



optyflo

Product Guide

Everything you need to turn contacts into customers — set up your account, import your audience, write emails with AI, send campaigns, and put your outreach on autopilot.

Getting started

Contacts

AI email writing

Campaigns

Automations

docs.optyflo.com

Step-by-step, with screenshots

Contents

★ Welcome to optyflo

1 Logging in & the dashboard

2 Connect your SMTP

3 Add a contact manually

4 Import contacts from a CSV file

5 Import contacts via webhook

6 Write an email with AI

7 Email templates

8 Create & send a campaign

9 Build an automation

Welcome to optyflo

optyflo is an all-in-one platform for turning contacts into customers. Email campaigns, AI email writing, contacts and CRM, a unified inbox, WhatsApp, webinars, and visual automations all live in one place, sharing **one contact list and one bill**. Instead of stitching together five separate tools, you run your entire outreach from a single dashboard.

This page orients you: what optyflo does, and the order to set it up so you reach your first send with the least friction.

Start on the free plan

Every account includes **1,000 lifetime emails** on the free plan, so you can set everything up and send real outreach before paying anything.

What optyflo does

Everything below draws from the same contact list, so a person you add once is available to every feature:

Area	What it's for
Email campaigns	Send one-off or scheduled broadcasts to a segment of your contacts.
AI email writing	Draft subject lines and body copy from a short prompt.
Contacts / CRM	Store, tag, and organize the people you're reaching.
Unified inbox	Read and reply to responses without leaving optyflo.
WhatsApp	Reach contacts on WhatsApp alongside email.
Webinars	Run webinar-driven outreach and follow-ups.
Visual automations	Build sequences that trigger and send on their own.

The recommended setup order

Do these in sequence. Each step builds on the one before it, and the first two are required before optyflo can send anything.

Step 1 — Log in and learn the dashboard

Sign in and get your bearings. The dashboard is your home base: the left sidebar navigates every feature, and a setup checklist guides you to your first send. Spend a minute here before diving in.

See [Logging in & the dashboard](#).

Step 2 — Connect your SMTP

Plug in your email provider — this is required to send. optyflo delivers through your own SMTP provider (Gmail, Amazon SES, your web host, and so on). Until it's connected, campaigns and automations will not go out.

See [Connect your SMTP](#).

Step 3 — Add your contacts

Bring in the people you want to reach. Campaigns need recipients. You can add contacts [manually](#), [import a CSV file](#), or feed them in automatically [via webhook](#).

Step 4 — Write an email

Create the message you'll send. Use the [AI builder](#) to generate copy from a prompt, or build a reusable [email template](#) in the visual builder.

Step 5 — Create and schedule a campaign

Send your first broadcast. Pick a template, choose recipients, and send now or schedule for later. See [Campaigns](#).

Step 6 — Build an automation

Let outreach run on its own. Trigger sequences on events like sign-ups or replies, set it once, and let optyflo do the sending. See [Automations](#).

The 5-step setup checklist

When you first land on the dashboard, you'll see a **"Welcome to optyflo — let's get you set up"** checklist. It's the fastest path to your first send, and each step links straight to where the work happens:

Step	What it does	Where it takes you
Connect your SMTP	Plug in any SMTP provider so optyflo can send on your behalf.	Settings → SMTP
Add your first contact	Import a CSV or add a contact manually — campaigns need recipients.	Contacts → Import
Create an email template	Use the visual builder, AI generator, or pick a starter.	Email Templates
Send your first campaign	Pick a template, choose recipients, and ship outreach.	New Campaign
Set up an automation	Trigger sequences on events — set it once, send forever.	Automations

The screenshot shows the optyflo Campaign Manager dashboard. At the top, there's a search bar and user information (Dark mode, 1,000/1,000 free emails, 100 left today). The main content area features a 'Welcome to optyflo' message with a 2/5 step progress indicator. Below this is a 'Setup progress' bar at 40% completion. The checklist includes: 'Connect your SMTP' (with a 'Connect SMTP' button), 'Add your first contact' (DONE), 'Create an email template' (DONE), 'Send your first campaign' (with a 'Start campaign' button), and 'Set up an automation' (with a 'Build automation' button). A plan usage section shows 'YOU ARE ON THE FREE PLAN' with '1,000 of 1,000 free emails left' and a 'View paid plans' button. At the bottom, there's an 'OVERVIEW My Campaigns' section with a 'New Campaign' button.

The post-login dashboard, with the setup checklist at the top and your plan usage and campaigns below.

Do the SMTP step first

Connecting your SMTP is the prerequisite for everything that sends. Campaigns and automations won't deliver until it's connected. A green **Done** badge appears as you finish each step, and the checklist hides itself once all five are complete.

Next: [Logging in & the dashboard →](#)

Logging in & the dashboard

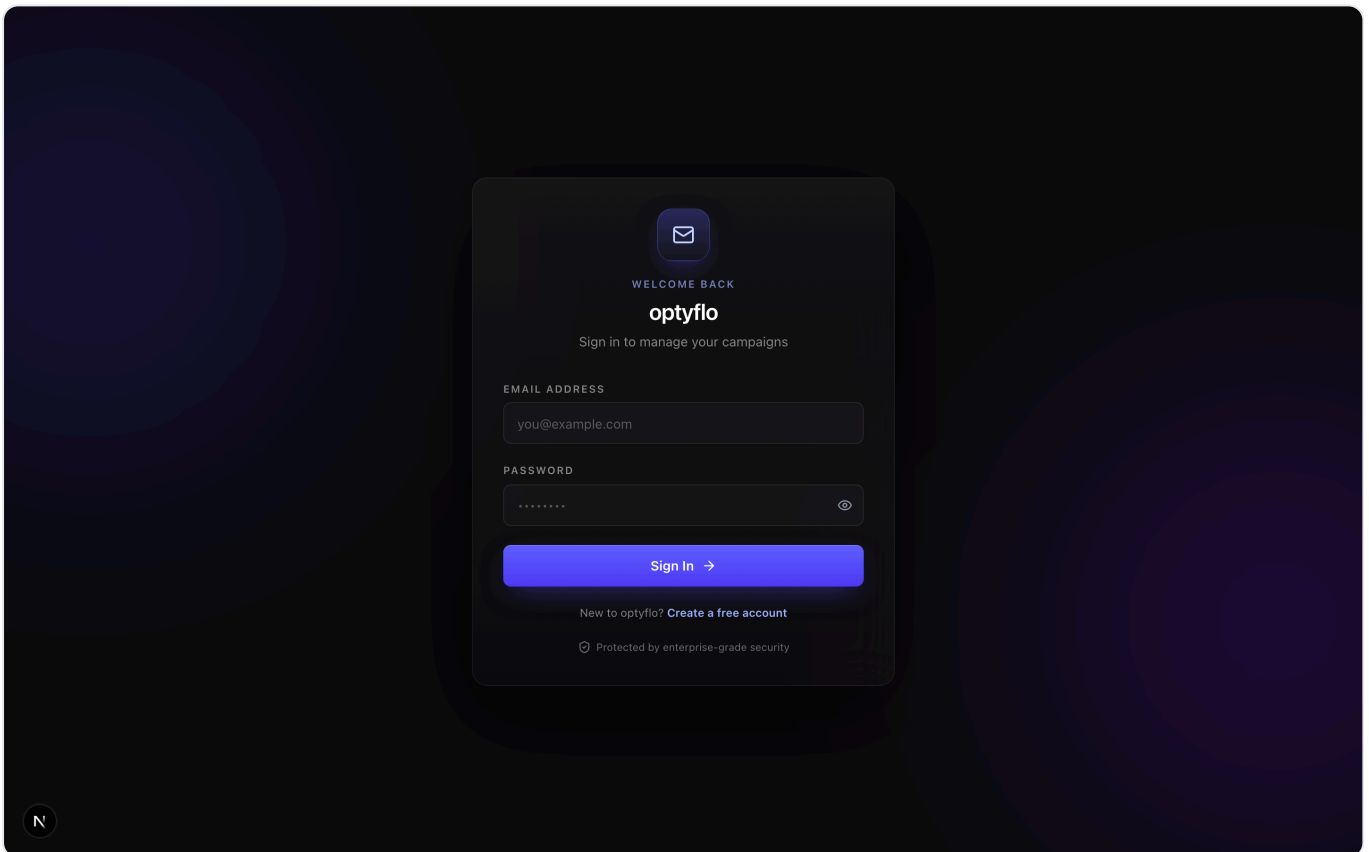
Signing in takes you to the dashboard, your home base in optyflo. This page walks you through the login screen and then gives you a guided tour of everything on the dashboard, so you know where each feature lives before you start.

💡 No account yet?

You'll need an optyflo account to sign in. You can create one free from the login screen — the free plan includes **1,000 lifetime emails**.

Step 1 — Sign in

Go to optyflo.com and click **“Sign In”**. This opens the login page (you can also go straight to </login>). Enter the **Email address** and **Password** for your account, then click **Sign In**.

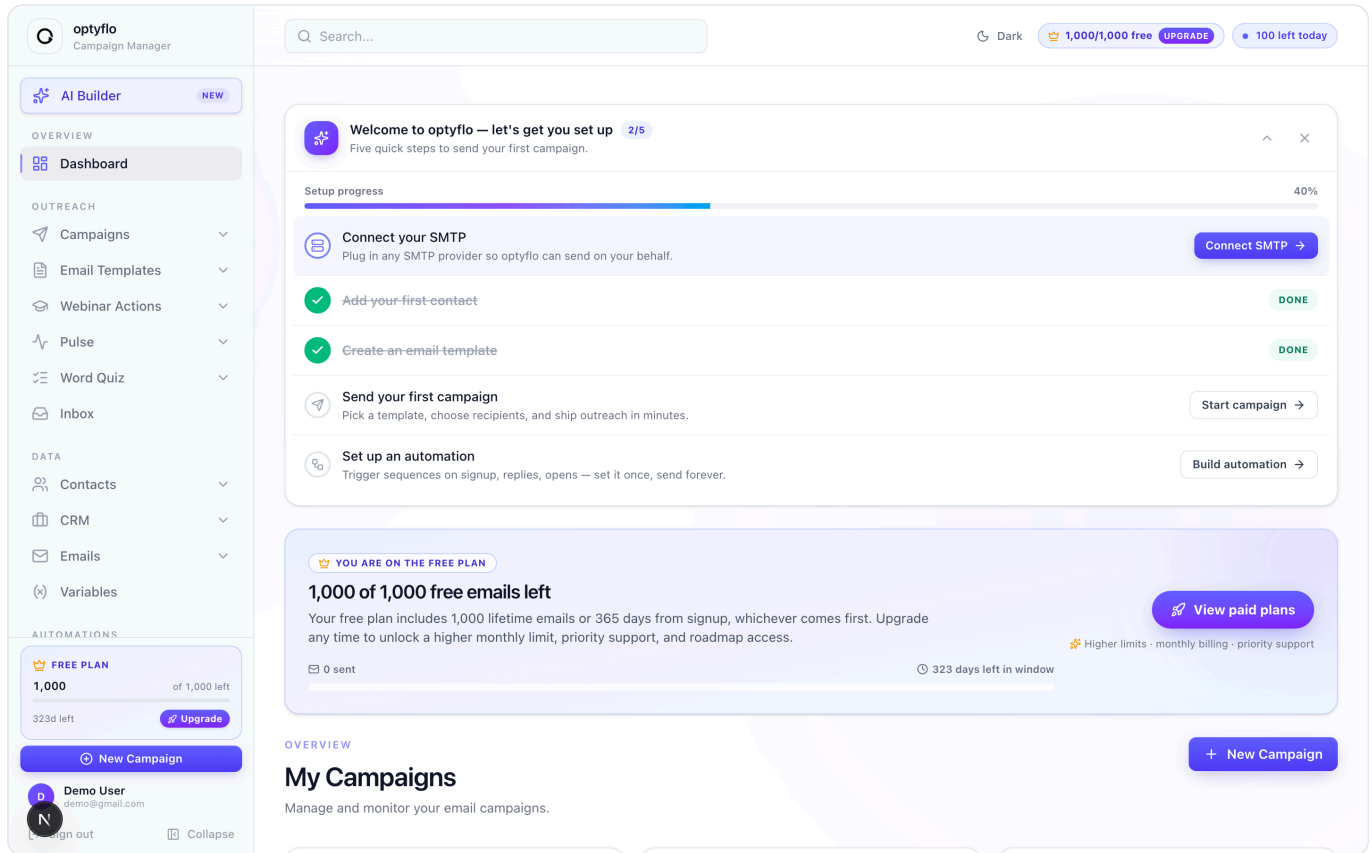


The optyflo sign-in screen, with the Email address and Password fields and the Sign In button.

If you don't have an account yet, click **Create a free account** to head to </signup>. The free plan gives you 1,000 lifetime emails to get started.

Step 2 — Land on the dashboard

After signing in you arrive at the dashboard (route `/client`). This is where you'll start every session. At the top sits a setup checklist that walks you to your first send, and below it your plan usage and campaign overview.



The dashboard: the “let’s get you set up” checklist at the top, with plan usage and campaigns below.

Step 3 — Learn the sidebar

Use the left sidebar to navigate every feature. It’s grouped into sections so related tools sit together:

Section	Items
Overview	Dashboard
Outreach	Campaigns, Email Templates, Webinar Actions, Pulse, Word Quiz, Inbox
Data	Contacts, CRM, Emails, Variables
Automations	Automations
Settings	(account and provider settings, including SMTP)

Your sidebar reflects your plan

Some items appear only when the matching feature is enabled for your account, so you may see more than the list above — for example **WhatsApp** or a **Knowledge Base**. If something in this guide isn't in your sidebar, that feature likely isn't turned on yet.

At the very top of the sidebar is an **AI Builder** button with a **New** badge — a chat assistant that helps you design and edit automations.

Step 4 — Read the top bar

Check the top bar for search and your sending limits. It carries a global search, a light/dark theme toggle, a plan usage pill, and a daily send-quota pill that shows how many sends you have left (for example, *100 left today*). The quota pill is worth a glance before a big campaign.

Step 5 — Work through the setup checklist

Follow the checklist card to reach your first send. It's titled **"Welcome to optyflo — let's get you set up"** with the subtitle *"Five quick steps to send your first campaign."* A **Setup progress** bar shows your completion percentage, and a green **Done** badge appears on each step as you finish it. Every step has a CTA button that drops you exactly where the work happens:

#	Step	What it does	CTA
1	Connect your SMTP	Plug in any SMTP provider so optyflo can send on your behalf.	Connect SMTP → SMTP settings
2	Add your first contact	Import a CSV or add a contact manually — campaigns need recipients.	Add contacts → import contacts or add manually
3	Create an email template	Use the visual builder, AI generator, or pick a starter.	Create template → Email Templates
4	Send your first campaign	Choose a template and recipients, then send.	Start campaign → new campaign
5	Set up an automation	Trigger sequences on events, then let them run.	Build automation → Automations

SMTP gates the rest

Step 1 is the prerequisite for everything that sends — connect your SMTP first, or campaigns and automations won't deliver.

 **Collapse or dismiss the checklist**

The collapse and dismiss controls sit in the checklist card's top-right corner. Tuck it away whenever you like — the card auto-hides once all five steps are complete.

Step 6 — Scan your plan and campaigns

Look below the checklist for your plan usage and campaign overview. A plan/usage card shows how much of your allowance you've used, and a **My Campaigns** overview surfaces recent campaign activity once you start sending.

Next: [Connect your SMTP →](#)

Connect your SMTP

optyflo sends email through **your own email provider (SMTP)**, so your campaigns go out from your inbox and land with your sender reputation. Connecting SMTP is the first thing to do after signing in, and it unlocks everything else.

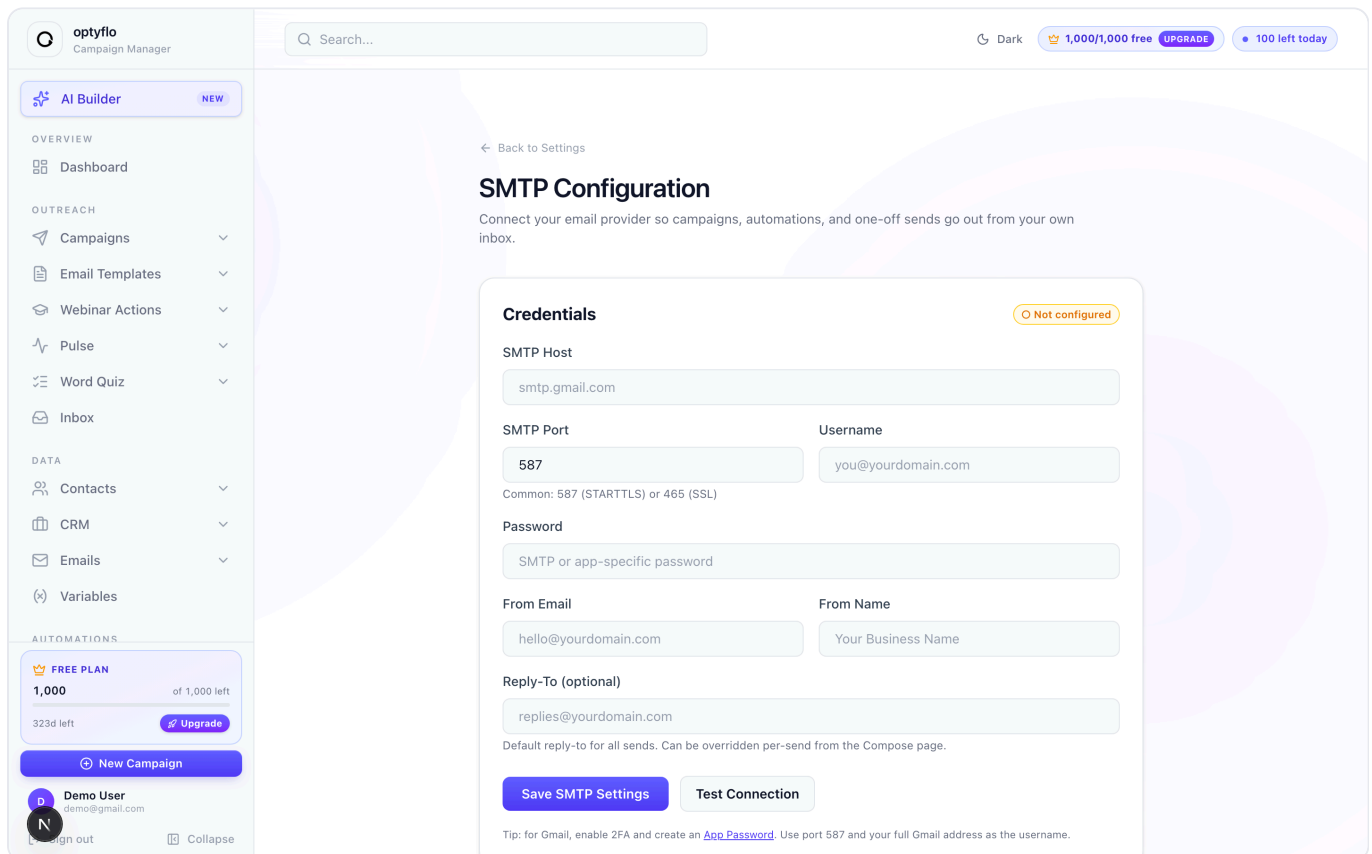
⚠ Required before you can send

Until you connect SMTP, **campaigns, automations, and one-off sends will not deliver.** This is step 1 of the setup checklist for a reason — do it before adding contacts or building anything else.

You can use Gmail, Amazon SES, your web host’s mailbox, or any other SMTP provider.

Step 1 — Open the SMTP settings

Go to Settings → SMTP Configuration. You can also click **Connect SMTP** on the dashboard checklist. Either way you land on the **SMTP Configuration** page at `/client/settings/smtp`, described as “Connect your email provider so campaigns, automations, and one-off sends go out from your own inbox.” A status badge at the top reads either **● Connected** or **○ Not configured**.



The SMTP Configuration page: enter your provider’s credentials, then test and save.

Step 2 — Fill in your credentials

Enter the details from your email provider. These come from your provider's SMTP or sending settings — not your webmail login page. Fill every required field:

Field	What to enter	Example
SMTP Host	Your provider's outgoing mail server	smtp.gmail.com
SMTP Port	Common: 587 (STARTTLS) or 465 (SSL)	587
Username	The login for your mailbox	you@yourdomain.com
Password	Your SMTP or app-specific password	(write-only — see below)
From Email	The address recipients see	hello@yourdomain.com
From Name	The name recipients see	Your Business Name
Reply-To (optional)	Default reply-to for all sends	replies@yourdomain.com

The password field is write-only

For security, optyflo never displays a stored password. Once one is saved, the field's label becomes **(stored — leave blank to keep current)** — so you can edit any other field and save without re-typing the password.

Using Gmail

There are no provider presets, so enter the values yourself. For Gmail, enable 2-factor authentication and create an **App Password**. Then use `smtp.gmail.com`, port `587`, and your full Gmail address as the **Username**.

Step 3 — Test the connection

Click **"Test Connection"** to confirm the credentials work. The button shows **Testing...** while it runs, then reports the result inline with a ✓ (success) or ✗ (error). Fixing problems here — a wrong host, port, or password — is much easier than discovering them after a campaign fails to send.

Step 4 — Save your settings

Click **"Save SMTP Settings"** to store the configuration. The button shows **Saving...**, then a **"SMTP settings saved"** message confirms it and the status badge flips to **● Connected**. From now on, every campaign, automation, and one-off send goes out from this identity.

Changing or disconnecting later

Come back to this page any time to update your provider. Because the password is write-only, leave it blank to keep the current one while editing other fields. When you're connected, a **Disconnect SMTP** button appears — clicking it clears your stored credentials and pauses all sending until you reconfigure.

Reply-To can be overridden per send

The **Reply-To (optional)** you set here is the default for all sends. You can override it on individual sends from the Compose page.

Next: bring in your audience → [add a contact manually](#), [import a CSV](#), or [import via webhook](#).

Add a contact manually

Adding one person by hand is the quickest way to get started or to capture a single new lead — a referral, a business card, someone who just replied to you. This guide walks you through creating a contact from scratch and explains why a few optional fields are worth filling in.

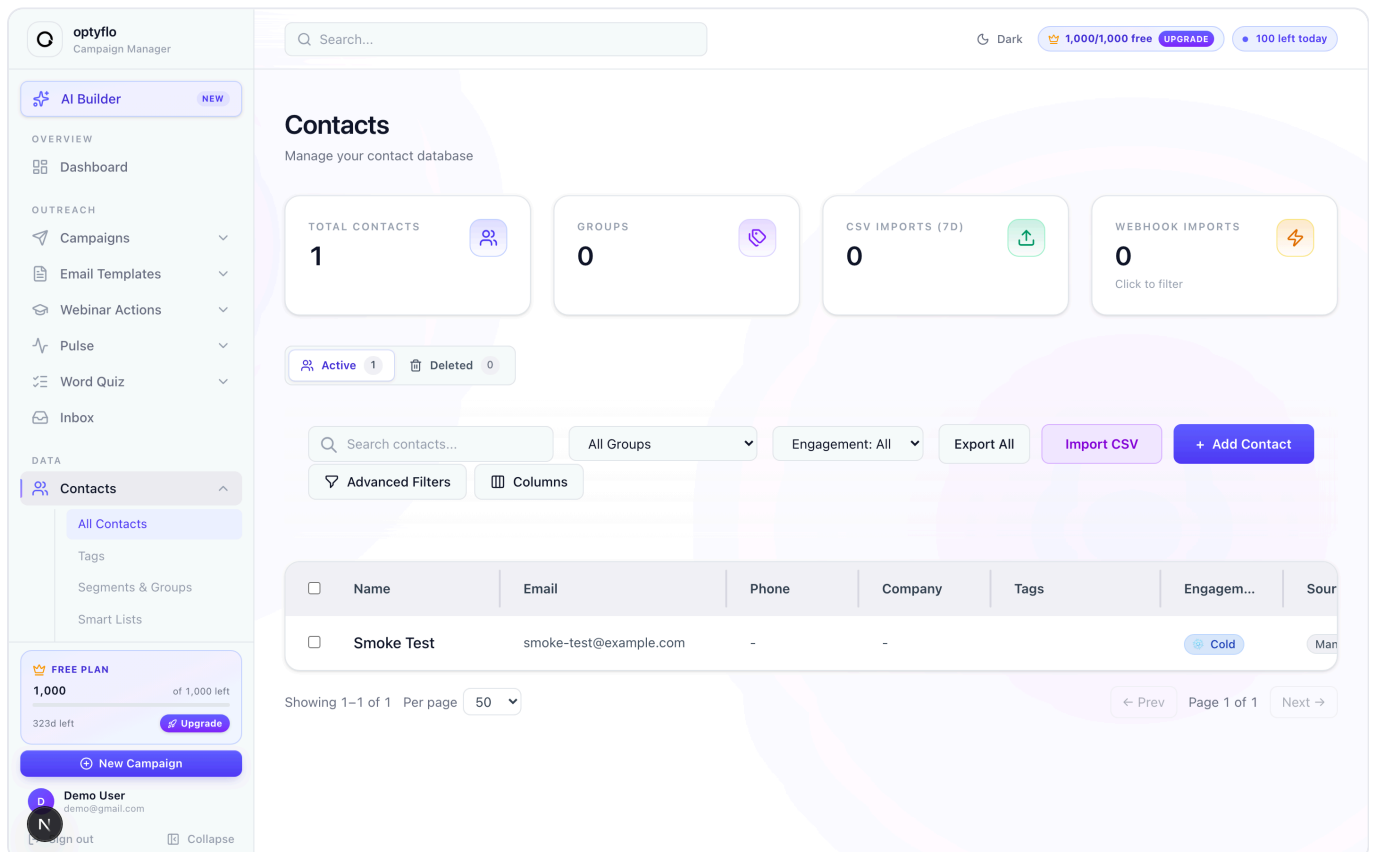
Recommended

You only need a name and an email to save a contact. Everything else is optional — but adding tags now makes it far easier to target campaigns and trigger automations later.

Step 1 — Open the Contacts page

Go to `/client/contacts` from the sidebar. This is the home for everyone in your audience, and where every new contact will land.

At the top you'll see stat cards for **Total Contacts**, **Groups**, **CSV Imports (7d)**, and **Webhook Imports**, followed by a **Search contacts...** box and your contact table. Use the **Active** and **Deleted** tabs to switch views (deleted contacts can be restored), or open **Advanced Filters** to narrow by tag, company, city, state, country, or Import Source. If this is a fresh account you'll see the empty state **"No contacts yet"** with the prompt **"Add your first contact to get started"**.



The Contacts page — stat cards up top, search and filters, then your contact table.

From this page you can also **Import CSV**, jump to **+ Add Contact**, or download your list with **Export All / Export Filtered**.

Step 2 — Open the Add Contact form

Click **+ Add Contact** in the top-right of the Contacts page. This opens `/client/contacts/new`, titled **"Add New Contact"** with the description **"Create a new contact in your database"**. A **← Back to Contacts** link sits at the top if you need to step away.

The screenshot shows the 'Add New Contact' form in the Optyflo Campaign Manager interface. The form is divided into four main sections: Basic Information, Demographics, Professional, and Address & Tags & Notes. The Basic Information section includes fields for First Name, Last Name, Email, and Phone. The Demographics section includes fields for Gender, Date of Birth, Age Range, and Marital Status. The Professional section includes fields for Occupation and Company. The Address & Tags & Notes section is partially visible at the bottom.

The Add New Contact form, grouped into Basic Information, Demographics, Professional, Address, and Tags & Notes.

Step 3 — Fill in the contact details

Complete the fields you have. Only **First Name** and **Email** are required (marked with *); everything else is optional and grouped into cards so you can fill in as much or as little as you like.

Card	Fields
Basic Information	First Name *, Last Name, Email *, Phone
Demographics	Gender (Male / Female / Other / Prefer not to say), Date of Birth, Age Range (18-24 ... 65+), Marital Status (Single / Married / Divorced / Widowed)
Professional	Occupation, Company
Address	Address Line 1, Address Line 2, City, State, Country, Postal Code
Tags & Notes	Tags (type in the Add tag... box), Notes

Age Range fills itself in

If you set a **Date of Birth** but leave **Age Range** blank, optyflo works out the age range for you automatically.

Step 4 — Save the contact

Click [Create Contact](#). The button shows **“Creating...”** while it saves, then takes you straight to the new contact's detail page. If something's missing you'll see an error — the two you're most likely to hit are **“Email and first name are required”** and, for a repeat email, **“Contact with this email already exists”** (edit the existing contact instead of creating a duplicate).

Tags are worth the extra few seconds

Tags aren't just labels — they're how you target campaigns and trigger [automations](#). For example, adding a tag can fire a **“Tag Added”** trigger that kicks off a welcome sequence. Add a couple of meaningful tags now and they'll pay off every time you send.

Next: [Import contacts from a CSV file](#) →

Import contacts from a CSV file

A CSV import is the fastest way to bring in an existing list — exported from another tool, a spreadsheet, or a signup form. optyflo walks you through a 4-step wizard, **Upload → Mapping → Preview → Import**, so you can check your data before anything is saved.

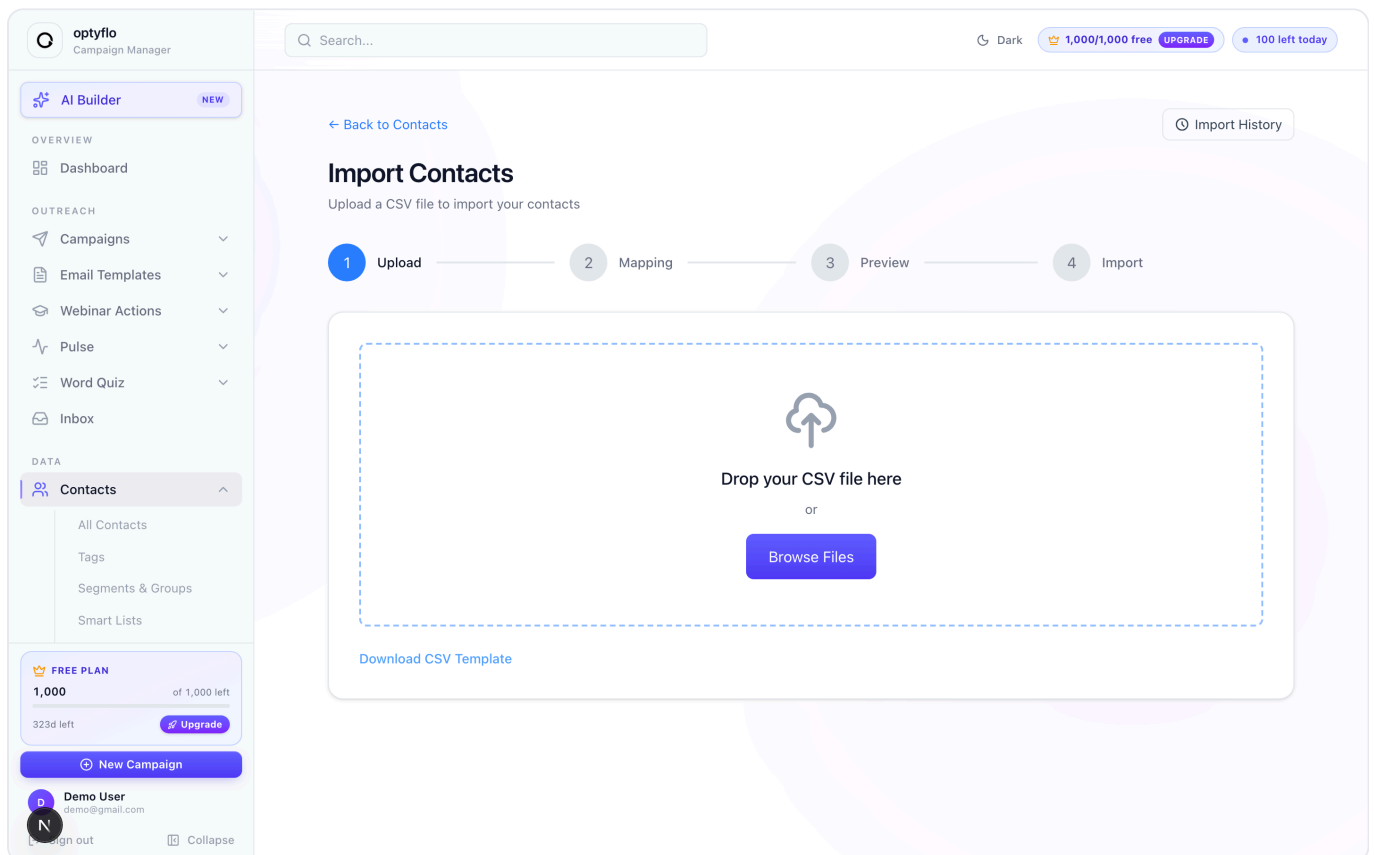
Recommended

Have your list ready as a `.CSV` file. Only an **email** column is essential — but the closer your file matches optyflo’s template, the less mapping you’ll do by hand.

Step 1 — Upload your file

Go to `/client/contacts/import`. The page is titled “**Import Contacts**” with the description “**Upload a CSV file to import your contacts**”, a stepper across the top (**Upload → Mapping → Preview → Import**), and an **Import History** link in the top-right.

Drag your file onto the **Drop your CSV file here** zone, or click **Browse Files** and pick a `.CSV`.



Step 1 — drop your CSV file or browse for it, and grab the template if you’re building your file from scratch.

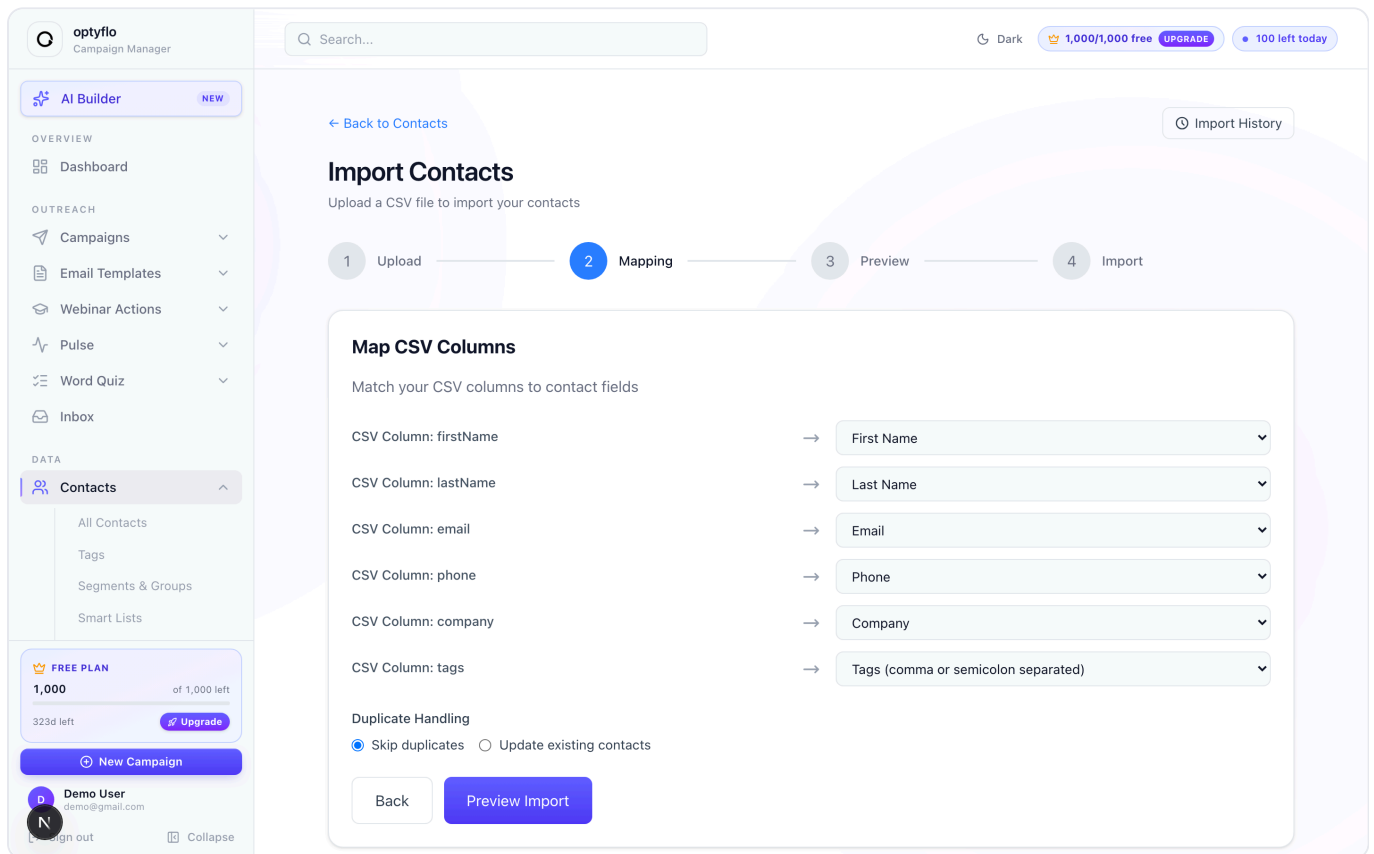
Not sure how to format it? Click **Download CSV Template** for a ready-made file whose header row is exactly:

```
firstName, lastName, email, phone, gender, dateOfBirth, ageRange, maritalStatus, occupation, company, addressLine1, addressLine2, city, state, country, postalCode, tags, notes
```

i Only email is essential
Every other column is optional. The **tags** column accepts multiple tags separated by commas or semicolons — for example `customer;vip`.

Step 2 — Map your columns

Match each CSV column to a contact field. Under the heading **“Map CSV Columns” / “Match your CSV columns to contact fields”**, optyflo auto-matches your headers — each row shows **“CSV Column: {name}”** with a dropdown of target fields on the right. Review them and adjust anything that landed wrong.



Step 2 — each CSV column maps to a contact field. Set how duplicates are handled, then continue.

Useful dropdown options include:

Option	Use it when
Skip this column	The column isn't something you want to import
Full Name (auto-split)	Your file has one combined name column
First Name, Email, ...	Standard one-to-one field matches
Tags (comma or semicolon separated)	Your file lists multiple tags in one cell
Notes	Free-form note text

Then set **Duplicate Handling** — how rows whose email already exists are treated:

- **Skip duplicates** (*default*) — existing contacts are left untouched; only new email addresses are added.
- **Update existing contacts** — intended to refresh matched contacts with the new values.

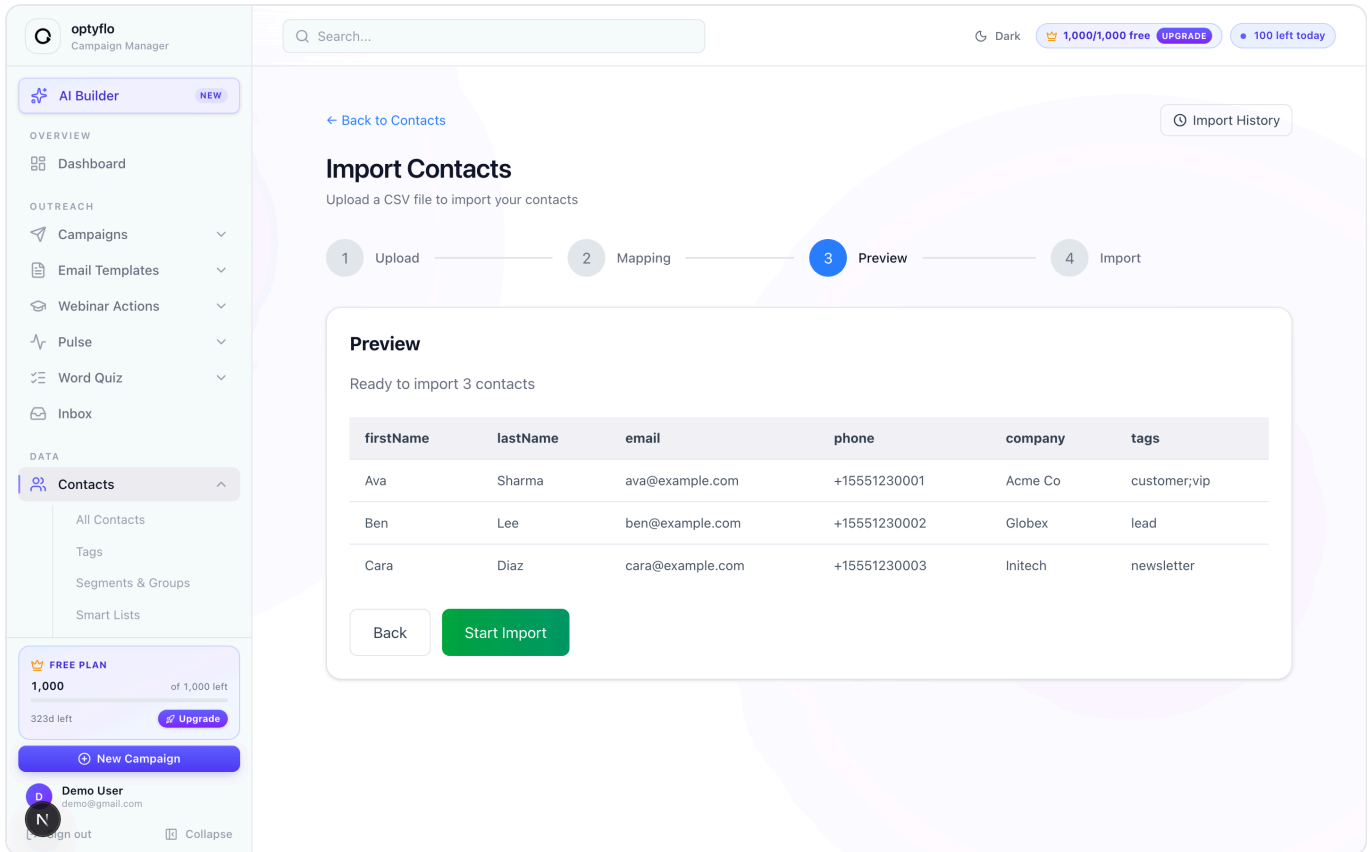
⚠ Duplicates are matched by email

optyflo de-duplicates by email address. In the current version, rows that match an existing contact are **skipped** rather than overwritten — so an import mainly **adds new people**, and the **Updated** count may stay at 0. Re-running the same file is safe.

When everything looks right, click **Preview Import**.

Step 3 — Preview before importing

Check the sample rows. The “**Preview**” step confirms “**Ready to import {N} contact(s)**” and shows the first mapped rows (“**Showing first 5 of {N} contacts**”) so you can spot a mis-mapped column before committing. If it all looks correct, click **Start Import**. To fix anything, click **Back**.



Step 3 — a preview of the first 5 mapped rows, so you can catch mistakes before importing.

Step 4 — Import and review the results

Click **Start Import** and let it run. optyflo shows **“Importing contacts...”** with a **“Processing {x} of {y}”** counter. Large imports keep running in the background — you can leave this page and check **Import History** later without losing progress.

When it finishes you’ll see **“Import Complete!”** with three counts:

Count	Meaning
Created	Brand-new contacts added
Updated	Existing contacts changed (see the note on duplicate handling above)
Skipped	Rows that were duplicates or invalid — expand View skip reasons for details

From here, the footer links let you jump to **View Contacts** or **Import History**.

💡 Changed your mind? You can undo

Every import is reversible for **30 days**. Go to **Import History** (</client/contacts/imports>), find the import, and use the **Rollback** action to remove exactly the contacts it added or changed.

Next: stream contacts in automatically → [Import contacts via webhook](#)

Import contacts via webhook

A webhook lets any external system add contacts to optyflo automatically — no manual export or import. Point Zapier, Make, Pabbly, a signup form, or your own script at your personal webhook URL, and new contacts flow in the moment they're captured.

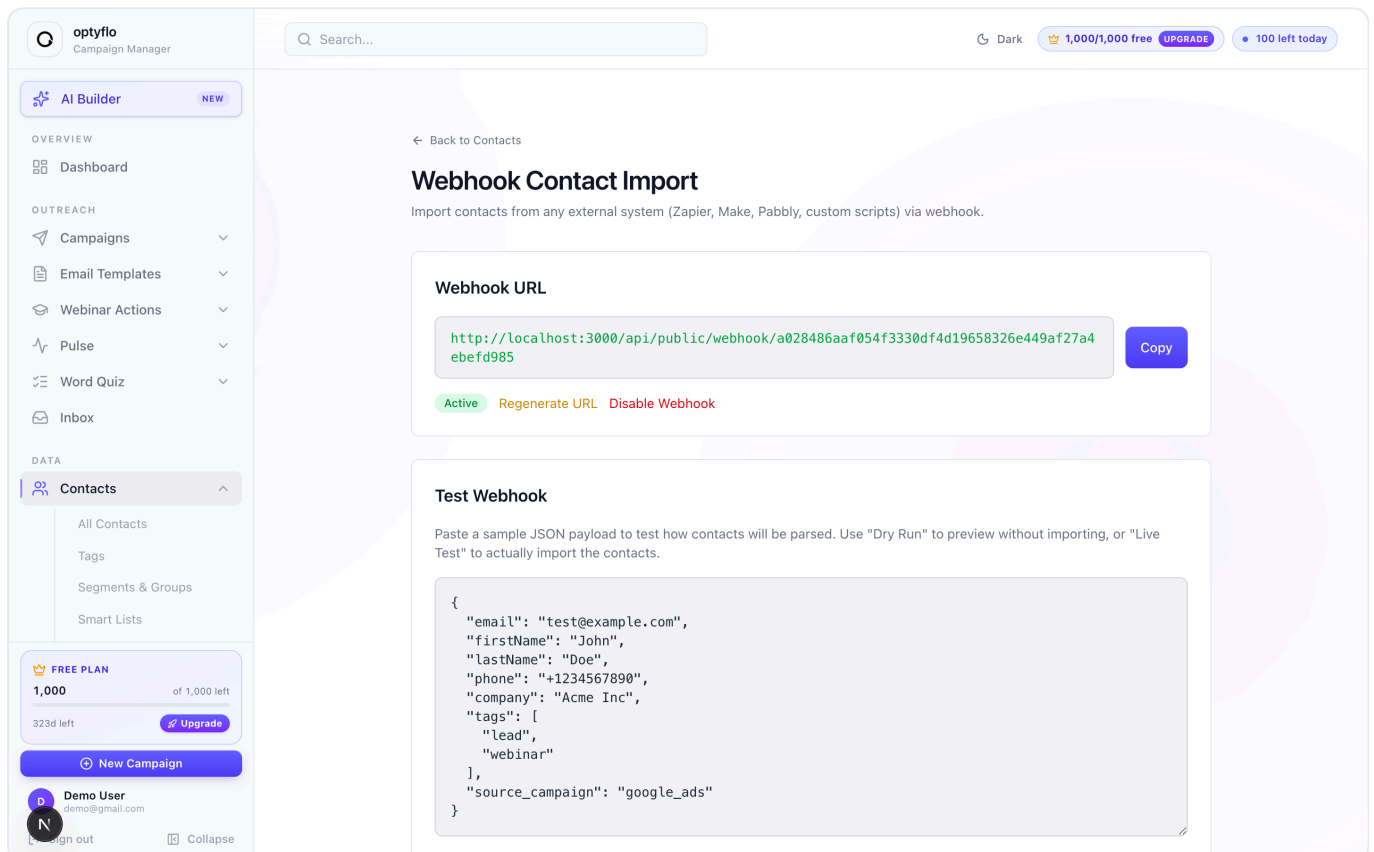
⚠ Before you start

Your webhook URL contains a secret key and works like a password — anyone who has the full URL can add contacts to your account. Only paste it into tools you trust, and regenerate it if it ever leaks.

Step 1 — Generate your webhook URL

Go to `/client/contacts/webhook-import`. The page is titled "Webhook Contact Import" with the description "Import contacts from any external system (Zapier, Make, Pabbly, custom scripts) via webhook." The first time, no URL exists yet — you'll see "No webhook URL configured yet." Click **Generate Webhook URL**.

Once active, the full URL appears in a mono box with a **Copy** button (it reads "Copied!" on click), an **Active** pill, and controls to **Regenerate URL** or **Disable Webhook** — both of which invalidate the old URL.



Once generated, your unique webhook URL appears with a Copy button, an Active status, and a test panel below.

The URL looks like this, with a long hex secret embedded directly in the path:

```
https://optyflo.com/api/public/webhook/<secret>
```

i The secret lives in the URL

There is no separate "secret" field to copy — the long key is part of the URL itself. Treat the whole URL as a password. (The screenshot above shows a `localhost` URL because it was captured on a local machine; in production your URL uses the `optyflo.com` domain.)

Step 2 — Send contacts to the URL

Have your external tool POST JSON to the URL. Three body shapes are accepted, so most tools work without reshaping their output:

```
// A single contact
{ "email": "john@acme.com", "firstName": "John", "tags": ["lead"] }

// Multiple contacts
[ { "email": "a@b.com" }, { "email": "c@d.com" } ]

// Wrapped in a "contacts" key
{ "contacts": [ { "email": "..." } ] }
```

optyflo maps common field names for you. Only `email` is required; everything else is optional:

Field	Also accepts	Required
<code>email</code>	<code>Email</code> , <code>EMAIL</code>	Yes
<code>firstName</code>	<code>first_name</code> , <code>FirstName</code> , <code>name</code>	No
<code>lastName</code>	<code>last_name</code> , <code>LastName</code>	No
<code>phone</code>	<code>Phone</code> , <code>phoneNumber</code> , <code>phone_number</code>	No
<code>company</code>	<code>Company</code> , <code>organization</code>	No
<code>tags</code>	array or comma-separated string	No
<i>(any other field)</i>	—	Becomes a custom field

💡 Integration guide built in

The page includes a **cURL example** pre-filled with your real URL, plus the full field-mapping reference — handy when wiring up Zapier, Make, or a custom script.

Step 3 — Test before going live

Use the **Test Webhook panel to dry-run your payload**. Paste sample JSON into the textarea, then choose:

- **Dry Run (Preview Only)** — shows exactly what would happen, with **Will Create / Will Update** badges per contact. Nothing is saved.
- **Live Test (Actually Import)** — sends the payload through for real, returning `Created: X | Updated: Y | Skipped: Z`.

Step 4 — Understand what happens on arrival

Know how each incoming contact is handled so your automations fire the way you expect:

- A **new email** creates a contact and fires any `contact_added` automations.
- An **existing email** updates that contact, and any newly added tags fire `tag_added` automations.
- **Invalid emails** are skipped and reported in the response.

That means a webhook import can automatically kick off a welcome sequence the instant a lead is captured elsewhere.

Next: write your first email → [Write an email with AI](#)

Write an email with AI

You don't have to write emails from scratch. Describe what you want the email to achieve in plain English, and optyflo's AI instantly generates a matching **subject line and HTML body** — saved as a reusable template you can edit later.

There are two places to do this, and both save the result to your template library:

Where	Best when
The AI Email Generator page	You just want to write an email.
The AI Generator inside the campaign wizard	You're already building a campaign.

AI usage limits

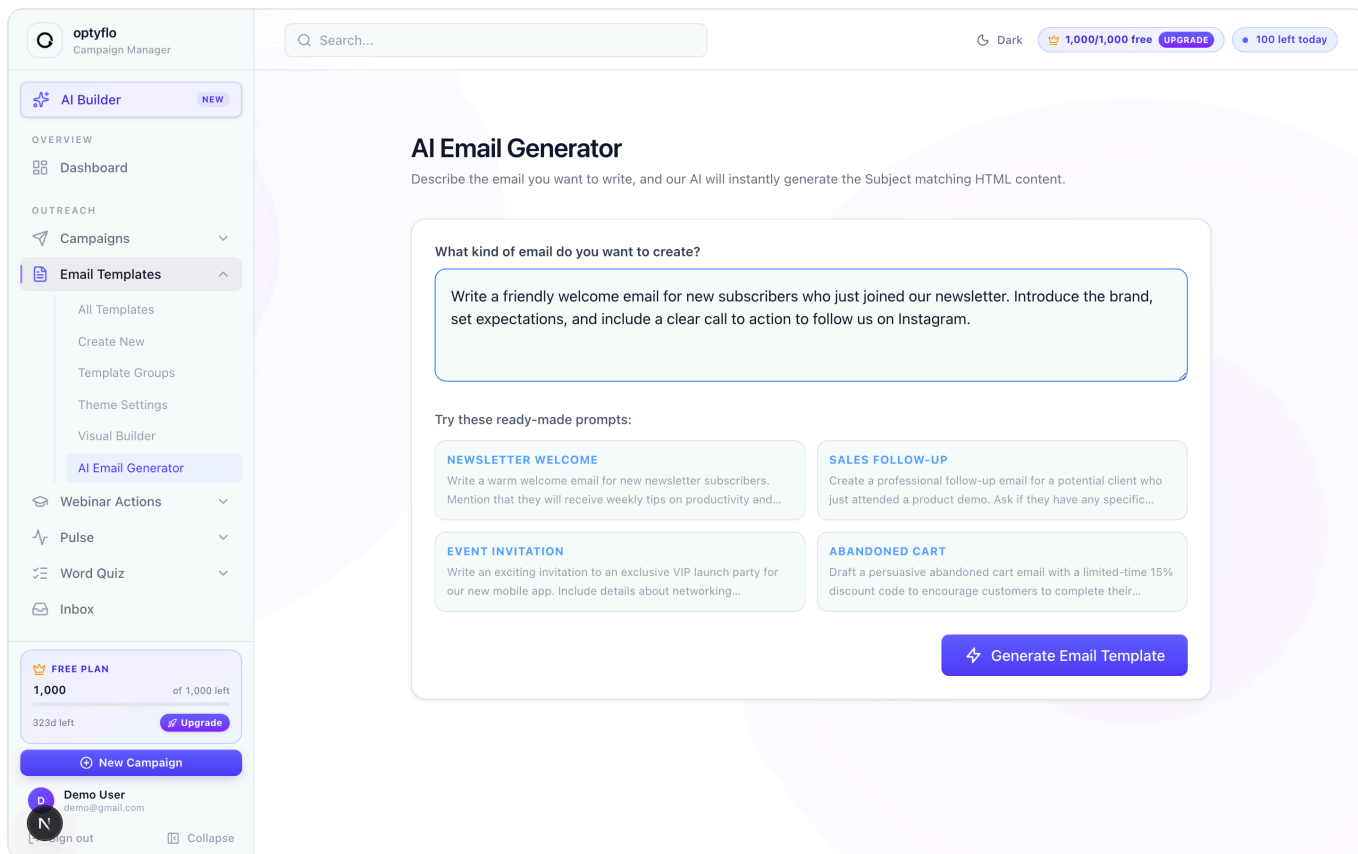
AI generation is subject to per-account daily and monthly limits (shown to you if you hit them). If you see

"AI features are disabled for your account,"

ask your admin to enable them.

Option A — The AI Email Generator page

This is the standalone writer. It lives at **Email Templates → AI Email Generator** (</client/email-templates/ai-generator>). Its subtitle sums it up: *"Describe the email you want to write, and our AI will instantly generate the Subject matching HTML content."*



Describe your goal, then let optyflo write the subject line and HTML content.

Step 1 — Describe the email

Type your goal into the “What kind of email do you want to create?” box. Be specific about the audience, the offer, and the call to action — the more detail you give, the sharper the draft. For example:

“Write a friendly welcome email for new subscribers who just joined our newsletter. Introduce the brand, set expectations, and include a clear call to action to follow us on Instagram.”

Short on ideas? Under **Try these ready-made prompts:**, click a preset — **Newsletter Welcome**, **Sales Follow-up**, **Event Invitation**, or **Abandoned Cart** — to pre-fill a starting point you can tweak.

Step 2 — Set the sign-off (optional)

Under **Sign-off details**, set the **Sender name** — and tick **Include business name** if you'd also like your business name in the closing. These populate the sign-off of the generated email so it reads as if it came from you, not a generic template.

Step 3 — Generate and preview

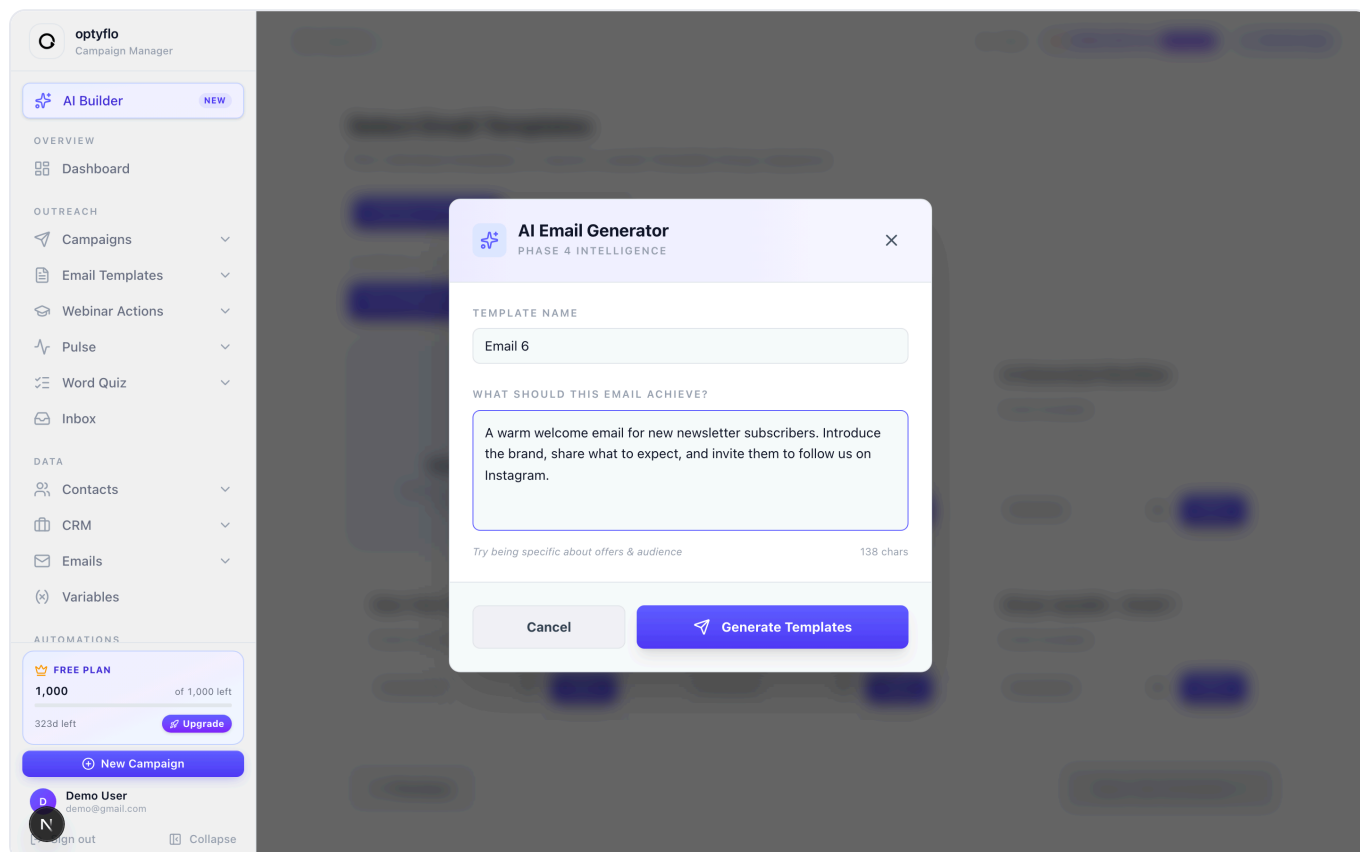
Click **Generate Email Template**. optyflo writes the subject and body, then shows a live preview rendered with your account's email theme, so you see exactly how it will land in the inbox.

Step 4 — Save it to your library

Click **Save to Library** (the button reads *Saving...* while it works). The email becomes a normal, reusable template you can drop into any campaign and refine further in the [visual builder](#).

Option B — Generate while building a campaign

When you're in the [campaign wizard](#) on **Step 2 (Select Email Templates)**, the first card in the grid is **Generate with AI** (“Describe your goal and let AI craft the perfect email body”). Click it to open the **AI Email Generator** modal — marked with a **Phase 4 Intelligence** badge — without leaving the wizard.



The in-campaign AI modal — name the template, describe the goal, and generate without losing your place.

Step 1 — Name and describe

Give the template a name in the **Template Name** field, then describe the email under “**What should this email achieve?**” The helper text nudges you to “*Try being specific about offers & audience,*” and a live character counter tracks your input. The same guidance from Option A applies — spell out the audience, offer, and call to action.

Step 2 — Generate the template

Click **Generate Templates** (the button reads *Crafting Content...* while it works, or click **Cancel** to back out). The generated email is saved to your library and automatically selected for the campaign you're building — so you can keep moving through the wizard.

Personalization tokens

Generated emails — like any template — can include merge tags such as `{{FIRST_NAME}}`, `{{COMPANY}}`, and `{{BUSINESS_NAME}}` that get filled in per recipient at send time. See [Email templates](#) for the full list.

Looking for the "AI Builder" in the sidebar?

The **AI Builder** button in the sidebar is a **different tool** — a chat assistant that builds and edits **automations**, not single emails. It reads your real templates, contacts, and tags, and stages workflow changes you can test (dry-run or send a test to yourself) before going live via **Promote to Live**. See [Build an automation](#) for that.

Next: [manage your templates](#) or [create a campaign](#).

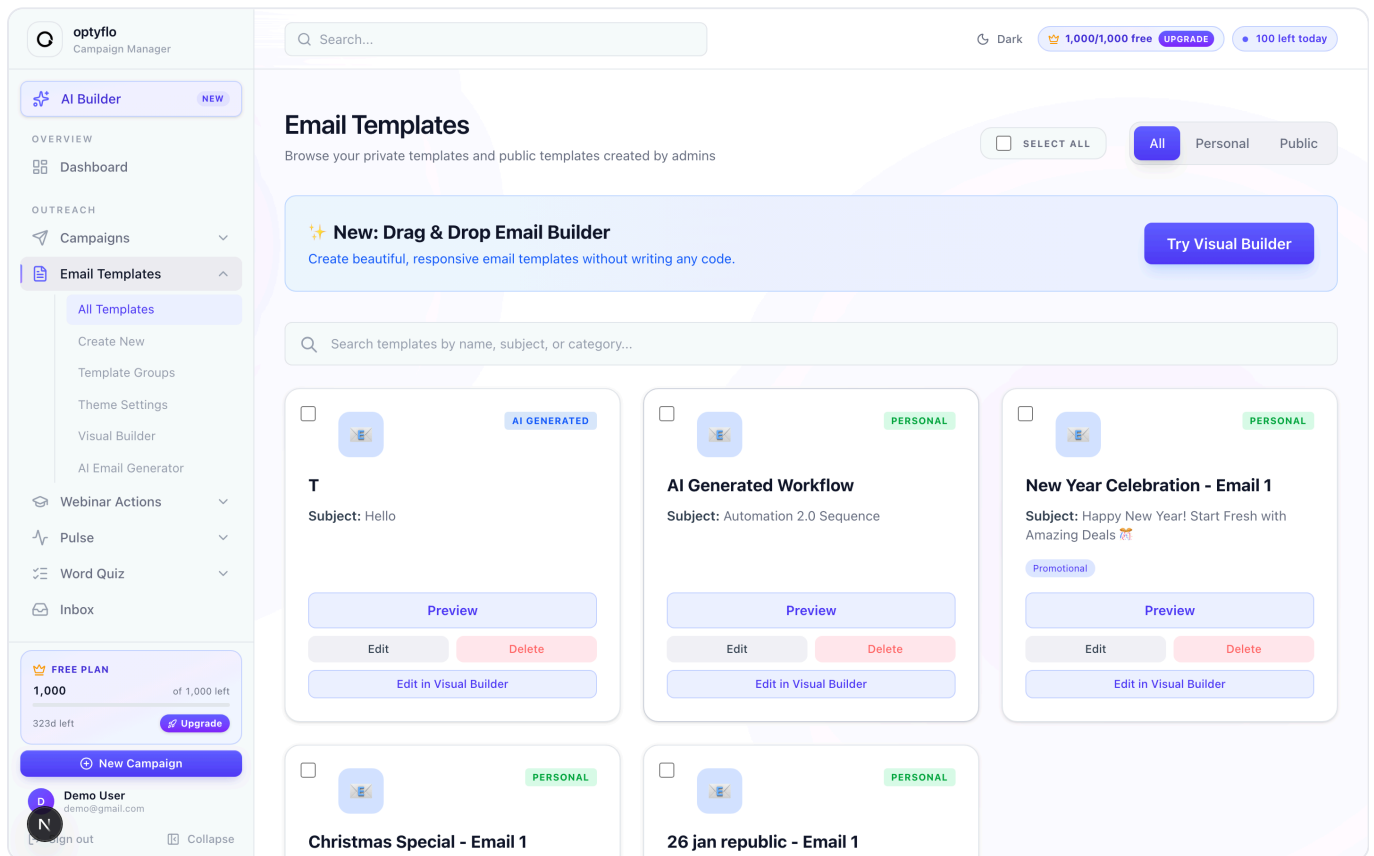
Email templates

Templates are reusable emails you build once and use across [campaigns](#) and [automations](#). optyflo gives you three ways to create them, plus a drag-and-drop visual builder to refine every detail.

Your template library

Open your library at [Email Templates \(/client/email-templates\)](/client/email-templates). This is home base for every email you've made or been given.

Use the **All / Personal / Public** tabs to browse your private templates and public templates created by admins. You can search your templates, rename them, and bulk-delete; AI-made templates carry an **AI Generated** badge. Click **Edit in Visual Builder** on any card to open it in the editor (</client/email-builder/{id}/edit>).



Your template library — filter by All / Personal / Public, search, and open any template in the visual builder.

Step 1 — Pick how you'll create the template

You have three routes to a new template. Choose the one that fits how much you want to design by hand.

Way	Route	Best when
Write it with AI	AI Email Generator	You want a finished draft fast. See Write an email with AI .
Design in the Visual Builder	/client/email-builder/new	You want full control over layout.
Start from a starter	/client/email-builder (Starter tab)	You want a pre-designed layout to customize.

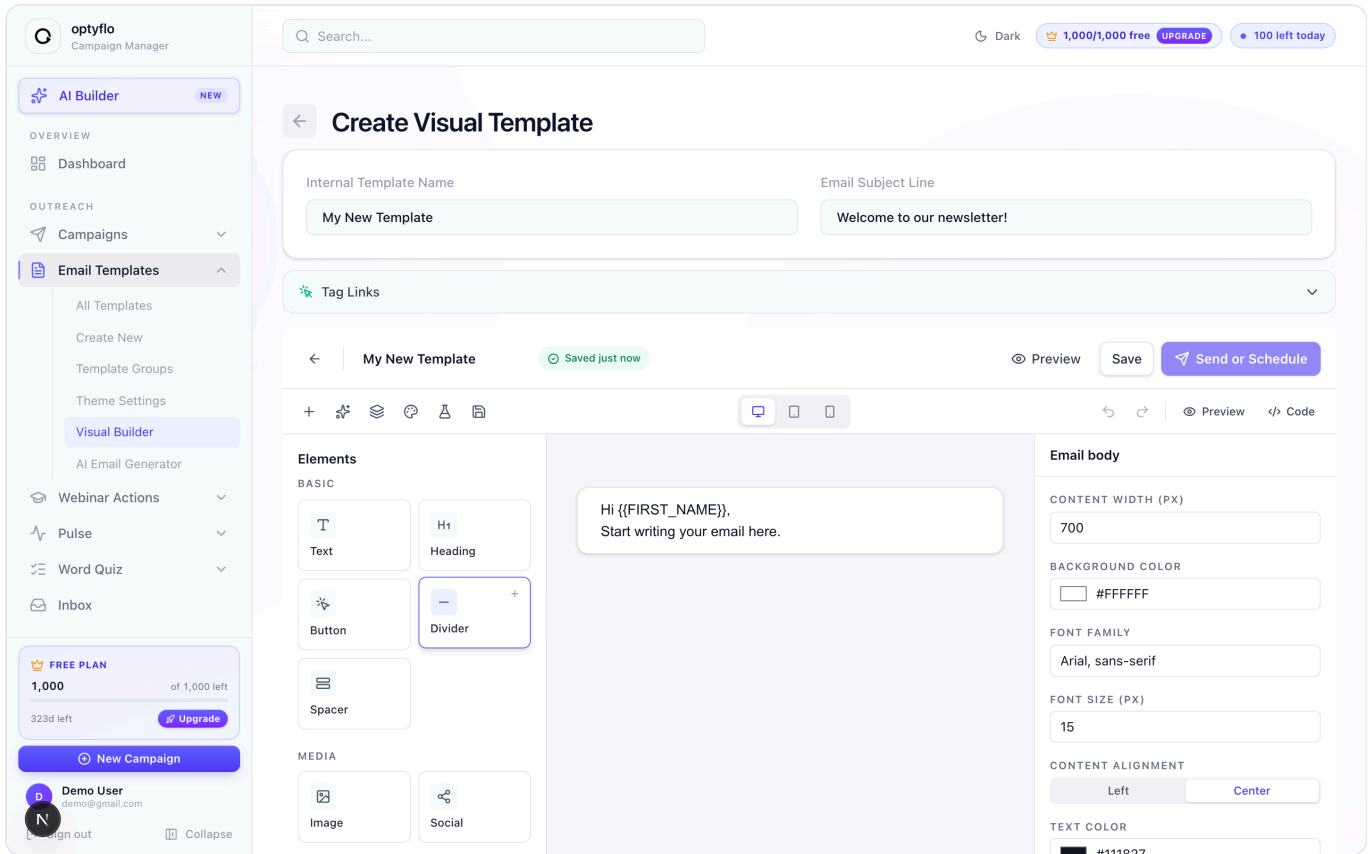
Step 2 — Design it in the Visual Builder

Open the drag-and-drop editor at **Create New → Visual Builder** (</client/email-builder/new>), titled **Create Visual Template**. This is where you assemble an email block by block.

Set the two fields at the top — **Internal Template Name** (how you'll find it later; e.g. *Summer Promo 2024*) and **Email Subject Line** (what recipients see; e.g. *Don't miss our summer sale!*). Then drag blocks from the left **Elements** panel onto the canvas:

Group	Blocks
Basic	Text, Heading, Button, Divider, Spacer
Media	Image, Social
Advanced	Columns
AI blocks	AI Opener, AI CTA, Smart Signature — content tailored per recipient at send time

Select any block to style it in the right-hand inspector — **Content Width, Background Color, Font Family, Font Size, Content Alignment**, and more. The top bar autosaves (**Saved just now**), and **Preview** lets you check desktop and mobile before you hit **Save**.



Drag blocks from the Elements panel, then style each one in the right-hand inspector.

Step 3 — Or start from a starter template

Open the Visual Builder gallery (</client/email-builder>) and switch to the **Starter** tab. It holds pre-designed layouts — pick one as your foundation, then customize it in the same editor instead of building from a blank canvas.

Personalization (merge tags)

Insert merge tags anywhere in a template and optifyflo fills them in per recipient at send time. Type them in the `{{TAG}}` form:

Category	Tags
Contact	<code>{{FIRST_NAME}}</code> , <code>{{LAST_NAME}}</code> , <code>{{EMAIL}}</code> , <code>{{COMPANY}}</code> , <code>{{JOB_TITLE}}</code> , <code>{{PHONE}}</code> , <code>{{NOTES}}</code> , <code>{{TAGS}}</code>
Business	<code>{{BUSINESS_NAME}}</code> , <code>{{SENDER_NAME}}</code> , <code>{{SENDER_EMAIL}}</code>
Compliance	<code>{{unsubscribe_url}}</code>
AI	<code>{{AI_INTRO}}</code> , <code>{{AI_HOOK}}</code> , <code>{{AI_CTA}}</code> — AI writes these uniquely per recipient

 **Group templates into sequences**

Under **Email Templates → Template Groups** you can bundle several templates into a sequence with send offsets (e.g. day 0, day 2, day 5). A campaign or automation can then send the whole group in order.

Next: [Create & send a campaign →](#)

Create & send a campaign

A campaign is one or more emails delivered to a set of recipients on a schedule, and it's how you reach your audience at exactly the right moment. optyflo's wizard walks you through it in six steps — the progress bar reads **Create Campaign** with **Step X of 6** and the labels **Campaign** → **Templates** → **Schedule** → **Recipients** → **Variables** → **Review**.

⚠ Before you start

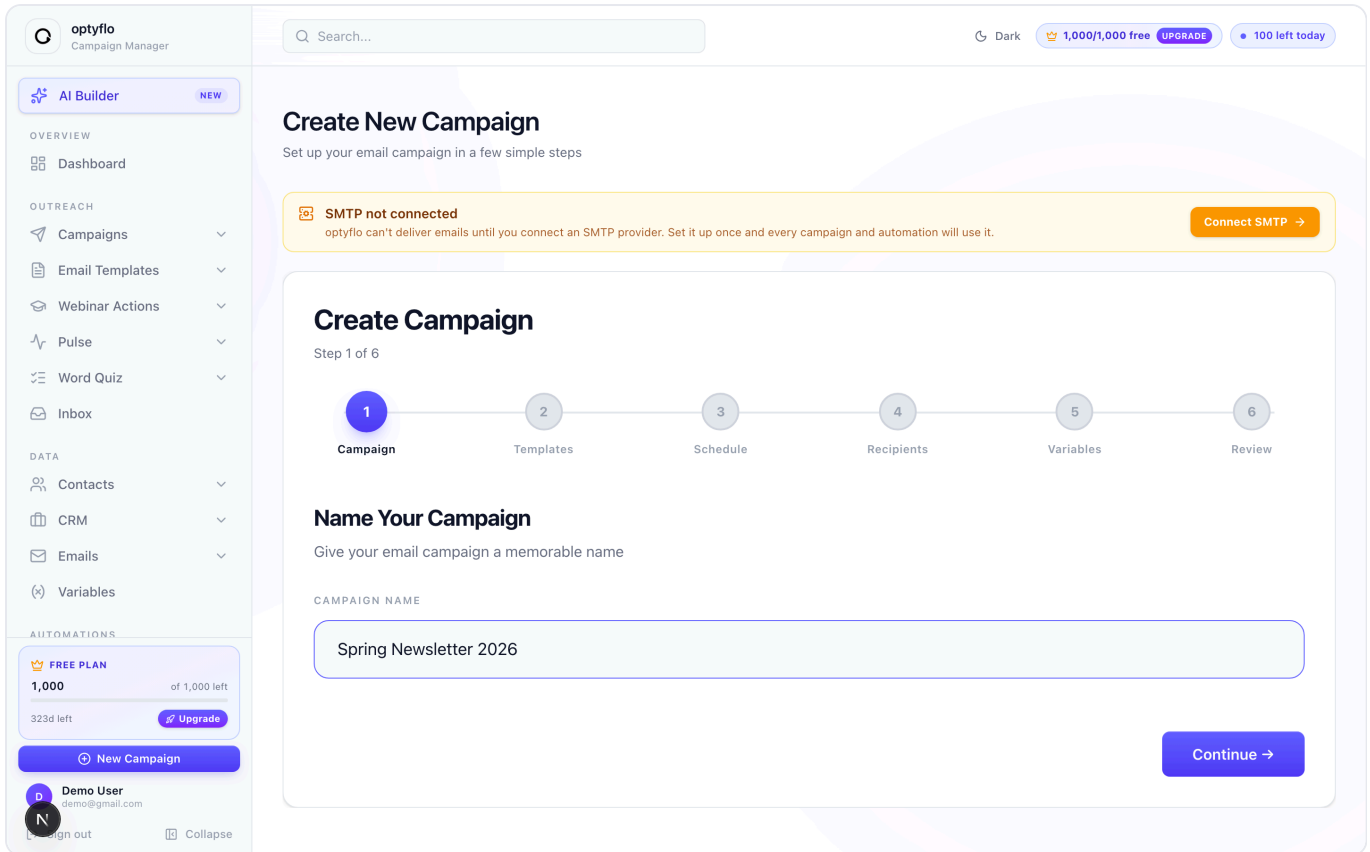
- **SMTP must be connected** or nothing delivers. If it isn't, the wizard shows an **SMTP not connected** banner — *“optyflo can't deliver emails until you connect an SMTP provider. Set it up once and every campaign and automation will use it.”* — with a **Connect SMTP** button.
- You need at least **one email template** (or generate one with AI in Step 2).
- You need at least **one recipient**.

To begin, open **New Campaign** from the sidebar, click the **+ New Campaign** button, or go to the route `/client/new-campaign`.

Step 1 — Name your campaign

Enter a name and click Continue →. This first step is titled **Name Your Campaign** — *“Give your email campaign a memorable name”*. The name is purely internal, so pick something you'll recognize in your campaigns list later; recipients never see it.

Type into the **Campaign Name** field (placeholder *“e.g., Holiday Sale 2024”*), then click **Continue →.**



Give the campaign a memorable, internal-only name.

Step 2 — Select email templates

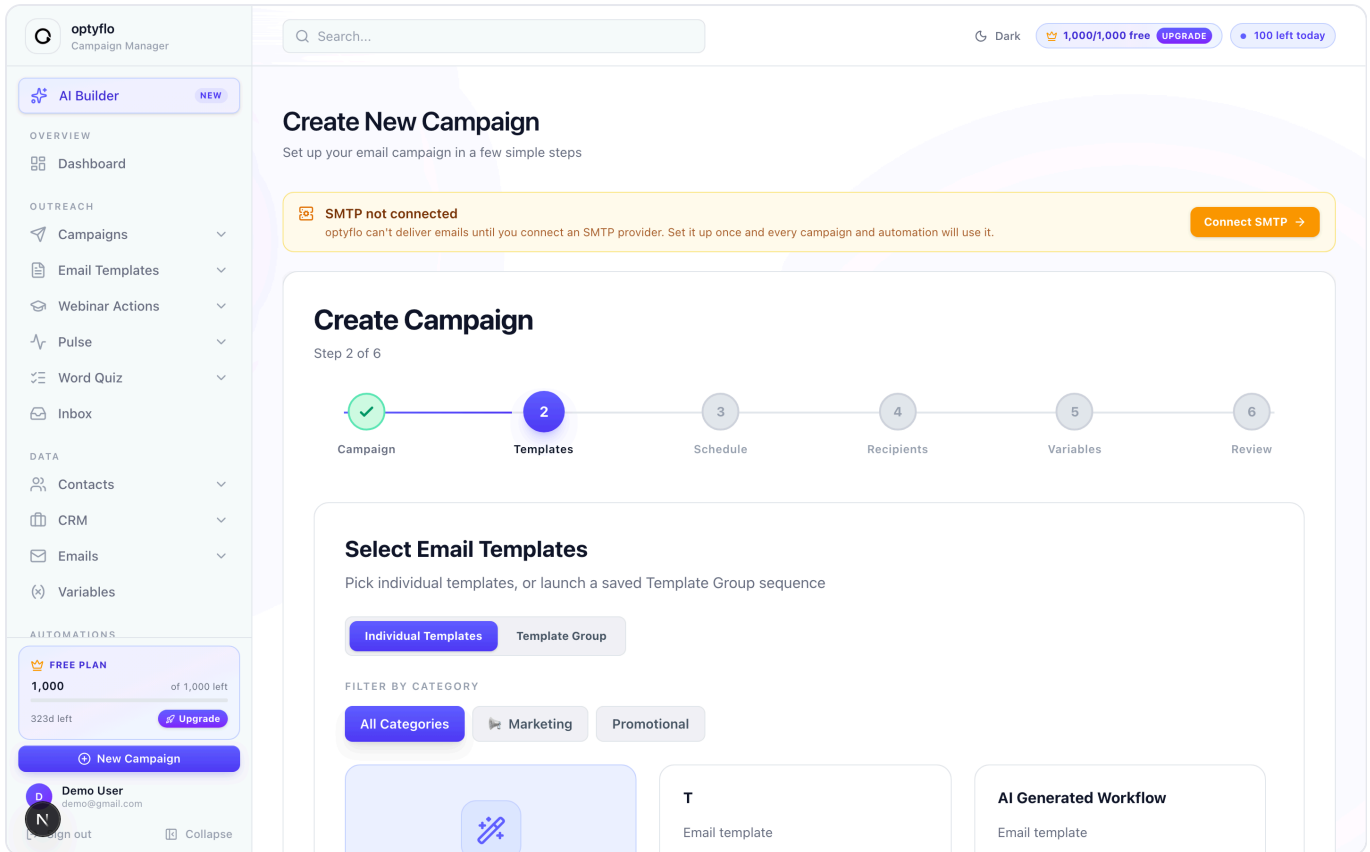
Choose the emails this campaign will send. This step is titled **Select Email Templates** — “Pick individual templates, or launch a saved Template Group sequence”. Toggle between the two modes depending on whether you’re sending a hand-picked set or a pre-built sequence.

Mode	What it does
Individual Templates	Filter by category and pick templates one by one. Each card has Preview Template and a Select / Remove button.
Template Group	Launch a saved sequence — each template fires at its own configured offset from the group start.

The very first card is **Generate with AI**. It opens the AI email generator so you can create a brand-new template right here without leaving the wizard — see [Write an email with AI](#).

i No templates yet?

If your library is empty, this step shows only “No templates found. Please create templates first.” with a **← Go Back** button — the template cards (including **Generate with AI**) appear once you have at least one template. Create one first with the [AI generator](#) or the [visual builder](#), then come back to this step.



Pick individual templates or a Template Group; the first card generates one with AI.

When you've picked your templates, click **Next: Set Schedule** → (or ← **Previous** to go back).

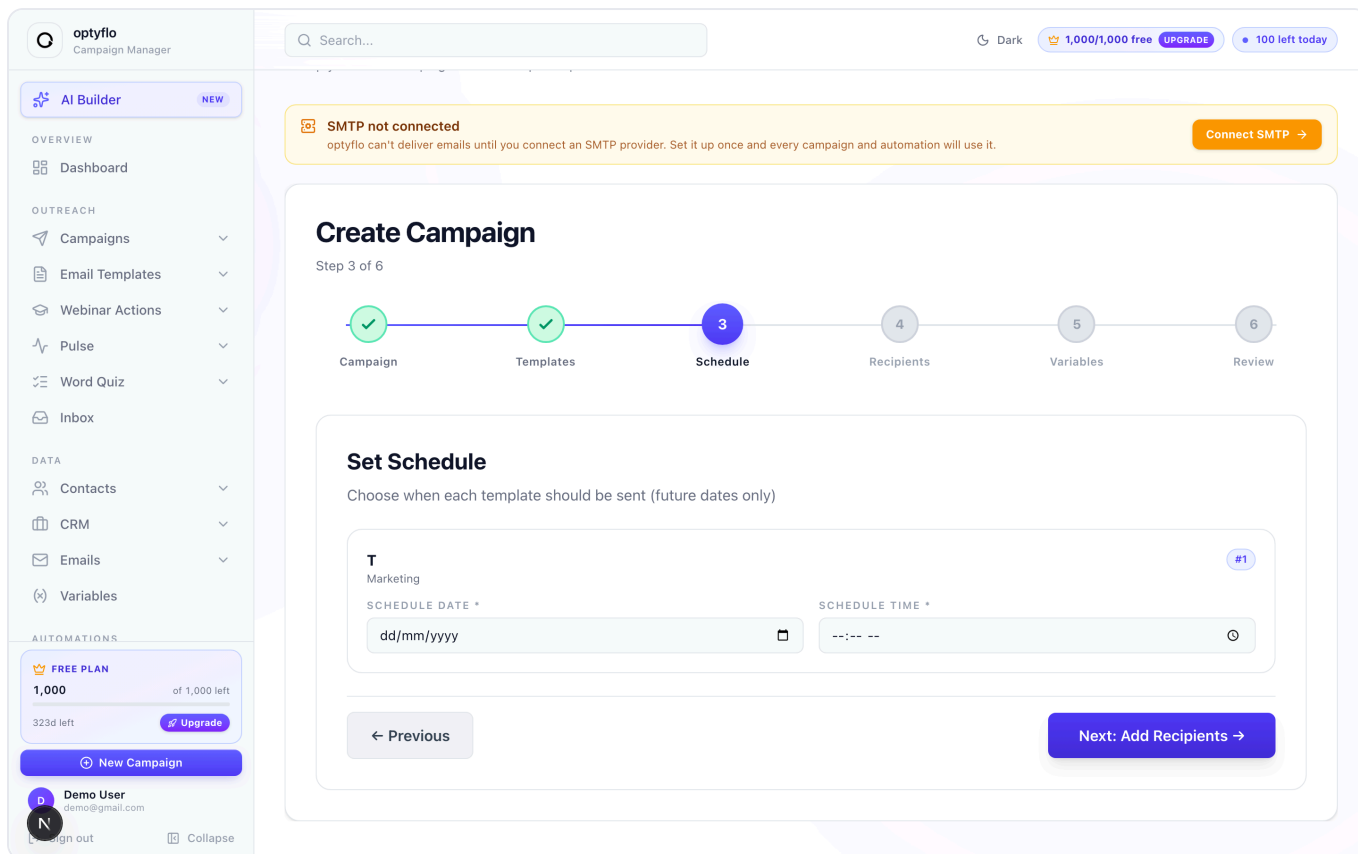
Step 3 — Set the schedule

Choose when each email goes out. This step is titled **Set Schedule** — “Choose when each template should be sent (future dates only)”. Scheduling ahead means your emails land at the best time for your audience, not just whenever you happen to be at your desk.

- **Individual templates** — each template gets its own **Schedule Date *** and **Schedule Time ***.
- **Template Group** — you set one **Group Start Date *** and **Group Start Time ***, and each template fires at its configured offset from that start.

💡 There is no "send now"

Every campaign is scheduled for a **future** time — you cannot send instantly. Pick a date and time ahead of now for each template.



Set a future date and time for each template (or one start time for a group).

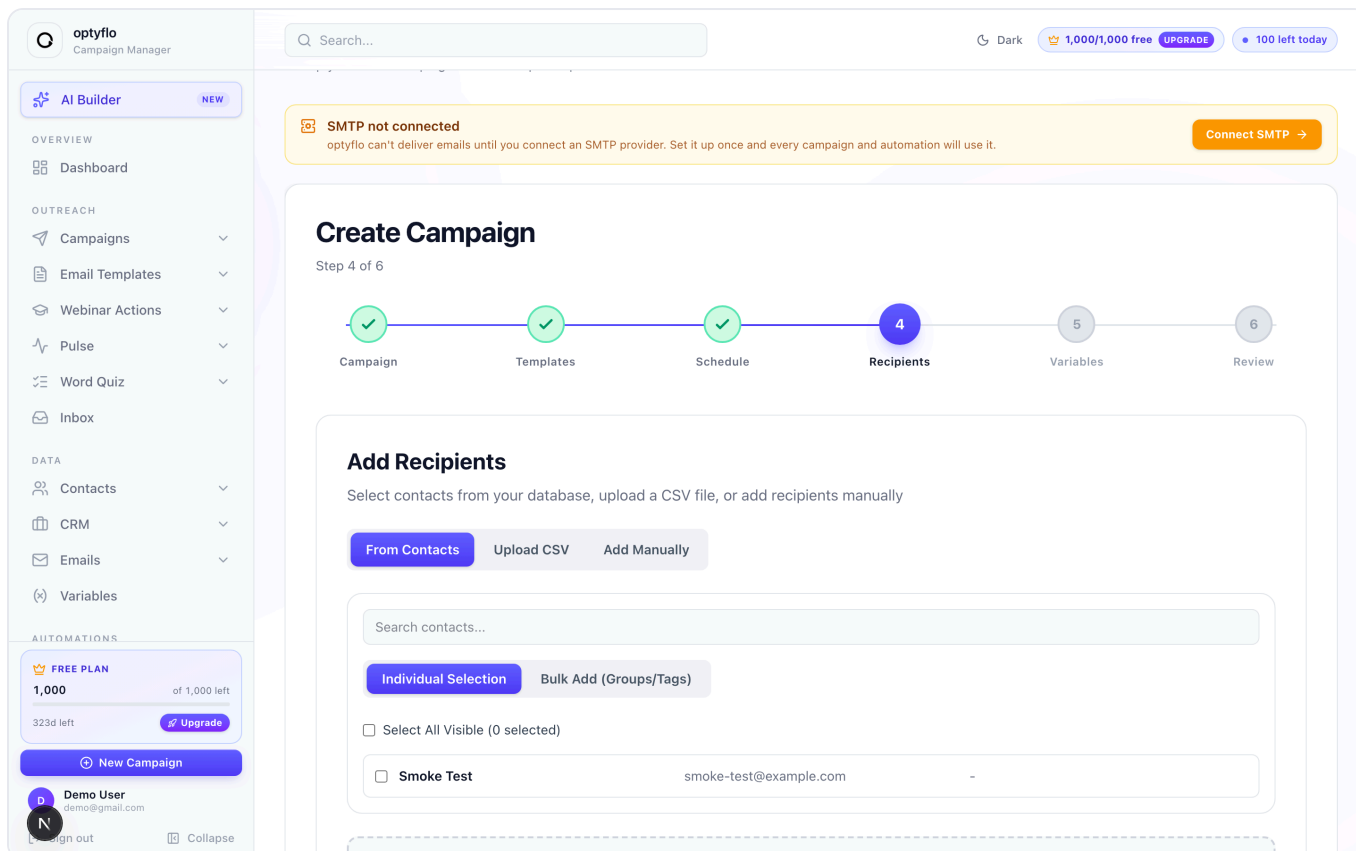
Click **Next: Add Recipients** → to continue.

Step 4 — Add recipients

Decide who receives the campaign. This step is titled **Add Recipients** — “Select contacts from your database, upload a CSV file, or add recipients manually”. You need at least one recipient to continue, and you can mix and match across the three tabs.

Tab	How it works
From Contacts	Search (“Search contacts...”) and choose via Individual Selection or Bulk Add (Groups/Tags) . Use Select All Visible (N selected) , then Add N Contact(s) . Empty library shows “No contacts found in your database.” with an Add contacts → link.
Upload CSV	Click Choose CSV File to upload a list just for this campaign. Required columns are name and email — grab the format from Download Sample CSV .
Add Manually	Enter recipients one at a time: First Name * , Last Name , Email * , Phone (optional) , Tag (optional) , then click + Add Recipient .

As you add people, a **Recipients (N)** list shows exactly who’s included so you can double-check before moving on.



Build your recipient list from contacts, a CSV upload, or manual entry.

Click **Next: Review** → when your list is ready.

Step 5 — Map template variables

Control how merge tags fill in for each recipient. This step's progress label is **Variables** and the page is titled **Map Template Variables**. If your templates use merge tags, optyflo fills each one using a **3-tier fallback** so no email ever arrives with a blank spot:

1. **Mapped Source** — where the value normally comes from: a CSV column, a CRM/contact field, or a global variable.
2. **Fallback Value** — used when the mapped source is empty for a given contact.
3. **Universal Default** — the final catch-all when everything else is blank.

A **Live Email Preview** shows the result as it'll actually render, and you can send yourself a test right here to sanity-check the personalization. If your templates don't use any merge tags, you'll simply see *"No custom variables found in your templates"* and can move straight on.

Click **Next: Review & Submit** → to continue.

Step 6 — Review & submit

Give everything a final look, then schedule the send. This step is titled **Review & Submit Campaign** — *"Review all campaign details before sending. You can edit any section or send a test email."* At the top, overview tiles summarize **Total Emails**, **Recipients**, **Templates**, and **Variables**.

Per template, you can set an optional **From Name (optional)** and a required **Subject Line ***. Every section is editable from here too — use controls like **Change Templates**, **View All**, or **Edit Mappings** to jump back without losing your place.

The screenshot displays the 'Create New Campaign' interface in the Optyflo Campaign Manager. The left sidebar contains navigation menus for Overview, Outreach, Data, and Automations. The main area shows a progress bar for 'Create Campaign' (Step 6 of 6) with steps: Campaign, Templates, Schedule, Recipients, Variables, and Review. Below the progress bar, there are summary tiles for 'TOTAL EMAILS' (1), 'RECIPIENTS' (1), 'TEMPLATES' (1), and 'VARIABLES' (0). The 'REVIEW & SUBMIT CAMPAIGN' section includes 'SENDER INFORMATION' (From Email: demo@gmail.com, Default From Name: Demo User) and a 'CAMPAIGN NAME' field. A yellow warning banner at the top indicates 'SMTP not connected' with a 'Connect SMTP' button.

Review the overview tiles, set subject lines, and edit any section before scheduling.

💡 Test before you commit

Click **Send Test Email** (available here and in Step 5) to receive a real, fully personalized copy of the send before it goes to your whole list.

When everything looks right, click the primary button — it reads **Schedule N Email(s)** (for example, **Schedule 250 Emails**). It shows **Submitting...** while it works, then **Campaign Submitted!**. You'll see *"Campaign submitted successfully! N emails scheduled."* and land on your campaigns list at </client/campaigns> (**My Campaigns**), where you can monitor delivery, opens, and clicks. That list has channel tabs — **All**, **Email**, and **WhatsApp** — and, when empty, prompts you with *"No campaigns found"* and a **Create Campaign** button.

Next: make your outreach run on its own → **Build an automation**.

Build an automation

An automation is a flow that runs your outreach for you: when a **trigger** fires, optyflo carries out a sequence of **actions** — send an email, wait, check a condition, and so on. Set it once, and it sends forever. Think of it as “Zapier, but built for email.”

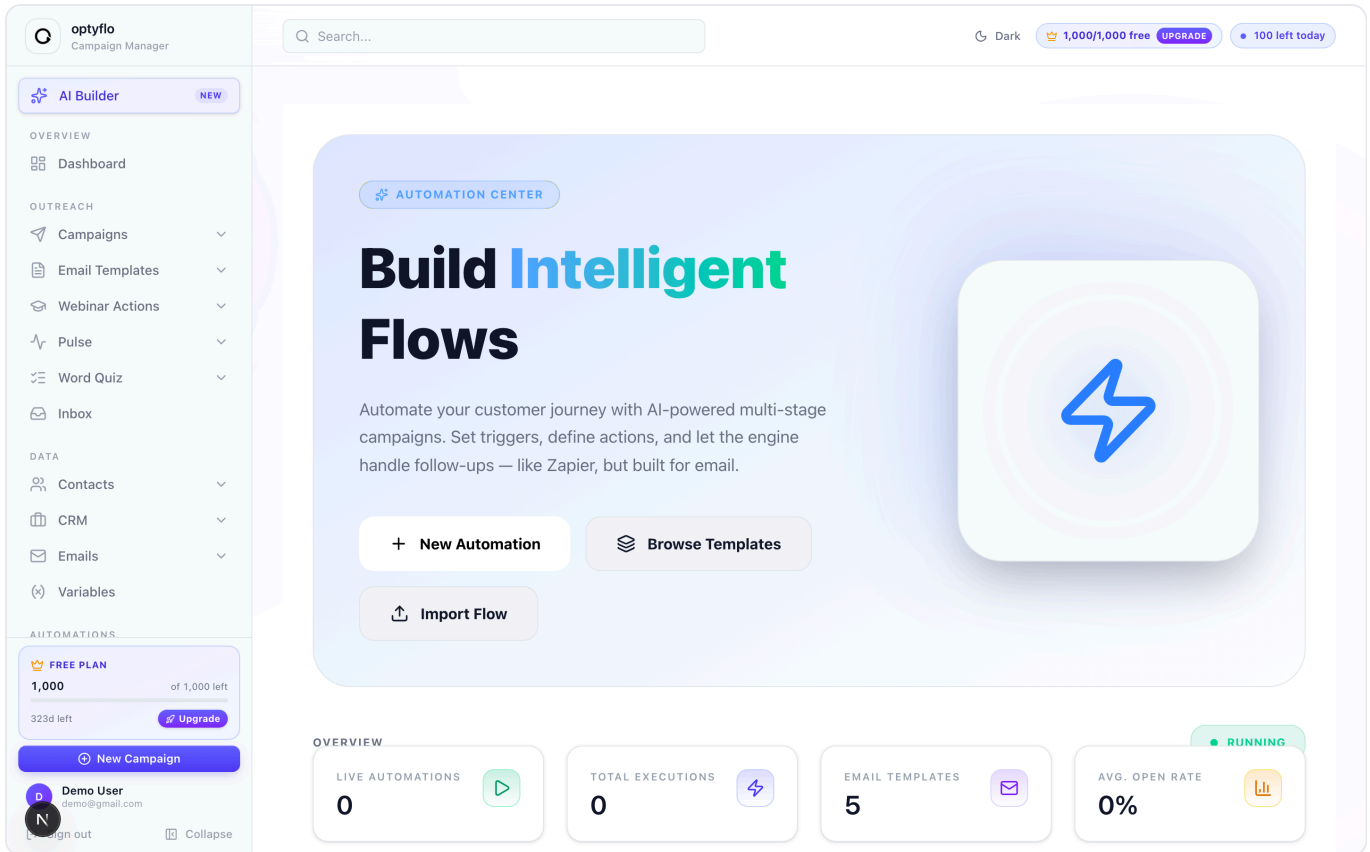
💡 Before you start

Every automation needs at least one **Send Email** step, and each email needs a subject and body — otherwise you'll hit a “*Missing Content*” / “*Incomplete Email Content*” warning at save time. Also make sure your [SMTP is connected](#), or the logic will run but the emails won't deliver.

Step 1 — Open the Automation Center

Go to **Automations in the sidebar** (route `/client/automations`). This is your Automation Center, headed “**Build Intelligent Flows**” — home for every flow you build.

From here you can start fresh with **New Automation**, start from a **Browse Templates** pre-built flow, or **Import Flow** to load a flow someone exported as a `.json` file. Existing automations show up as cards you can **Activate/Pause**, view logs for, edit, or delete. Filter with the **all / active / draft** tabs or the **Search automations...** box. If you've never made one, you'll see “**No Automations Found**” with a **Start Building Now** button.

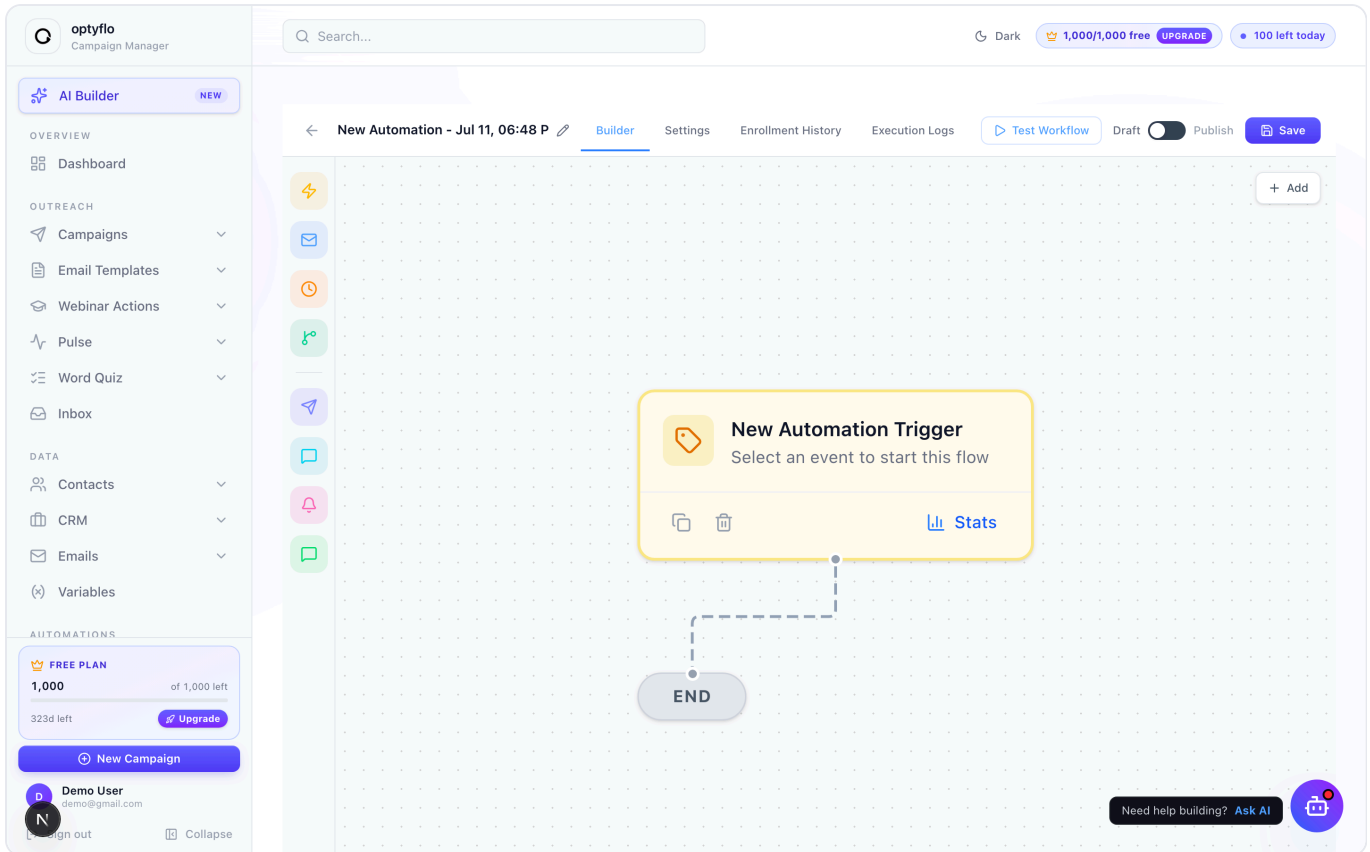


The Automation Center — start a new flow, browse templates, or import one.

Step 2 — Meet the builder

Click **New Automation** to open the visual builder (route `/client/automations/new`). The canvas starts with a single trigger node, “**New Automation Trigger**” (“Select an event to start this flow”), wired to an **END** node — you build your flow in between.

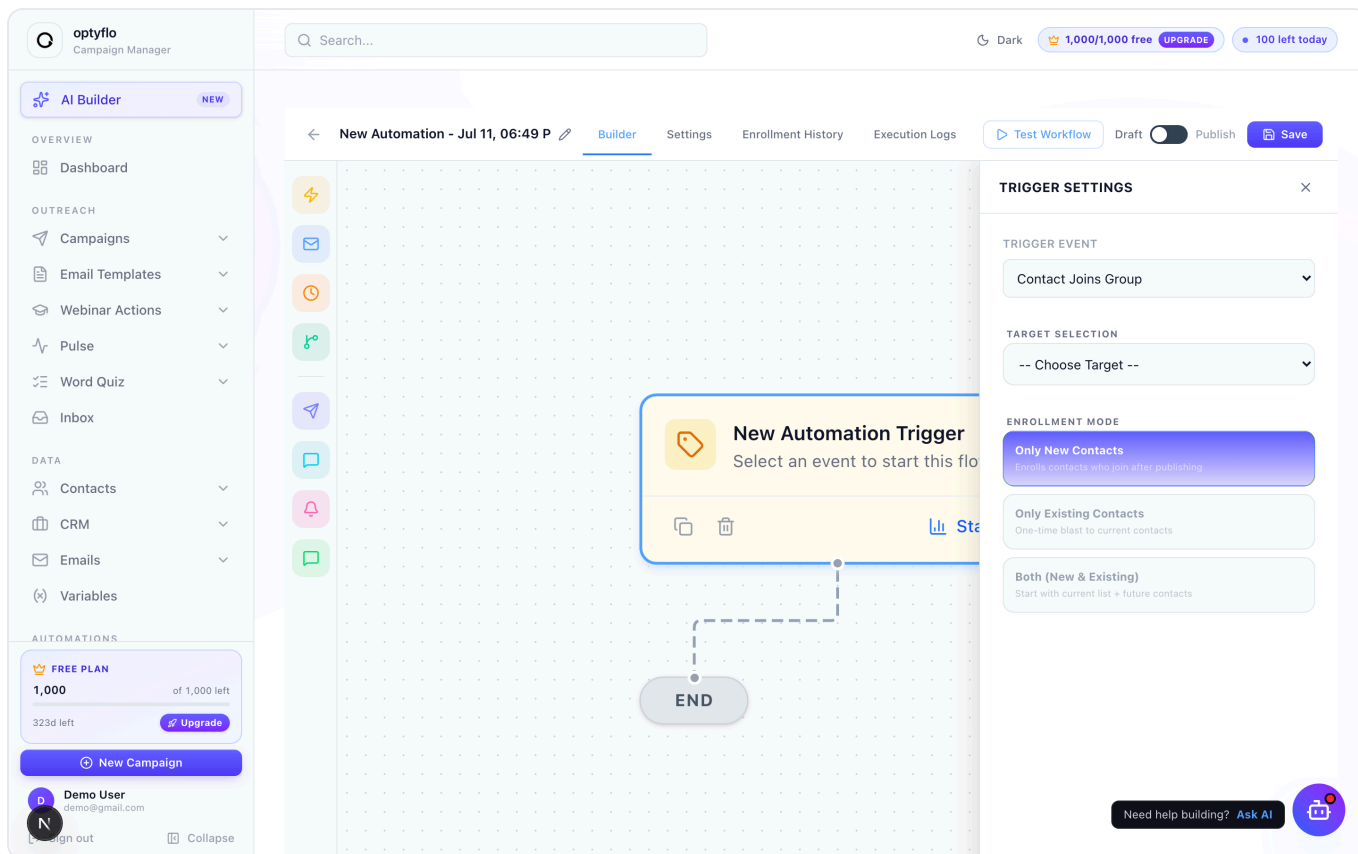
Along the top you’ll find an editable name (default “**New Automation - <date>**”), the **Builder / Settings / Enrollment History / Execution Logs** tabs, a **Test Workflow** button, a **Draft ↔ Publish** toggle, and a **Save** button. Down the left is a toolbar of colored action icons, plus a **+ Add** button for dropping in new steps.



The builder canvas: a trigger node connected to an END node, with the action toolbar down the left.

Step 3 — Choose a trigger

Click the **“New Automation Trigger”** node to open its settings, then pick a **Trigger Event**. The trigger is the thing that starts the flow — a contact joining a group, a tag being applied, a form coming in, and so on.



Pick what starts the flow, choose its target, and decide who gets enrolled.

Trigger	Fires when...
Contact Joins Group	a contact is added to a group
Form Submitted	someone submits a chosen form
Tag Added	a specific tag is applied to a contact
Contact Created (All Contacts)	any new contact is created
CRM Stage Changed	a deal moves to a chosen pipeline stage

Next, set the **Target Selection** (“-- Choose Target --”) to the specific group, tag, or form — or the Pipeline + Stage for CRM. For contact-based triggers, an **Enrollment Mode** also appears: **Only New Contacts**, **Only Existing Contacts**, or **Both (New & Existing)**.

Step 4 — Add actions

Add steps using the left icon toolbar or the “+ Add” button. Each step is one thing the flow does after the trigger fires — you can chain as many as you need.

Action	What it does
Send Email	send a template or write one from scratch
Wait / Delay	pause a set time, or until a specific date
Condition	branch on a rule (has tag, field value, opened, clicked)
Wait for Reply	pause until the contact replies, or times out
Webhook	call an external URL
Notification	notify your team
WhatsApp	send a WhatsApp message

More on Wait / Delay and Condition

Wait / Delay can be a **Relative Delay** (wait X days or hours) or an **Exact Date**.

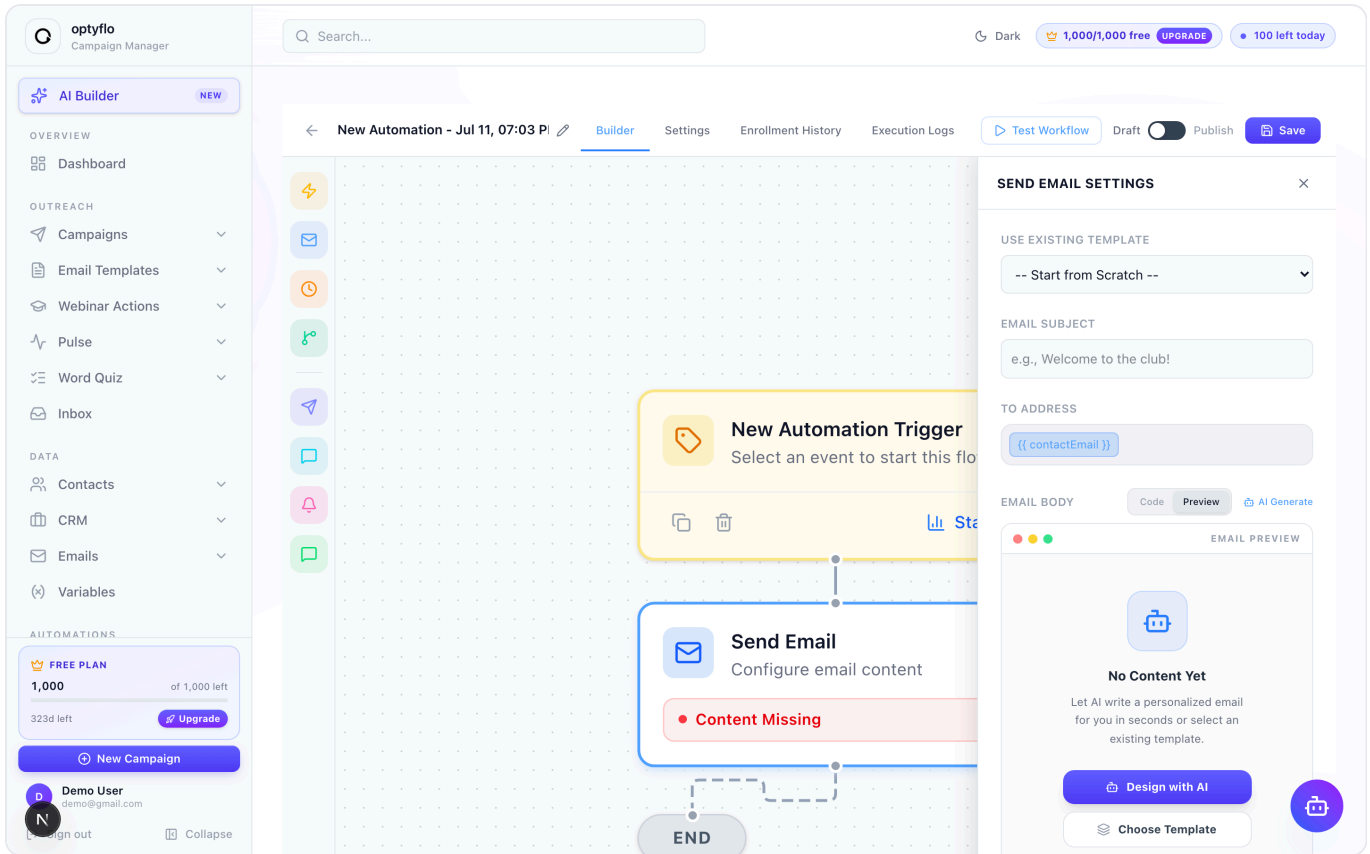
Condition types are **Has Tag**, **Contact Field**, **Email Opened**, and **Link Clicked**, with operators including **Equals**, **Not Equals**, **Contains**, **Does Not Contain**, **Exists**, **Does Not Exist**, **Greater Than**, and **Less Than**.

A simple welcome flow, for example: **Tag Added** → **Send Email** → **Wait 2 days** → **Send Email**.

Step 5 — Configure a Send Email step

Click a **“Send Email”** node to open its **Send Email Settings** panel. Because every automation needs at least one working email, this is the step to get right.

Choose **Use Existing Template** from the dropdown (or leave it on **“-- Start from Scratch --”**), set the **Email Subject**, and confirm the **To Address** (it defaults to `{{contactEmail}}`). Write the **Email Body** with the **Code / Preview / AI Generate** options, plus the **Design with AI** and **Choose Template** buttons. If the body is empty, the node warns **“Content Missing”** — fill it before you save.

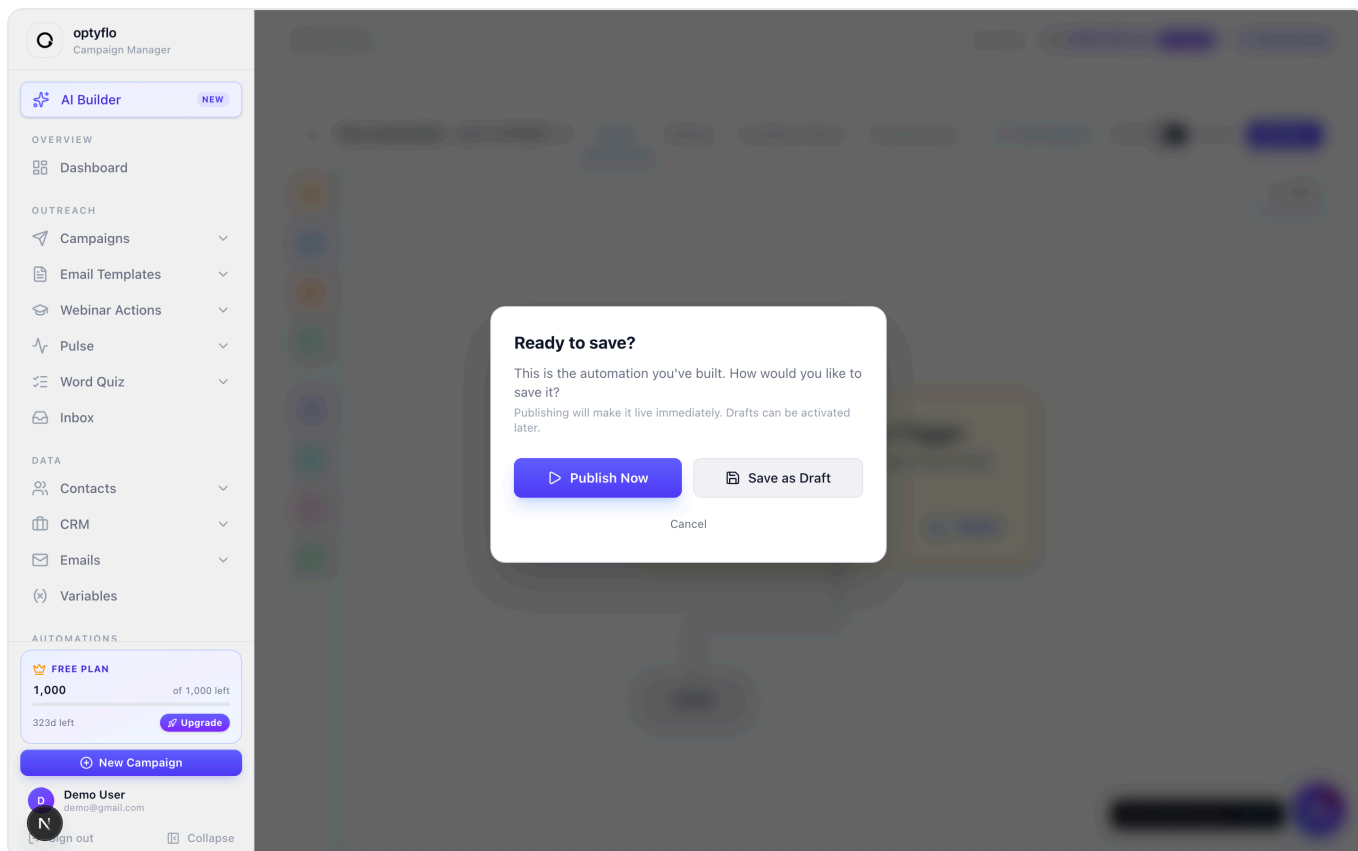


The Send Email Settings panel: template, subject, to-address, and body.

Step 6 — Save & activate

Click **Save** (or flip the **Publish** toggle). A **"Ready to save?"** modal appears — *"This is the automation you've built. How would you like to save it?"* — reminding you that *"Publishing will make it live immediately. Drafts can be activated later."*

- **Publish Now** — makes the automation live immediately; matching contacts start flowing through it.
- **Save as Draft** — keeps it for later. You can activate it anytime from its card on the Automations list (the play/pause toggle).
- **Cancel** — go back to editing.



The publish/draft modal — go live now, or keep it as a draft.

⚠ Don't skip validation

If any email is missing its subject or body, you'll see **"Missing Content"** / **"Incomplete Email Content"** instead of a clean save. Fix the flagged step, and double-check your [SMTP connection](#) so published emails actually deliver.

Build it with AI

Don't want to drag nodes around? The sidebar **AI Builder** button is a chat assistant that designs and edits automations for you. Describe what you want in plain English — *"Build a welcome sequence for newly tagged contacts"* — and it drafts the flow, reading your real templates, tags, and contacts.

Crucially, it **stages** changes into a draft you can **test** (dry-run previews, or send a test to yourself) and only goes live when you explicitly **Promote to Live**. There's also a standalone **AI Flow Builder** that builds a flow from a plain-English description — *"Describe your automation in plain English, and AI will build it for you."*

💡 Test before you trust

Use **Test Workflow** in the builder (and the AI Builder's dry-run) to walk a sample contact through the flow and confirm the emails, delays, and branches behave the way you expect — before real contacts hit it.

That's the whole journey — you can now import an audience, write emails with AI, send campaigns, and automate the lot. If you want to retrace any earlier step, head back to the [overview](#). Happy sending. 🎉