

Everything you need to send your first campaign.

Proiga - Getting Started

1 Create a contact list

- Go to Lists → Create List → name your list (e.g. "Leads Jan 2026").
- Click Import and upload your .csv file.
- Required column: email. Optional: name, company, phone.

One list = one campaign audience.

2 Register your sending domain

- Go to Domains → Buy New Domain → pick a name and register.
- DNS records (SPF, DKIM, MX) are set up automatically.
- Registration takes 5–30 minutes.

Add bounce@yourdomain.com as a sender - this catches failed delivery notifications.

3 Add a sender address

- Go to Domains → click your domain → Add Sender.
- This is the From address your recipients will see.
- You can create multiple senders per domain.

Don't forget to set up a signature.

4 Write an email template

- Go to Templates → New Template.
- Write your subject and body. Use {{name}}, {{company}} to personalize.
- Click + **Add to Pool** to save your email - **this is required even if you don't plan to use variants**. Without it your template has no body to send.
- Hit "AI Variants" to generate variations automatically.

AI Workshop generates subject and body variations using AI. + Add to Pool saves a variation for A/B testing

5 Set up redirect (optional)

- Go to Domains → Redirect.
 - Forward replies from your domain to any inbox you already use.
 - Useful if you want to get replies in Gmail, Outlook, etc.
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6 Launch a campaign

- Go to Campaigns → New Campaign.
- Select: List + Template + Sender. Schedule or send now.
- Emails send gradually - safer for deliverability.
- You can pause or stop at any time.

Track opens, clicks and bounces in Statistics.

7 Handle replies

- All replies land in Email → Inbox.
- Click any reply to read and respond directly from Proiga.
- Sent responses go to “SENT” in Email tab.

8 Link emails & merge contacts

- Open a contact → click Link Email to attach another email address to the same person.
- If the same person has two separate contacts, open one → Merge → select the other.
- After merging, all history, replies and statuses are combined into one contact.

Useful when someone replies from a different address than the one you emailed.

9 Use the Calendar

- Go to Calendar to see all your campaigns on a timeline.
 - Each bar = one campaign. Solid color = future sends. Faded = already sent.
 - Click any bar to open that campaign.
 - Use it to plan sends and avoid overlapping campaigns to the same audience.
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10 Add team members

- Go to Team → Invite Member → enter their email.
 - They get an invite link and must accept before joining your workspace.
 - Team members can share contact lists, co-manage campaigns and track leads together.
 - Remove a member anytime - their account stays intact, they just leave your team.
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Contact Labels, Statuses & Flags

Labels

Labels show where a contact is in your outreach flow. Set manually or automatically when a blast or follow-up is sent.

Label	Meaning
Active	No email sent yet - contact is ready to receive a campaign (default state)

Pending	Campaign blast was sent - contact is now waiting for a follow-up
FUP Sent	Follow-up was sent - contact is put on ice until manually re-activated
FUP	Manually flagged for a follow-up - you decide when to reach out
DS	Don't Sale - contact is excluded from sending (has the instrument but is not ready to sell)
NR	Not Relevant - contact is excluded from sending (wrong target)
Client	Existing client - excluded from cold outreach campaigns
Blacklist	Blocked permanently - will never receive any email from Proiga

Sending statuses

These are the three actual states Proiga checks before sending any email.

Status	Meaning
Active	Contact is eligible to receive a blast. Default state before any email is sent.
On Ice	Contact is temporarily skipped. Applied automatically when label becomes: FUP Sent, FUP (man)
BL	Contact is blocked permanently. Will never be contacted again under any circumstance.

Automatic flags

Set by the system automatically. Both result in the contact being treated as BL - they will never receive an email from Proiga.

Flag	What happens
Bounced	Email could not be delivered (invalid address or server rejection). Contact is automatically blacklisted.
Unsubscribed	Contact clicked the Unsubscribe link. Contact is automatically blacklisted.

Manual indicators

Set by you - for tracking only. These do not affect whether emails are sent.

Indicator	Meaning
Replied (green tick)	You manually mark this when a contact has replied. Display only.
In Multiple Lists	Contact appears in more than one list and will receive campaigns sent to any of them.

Lists

- Your CSV file must have an **Email** column - this is the only required field.
- All other columns are optional but must use these exact names. Once imported, use `{{first_name}}`, `{{organization}}`, `{{journal}}` etc. in your templates to personalize emails automatically.

How to upload a CSV

1. Go to **Lists** and open or create a list.
2. Click **Import** at the top of the list page.
3. Select your **.csv, .xls, or .xlsx** file.

4. Choose the **status** to apply to all imported contacts (usually leave as Active).
5. Choose how to handle contacts that already exist in other lists: add to this list or skip.
6. Click **Import** - Proiga will process the file and show you a summary when done.

Tip: make sure your CSV has a header row as the first line with the exact column names from the table above. Proiga uses those names to map the data.

Required CSV column names

Your CSV file must have a header row as the first line. Use these exact column names - Proiga will not recognize any other spelling:

Email, First Name, Last Name, Organization, Article Title, Journal, Year, DOI, Authors

Column	Used as
Email	required
First Name	{{first_name}}
Last Name	{{last_name}}
Organization	{{organization}}
Article Title	{{article_title}}
Journal	{{journal}}
Year	{{year}}
DOI	{{doi}}
Authors	{{authors}}

Writing Templates - Key Rules

1. Why use AI Workshop?

- Write your draft or idea in the template first - AI Workshop uses it as a base and generates similar variations from it.
- Click AI Workshop to create subject line and body alternatives based on what you already wrote.
- You can regenerate as many times as needed until you find a version you like.

2. Add to Pool - what it does and why

- After AI Workshop generates a variation, click **+ Add to Pool** to save it.
- The Pool stores multiple subject/body versions. When you run a campaign, Proiga rotates through them automatically - each contact gets a slightly different version.
- This is your built-in A/B test: different wording, same audience. Compare open rates to see which version wins.
- **You must add at least one body to the Pool - even if you only use the original and no variants at all.**

3. Use {{first_name}}, not "Hello Name"

- Never type a contact's name directly into the template body.
- Instead write: **Hello {{first_name}}**, - Proiga replaces it with the real name from your CSV when sending.
- Other variables: {{last_name}}, {{organization}}, {{article_title}}, {{journal}}, {{year}}, {{doi}}, {{authors}}.
- These variables come from your CSV column headers. See the **Lists** section of this guide for the exact column names to use.

4. Do not write your signature in the email body

- Do **not** paste your name, title, phone or company into the template body - it will appear duplicated or inconsistent across campaigns.
 - Instead: go to **Domains** → **your domain** → **Sender** → **Edit Signature**.
 - Set your signature once per sender address. It is appended automatically to every email sent from that sender.
 - This way all campaigns always have the correct, up-to-date signature without touching any template.
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A/B Testing & Stats

- Go to **Statistics** to see opens, clicks and bounces across all campaigns.
 - To compare two campaigns: open each one and check its individual stats.
 - **All Variants** = your built-in A/B test - send different versions to different lists, compare open rates.
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Files

- Go to **Files** to upload contact CSV files and manage them in one place.
- You can **split a large file into smaller lists** - upload your CSV and choose how many contacts per list (e.g. 500 per list).
- Each split becomes a separate file that you can use to create a separate list and run all blasts **simultaneously** for faster outreach.
- Useful when you want to reach thousands of contacts at once without waiting for one campaign to finish.

■■ We do not recommend sending more than 100 emails/hour per sender, or using more than 3 senders per domain. Exceeding these limits increases the risk of your domain being flagged or blacklisted by mail servers.