your campaign
2. Click **"📧 Test Campaign"**
3. Choose recipient:
    - Send to yourself
    - Send to custom email
4. Review the preview
5. Click **"📧 Send Test Email"**

### Resending a Completed Campaign

1. Check the completed campaign
2. Click **"🔄 Reset & Resend"**
3. Confirm the reset
4. Click **"▶️ Start Selected"**

This resets:

- ✅ All tracking (sent/opened/replied)
- ✅ Contact positions back to Step 1

This preserves:

- ✅ Bounced contacts (won't resend)
- ✅ Unsubscribed contacts (won't resend)

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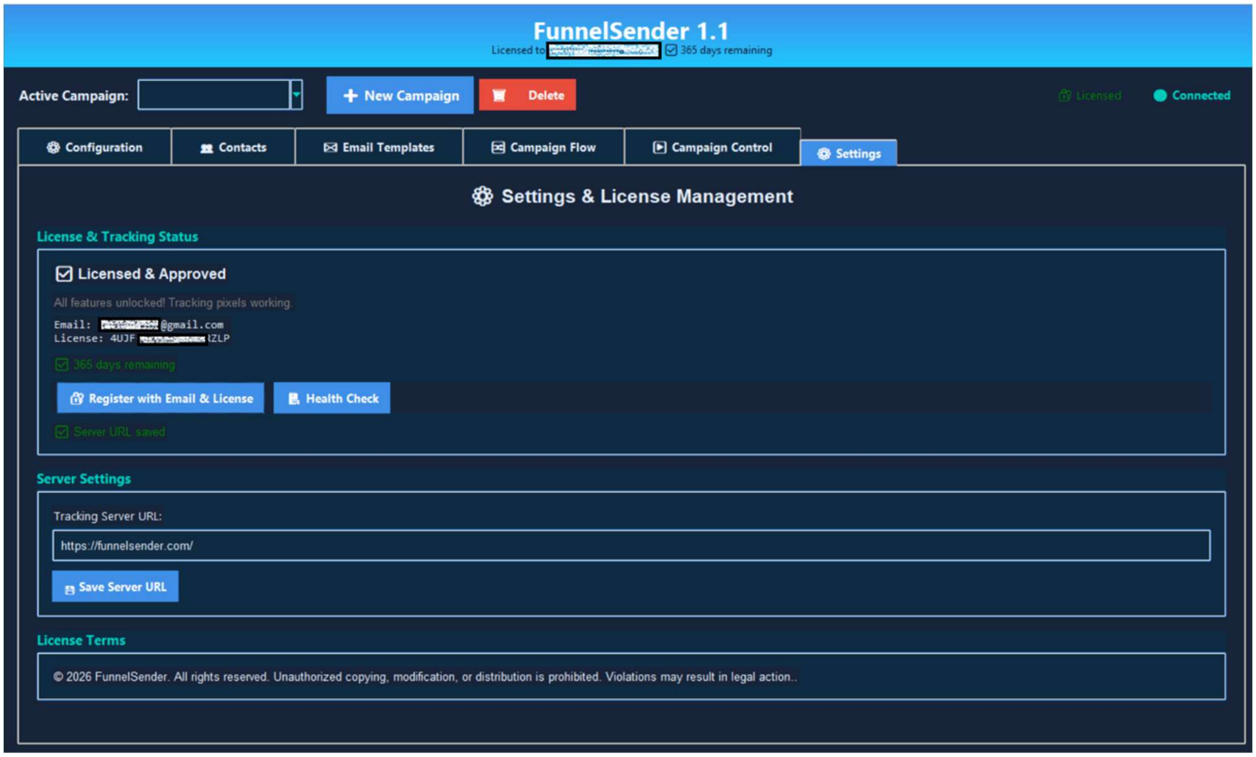
# 11. Settings Tab

The Settings tab manages your license and application configuration.




## License Management

### View Status:

- Current license status (Approved/Pending/Expired)
- Email and license key
- Days remaining

### Actions:

- **Check Status** - Refresh license status from server
- **Health Check** - Comprehensive system diagnostic
- **Test Tracking** - Verify tracking pixels work

## Server Settings

### Tracking Server URL:

- Default server is pre-configured
- Only change if instructed by support

### Health Check

The Health Check tests:

1. ☑ Internet connection
2. ☑ Server reachability
3. ☑ Registration status
4. ☑ License validation
5. ☑ Tracking pixel functionality
6. ☑ Opens API connection

Run this if you experience issues.

---

## 12. Advanced Features

### Template Shuffling

Send different templates to different contacts automatically.

**Setup:**

1. Create multiple templates (e.g., "Subject A", "Subject B")
2. Add a Step node
3. Choose **"Shuffle between multiple templates"**
4. Select all templates to include
5. Save

FunnelSender randomly picks one template per contact, letting you test which performs better.

### Multi-Account Rotation

Distribute sending across multiple accounts.

**How it works:**

1. Add multiple email accounts in Configuration
2. Set daily limits for each (e.g., 50/day)
3. Start your campaign
4. FunnelSender rotates automatically when limits are reached

**Example:**

- Account A: 50 emails/day
- Account B: 50 emails/day
- Account C: 50 emails/day
- **Total capacity:** 150 emails/day

## Working Hours Scheduling

Only send during business hours.

**Setup:**

1. Open Schedule dialog
2. Enable **"Only send during working hours"**
3. Set start and end times (e.g., 9:00 - 18:00)
4. Select working days (e.g., Mon-Fri)
5. Set timezone
6. Save

Campaign pauses outside working hours and resumes automatically.

## Conditional Flow Logic

Create intelligent sequences based on recipient behavior.

**"If replied" Condition:**

- YES path: Contact replied → typically ends sequence
- NO path: No reply → continue with follow-ups

**"If opened" Condition:**

- YES path: Contact opened email → send engaged follow-up
- NO path: Not opened → send different approach

**Example Flow:**

```
[Initial Email] → [Wait 48h] → [If opened?]
                                    │
                          YES ──────┴────── NO
                           │                │
                           ▼                ▼
                    [Engaged          [Re-engagement
                     Follow-up]        Email]
```

## System Tray Operation

FunnelSender can minimize to system tray:

1. When you close the window with campaigns running
2. Choose **"Minimize to tray"**
3. FunnelSender continues running in background
4. Double-click tray icon to restore
5. Right-click for menu:
    - Open App
    - Stop campaigns and exit

## Connection Recovery

FunnelSender handles internet disconnections:

1. **Connection lost:**
    - Campaigns auto-pause
    - Status shows "Paused (No Internet)"
    - Progress is saved
2. **Connection restored:**
    - Campaigns auto-resume
    - Continues from where it stopped
    - No emails are duplicated

---

# 13. Troubleshooting

## Common Issues and Solutions

### "SMTP Authentication Failed"

**Cause:** Incorrect email credentials

**Solutions:**

1. Verify email and password are correct
2. For Gmail: Use App Password, not regular password
3. For Outlook: Enable SMTP in account settings
4. Check if 2FA requires app-specific password

### "Connection Test Failed"

**Cause:** Network or server issues

**Solutions:**

1. Check internet connection
2. Verify server addresses are correct
3. Try different ports (587 vs 465)
4. Check if firewall is blocking connection
5. Try disabling VPN temporarily

### "Emails Going to Spam"

**Cause:** Deliverability issues

**Solutions:**

1. Use Safe or Normal sending mode
2. Warm up new email accounts gradually
3. Avoid spam trigger words in subject
4. Personalize emails with merge tags
5. Don't send too many emails per day
6. Use a custom domain instead of free email

### "Tracking Not Working"

**Cause:** License or server issues

**Solutions:**

1. Go to Settings → Run Health Check
2. Verify license is approved
3. Click "Test Tracking" to verify
4. Check internet connection
5. Contact support if issues persist

**"Campaign Stuck on Waiting"**

**Cause:** Various timing issues

**Solutions:**

1. Check if within working hours (if enabled)
2. Verify internet connection
3. Click "🔄 Hard Refresh"
4. Check if all accounts reached daily limits
5. Review log for error messages

**"Application Won't Start"**

**Cause:** Installation or system issues

**Solutions:**

1. Run as Administrator
2. Check Windows Defender isn't blocking
3. Reinstall the application
4. Verify system requirements are met
5. Check for Windows updates

**"License Shows Pending"**

**Cause:** Awaiting admin approval

**Solutions:**

1. You have 5-day grace period with full access
2. Wait for admin approval
3. Check Settings → License status
4. Contact support if more than 5 days

### Error Messages Reference

| Error | Meaning | Solution |
|---|---|---|
| "No sender accounts" | No email accounts configured | Add account in Configuration |
| "All accounts disabled" | Every account is disabled | Enable at least one account |
| "Daily limit reached" | All accounts at quota | Wait until reset or add accounts |
| "Template not found" | Template was deleted | Re-assign template in flow |
| "Start node not set" | No starting point defined | Set starting point in flow |
| "No contacts" | Campaign has no contacts | Import contacts in Contacts tab |

---

# 14. Best Practices

### Email Deliverability

**DO:**

- ☑ Warm up new accounts (start with 10-20/day)
- ☑ Use Safe or Normal sending mode
- ☑ Personalize every email
- ☑ Keep lists clean (remove bounces)
- ☑ Use custom domain email
- ☑ Include unsubscribe option
- ☑ Write like a human, not a marketer

**DON'T:**

- ❌ Send 500 emails from new account
- ❌ Use Bulk mode for cold outreach
- ❌ Buy email lists
- ❌ Use spam trigger words
- ❌ Send identical emails to everyone
- ❌ Ignore bounces

### Campaign Strategy

**Optimal Sequence Length:**

- 3-5 emails is ideal
- More than 7 rarely improves results

- Space emails 2-4 days apart

**Best Sending Times:**

- Tuesday-Thursday: Highest open rates
- 9-11 AM: Best morning window
- 2-4 PM: Best afternoon window
- Avoid Mondays and Fridays

**Subject Line Tips:**

- Keep under 50 characters
- Personalize with {first_name} or {company}
- Ask a question
- Create curiosity
- Avoid ALL CAPS and excessive punctuation!!!

## List Management

**Keep Lists Clean:**

1. Remove bounces immediately
2. Honor unsubscribes promptly
3. Remove non-responders after campaign
4. Update contact information regularly

**Segmentation:**

- Separate by industry
- Separate by company size
- Separate by previous engagement
- Target specific personas

## Account Management

**Multiple Accounts:**

- Use 3-5 accounts for large campaigns
- Set conservative daily limits (50-100)
- Warm up each account separately
- Rotate domains if possible

**Warming Schedule:**

- Week 1: 10-20 emails/day
- Week 2: 30-50 emails/day

- Week 3: 50-75 emails/day
- Week 4+: 75-100 emails/day

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# 15. Keyboard Shortcuts

## Global Shortcuts

| Shortcut | Action |
|---|---|
| Ctrl+S | Save current data |
| Ctrl+Z | Undo |
| Ctrl+Y | Redo |
| F5 | Refresh |

## Spreadsheet Shortcuts (Contacts & Configuration)

| Shortcut | Action |
|---|---|
| Ctrl+C | Copy |
| Ctrl+V | Paste |
| Ctrl+X | Cut |
| Ctrl+A | Select all |
| Delete | Clear contents |
| Tab | Next cell |
| Shift+Tab | Previous cell |
| Enter | Cell below |
| Arrow keys | Navigate |
| Double-click | Edit cell |

## Template Editor Shortcuts

| Shortcut | Action |
|---|---|
| Ctrl+B | Bold |
| Ctrl+I | Italic |
| Ctrl+U | Underline |
| Ctrl+L | Align left |
| Ctrl+E | Align center |
| Ctrl+R | Align right |
| Ctrl+A | Select all |
| Ctrl+Z | Undo |

| Shortcut | Action |
|---|---|
| Ctrl+Y | Redo |

### Flow Builder Shortcuts

| Shortcut | Action |
|---|---|
| Ctrl++ | Zoom in |
| Ctrl+- | Zoom out |
| Ctrl+0 | Reset zoom |
| Ctrl+Scroll | Zoom |
| Delete | Delete selected |
| Double-click | Edit node |
| Right-click | Context menu |

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## 16. Glossary

| Term | Definition |
|---|---|
| **Bounce** | Email that couldn't be delivered |
| **Campaign** | A set of automated emails sent to a contact list |
| **Cold Email** | Unsolicited email to a prospect |
| **Condition Node** | Flow element that routes based on behavior |
| **CTR** | Click-through rate |
| **Flow** | Visual representation of email sequence |
| **IMAP** | Protocol for receiving emails |
| **Merge Tag** | Placeholder replaced with contact data |
| **Open Rate** | Percentage of emails opened |
| **Reply Rate** | Percentage of emails that got replies |
| **Sequence** | Series of automated follow-up emails |
| **SMTP** | Protocol for sending emails |
| **Step Node** | Flow element that sends an email |
| **Template** | Pre-written email content |
| **Tracking Pixel** | Invisible image that detects opens |
| **Unsubscribe** | Request to stop receiving emails |
| **Warm Up** | Gradually increasing sending volume |

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# 17. Support & Contact

## Getting Help

**Documentation:**

- This user manual
- Video tutorials at [website]/tutorials
- Knowledge base at [website]/help

**Email Support:**

- support@funnelsender.com
- Response within 24-48 hours

**Before Contacting Support:**

1. Run Health Check (Settings → Health Check)
2. Check Troubleshooting section in this manual
3. Note any error messages
4. Have your license key ready

## Reporting Issues

When reporting an issue, please include:

1. Your license key
2. Windows version
3. FunnelSender version
4. Steps to reproduce the issue
5. Screenshots if applicable
6. Any error messages from the log

## Feature Requests

We welcome your feedback! Send feature requests to:

- feedback@funnelsender.com

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# Document Information

**FunnelSender User Manual**
**Version:** 1.1
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*End of User Manual*

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