

Product Manual

Everyday guide to contacts, groups, campaigns, templates, automation, and reporting



A straightforward setup that keeps your credentials private.

EmailMarketingAutomation for Windows x64 and SQL Server.
Product and project names are unchanged.

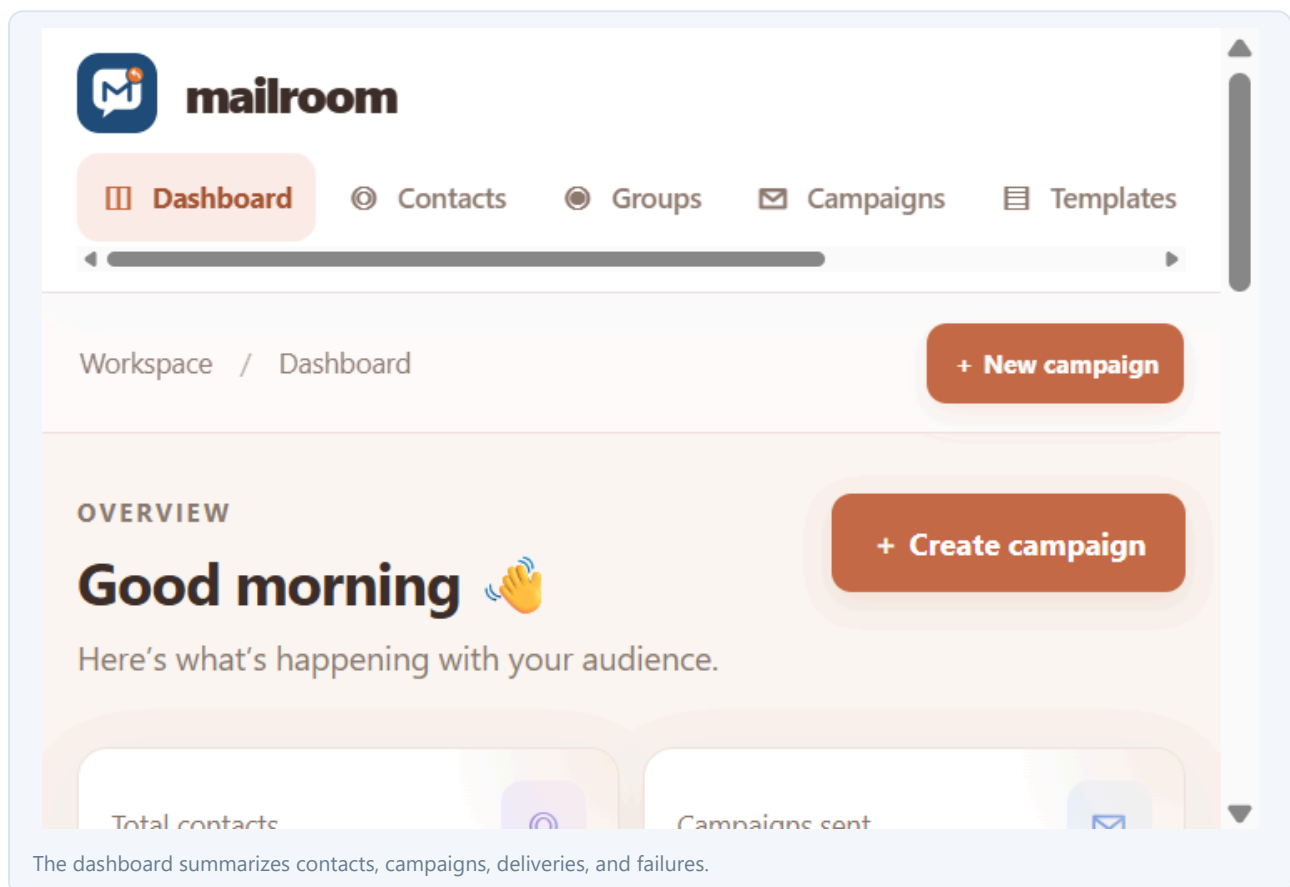
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Dashboard and Warm Sunset Theme

Review total contacts, sent campaigns, successful emails, and delivery failures on the dashboard. Use the left navigation to open contacts, groups, campaigns, templates, reports, and settings. The Warm Sunset color theme is applied consistently throughout the workspace, sign-in page, and unsubscribe page.



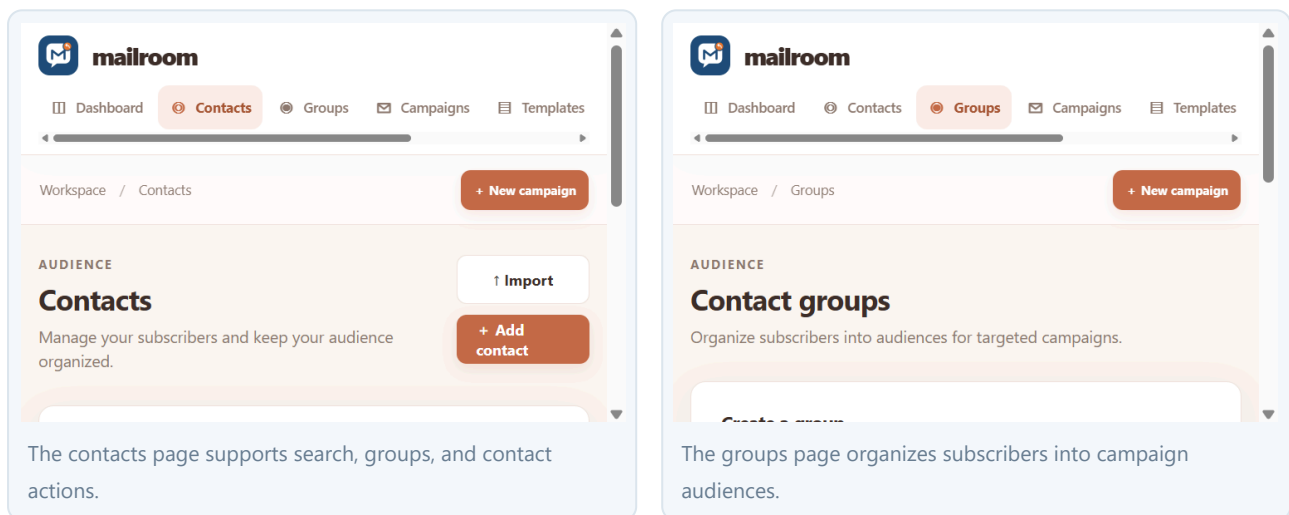
Quick Checklist

- Warm Sunset is the fixed application theme
- The same colors are used throughout the application



Manage Contacts and Groups

On the Contacts page, choose Add Contact to enter an email address, customer name, company, and group. Use Edit to change details or Delete to remove a contact. Create audience groups for campaigns on the Groups page. Unsubscribed addresses are excluded from marketing.



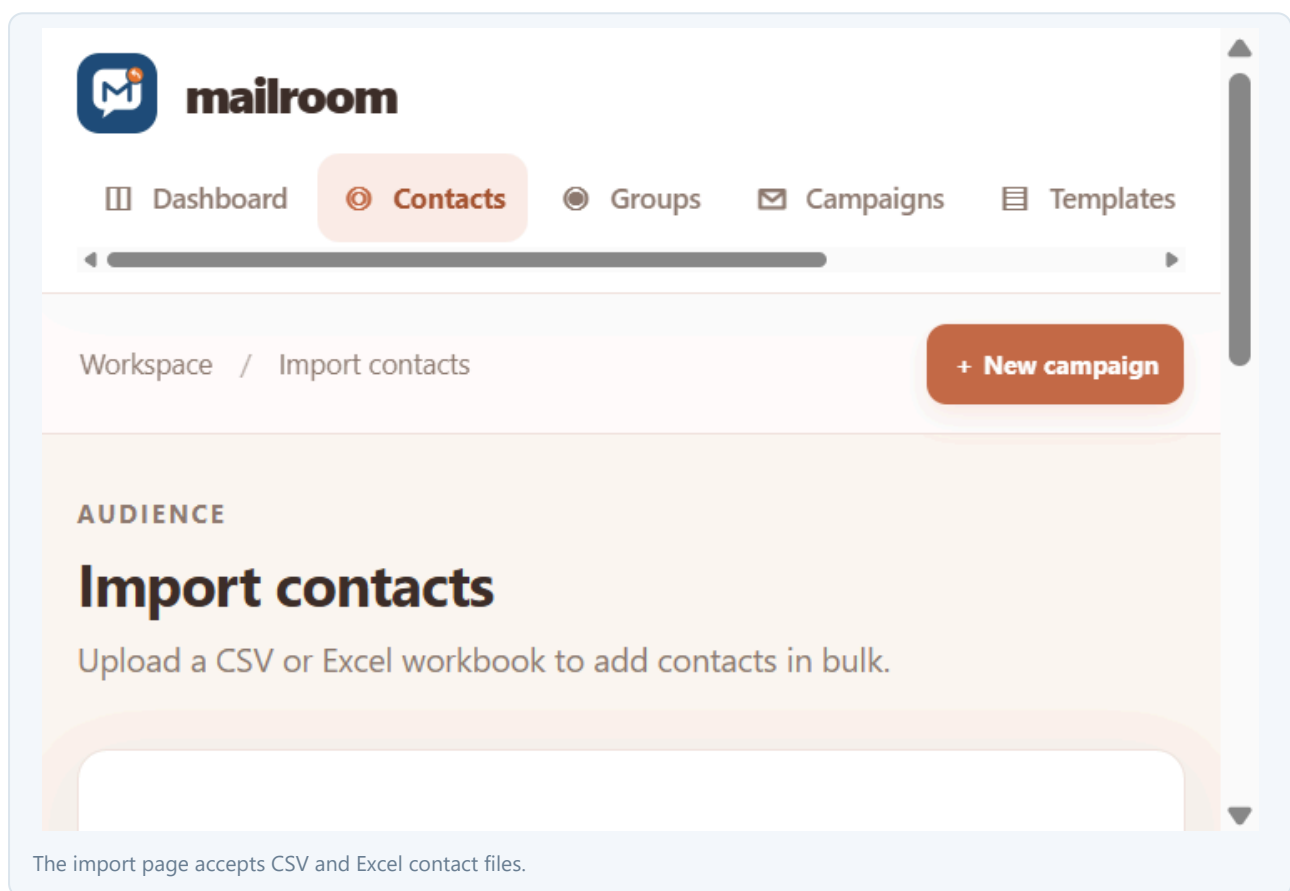
Quick Checklist

- Email addresses are required and must be unique
- Import contacts from CSV or XLSX
- CSV requires an Email header; Name and Company are optional



Import CSV and Excel Files

Choose Import on the Contacts page, select a CSV or XLSX file, and optionally select a group. The first row must contain an Email column. Name and Company are optional. Files can be up to ten megabytes. Invalid, duplicate, and unsubscribed addresses are skipped.



The import page accepts CSV and Excel contact files.

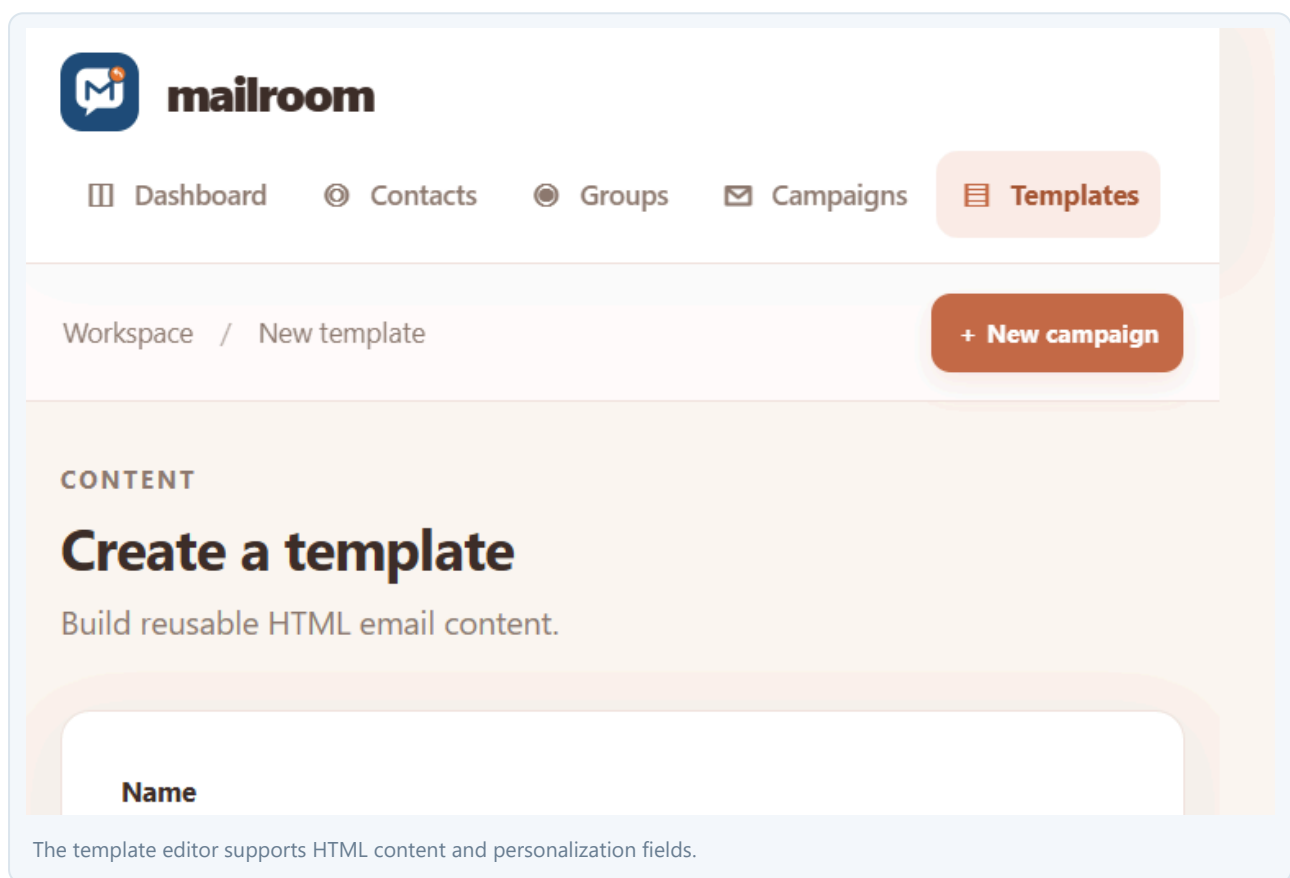
Quick Checklist

- XLSX contacts are read from the first worksheet
- Duplicate and invalid email addresses are not added
- Check the group contact count after importing



Templates and Personalization

Create a template on the Templates page and enter its name, subject, and HTML email content. Use `{{CustomerName}}` and `{{CompanyName}}` to personalize the customer name and company. Choose Preview Email to review an example, then choose Save Template.



Quick Checklist

- HTML email may look different across email clients
- Check layout and links with a test message
- Contact details are filled in for each recipient



Create, Send, and Schedule Campaigns

Choose Create Campaign on the Campaigns page. Enter a campaign name, subject, HTML content, and a group or all active contacts. Leave Schedule empty to save a Draft. Set a future date and time to schedule a campaign. Choose Send Now for a draft or Cancel for a scheduled campaign.



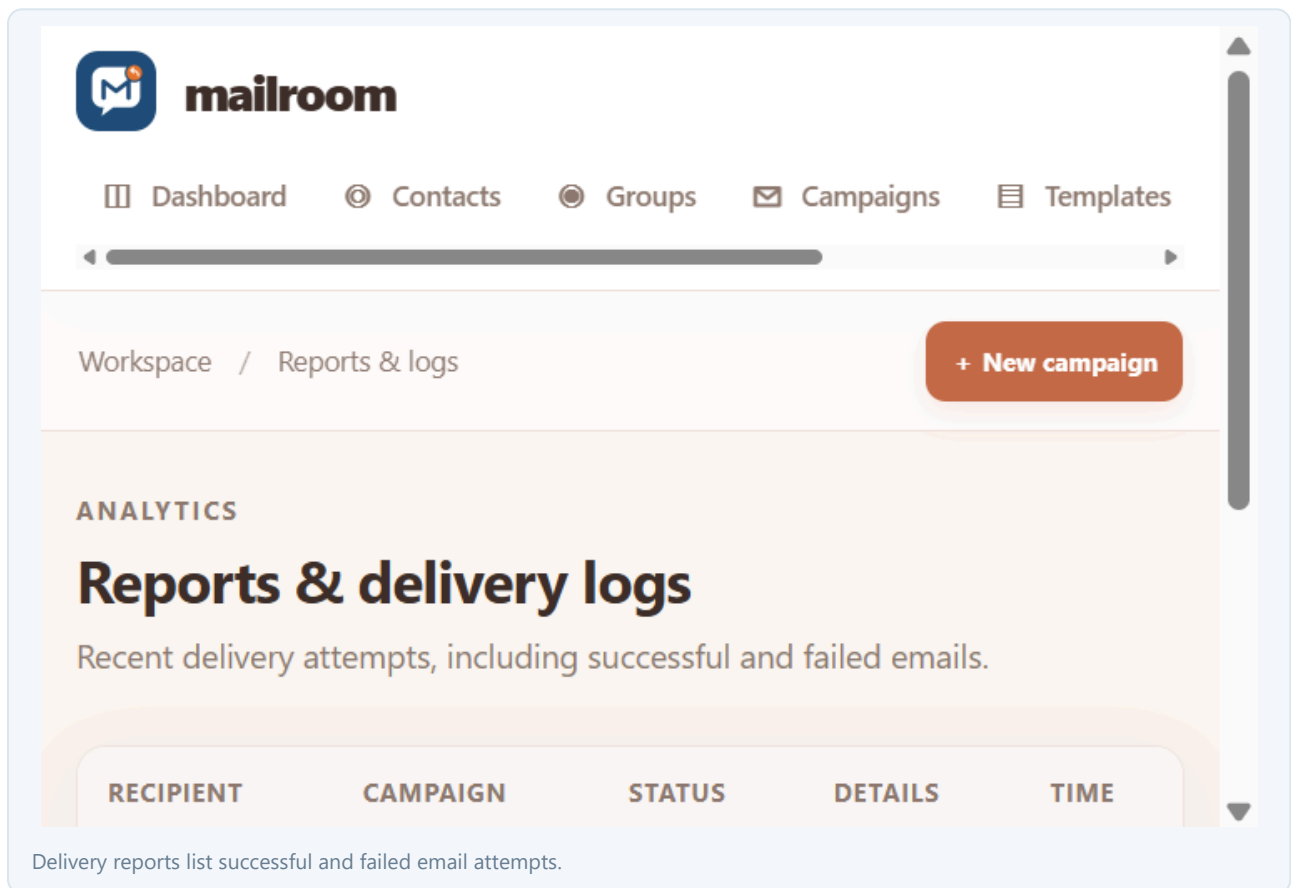
Quick Checklist

- Unsubscribed contacts are never included
- Scheduled sends use the server's local time
- A controlled daily sending limit is applied



SMTP Delivery and Reports

Review the SMTP host and sender address in Settings. Passwords are supplied securely through the process environment. Daily Limit and Batch Size control the number of messages sent each day and in each batch. Review successful and failed attempts, times, and details in Reports and Logs.



The screenshot shows the Mailroom web application interface. At the top, there's a navigation bar with the Mailroom logo and menu items: Dashboard, Contacts, Groups, Campaigns, and Templates. Below this, a breadcrumb trail shows 'Workspace / Reports & logs' and a '+ New campaign' button. The main content area is titled 'ANALYTICS' and 'Reports & delivery logs', with a subtitle 'Recent delivery attempts, including successful and failed emails.' Below this is a table with columns: RECIPIENT, CAMPAIGN, STATUS, DETAILS, and TIME. A note at the bottom states 'Delivery reports list successful and failed email attempts.'

Quick Checklist

- Use TLS and an app password for Gmail SMTP
- The default daily limit is 500 emails



Welcome and Follow-Up Automation

Choose saved templates in the Welcome and Follow-up Automation section of Settings. A welcome message is sent to a new contact. After a successful welcome, one follow-up is scheduled after the selected number of days. Further messages stop when a contact unsubscribes.

Quick Checklist

- Create templates before selecting them
- Choose a welcome template to enable follow-ups
- Review delivery reports if SMTP is unavailable



Unsubscribes, Security, and Support

Marketing emails automatically include a personalized unsubscribe link. The unsubscribe record remains even if the contact is deleted. Sign out on shared computers, use HTTPS, and choose a strong password. Your team is responsible for SQL Server and email account backups and security.

Quick Checklist

- Only authorized users should access personal information
- A public site URL is required for unsubscribe links
- Check logs and SMTP and SQL connections when troubleshooting