SoloStaff Emailer User Guide

Version 0.8.0-beta

Table of Contents

Introduction

SoloStaff Emailer is a desktop email management application designed specifically for solo staff and small nonprofit organizations. It helps you manage email subscribers, create professional email campaigns, and track engagement—all from your local computer.

Key Features

- **Subscriber Management** - Import, organize, and maintain contact lists with tags
- **Campaign Editor** - Create email campaigns using professional templates
- **Segmentation** - Group subscribers for targeted messaging
- **SendGrid Integration** - Professional email delivery with analytics
- **SMTP Support** - Use your existing email provider
- **Scheduling** - Schedule campaigns for future delivery
- **Analytics Dashboard** - Track opens, clicks, and engagement
- **GDPR Compliance** - Consent tracking and unsubscribe management

System Requirements

- **Windows**: Windows 10 or later

- **macOS**: macOS 11 (Big Sur) or later
- **Linux**: Ubuntu 20.04+ or equivalent

Getting Started

First Launch

When you first launch SoloStaff Emailer, the **Getting Started Wizard** will guide you through initial setup:

1. **Database Location** - Choose where to store your data (default location recommended)
2. **Email Provider** - Configure SendGrid API or SMTP settings
3. **Sender Information** - Set up your organization details
4. **Import Subscribers** - Optionally import existing contacts

Application Layout

The main window consists of:

- **Navigation Panel** (left side) - Switch between sections:
  - Subscribers
  - Campaigns
  - Segments
  - Analytics
  - Settings
- **Main Content Area** (center) - Displays the current section
- **Status Bar** (bottom) - Shows subscriber count and status messages

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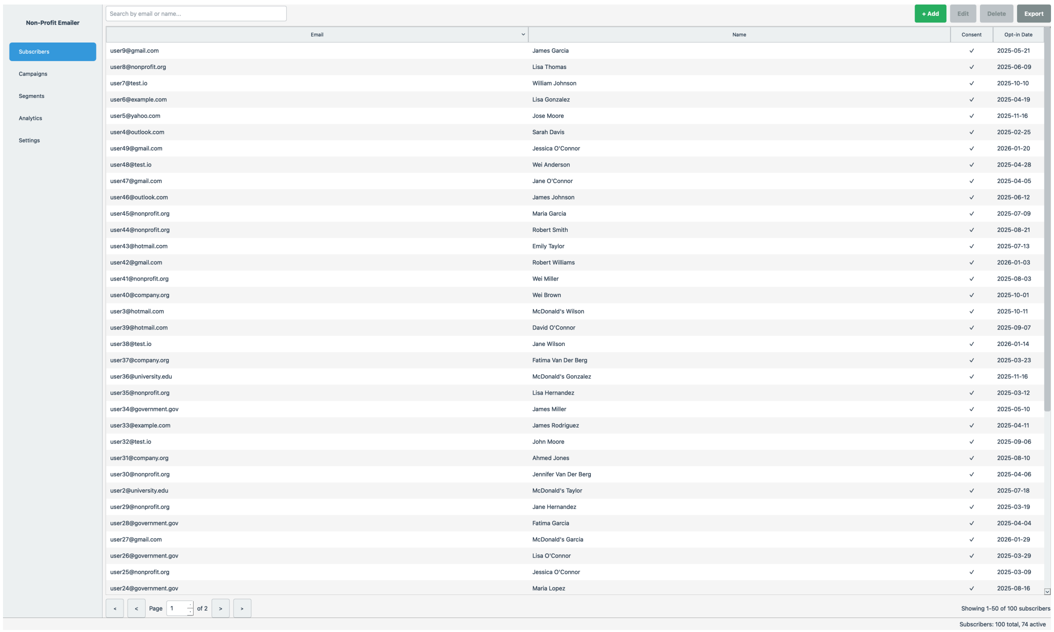
Managing Subscribers

The **Subscribers** section is where you manage your email contacts.



Subscribers View

Viewing Subscribers

The subscriber list displays:

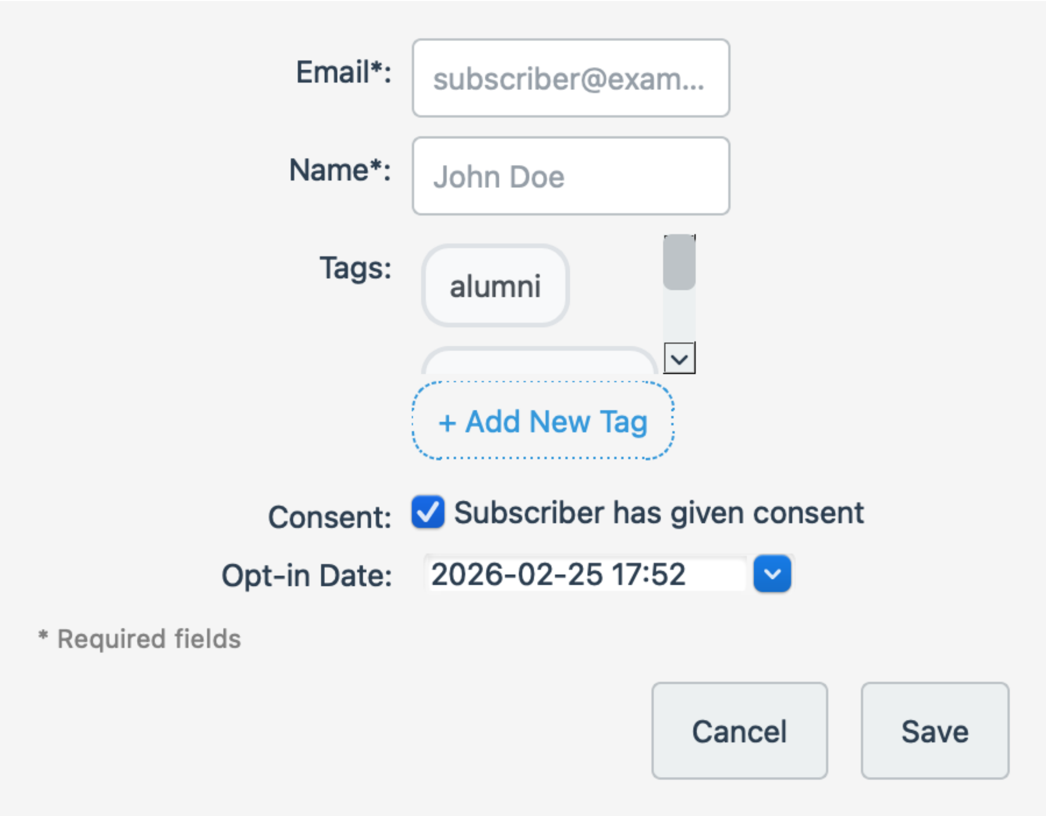
Column	Description
Email	Subscriber’s email address
Name	Subscriber’s display name
Consent	Checkmark indicates consent given
Opt-in Date	Date subscriber gave consent

Use the **Search** box to find subscribers by email or name.

Adding Subscribers

1. Click the **+ Add** button
2. Enter the subscriber’s email address (required)
3. Enter the subscriber’s name (required)
4. Select tags to categorize the subscriber
5. Check “Subscriber has given consent” if applicable
6. Set the opt-in date
7. Click **Save**

Editing Subscribers



Add Subscriber

1. Select a subscriber in the list
2. Click the **Edit** button (or double-click the subscriber)
3. Modify the subscriber's information:
    - Email address
    - Name
    - Tags (click tags to toggle selection)
    - Consent status
    - Opt-in date
4. Click **Save** to confirm changes

Deleting Subscribers

1. Select one or more subscribers
2. Click the **Delete** button
3. Confirm the deletion

Note: Deleted subscribers cannot be recovered.

Importing Subscribers

To import subscribers from a CSV file:

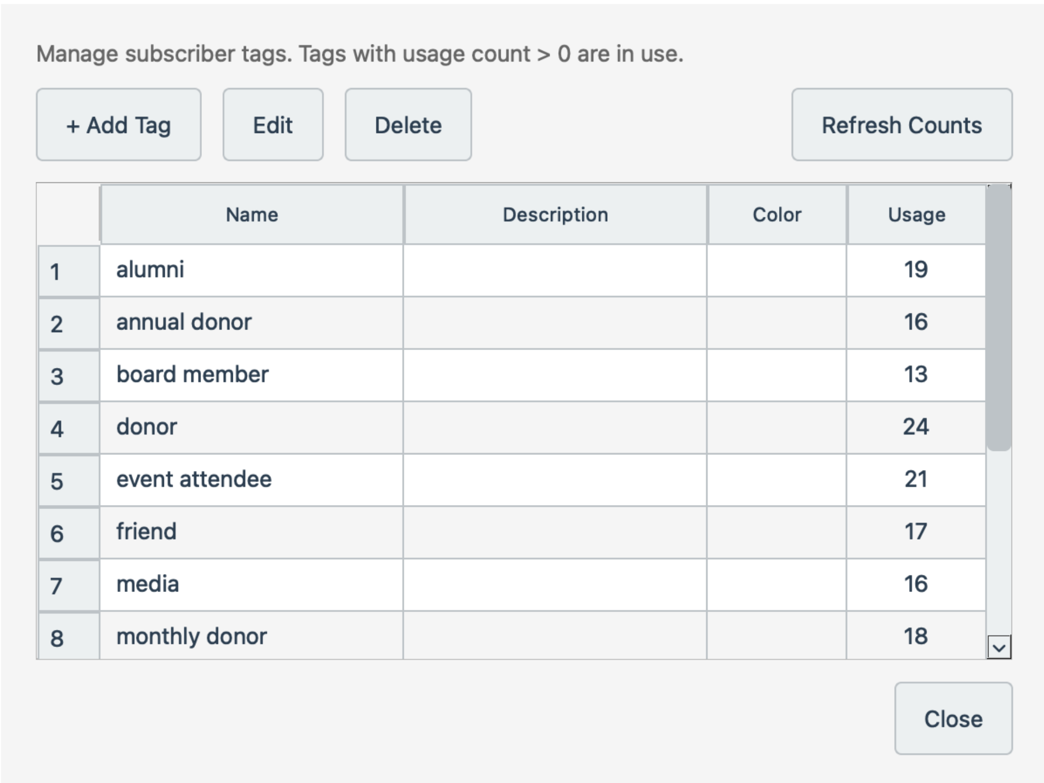
1. Go to **File > Import Subscribers** (or press Ctrl+I)
2. Select your CSV file
3. Map columns to subscriber fields:
    - Email (required)
    - Name
    - Tags
    - Consent status
4. Preview the import
5. Click **Import** to add subscribers

Exporting Subscribers

1. Click the **Export** button
2. Choose a location and filename
3. The CSV file will include all subscriber data

Working with Tags

Tags help you organize and categorize subscribers for targeted campaigns.



Manage Tags

Opening Tag Manager

Go to **Tools > Manage Tags** to open the tag management dialog.

Creating Tags

1. Click **+ Add Tag**
2. Enter a tag name (e.g., “donor”, “volunteer”, “newsletter”)
3. Optionally add a description
4. Choose a color for visual identification
5. Click **Save**

Editing Tags

1. Select a tag in the list
2. Click **Edit**
3. Modify the name, description, or color
4. Click **Save**

Deleting Tags

1. Select a tag
2. Click **Delete**
3. Confirm deletion

Note: The “Usage” column shows how many subscribers have each tag. Tags in use will remain on existing subscribers after deletion.

Assigning Tags to Subscribers

When editing a subscriber, click on tag chips to toggle them: - **Highlighted tags** (blue) are assigned to the subscriber - **Gray tags** are not assigned - Click **+ Add New Tag** to create a new tag while editing

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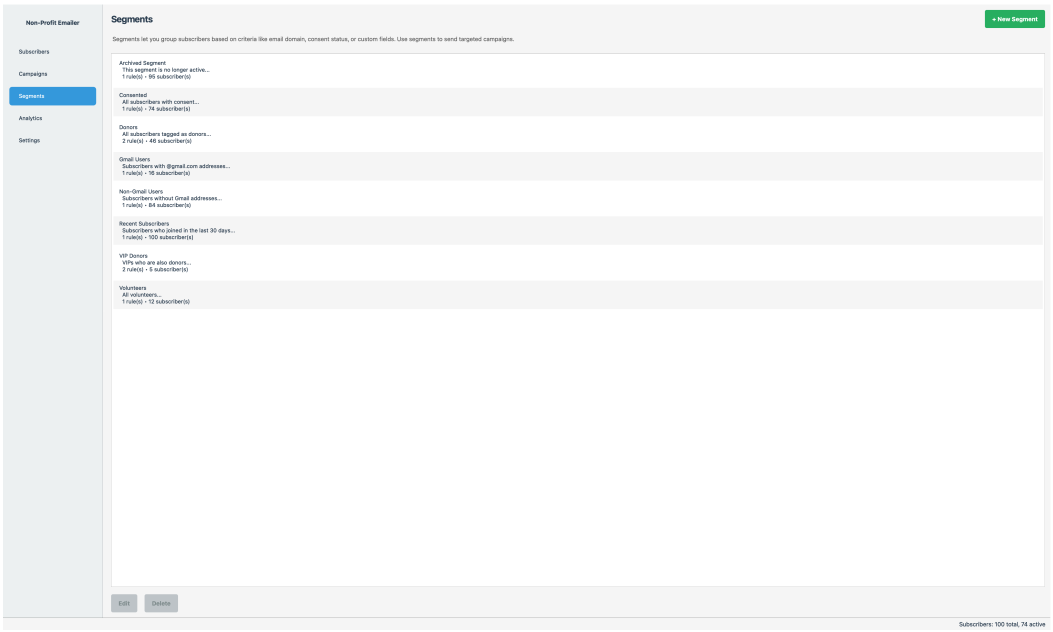
Creating Segments

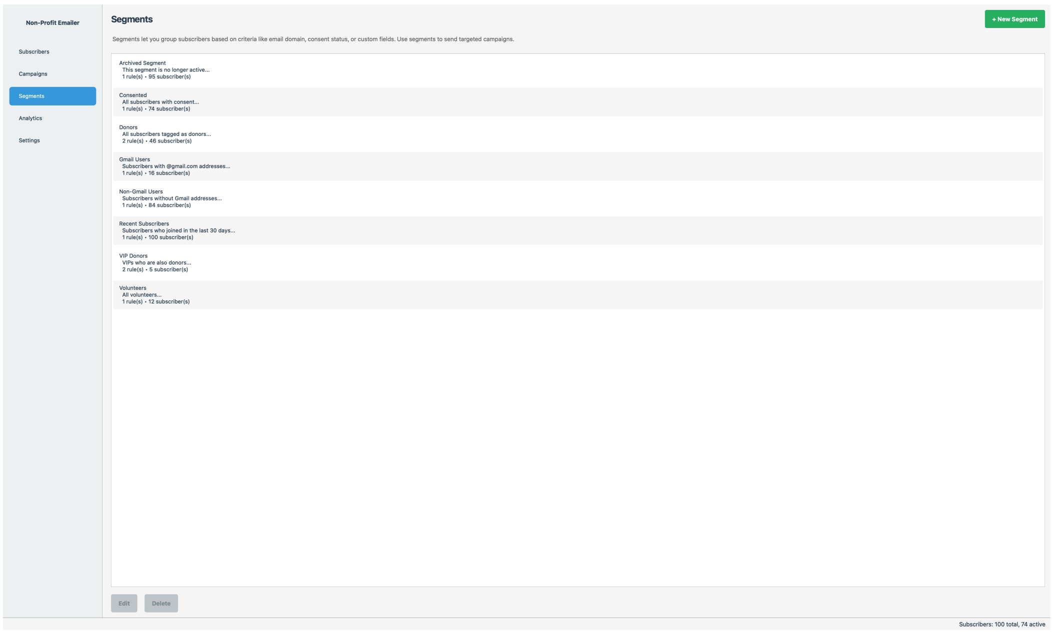
Segments let you group subscribers based on criteria like email domain, consent status, or tags.



Segments View

Creating a New Segment

1. Go to the **Segments** section
2. Click **+ New Segment**



New Segment Dialog

1. Enter a **Name** for the segment (e.g., “Gmail Users”, “VIP Donors”)
2. Enter an optional **Description**
3. Configure **Rules**:
    - Choose a field (Email, Name, Tags, Consent, etc.)
    - Choose an operator (contains, equals, starts with, etc.)
    - Enter a value
4. Add more rules with **+ Add Rule**

5. Choose rule matching:
    - **ALL rules match (AND)** - Subscriber must match every rule
    - **ANY rule matches (OR)** - Subscriber must match at least one rule
6. Click **Preview Matches** to see matching subscribers
7. Click **Save**

Segment Examples

Segment Name	Rule	Description
Gmail Users	Email contains “@gmail.com”	All Gmail subscribers
Donors	Tags contains “donor”	All donors
Recent Subscribers	Opt-in Date is after [date]	New subscribers
Consented	Consent equals “Yes”	Subscribers with consent

Editing Segments

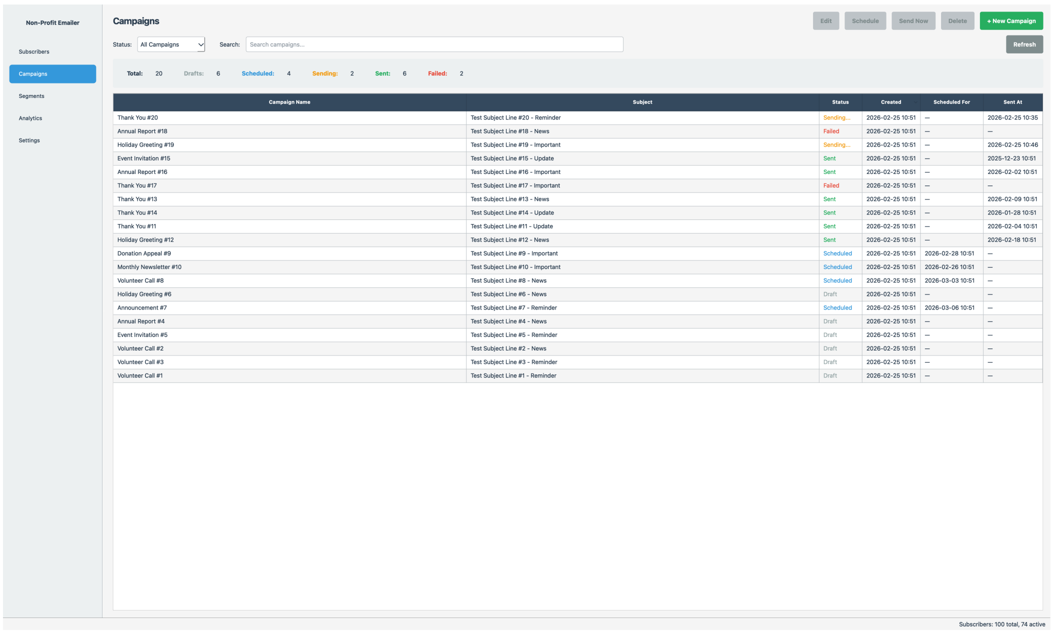
1. Select a segment
2. Click **Edit**
3. Modify rules or settings
4. Click **Save**

Deleting Segments

1. Select a segment
2. Click **Delete**
3. Confirm deletion

Creating and Sending Campaigns

Campaigns are the emails you send to your subscribers.



Campaigns View

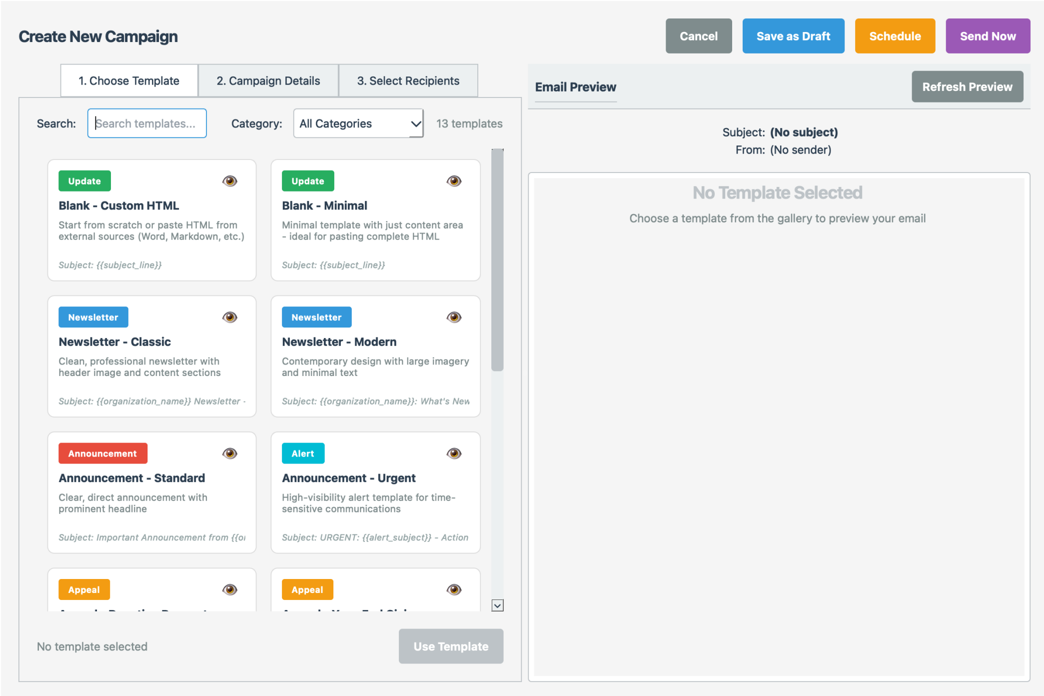
Campaign Statuses

Status	Color	Description
Draft	Gray	Not yet sent or scheduled
Scheduled	Blue	Scheduled for future delivery
Sending	Orange	Currently being sent
Sent	Green	Successfully delivered
Failed	Red	Delivery failed

Creating a New Campaign

Click **+ New Campaign** to open the campaign wizard.

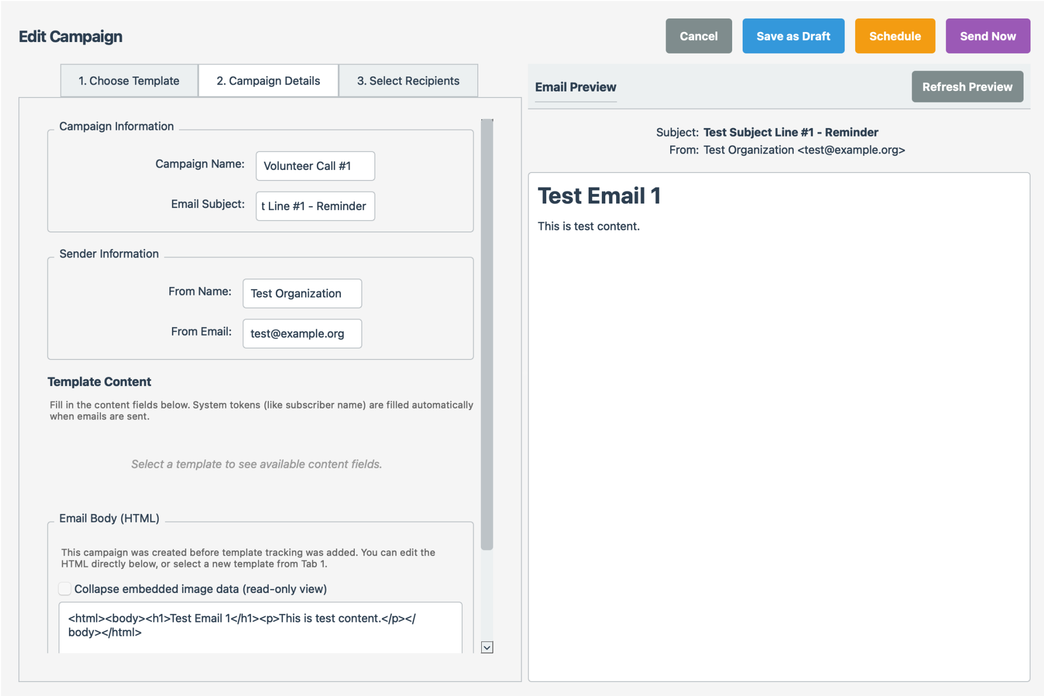
Step 1: Choose Template



Choose Template

1. Browse available templates by category:
    - **Update** - General announcements
    - **Newsletter** - Regular newsletters
    - **Announcement** - Important notices
    - **Alert** - Urgent messages
    - **Appeal** - Donation requests
    - **Event** - Event invitations
    - **Thank You** - Appreciation messages
    - **Welcome** - New subscriber welcomes
2. Click a template to preview it
3. Click **Use Template** to select it

Step 2: Campaign Details



Campaign Details

Fill in your campaign information:

Campaign Information - **Campaign Name** - Internal name (not shown to recipients) - **Email Subject** - Subject line recipients will see

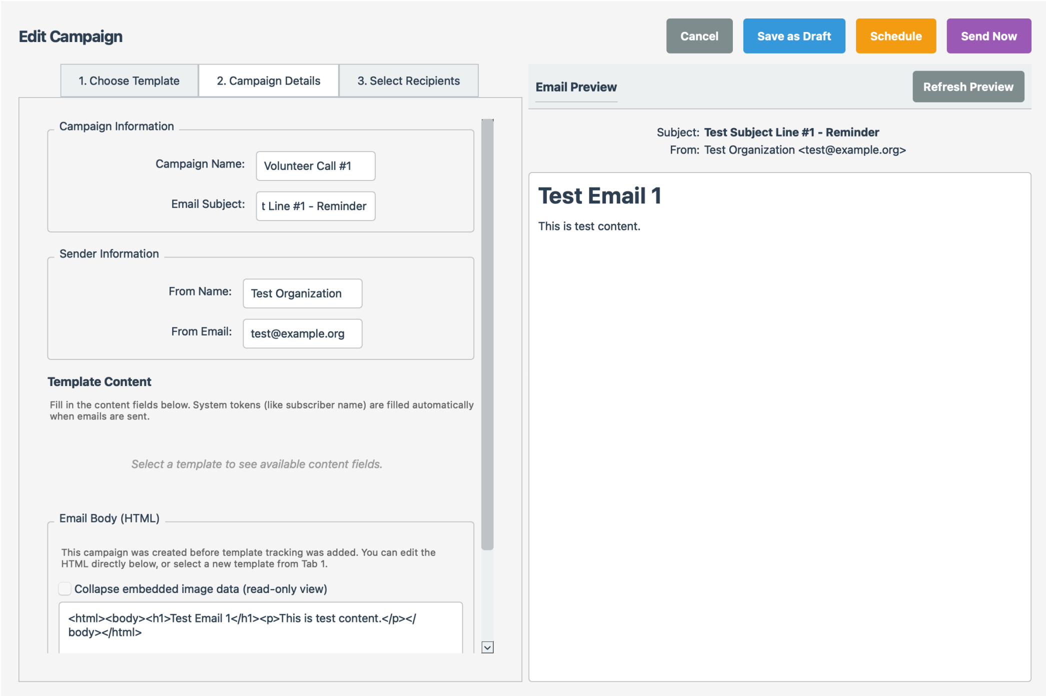
Sender Information - **From Name** - Sender’s display name - **From Email** - Sender’s email address

Template Content - **Button Text** - Text for call-to-action button - **Button URL** - Link for the button - **Main Content** - Your email body text

Auto-Filled Fields These fields are automatically personalized: - `{{first_name}}` - Subscriber’s first name - `{{organization_name}}` - Your organization name - `{{organization_address}}` - Your address - `{{unsubscribe_links}}` - Unsubscribe link (required)

Click **Refresh Preview** to see your changes in the email preview.

Step 3: Select Recipients



Select Recipients

Choose who receives the campaign:

- **All Active Subscribers** - Send to everyone with consent
- **Specific Segment** - Send to a segment you created

The **Summary** shows how many subscribers will receive the campaign.

Sending Options

After completing all steps, you have three options:

Button	Action
Save as Draft	Save for later editing
Schedule	Set a future date/time to send
Send Now	Send immediately

Managing Campaigns

From the Campaigns view:

- **Edit** - Modify a draft campaign
- **Schedule** - Set send date for a draft
- **Send Now** - Send a draft immediately

- **Delete** - Remove a campaign
- **Refresh** - Update the campaign list

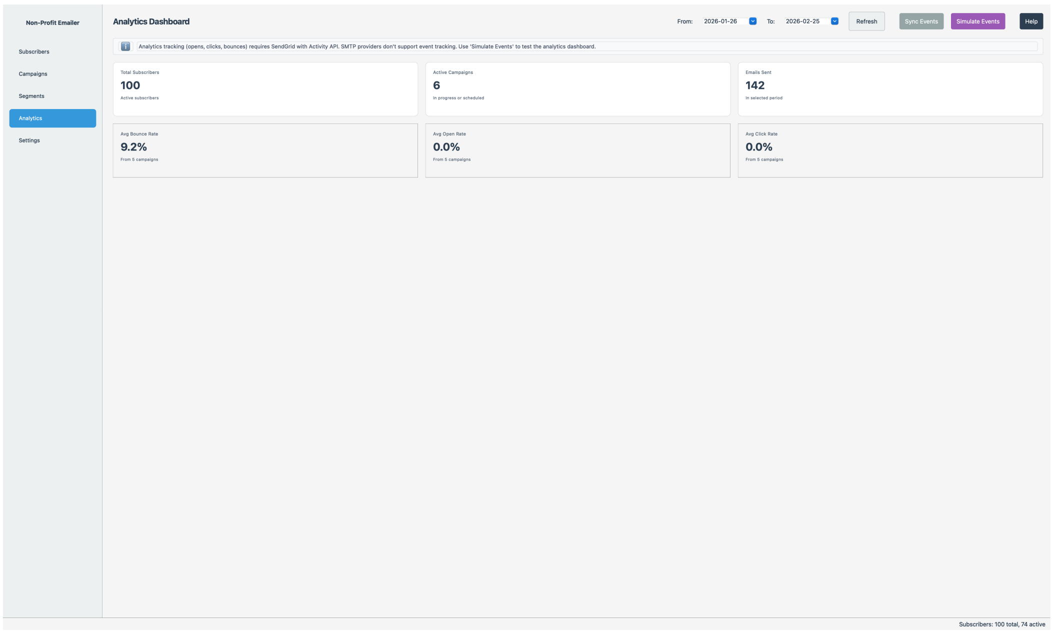
Filtering Campaigns

Use the **Status** dropdown to filter by: - All Campaigns - Drafts - Scheduled - Sending - Sent - Failed

Use the **Search** box to find campaigns by name.

Analytics Dashboard

Track your email campaign performance in the **Analytics** section.



Analytics Dashboard

Metrics Overview

Metric	Description
Total Subscribers	Number of active subscribers
Active Campaigns	Campaigns in progress or scheduled
Emails Sent	Total emails sent in selected period
Avg Bounce Rate	Percentage of undeliverable emails
Avg Open Rate	Percentage of emails opened

Metric	Description
Avg Click Rate	Percentage of links clicked

Date Range

Use the **From** and **To** date pickers to select a time period, then click **Refresh**.

Syncing Events

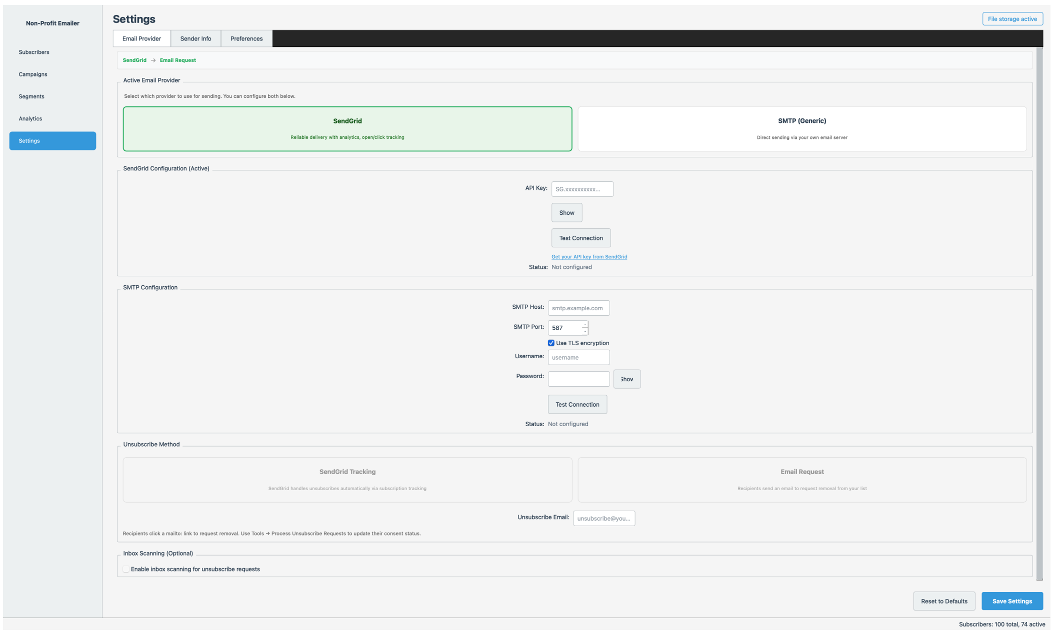
Click **Sync Events** to fetch the latest tracking data from your email provider (SendGrid).

Note: Event syncing requires SendGrid with tracking enabled.

Settings and Configuration

The **Settings** section has three tabs for configuring the application.

Email Provider Tab



Email Provider Settings

SendGrid Configuration

1. Select **SendGrid** as your active provider
2. Enter your **API Key** (starts with “SG.”)
3. Click **Test Connection** to verify
4. Status shows: Connected with tracking features enabled

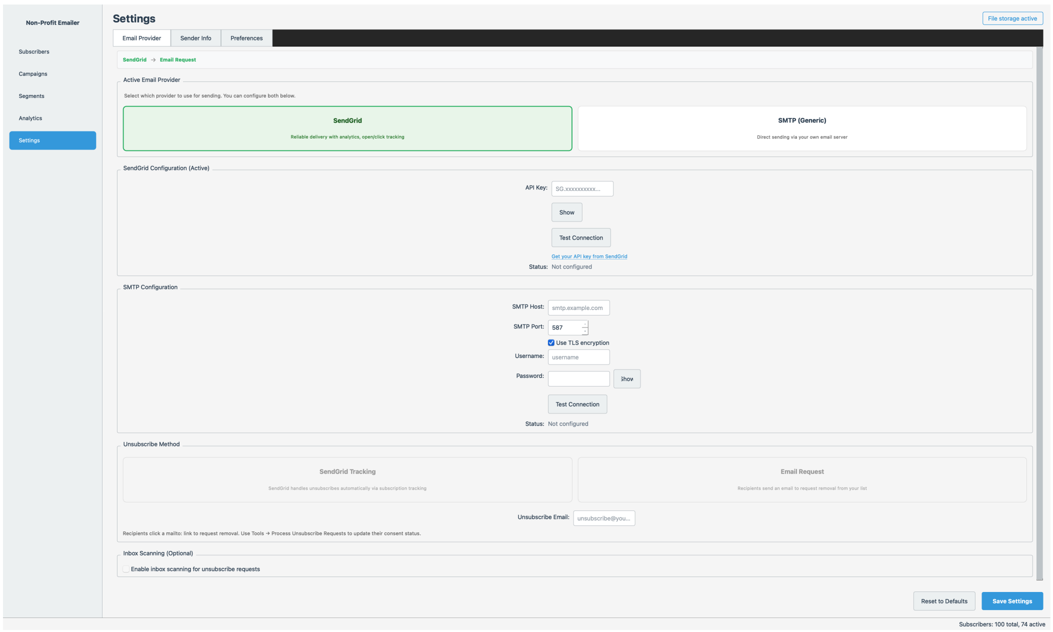
SMTP Configuration

1. Select **SMTP (Generic)** as your active provider
2. Enter your SMTP settings:
    - **SMTP Host** (e.g., smtp.gmail.com)
    - **SMTP Port** (typically 587 for TLS)
    - **Use TLS encryption** (recommended)
    - **Username**
    - **Password**
3. Click **Test Connection** to verify

Unsubscribe Method

Choose how unsubscribes are handled: - **SendGrid Tracking** - SendGrid manages unsubscribes automatically - **Email Request** - Recipients send an email to unsubscribe

Sender Info Tab



Sender Info Settings

Organization

- **Organization Name** - Your nonprofit's name
- **Organization Address** - Physical address (required for compliance)

Sender Identity

- **From Name** - Default sender name
- **From Email** - Default sender email
- **Reply-To Email** - Where replies are sent (optional)

The **Email Header Preview** shows how your sender information will appear.

Preferences Tab

Configure application behavior: - Theme settings - Default values - Notification preferences

Saving Settings

Click **Save Settings** to apply changes. The status bar shows “Unsaved changes” when modifications are pending.

Keyboard Shortcuts

Shortcut	Action
Ctrl+N	New campaign
Ctrl+I	Import subscribers
Ctrl+E	Export subscribers
Ctrl+F	Focus search box
Ctrl+S	Save (in dialogs)
Escape	Cancel/Close dialog
F1	Open help
F5	Refresh current view

Troubleshooting

Application Won’t Start

1. Ensure your system meets the minimum requirements
2. Try running as administrator (Windows) or with sudo (Linux)
3. Check for error messages in the console

SendGrid Connection Failed

1. Verify your API key is correct
2. Ensure the key has “Mail Send” permission
3. Check your internet connection

4. Try generating a new API key

SMTP Connection Failed

1. Verify host, port, and credentials
2. Ensure TLS is enabled if required
3. For Gmail: Enable “Less secure app access” or use App Password
4. Check firewall settings

Emails Not Sending

1. Verify email provider is configured and tested
2. Check campaign status for error messages
3. Ensure subscribers have consent
4. Review SendGrid activity for bounces

Import Failing

1. Ensure CSV file is properly formatted
2. Check for special characters in email addresses
3. Verify column mapping is correct
4. Try a smaller test import first

Credential Storage

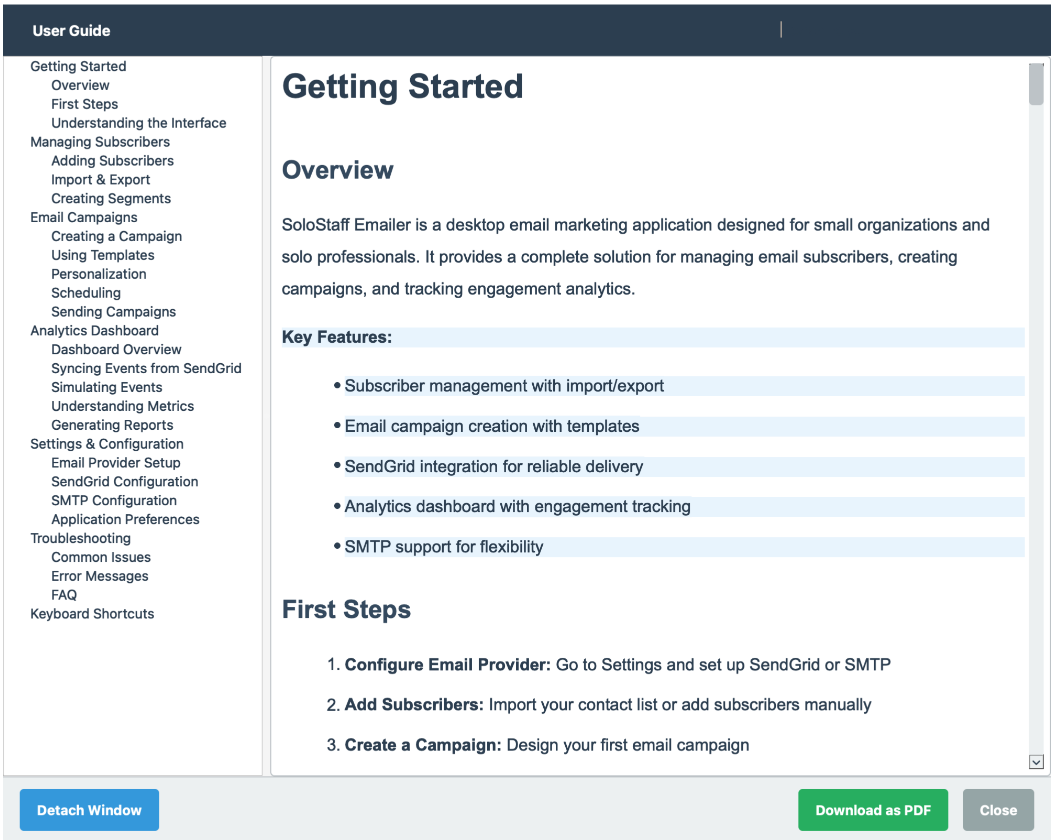
The status badge in Settings shows your credential storage method:

Status	Color	Description
Secure storage active	Green	Using OS keyring
File storage active	Blue	Using encrypted file
Temporary storage	Orange	Memory only (not persistent)

Getting Help

Built-in Help

Access the inline user guide: **Help > User Guide** (or press F1)



Inline User Guide

Report Issues

If you encounter bugs or have feature requests:

1. Go to: https://github.com/StephenBogner/solostaff-emailer-application/issues
2. Click “New Issue”
3. Describe the problem with steps to reproduce
4. Include your operating system and application version

Contact

For direct support, contact the developer through the GitHub repository.

Personalization Tokens Reference

SoloStaff Emailer uses **handlebar tokens** (also called merge tags) to personalize emails. Tokens are placeholders in the format `{{token_name}}` that get replaced with actual values when emails are sent.

How Tokens Work

When you create a campaign: 1. **System tokens** are automatically filled from subscriber data and your settings 2. **Content tokens** are fields you fill in when creating the campaign 3. When the email is sent, all tokens are replaced with actual values

System Tokens (Auto-Filled)

These tokens are automatically populated from subscriber data and your organization settings. You don't need to enter values for these—they're filled in for each recipient.

Token	Description	Example Output
`{{first_name}}`	Subscriber's first name (extracted from full name)	"Jane"
`{{last_name}}`	Subscriber's last name	"Doe"
`{{name}}`	Subscriber's full name	"Jane Doe"
`{{email}}`	Subscriber's email address	"jane.doe@example.com"
`{{organization_name}}`	Your organization name (from Settings)	"Local Nonprofit"
`{{organization_address}}`	Your organization address (from Settings)	"123 Main St, Anytown, CA"
`{{unsubscribe_url}}`	Direct unsubscribe link URL	`https://...`
`{{preferences_url}}`	Email preferences page URL	`https://...`
`{{unsubscribe_links}}`	Complete HTML block with unsubscribe/ preferences links	[Unsubscribe] | [Preferences]
`{{year}}`	Current year	"2025"
`{{month}}`	Current month name	"December"

Token	Description	Example Output
`{{day}}`	Current day of month	“27”

Content Tokens (User-Editable)

These tokens appear as form fields when you create a campaign. Fill them in to customize your email content.

Campaign Information

Token	Description	Input Type
`{{subject_line}}`	Email subject (for blank templates)	Single line
`{{preview_text}}`	Preview text shown in inbox	Single line
`{{headline}}`	Main headline text	Single line
`{{subheadline}}`	Secondary headline	Single line

Sender Information

Token	Description	Input Type
`{{sender_name}}`	Name of the person sending	Single line
`{{sender_title}}`	Title/role of sender	Single line

Main Content

Token	Description	Input Type
`{{main_content}}`	Primary email body content	Multi-line
`{{intro_paragraph}}`	Opening paragraph	Multi-line
`{{closing_paragraph}}`	Closing paragraph	Multi-line
`{{closing_message}}`	Brief closing message	Multi-line
`{{custom_content}}`	Free-form HTML content (blank templates)	Multi-line

Buttons and Links

Token	Description	Input Type
`{{button_text}}`	Call-to-action button label	Single line
`{{button_url}}`	Button destination URL	Single line
`{{featured_link}}`	Link for featured content	Single line

Appeal/Fundraising Templates

Token	Description	Input Type
`{{appeal_headline}}`	Fundraising appeal headline	Single line
`{{appeal_subheadline}}`	Appeal secondary text	Single line
`{{story_paragraph}}`	Impact story content	Multi-line
`{{fundraising_goal}}`	Target amount (e.g., "$10,000")	Single line
`{{amount_raised}}`	Amount raised so far	Single line
`{{goal_amount}}`	Goal amount for progress bar	Single line
`{{progress_percent}}`	Progress percentage (0-100)	Single line
`{{impact_message}}`	How donations help	Multi-line
`{{donate_link_other}}`	Link for custom donation amount	Single line

Year-End Giving Templates

Token	Description	Input Type
`{{days_remaining}}`	Days until deadline	Single line
`{{deadline}}`	Deadline date	Single line
`{{year_end_message}}`	Year-end appeal content	Multi-line
`{{ein_number}}`	Organization EIN for tax receipts	Single line

Event Templates

Token	Description	Input Type
`{{event_name}}`	Name of the event	Single line
`{{event_date}}`	Event date	Single line
`{{event_time}}`	Event start time	Single line
`{{event_location}}`	Venue name	Single line
`{{event_address}}`	Venue address	Single line
`{{dress_code}}`	Dress code information	Single line
`{{invitation_message}}`	Event description	Multi-line
`{{additional_info}}`	Extra event details	Multi-line
`{{rsvp_deadline}}`	RSVP due date	Single line
`{{rsvp_accept_url}}`	RSVP acceptance link	Single line
`{{rsvp_decline_url}}`	RSVP decline link	Single line
`{{time_until_event}}`	Time remaining (e.g., "3 days")	Single line
`{{what_to_bring}}`	Items to bring	Multi-line
`{{contact_email}}`	Contact email for questions	Single line

Thank You/Receipt Templates

Token	Description	Input Type
`{{donation_amount}}`	Donation amount received	Single line
`{{donation_date}}`	Date of donation	Single line
`{{transaction_id}}`	Transaction reference number	Single line
`{{share_facebook}}`	Facebook share link	Single line
`{{share_twitter}}`	Twitter/X share link	Single line

Token	Description	Input Type
`{{share_linkedin}}`	LinkedIn share link	Single line

Announcement/Alert Templates

Token	Description	Input Type
`{{announcement_title}}`	Announcement headline	Single line
`{{announcement_body}}`	Announcement content	Multi-line
`{{alert_title}}`	Alert headline	Single line
`{{alert_subject}}`	Alert subject for email	Single line
`{{alert_message}}`	Alert body content	Multi-line
`{{action_required}}`	Required actions	Multi-line

Newsletter Templates

Token	Description	Input Type
`{{newsletter_tagline}}`	Newsletter tagline/slogan	Single line
`{{featured_title}}`	Featured article title	Single line
`{{featured_content}}`	Featured article content	Multi-line
`{{article1_excerpt}}`	First article excerpt	Multi-line
`{{article2_excerpt}}`	Second article excerpt	Multi-line

Creating Custom Templates

You can create custom email templates using HTML and the token system described above.

Using the Blank Templates

SoloStaff Emailer includes two blank templates for custom content:

1. **Blank - Custom HTML** - Full control with header and footer
2. **Blank - Minimal** - Maximum flexibility, minimal structure

These templates accept the `{{custom_content}}` token where you can paste your own HTML.

Writing Custom HTML

When creating custom content, you can:

1. **Paste from Word/Google Docs** - Copy formatted text and paste into the content field
2. **Write HTML directly** - Use standard HTML tags for formatting
3. **Export from Markdown** - Convert Markdown to HTML and paste

Basic HTML Examples

```html
<!-- Paragraph with bold text -->
<p>Thank you for your <strong>generous support</strong> this year!</p>

<!-- Bulleted list -->
<ul>
    <li>Item one</li>
    <li>Item two</li>
    <li>Item three</li>
</ul>

<!-- Link -->
<p>Visit our <a href="https://example.com">website</a> for more information.</p>

<!-- Image (use absolute URLs) -->
<img src="https://example.com/image.jpg" alt="Description" width="600">
```

Template Best Practices

1. Always Include Required Tokens

Every template should include: - `{{unsubscribe_links}}` or `{{unsubscribe_url}}` - Required for CAN-SPAM compliance - `{{organization_name}}` - Identifies your organization - `{{organization_address}}` - Required physical address

2. Use Personalization Thoughtfully

- Use `{{first_name}}` in greetings: “Dear {{first_name}},”
- Provide fallbacks mentally - some subscribers may not have names set
- Don’t over-personalize - it can feel intrusive

3. Keep Emails Mobile-Friendly

- Use single-column layouts
- Keep text readable (14-16px minimum)
- Make buttons large enough to tap (44px minimum height)
- Test on mobile devices

4. Optimize Images

- Host images on reliable servers (or use built-in image embedding)
- Always include `alt` text for accessibility
- Keep total email size under 100KB when possible

Template Token Syntax

Tokens must follow this exact format:

```
{{token_name}}
```

Rules: - Use double curly braces: `{{` and `}}` - Token names use lowercase letters and underscores only - No spaces inside the braces - Tokens are case-sensitive

Correct: `{{first_name}}`, `{{organization_name}}`

Incorrect: `{{ first_name }}`, `{{FirstName}}`, `{first_name}`

Testing Your Templates

Before sending to your list:

1. **Preview** - Use the preview panel to see how tokens render
2. **Test Send** - Send a test email to yourself
3. **Check Links** - Verify all URLs work correctly
4. **Mobile Test** - View on a phone or tablet
5. **Spam Check** - Avoid spam trigger words

Email Client Compatibility

Different email clients render HTML differently. For best results:

Do	Don't
Use inline CSS styles	Use external stylesheets
Use `<table>` for layouts	Use CSS flexbox/grid

Do	Don't
Use web-safe fonts	Use custom fonts
Use absolute image URLs	Use relative paths
Test in multiple clients	Assume one client = all

Embedding Images

SoloStaff Emailer supports two methods for images:

1. **External URLs** - Link to images hosted elsewhere

   ```
   <img src="https://yoursite.com/image.jpg" alt="Description">
   ```

2. **Embedded Images** - Use the **Insert Image** button in the campaign editor to embed images directly in the email (increases email size but ensures display)

SoloStaff Emailer v0.8.0-beta

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For the latest version and updates, visit: https://github.com/StephenBogner/solostaff-emailer-application