Marketing · Email

Bold Estimation cold email guides

13 self-serve guides · 72 steps in all · Page, PDF and narrated video · Updated Sep 30, 2026

Bold wins estimating work by sending short, plain emails to contractors and suppliers. These guides walk every part of that work on the real screens, one job per guide, for someone who has never used these tools. Each one gives you the rule for every decision on the way.

New here	Start with guide 1, how Bold's cold email works, and its word list
Every weekday	Guide 5, the mailbox health check, before sending starts at 7 AM Central
Golden rules	Warm new mailboxes 19 days, keep bounces under 2 percent, at most 5 people per company a day

Start here: the three tools and the words they use

Read this first. It shows where each part of the work happens and explains the terms the other guides use.

1. How Bold's cold email works

Zapmail, Instantly, Google Sheets

Bold sends short, plain emails to contractors and suppliers who have never heard of it. Three tools do the work: Zapmail holds the sending addresses, Instantly sends the emails and collects the replies, and two Google Sheets hold the lists and the results. This guide shows each one and explains the words the other guides use.

When: Once, before any other guide · 7 steps · 3 min

Zapmail: where the sending addresses come from

Zapmail sells and holds the extra domains and mailboxes the emails go out from.

2. Check your domains and mailboxes in Zapmail

Zapmail

Zapmail sells and holds the domains and mailboxes Bold's cold email goes out from. Sign in at app.zapmail.ai. Once a week, confirm that every domain still has its four DNS records and every mailbox says Active. It takes three minutes and changes nothing.

When: Weekly, on Monday · 6 steps · 3 min

3. Add sending capacity, from Zapmail to Instantly

Zapmail, Instantly

More emails a day means more mailboxes. This guide goes from searching for a domain in Zapmail to warming the new mailboxes in Instantly. The example uses a made-up domain and stops before anything is bought.

When: About three weeks before you need more emails a day · 6 steps · 20 min

Instantly: the tool that sends the emails

Instantly warms up the mailboxes, sends the campaigns and collects the replies.

4. A tour of Instantly and your email accounts

Instantly

Instantly is the tool that sends Bold's campaigns. Sign in at app.instantly.ai. This tour shows where everything sits, what the numbers on each mailbox mean, and why warmup always stays on. You only look; no setting changes.

When: Once, then whenever you need a reminder · 6 steps · 4 min

5. The daily mailbox health check in Instantly

Instantly

Two minutes every weekday before sending starts at 7 AM Central. You confirm every mailbox is connected, healthy and set to this week's daily limit, and you take the ones that are not out of their campaigns.

When: Every weekday, before 7 AM Central · 6 steps · 2 min

6. Inside an Instantly campaign, tab by tab

Instantly

A campaign is one group of people, the two emails they get, and the mailboxes that send them. This guide opens a finished campaign and walks each tab: Analytics, Editor, Leads and Settings.

When: Whenever you open a campaign · 8 steps · 4 min

The process: from a list of people to a reply

The work in order: add a list to a campaign, start sending, keep the campaign healthy, answer the replies.

7. Add leads to a campaign in Instantly

Instantly

A lead is one person a campaign will email. The team adds people to the list drop sheet (guide 11); whoever loads campaigns brings the list into Instantly from the campaign's Leads tab. This guide walks up to the upload screen and stops there, so no real list is uploaded.

When: Whenever a new list is ready · 4 steps · 5 min

8. Launch a campaign in Instantly

Instantly

A new campaign waits as a Draft until someone presses Launch. Before that, four things get checked: the people, the emails, the mailboxes and the schedule. This guide walks the checks on a real draft and stops at the Launch button without pressing it.

When: Once per new campaign · 6 steps · 10 min

9. Manage running campaigns in Instantly

Instantly

Once a campaign is sending, three habits keep it healthy: check bounces every day, pause before any change, and duplicate a finished campaign instead of restarting it. This guide shows where each one happens.

When: Daily while a campaign is sending · 4 steps · 5 min

10. Handle replies in the Unibox

Instantly

Every reply to every mailbox lands in Instantly's Unibox, and a copy goes to the outreach core sheet. This guide shows how to find a reply, give it a status, and block a company that says no. An interested reply gets a phone call within 15 minutes.

When: All day while campaigns send · 5 steps · 5 min

Our docs: the sheets and the templates

The two Google Sheets and the Google Doc the team works in every week.

11. The list drop sheet

Google Sheets

BOLD LIST DROP is the Google Sheet where the team adds the people Bold should email, any day, one line per person. Each weekday morning the ready lines go into their campaign. This guide shows the tabs and the few rules that keep a line from being held.

When: Any day you have new people to email · 4 steps · 5 min

12. The outreach core sheet

Google Sheets

BOLD OUTREACH CORE fills itself in from Instantly within seconds: every email sent, every reply, and a scoreboard per campaign. The team works from its Replies tab and adds to Do not contact; the tracker fills in the rest.

When: Daily, to follow replies and results · 6 steps · 4 min

13. The email templates doc

Google Docs

Bold Email Templates is the Google Doc that holds every cold email before it goes into Instantly. Writers draft and change emails here, never in Instantly. This guide shows how the doc is laid out and the rules that keep an email out of spam.

When: Whenever you write or change an email · 4 steps · 4 min

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up.

Guide 1 of 13 · Start here · Zapmail, Instantly, Google Sheets

How Bold's cold email works

Updated Sep 30, 2026

Bold sends short, plain emails to contractors and suppliers who have never heard of it. Three tools do the work: Zapmail holds the sending addresses, Instantly sends the emails and collects the replies, and two Google Sheets hold the lists and the results. This guide shows each one and explains the words the other guides use.

7 steps · 3 min · 1 watch-out

Watch it first: how Bold's cold email works in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/start-how-bold-cold-email-works.mp4

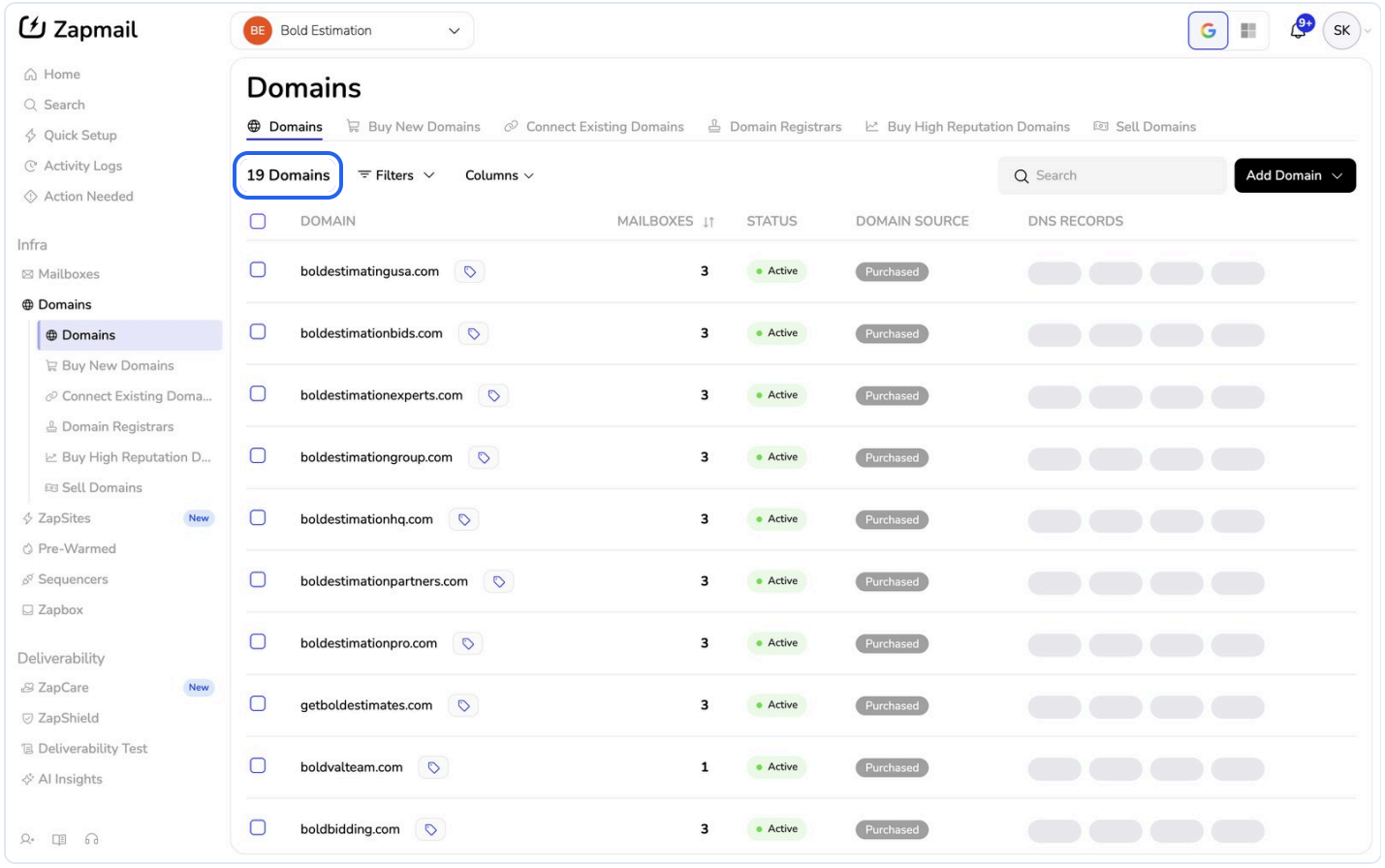
7 steps, each with the screen you will see

1. Zapmail holds the domains
2. Each domain has mailboxes
3. Instantly sends the emails
4. Campaigns hold the people
5. Replies land in the Unibox
6. The list drop sheet
7. The outreach core sheet

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Zapmail holds the domains

Bold's cold email runs on three tools. The first is Zapmail. It holds the domains, the extra web addresses Bold sends cold email from.

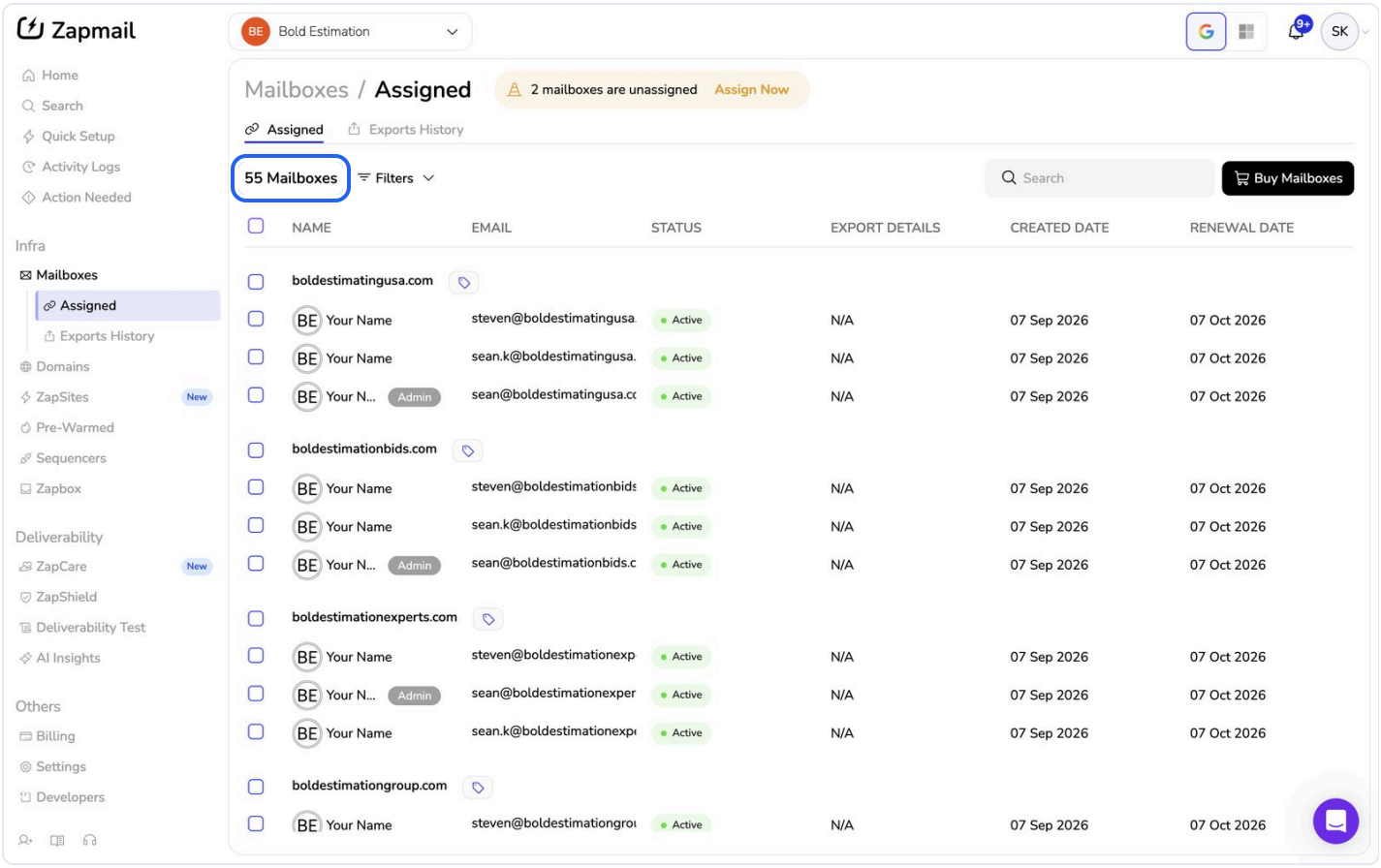


> ⚠ **Watch out.** Cold email never goes out from Bold's main company address. If one of these extra domains gets marked as spam, the main address and everyday email stay safe. Keep it that way: send campaigns only from Zapmail mailboxes.

2 Each domain has mailboxes

Next, Mailboxes.

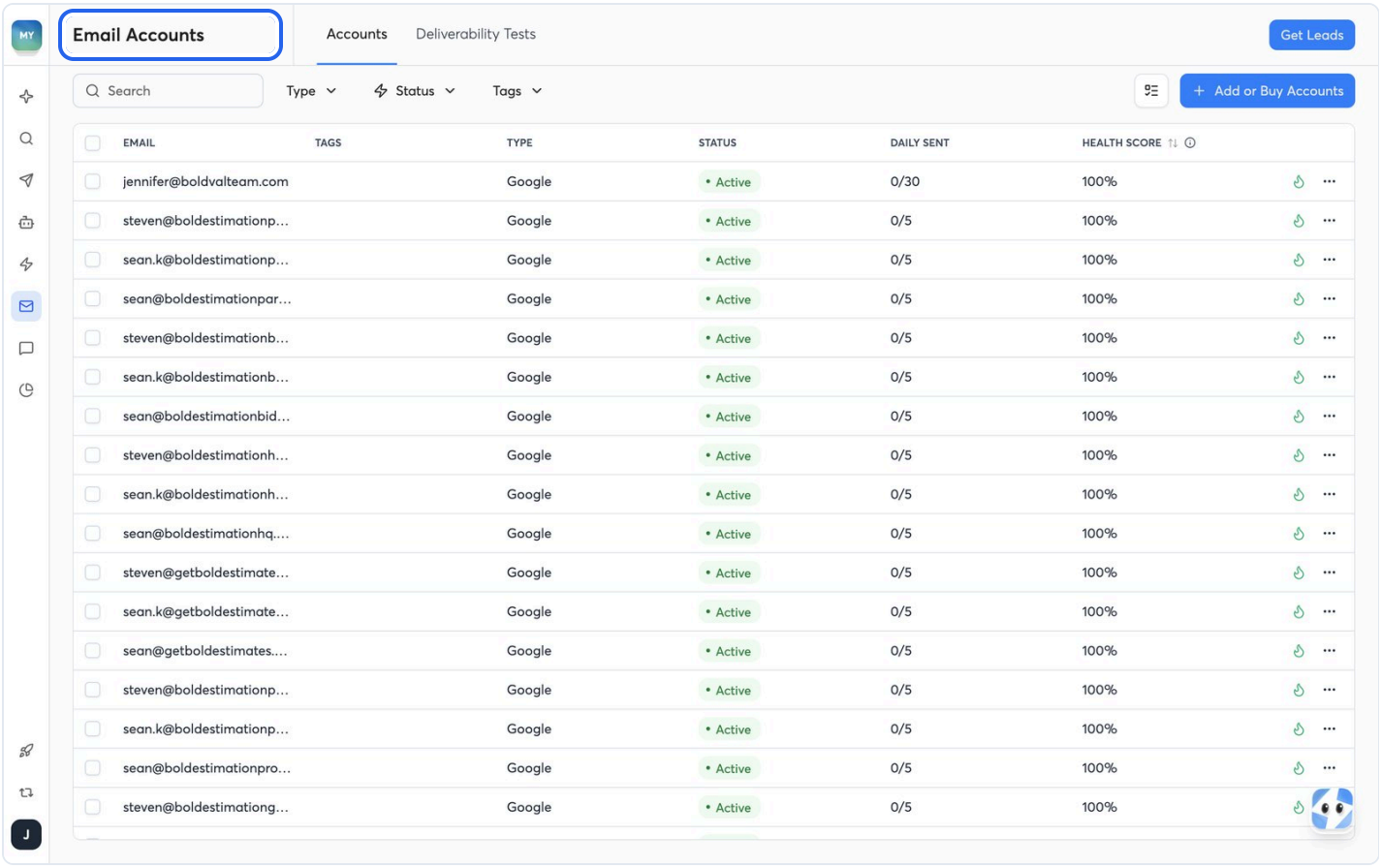
Each domain holds three mailboxes. A mailbox is one sending address, and this page lists every one.



3 Instantly sends the emails

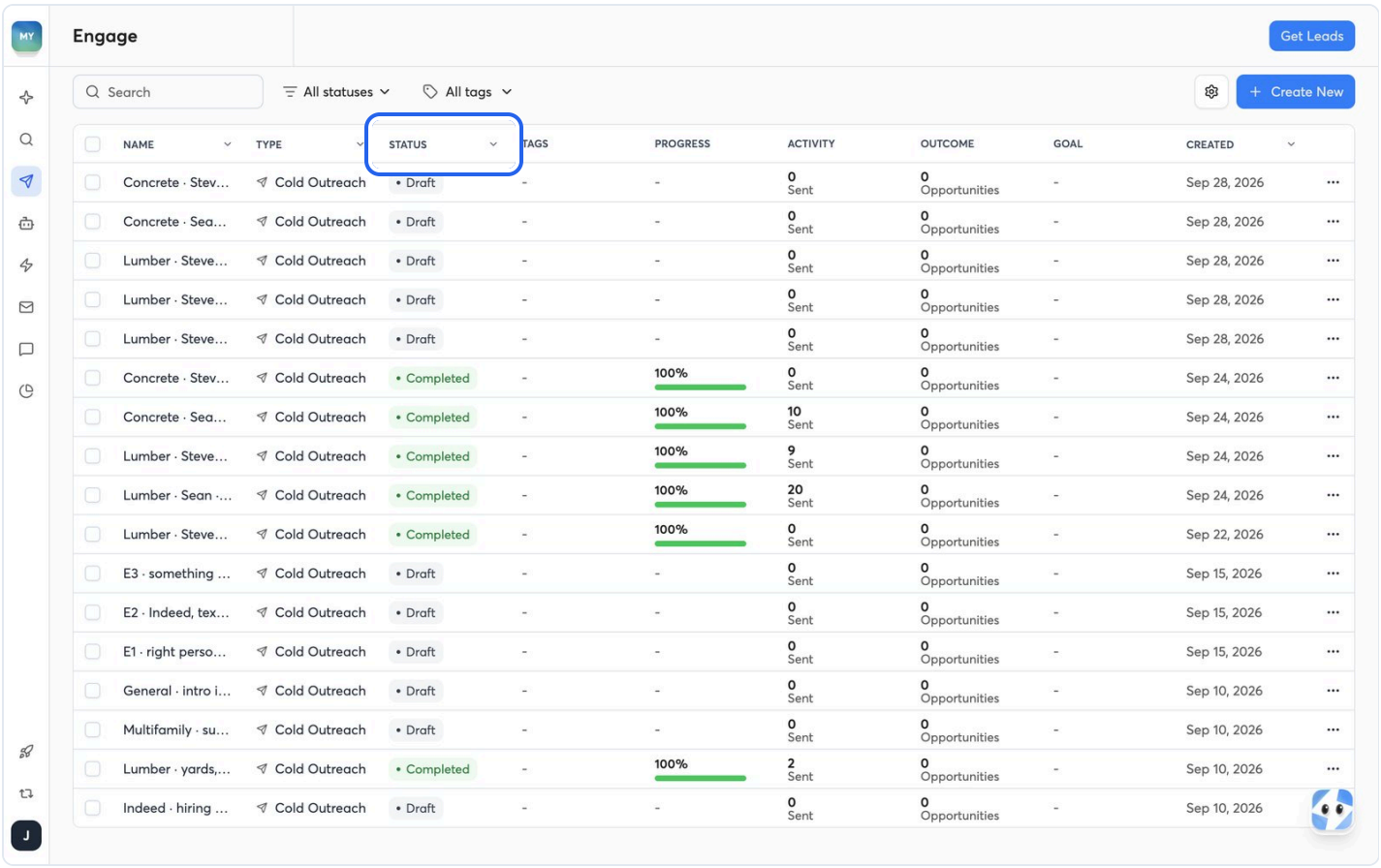
The second tool is Instantly.

Every Zapmail mailbox shows up here, under Email Accounts. Instantly warms each one up and sends the emails from it.



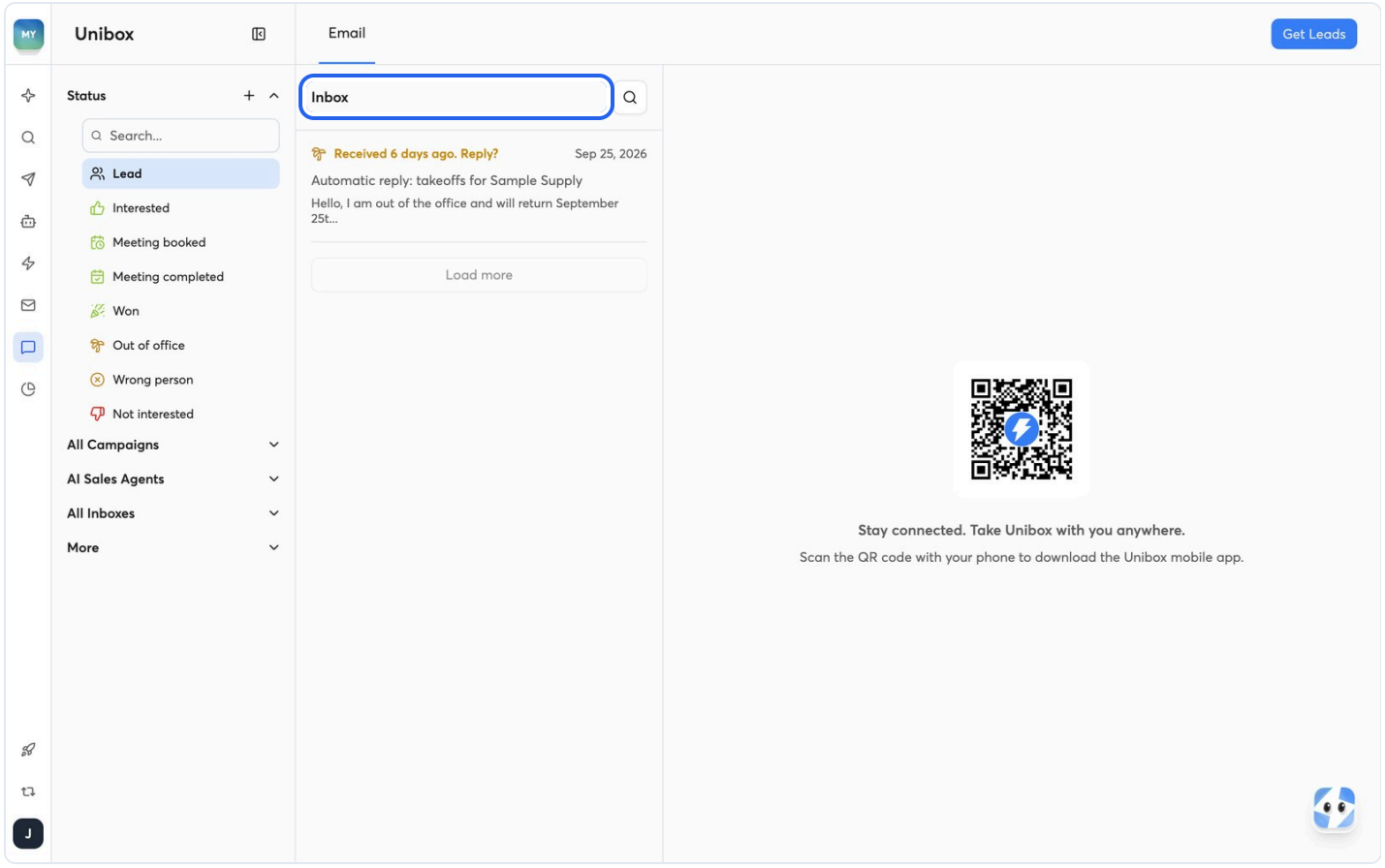
4 Campaigns hold the people

A campaign is one group of people and the emails they get. Engage lists every campaign, and Status shows whether each one is a draft, sending, on hold or finished.



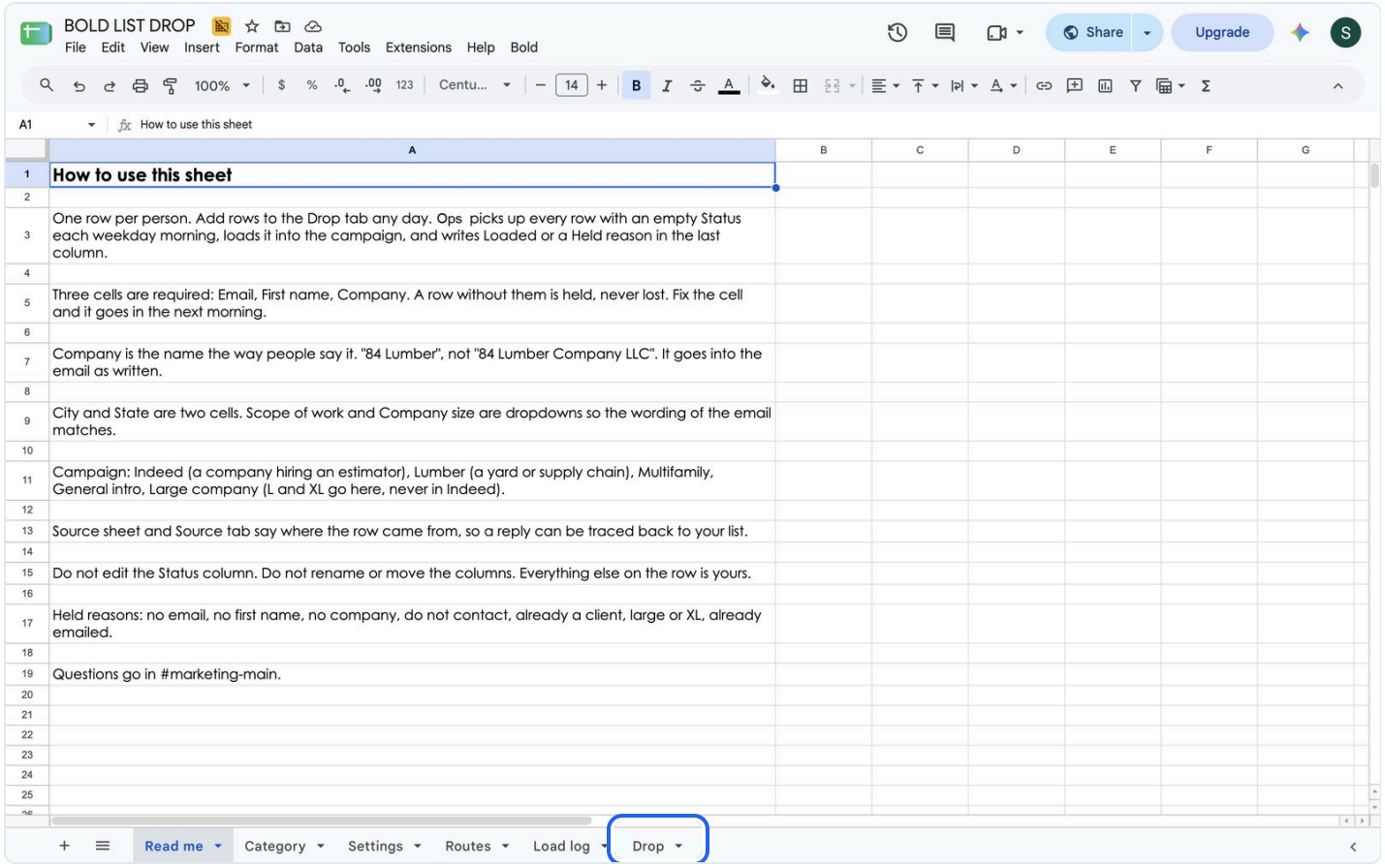
5 Replies land in the Unibox

When someone answers, the reply lands in the Unibox, one inbox for every mailbox.



6 The list drop sheet

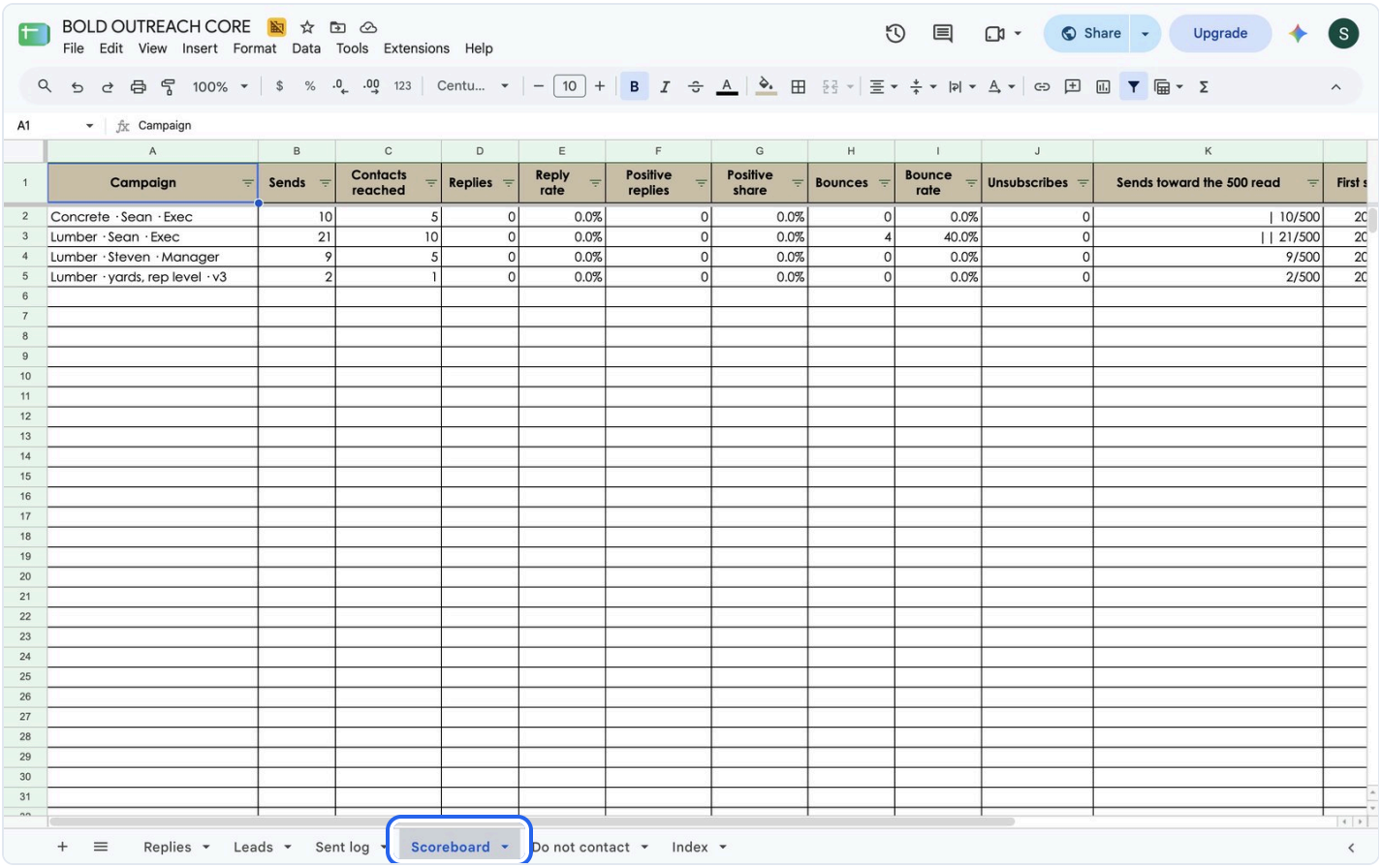
The third tool is Google Sheets. The list drop sheet is where the team adds the people Bold should email, one line per person, in the Drop tab.



7 The outreach core sheet

The outreach core sheet fills itself in. It logs every email sent and every reply.

Its Scoreboard tab adds up how each campaign is doing.



Campaign	Sends	Contacts reached	Replies	Reply rate	Positive replies	Positive share	Bounces	Bounce rate	Unsubscribes	Sends toward the 500 read
Concrete · Sean · Exec	10	5	0	0.0%	0	0.0%	0	0.0%	0	| 10/500
Lumber · Sean · Exec	21	10	0	0.0%	0	0.0%	4	40.0%	0	| | 21/500
Lumber · Steven · Manager	9	5	0	0.0%	0	0.0%	0	0.0%	0	9/500
Lumber · yards, rep level · v3	2	1	0	0.0%	0	0.0%	0	0.0%	0	2/500

12 words you will see, in plain English

Word	Meaning
Domain	A web address, like boldestimationhq.com. Bold owns extra domains only for cold email, so the main company address is never at risk.
Mailbox	One email address on a domain, like sean@boldestimationhq.com. Each domain has three.
DNS records	Settings on a domain that prove it is allowed to send email. The four that matter are SPF, DKIM, DMARC and MX.

Word	Meaning
Warmup	Friendly background emails that Instantly trades between mailboxes, so inboxes learn to trust a new mailbox. A new mailbox warms up 19 days before it sends a campaign.
Health score	Instantly's measure of how well a mailbox's emails land. 95 percent or higher is healthy.
Bounce	An email that could not be delivered, usually because the address does not exist. Keep bounces under 2 percent of emails sent.
Daily limit	The most campaign emails one mailbox sends in a day. It starts at 5 and grows by 3 a week, up to 20.
Campaign	One group of people and the emails they get, sent from a chosen set of mailboxes.
Sequence	The emails inside a campaign, in order. Bold uses two: a first email, then a short follow up three days later.
Lead	One person in a campaign, with an email address, first name and company.
Unibox	Instantly's single inbox. Every reply to every mailbox lands there.
Blocklist	Addresses and domains Instantly will never email again, for example a company that said no.

1 watch-out to keep in mind Before you click

⚠ Cold email never goes out from Bold's main company address. If one of these extra domains gets marked as spam, the main address and everyday email stay safe. Keep it that way: send campaigns only from Zapmail mailboxes.

Check your domains and mailboxes in Zapmail

Updated Sep 30, 2026

Zapmail sells and holds the domains and mailboxes Bold's cold email goes out from. Sign in at app.zapmail.ai. Once a week, confirm that every domain still has its four DNS records and every mailbox says Active. It takes three minutes and changes nothing.

6 steps · 3 min · 2 watch-outs

Watch it first: check domains and mailboxes in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/zapmail-check-domains-and-mailboxes.mp4

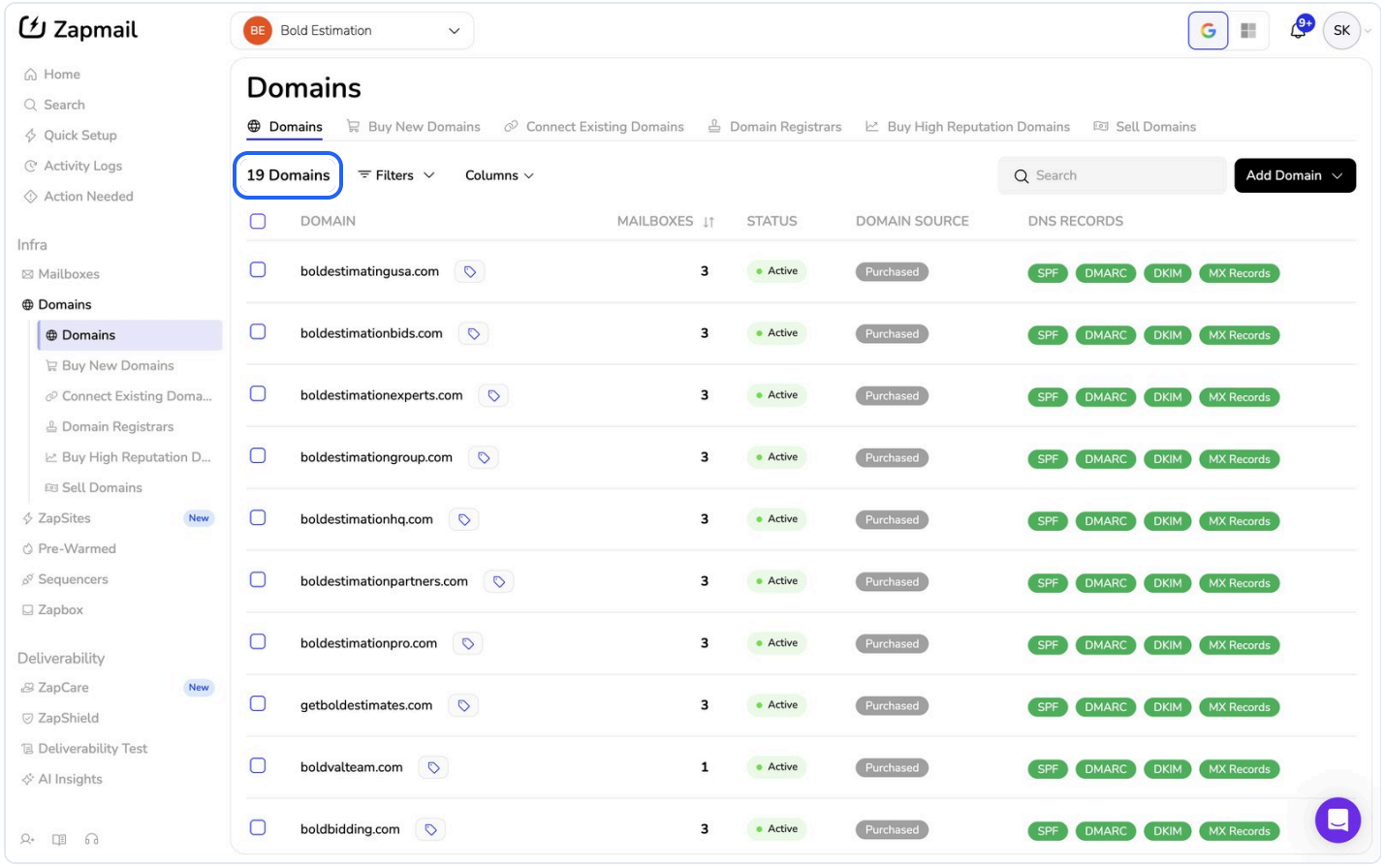
6 steps, each with the screen you will see

1. Open Domains
2. Check each domain
3. Check the four DNS records
4. Open Mailboxes
5. Check the renewal date
6. Change the setup with care

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

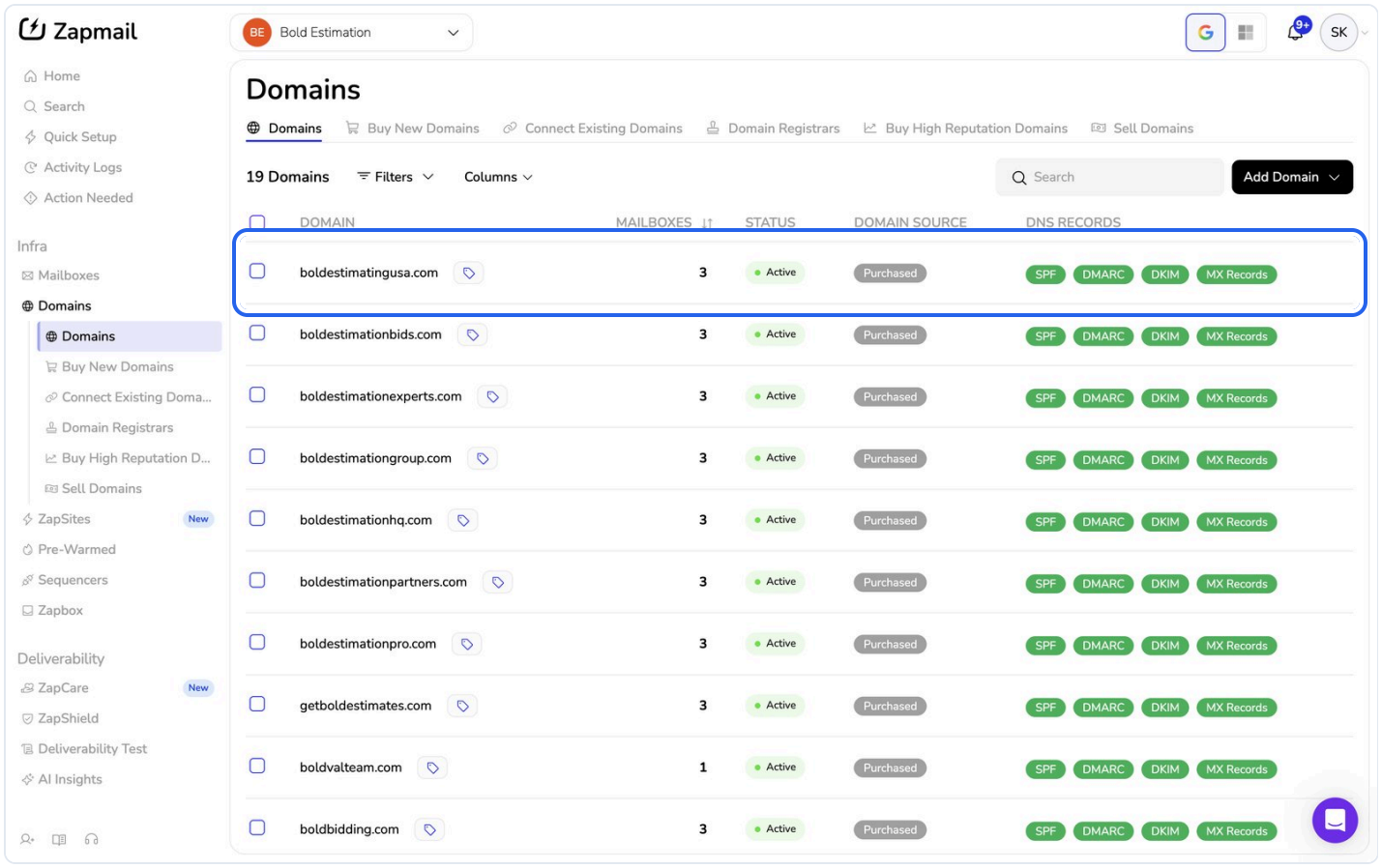
1 Open Domains

Sign in to Zapmail and click Domains in the left menu. If a popup appears, dismiss it. The number at the top counts every sending domain.



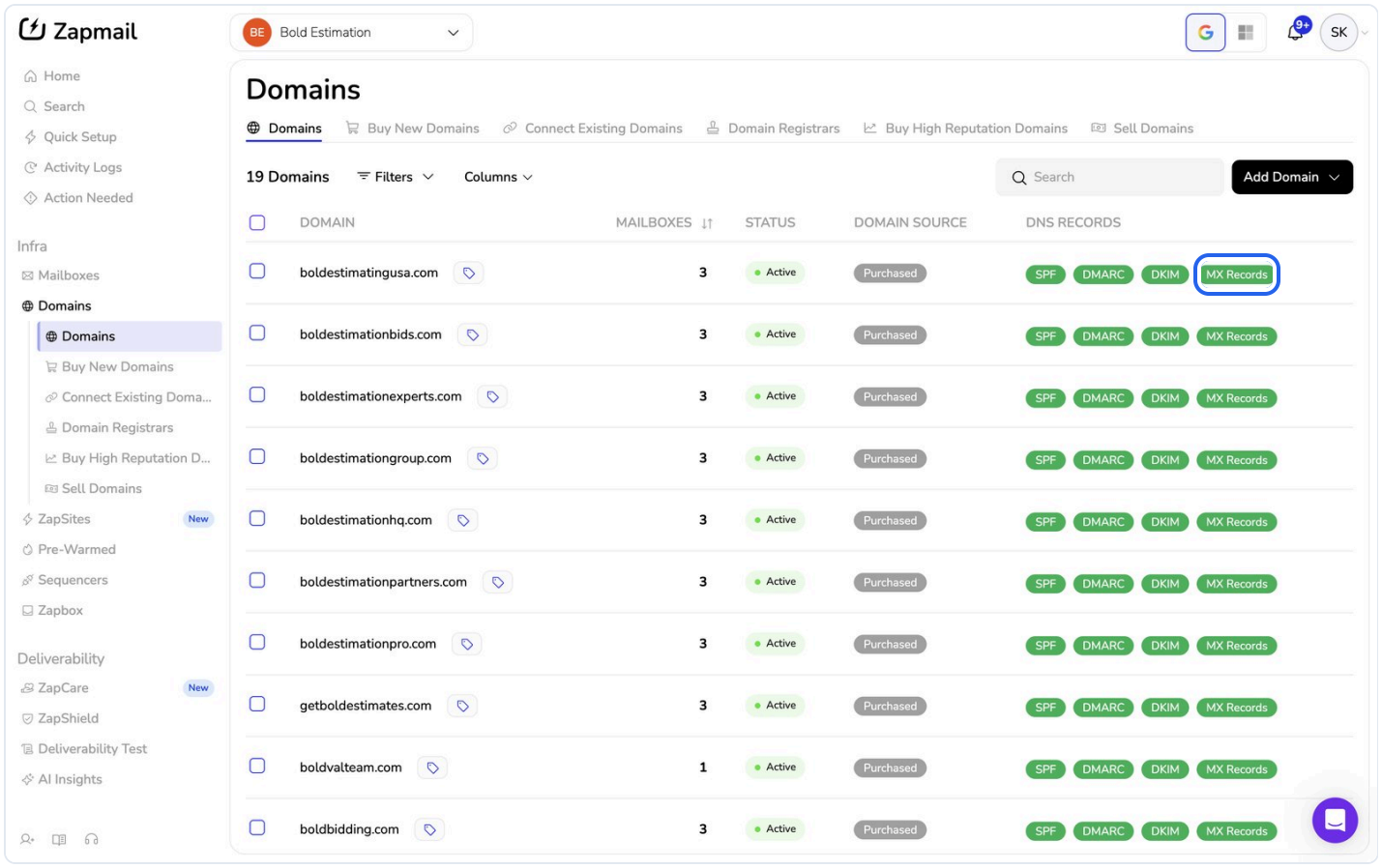
2 Check each domain

Each line is one domain. Mailboxes shows how many addresses it holds, and Status should say Active.



3 Check the four DNS records

On the right are four green labels: SPF, DMARC, DKIM and MX. Together they prove the domain is allowed to send email. Every domain needs all four.

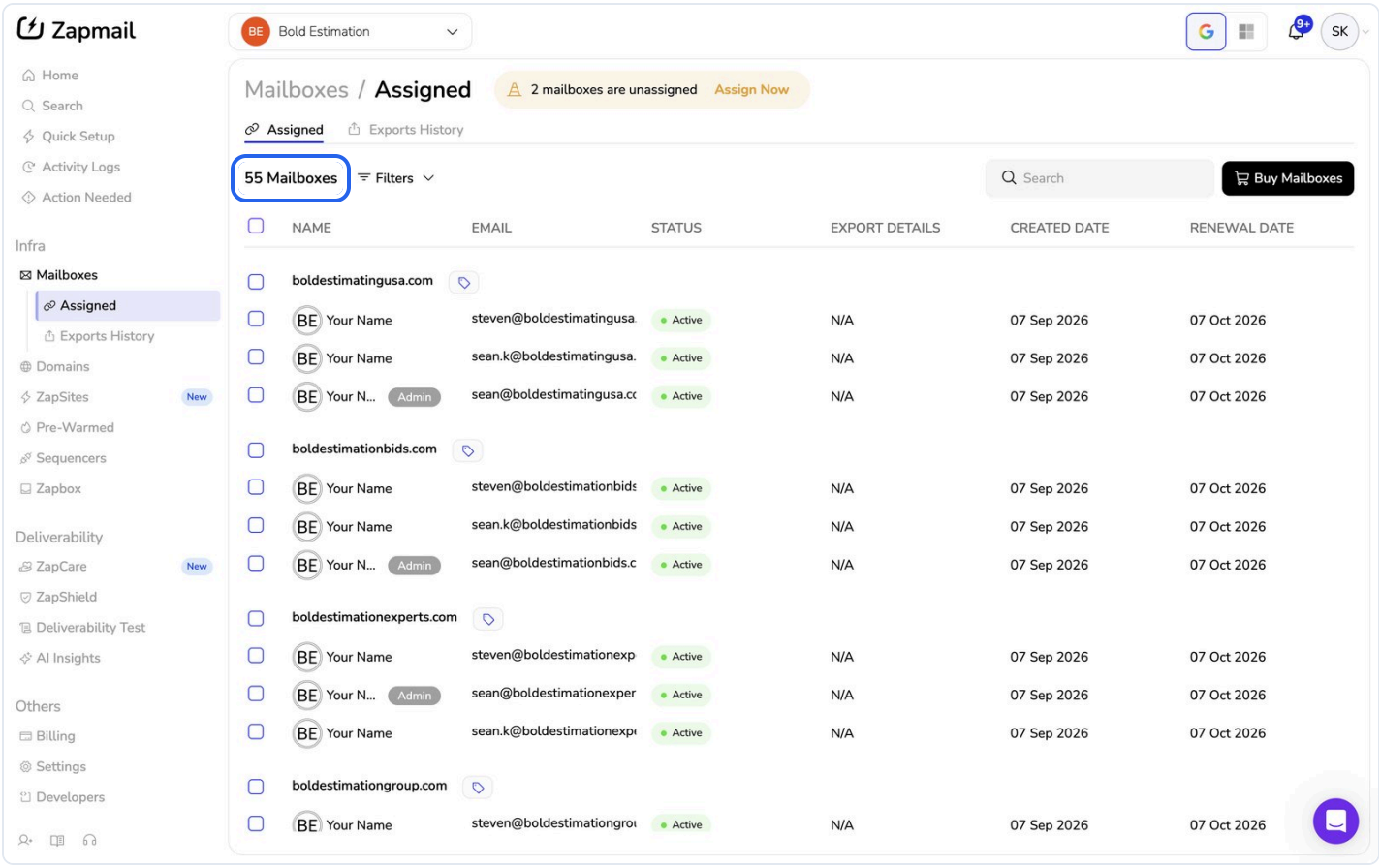


> ⚠ **Watch out.** If a label is missing or not green, take that domain's mailboxes out of every Instantly campaign today, then ask Zapmail support to restore the record. A domain with a missing record lands in spam.

4 Open Mailboxes

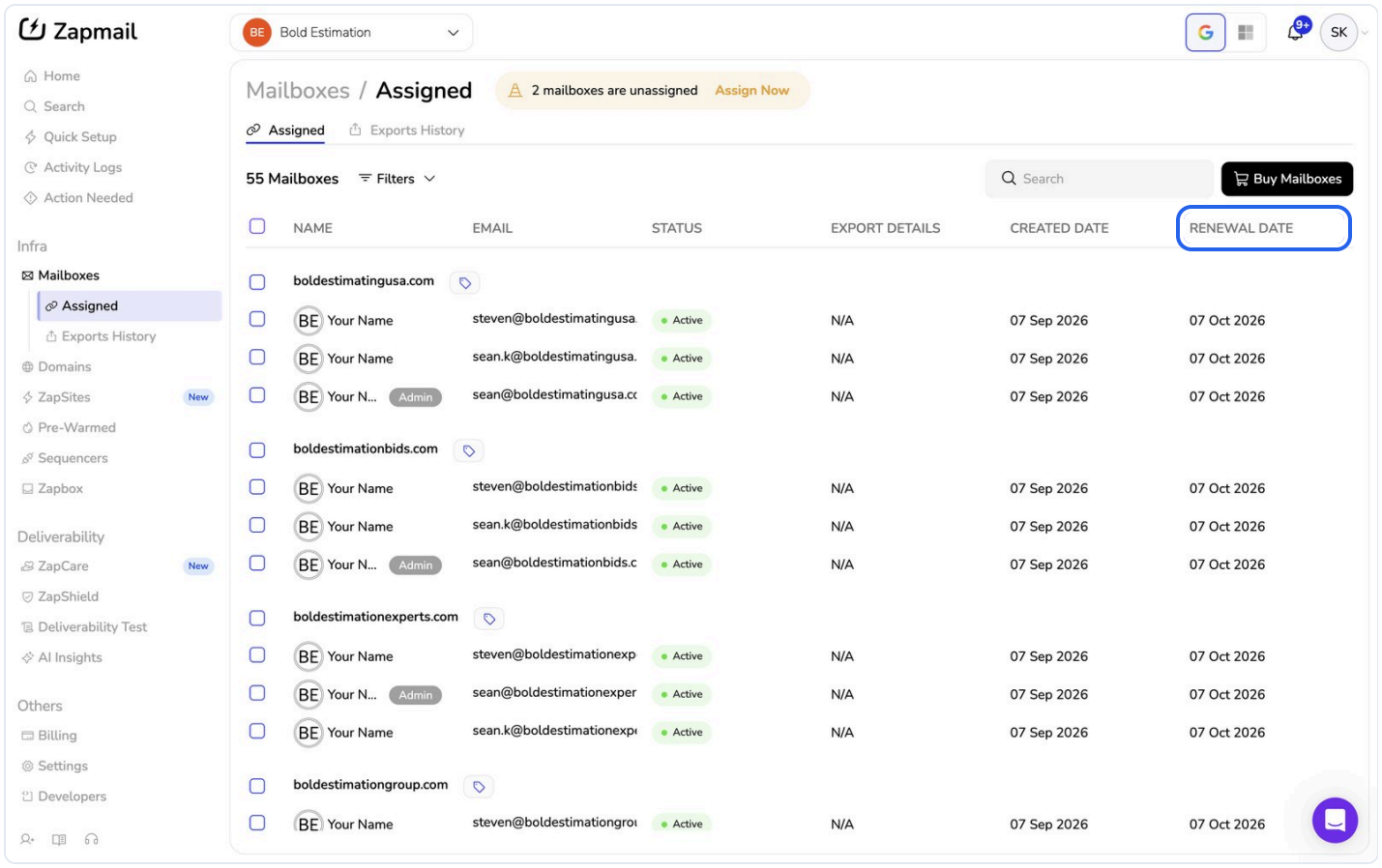
Next, click Mailboxes in the left menu.

The number at the top is your total mailbox count. Every mailbox should say Active.



5 Check the renewal date

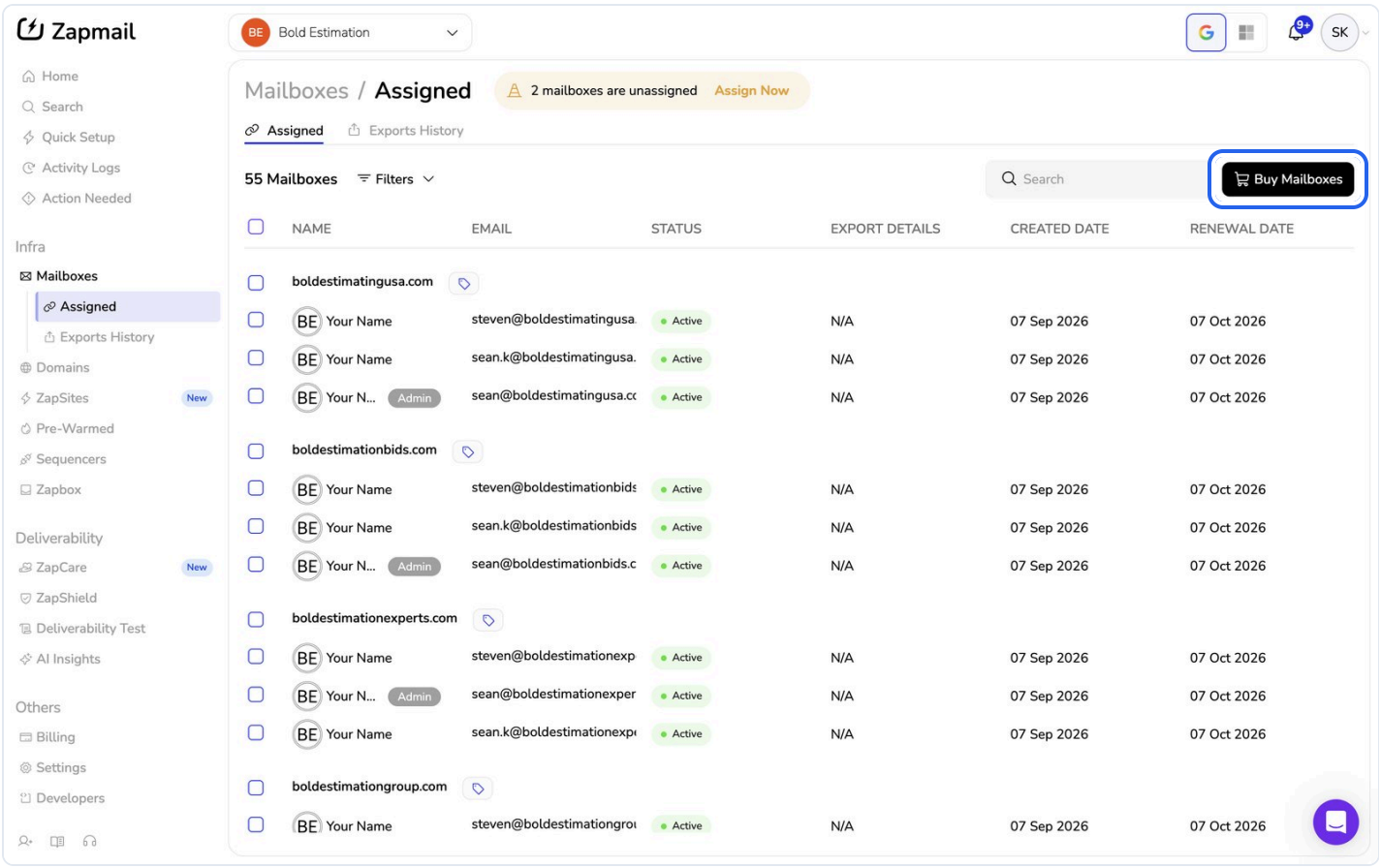
Renewal date is when each mailbox bills again. Mailboxes renew every month on the card on file, so keep that card up to date.



Tip. If the card fails, the mailboxes stop at renewal and every campaign that sends from them stops too. Keep a backup card on file under Billing.

6 Change the setup with care

Buy Mailboxes, and the delete and swap options on each mailbox, change what Bold can send from. Use them only when you mean to change the setup, as guide three shows.



> ⚠ **Watch out.** Before you delete or swap a mailbox, remove it from every Instantly campaign first. A mailbox deleted while a campaign still uses it stops that campaign's emails from it without warning.

2 watch-outs to keep in mind

Before you click

> ⚠ If a label is missing or not green, take that domain's mailboxes out of every Instantly campaign today, then ask Zapmail support to restore the record. A domain with a missing record lands in spam.

⚠ Before you delete or swap a mailbox, remove it from every Instantly campaign first. A mailbox deleted while a campaign still uses it stops that campaign's emails from it without warning.

Add sending capacity, from Zapmail to Instantly

Updated Sep 30, 2026

More emails a day means more mailboxes. This guide goes from searching for a domain in Zapmail to warming the new mailboxes in Instantly. The example uses a made-up domain and stops before anything is bought.

6 steps · 20 min · 2 watch-outs

Watch it first: add sending capacity in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/zapmail-buy-and-send-to-instantly.mp4

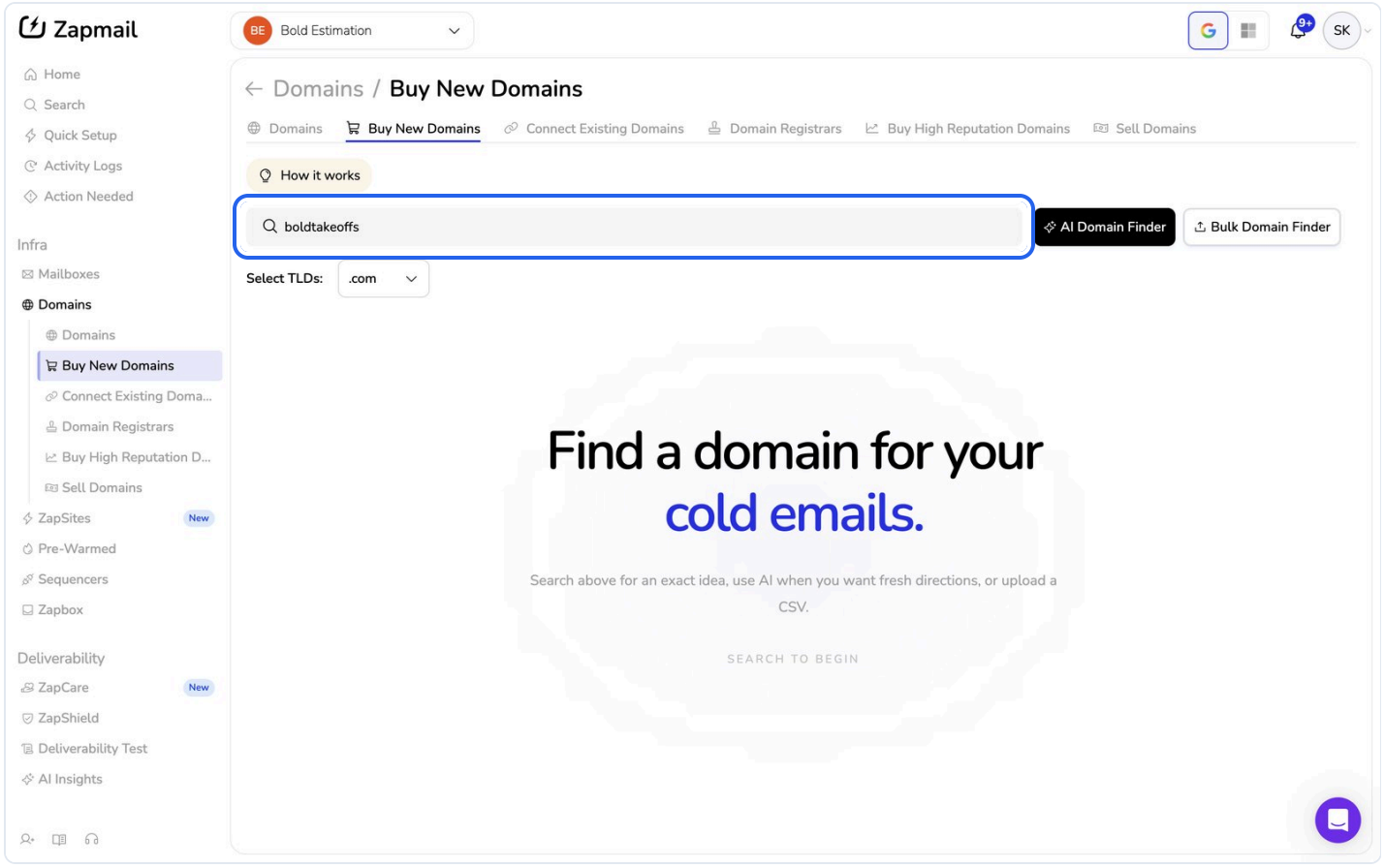
6 steps, each with the screen you will see

1. Search a domain idea
2. Compare the matches
3. Add to cart
4. Tick the new mailboxes
5. Export to Instantly
6. Warm up in Instantly

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Search a domain idea

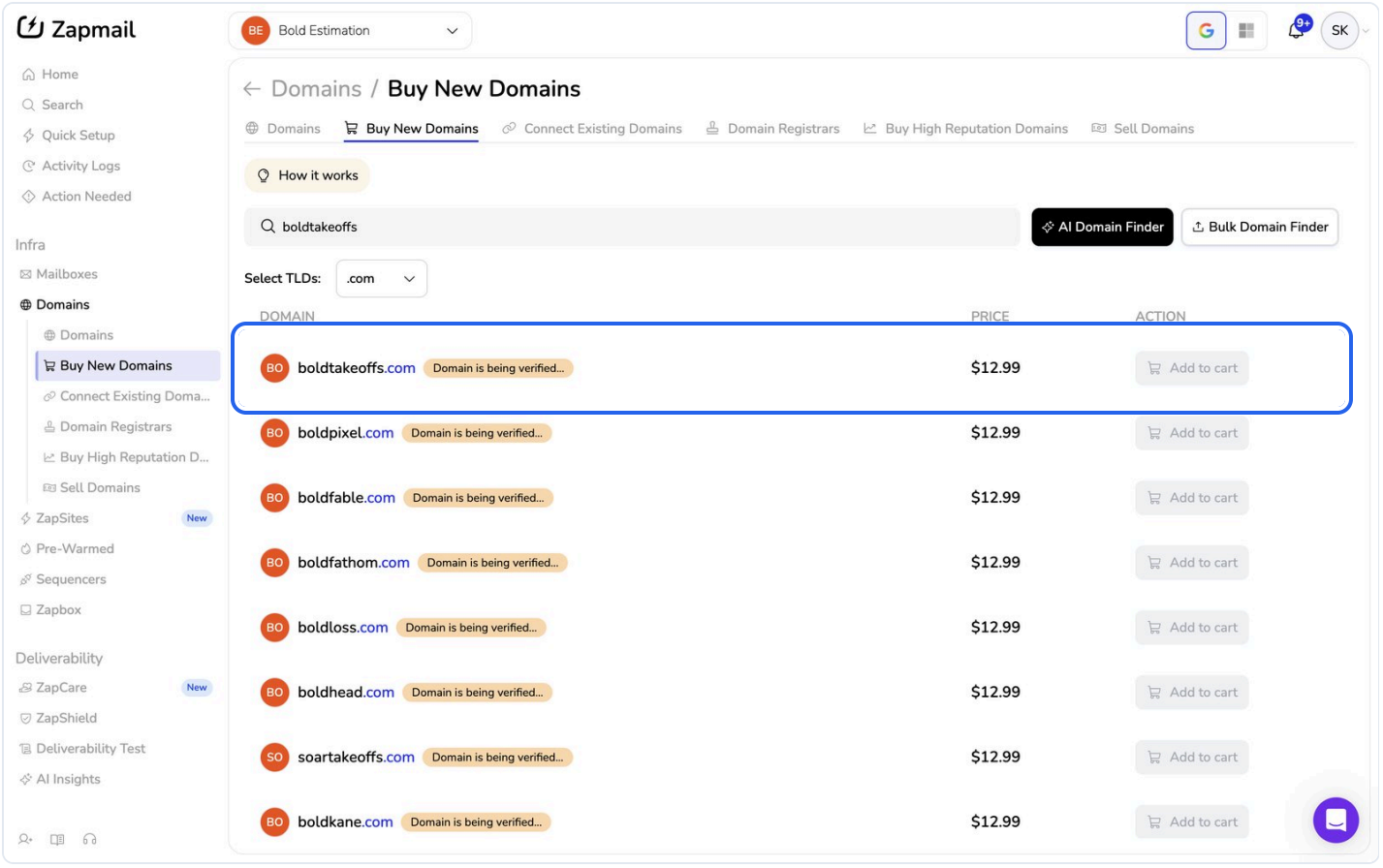
In Zapmail, open Domains, then Buy New Domains. Type a domain idea that sounds like the brand. This example uses a made-up one, bold takeoffs.



2 Compare the matches

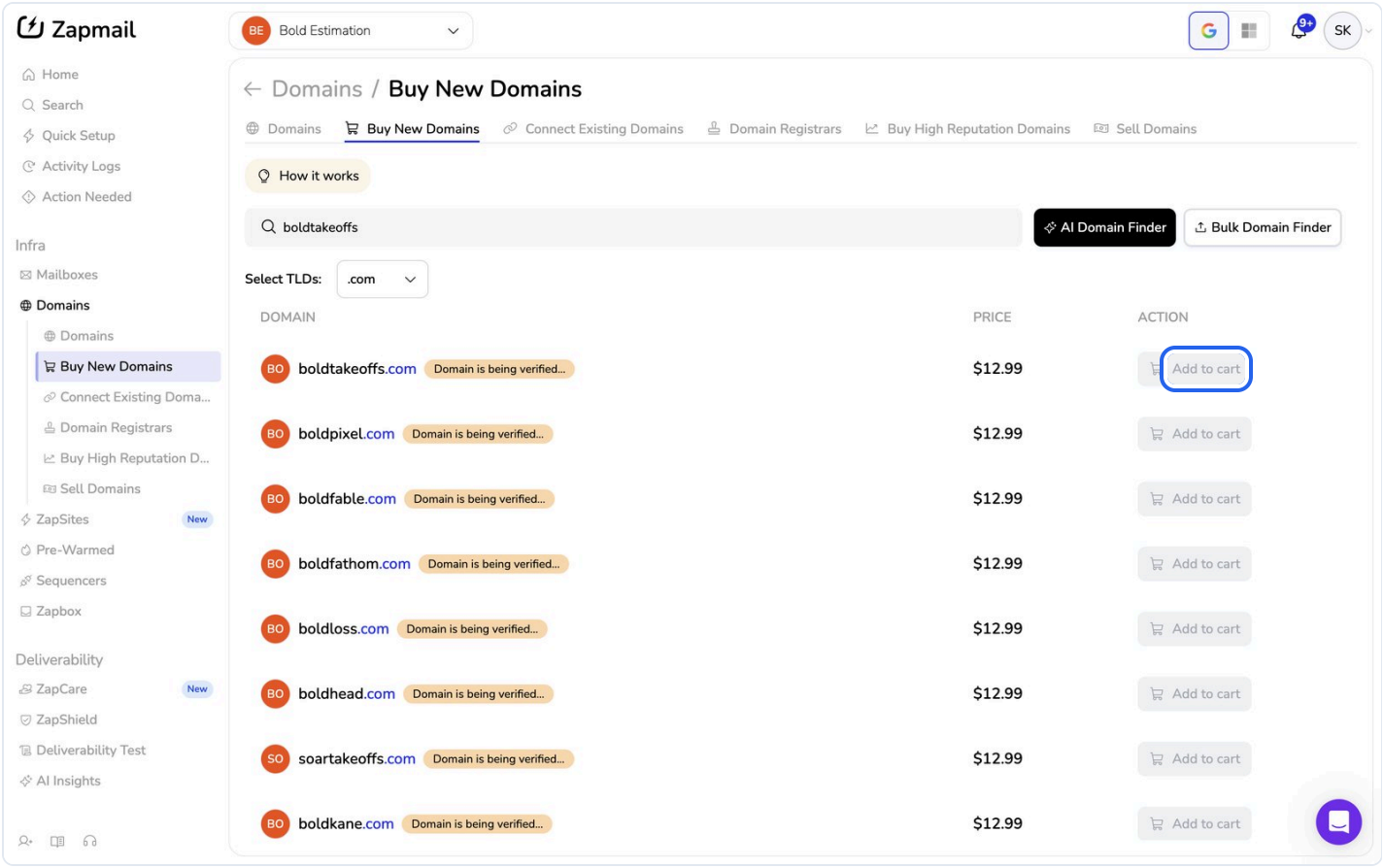
Press Enter. Zapmail checks the idea and suggests similar names, each with a price.

The first line is your exact idea. A domain costs about thirteen dollars a year. Pick names a buyer would trust.



3 Add to cart

Add to cart starts the purchase. A good batch is eight domains with three mailboxes each, which adds about seventy emails a day once they are warm.



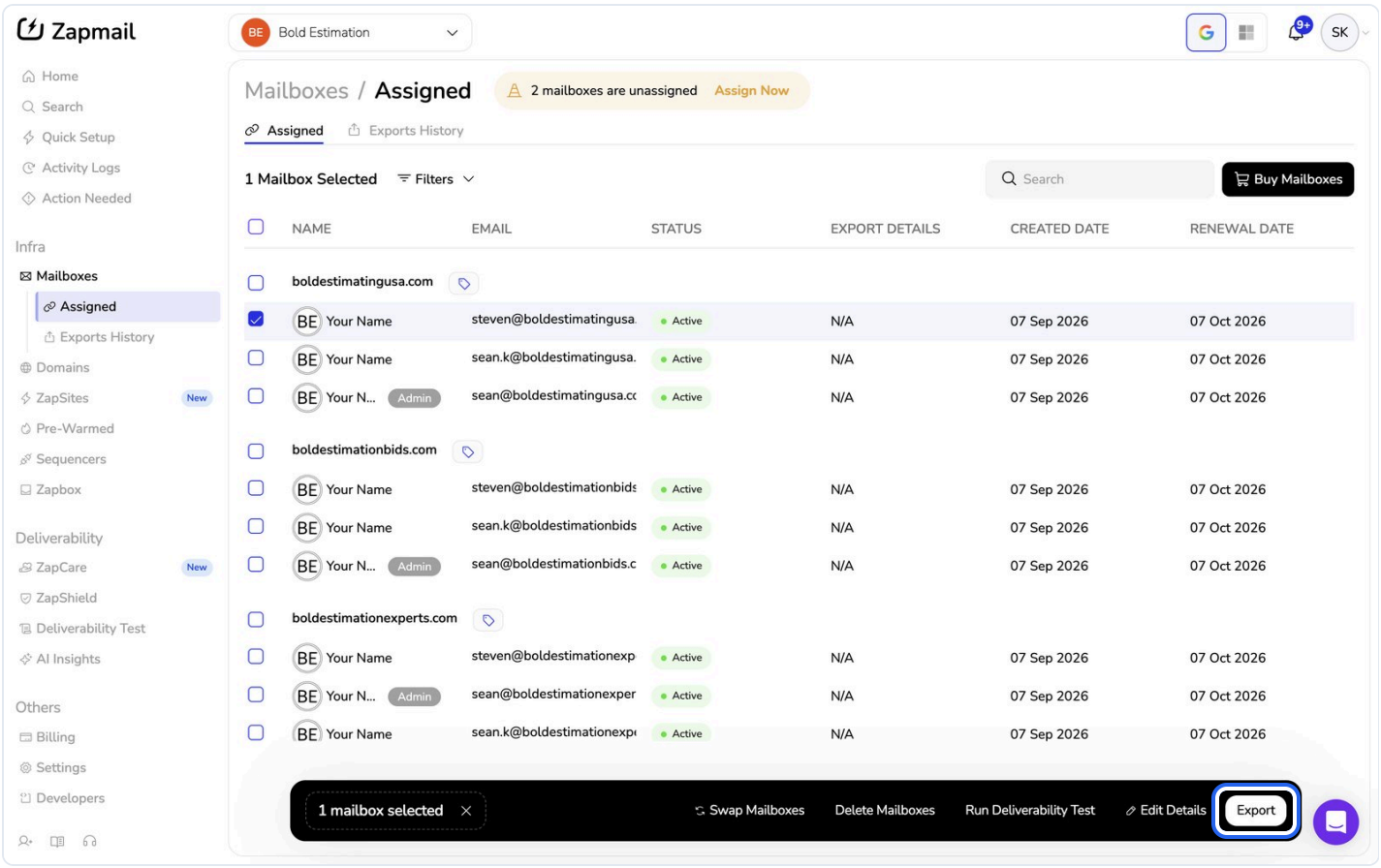
> ⚠ **Watch out.** New mailboxes need 19 days of warmup before they join a campaign. Buy about three weeks before you need the extra emails, and check the total at checkout before you pay.

4 Tick the new mailboxes

After the purchase, the new mailboxes appear under Mailboxes.

Tick the box next to each new mailbox. Ticking changes nothing by itself.

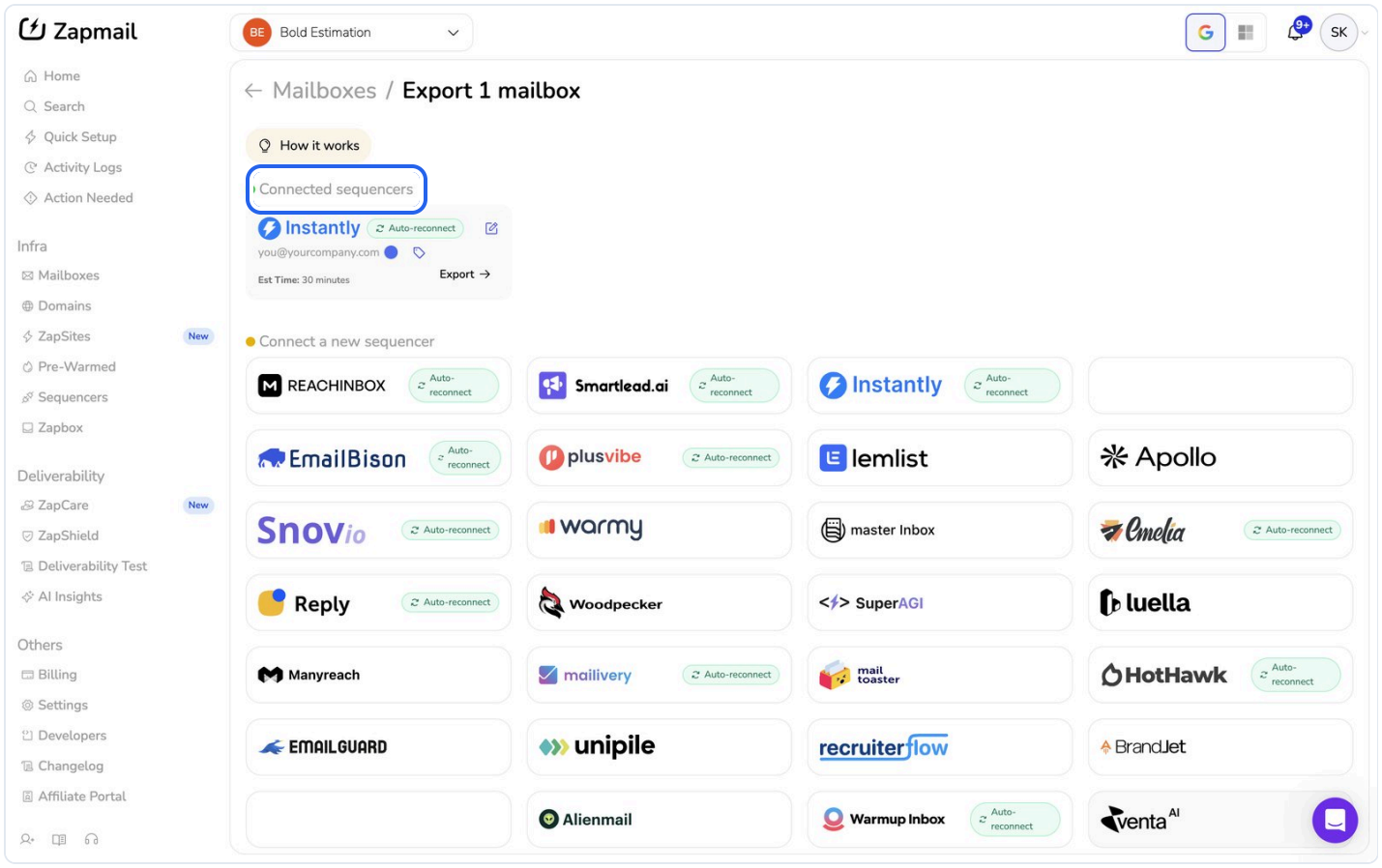
A toolbar appears at the bottom. Export sends the ticked mailboxes to Instantly.



> ⚠ **Watch out.** The same toolbar holds Delete Mailboxes and Swap Mailboxes. Make sure you press Export.

5 Export to Instantly

The export screen shows Instantly as the connected tool. Its Export link starts the handover, which takes about thirty minutes.

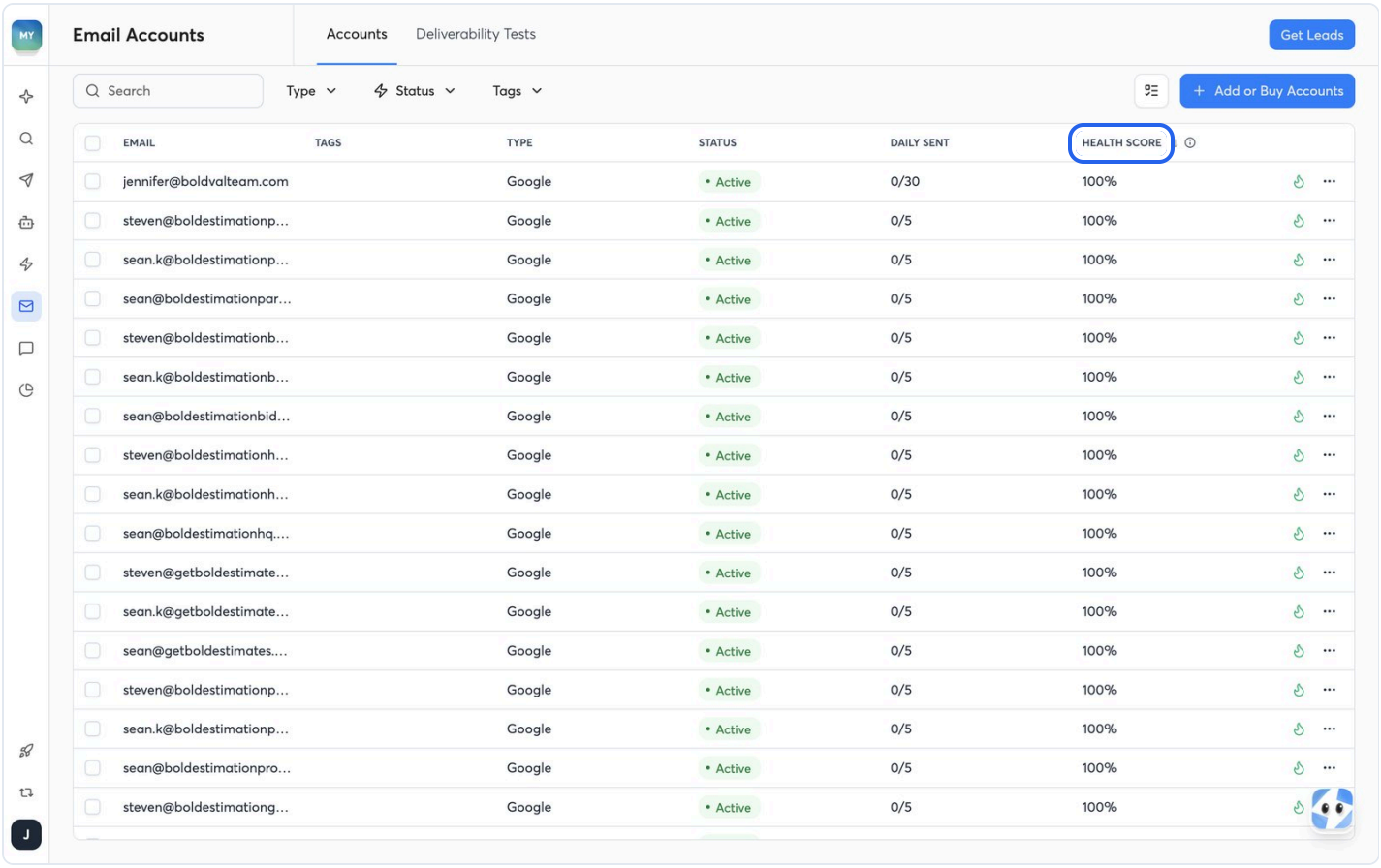


Tip. If the export stalls for domains bought the same day, wait a day and export again, or add each mailbox in Instantly with Add or Buy Accounts and the mailbox's app password from Zapmail.

6 Warm up in Instantly

In Instantly, the new mailboxes appear under Email Accounts with warmup on.

Leave them out of every campaign for nineteen days, then add them.



2 watch-outs to keep in mind Before you click

- ⚠ New mailboxes need 19 days of warmup before they join a campaign. Buy about three weeks before you need the extra emails, and check the total at checkout before you pay.
- ⚠ The same toolbar holds Delete Mailboxes and Swap Mailboxes. Make sure you press Export.

Guide 4 of 13 · Instantly

A tour of Instantly and your email accounts

Updated Sep 30, 2026

Instantly is the tool that sends Bold's campaigns. Sign in at app.instantly.ai. This tour shows where everything sits, what the numbers on each mailbox mean, and why warmup always stays on. You only look; no setting changes.

6 steps · 4 min · 1 watch-out

Watch it first: a tour of Instantly in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/instantly-tour-and-email-accounts.mp4

6 steps, each with the screen you will see

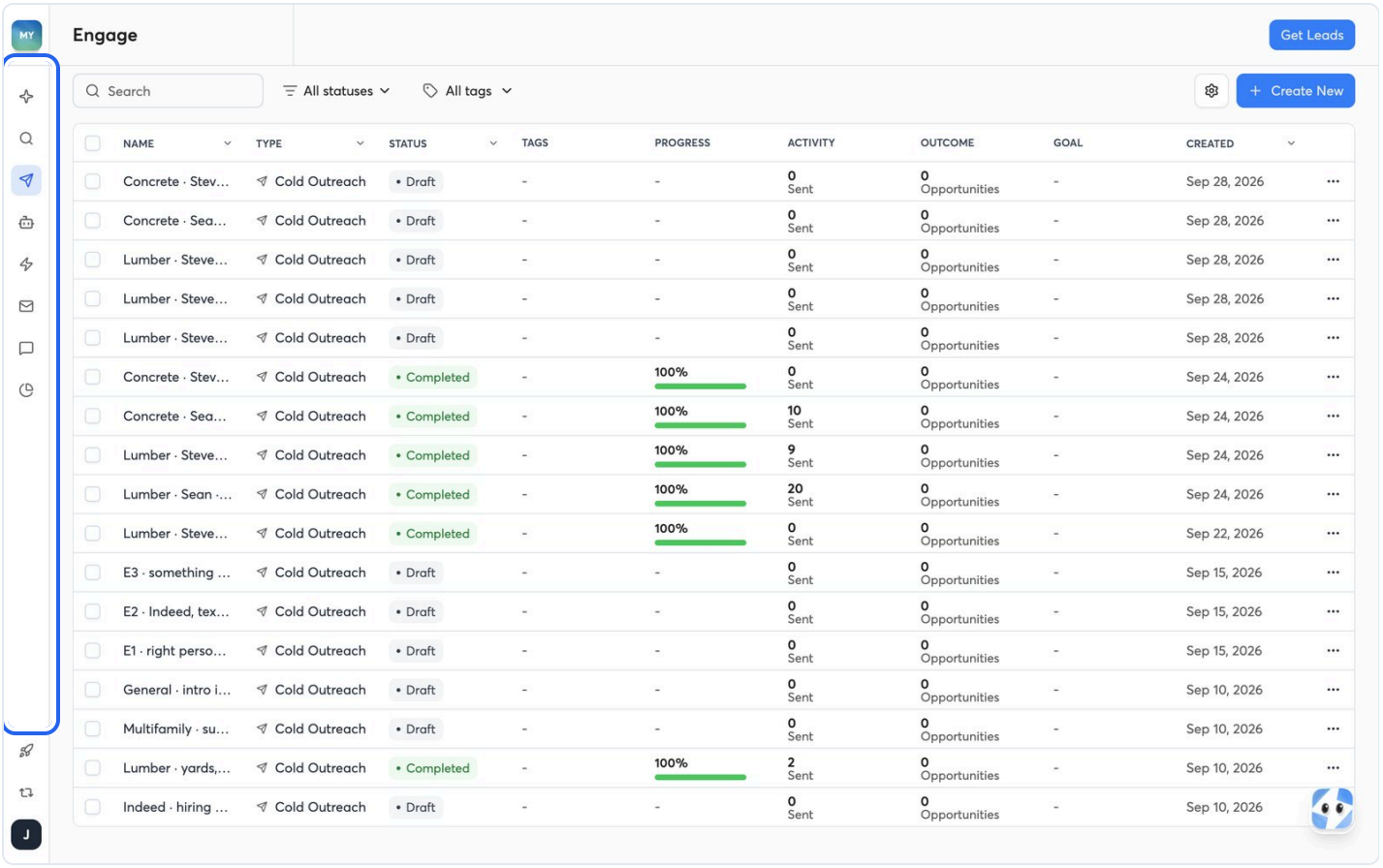
1. The left bar
2. Email Accounts
3. Daily Sent and Health Score
4. The warmup flame
5. A mailbox's warmup
6. A mailbox's campaigns

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 The left bar

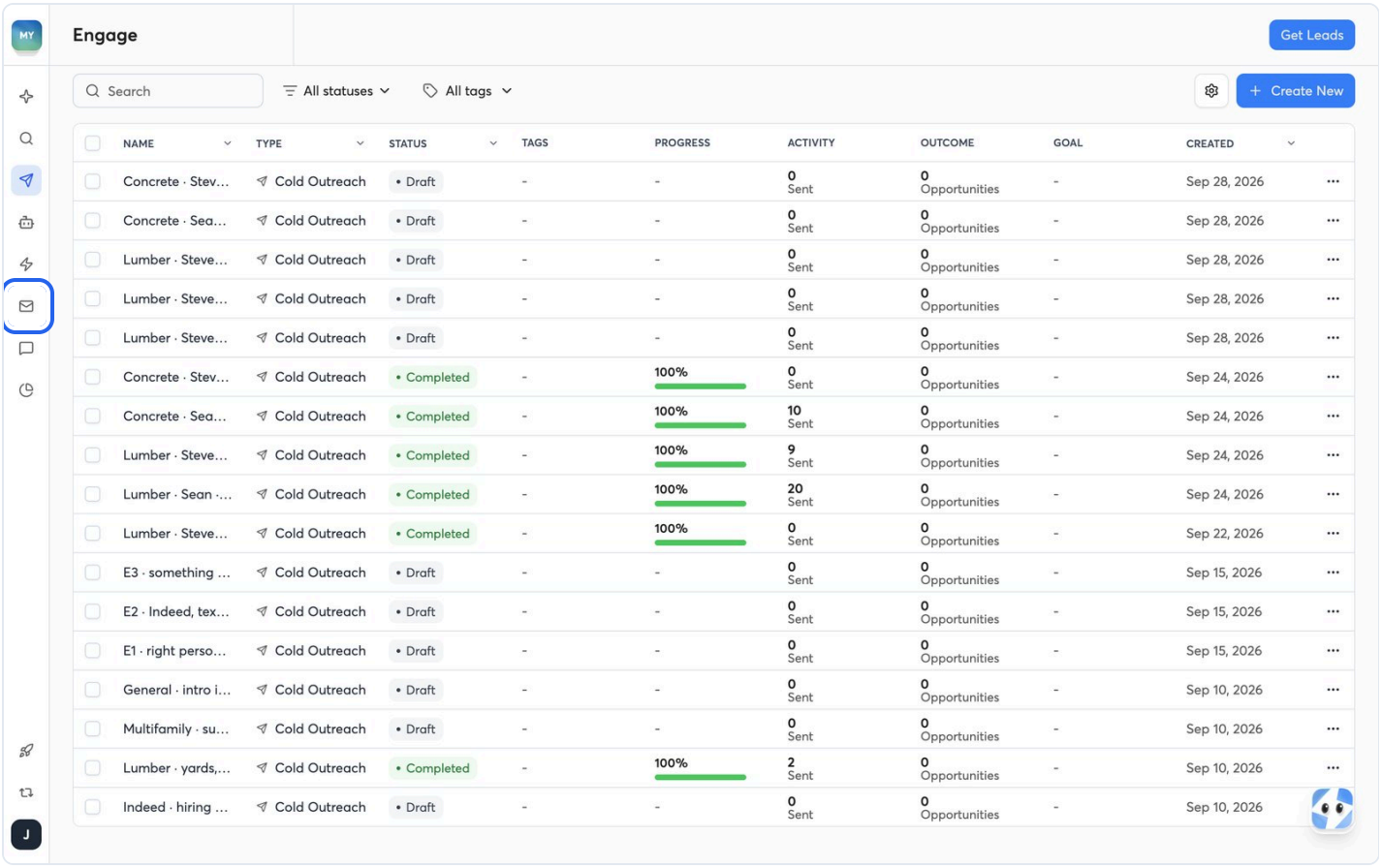
Sign in to Instantly.

The bar on the left holds every part of Instantly. The paper plane is Engage, where the campaigns are. The speech bubble is the Unibox, where replies arrive.



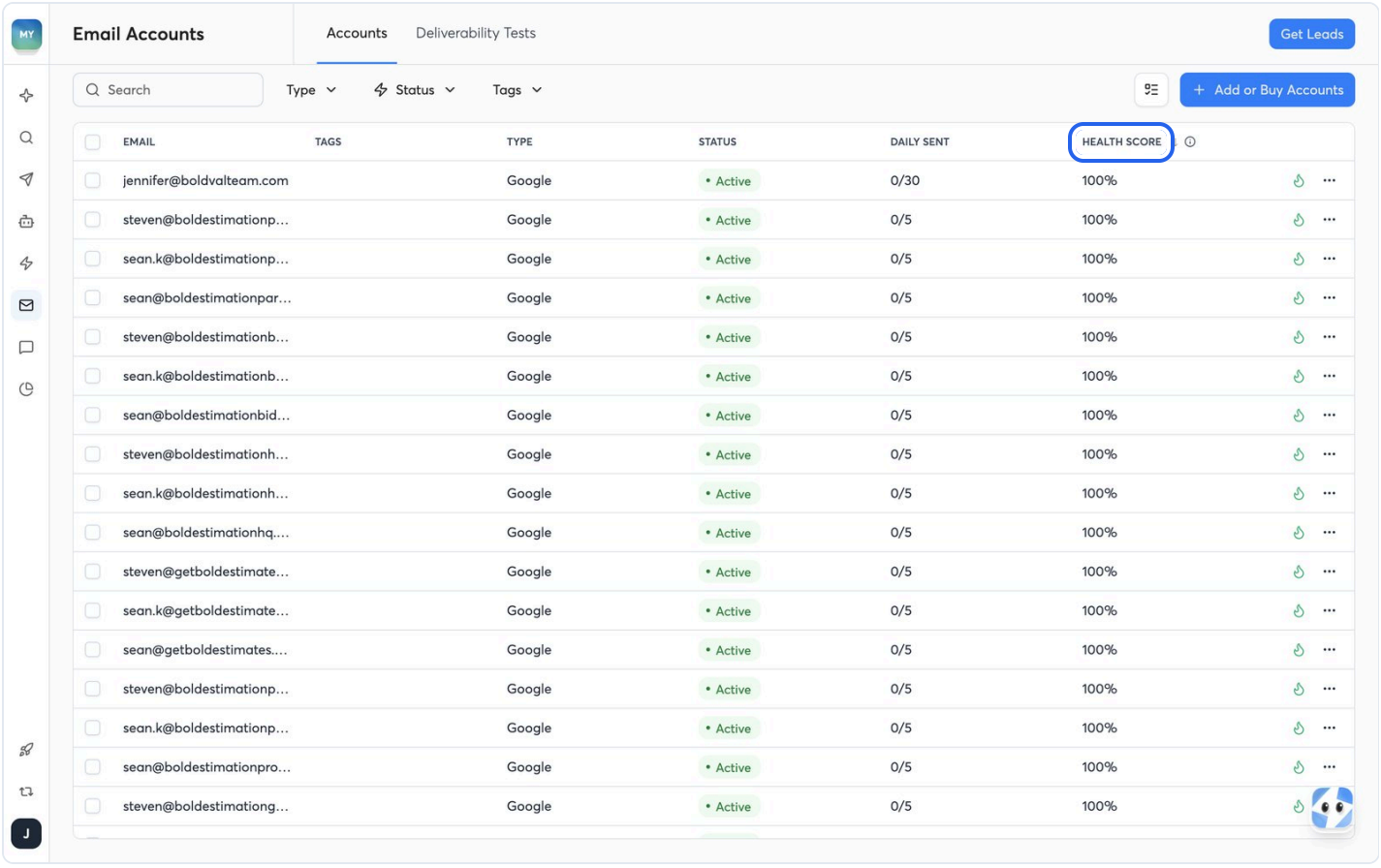
2 Email Accounts

The envelope opens Email Accounts. Each line is one sending mailbox.



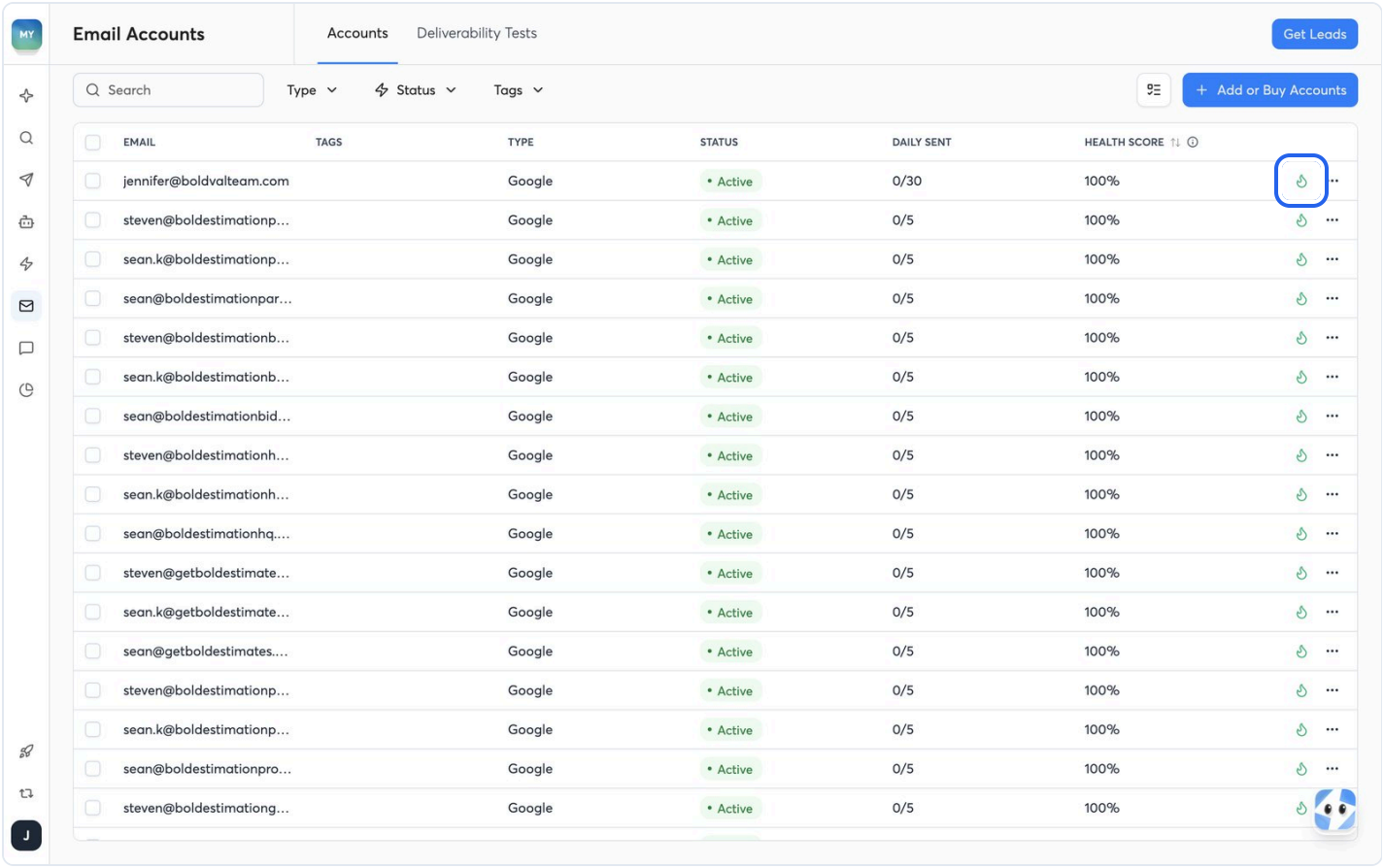
3 Daily Sent and Health Score

Daily Sent shows today's campaign emails against the mailbox's limit, like zero of five. Health Score shows how well its emails land. Healthy is 95 percent or more.



4 The warmup flame

The green flame means warmup is on. Warmup trades friendly emails with other mailboxes, so inboxes learn to trust yours. Leave it on for every mailbox.

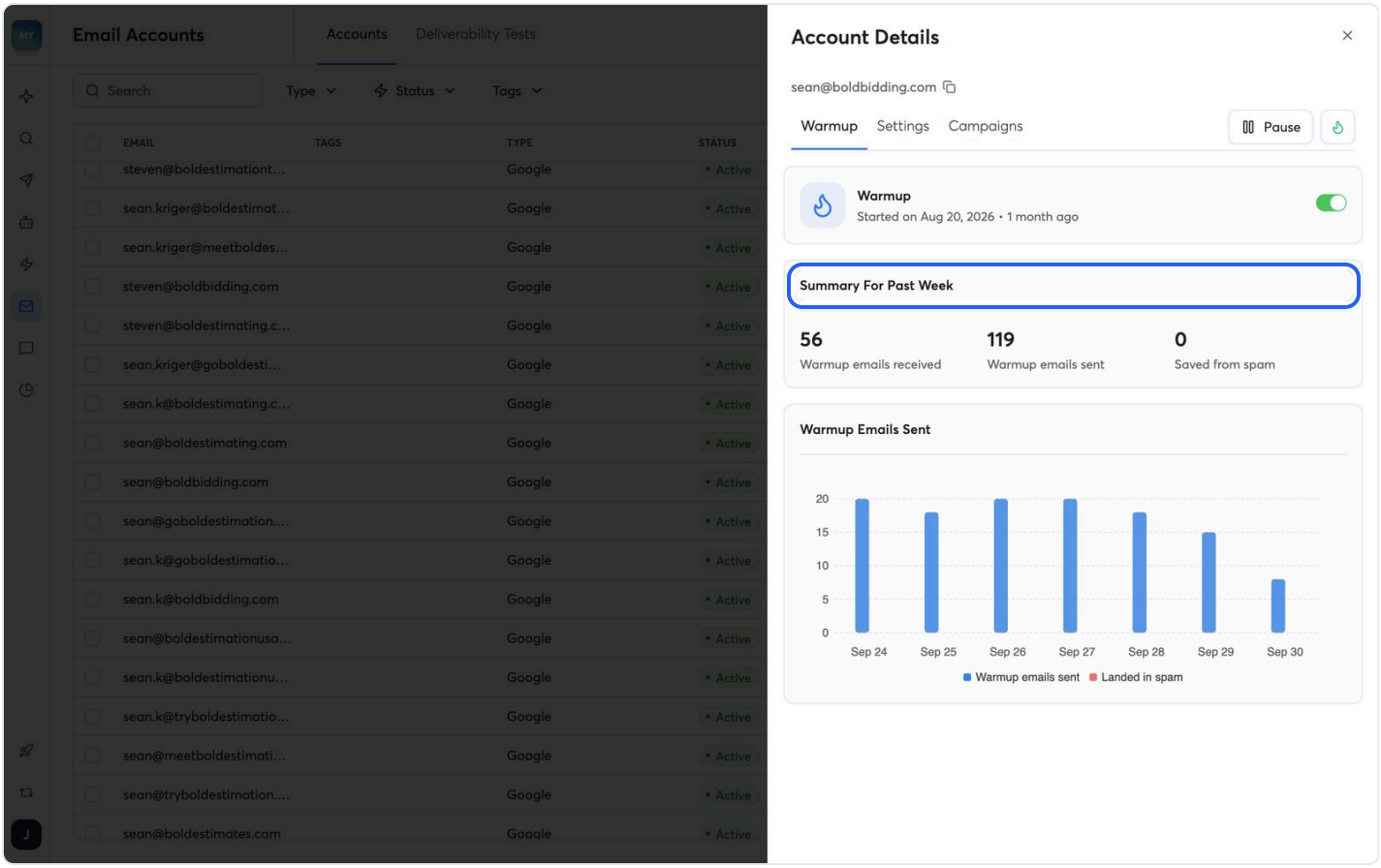


> ⚠ **Watch out.** Never turn warmup off, even on mailboxes that send campaigns. Without it a mailbox loses trust within days and its emails start landing in spam. If a flame is grey, open the mailbox and switch warmup back on in its Warmup tab.

5 A mailbox's warmup

Click a mailbox to open its details.

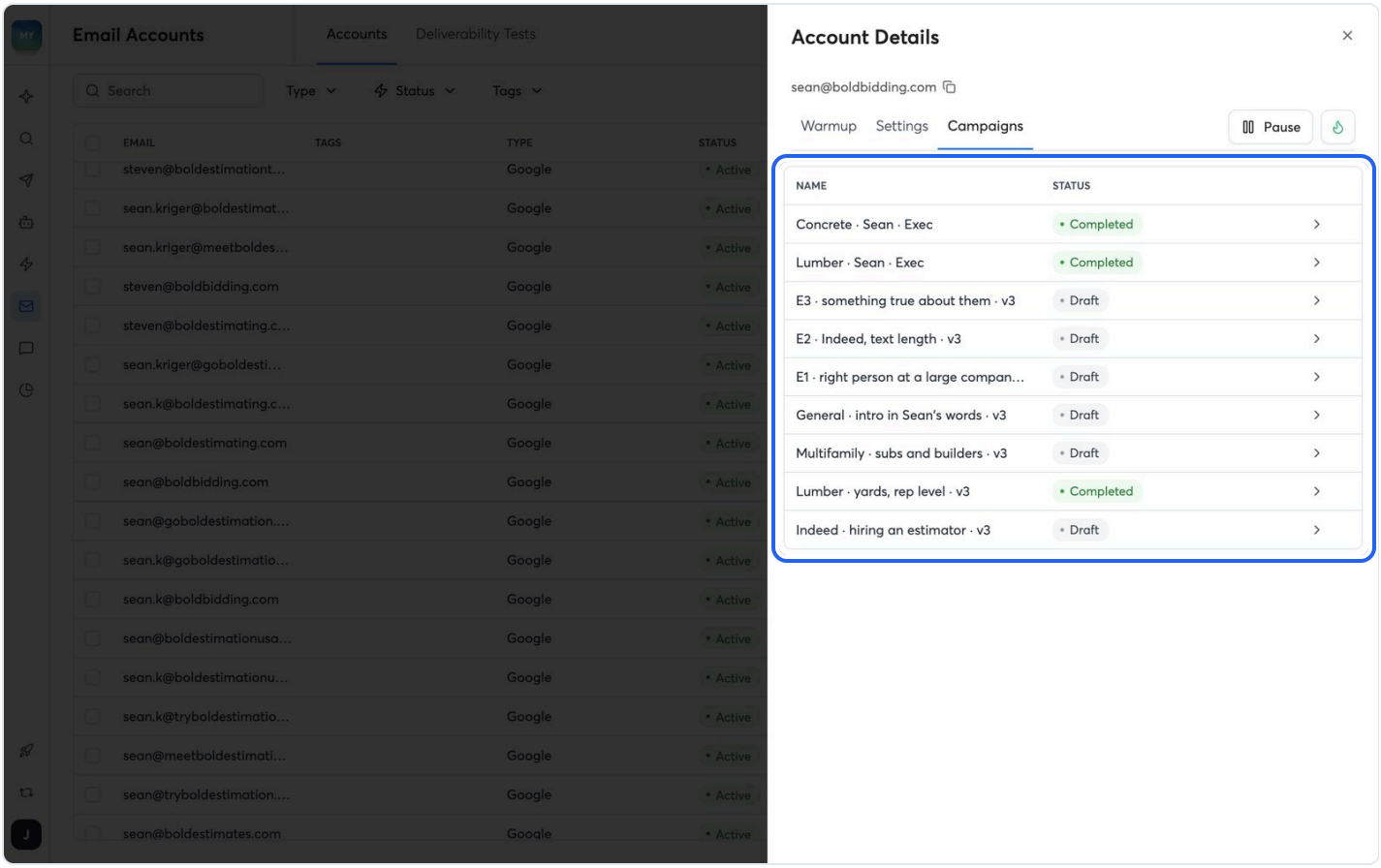
The Warmup tab shows the past week. Saved from spam should stay at zero.



6 A mailbox's campaigns

The Campaigns tab lists every campaign this mailbox sends for.

Press Escape to go back to the list.



1 watch-out to keep in mind Before you click

⚠ Never turn warmup off, even on mailboxes that send campaigns. Without it a mailbox loses trust within days and its emails start landing in spam. If a flame is grey, open the mailbox and switch warmup back on in its Warmup tab.

The daily mailbox health check in Instantly

Updated Sep 30, 2026

Two minutes every weekday before sending starts at 7 AM Central. You confirm every mailbox is connected, healthy and set to this week's daily limit, and you take the ones that are not out of their campaigns.

6 steps · 2 min · 3 watch-outs

Watch it first: daily mailbox health check in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/instantly-daily-health-check.mp4

6 steps, each with the screen you will see

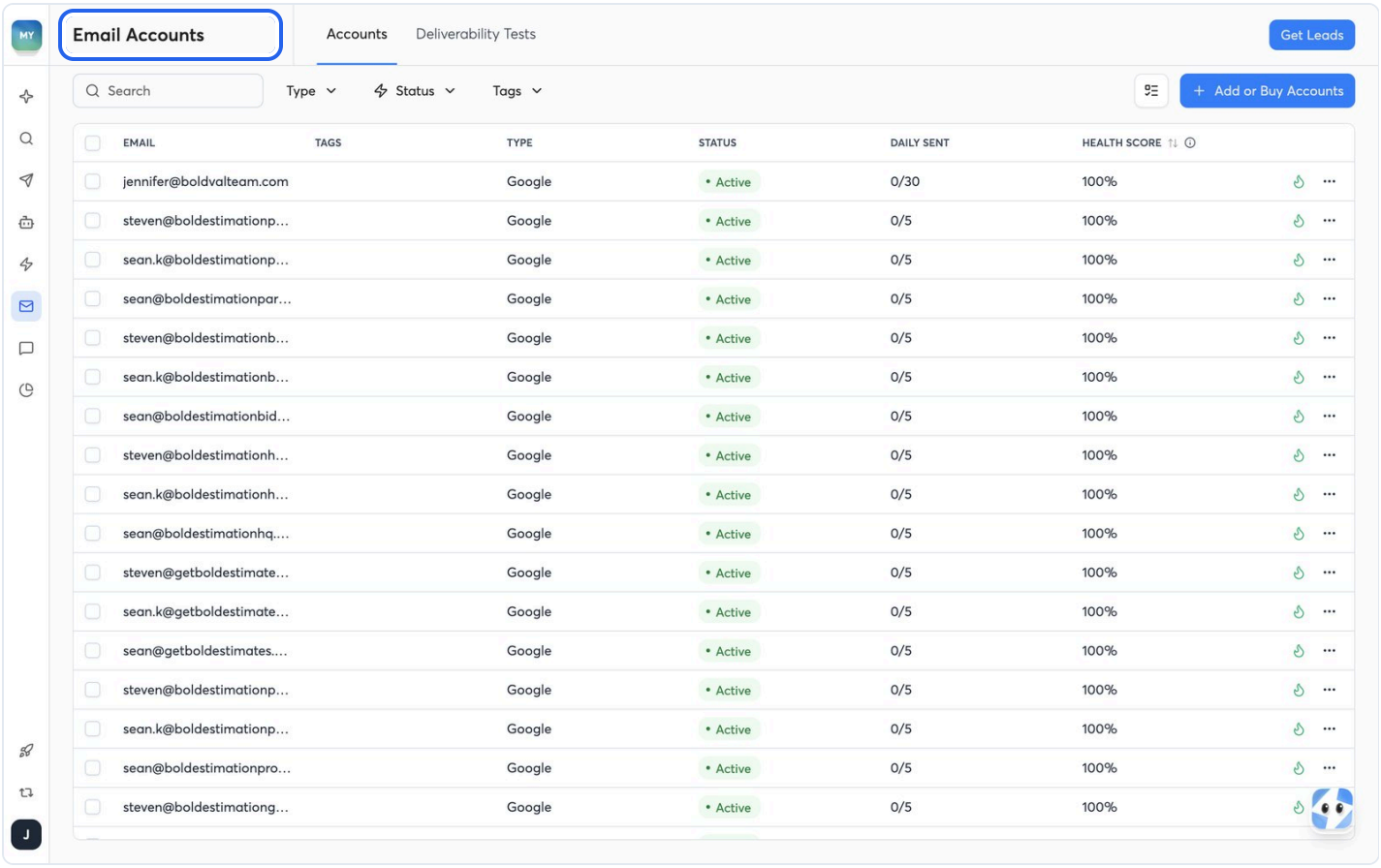
1. Open Email Accounts
2. Find problem mailboxes
3. Filter for errors
4. See what went wrong
5. Check the daily limit
6. Check the warmup settings

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Open Email Accounts

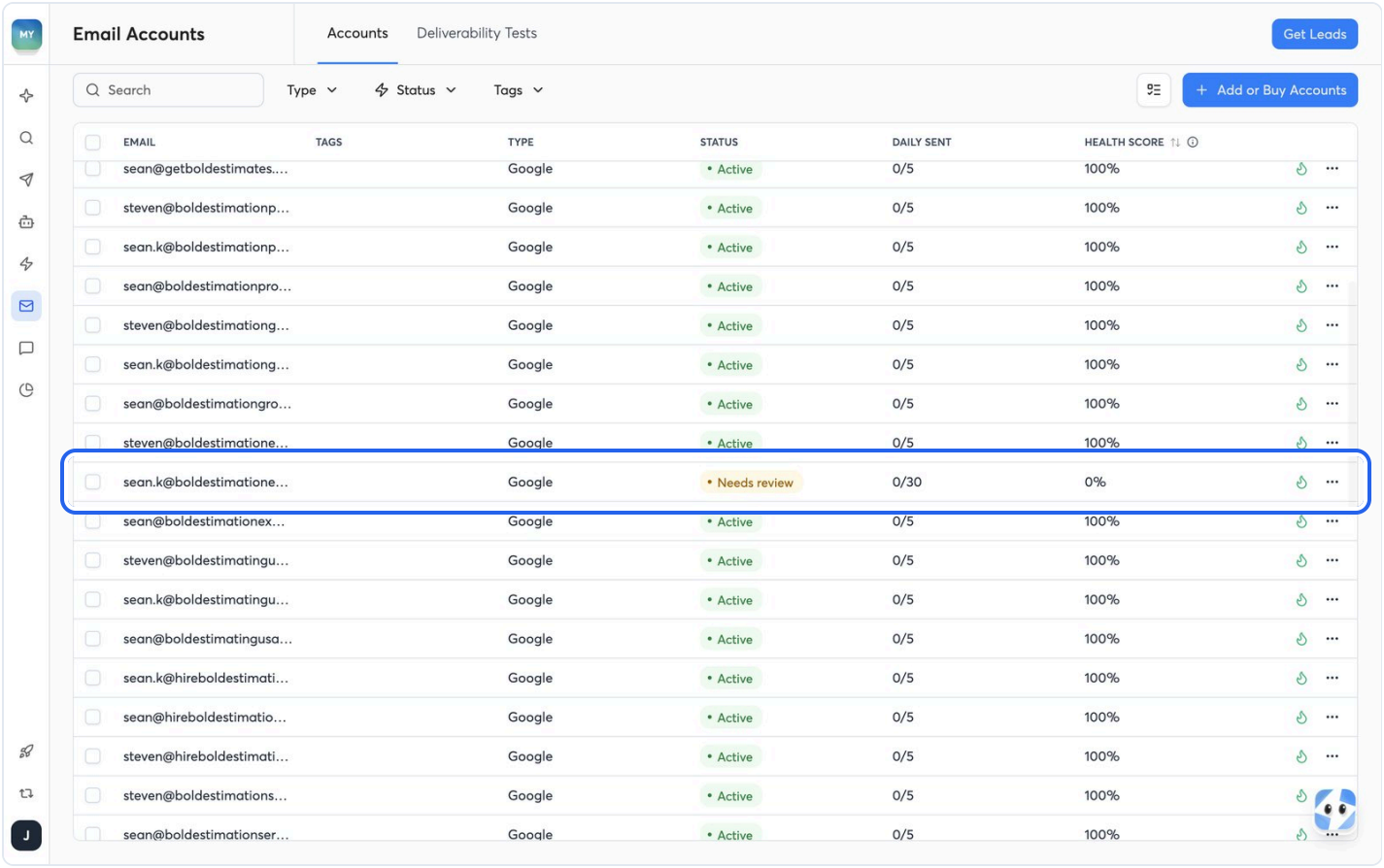
Open Instantly.

Each weekday before seven in the morning, Central time, open Email Accounts.
Every mailbox should say Active, with a health score of 95 percent or more.



2 Find problem mailboxes

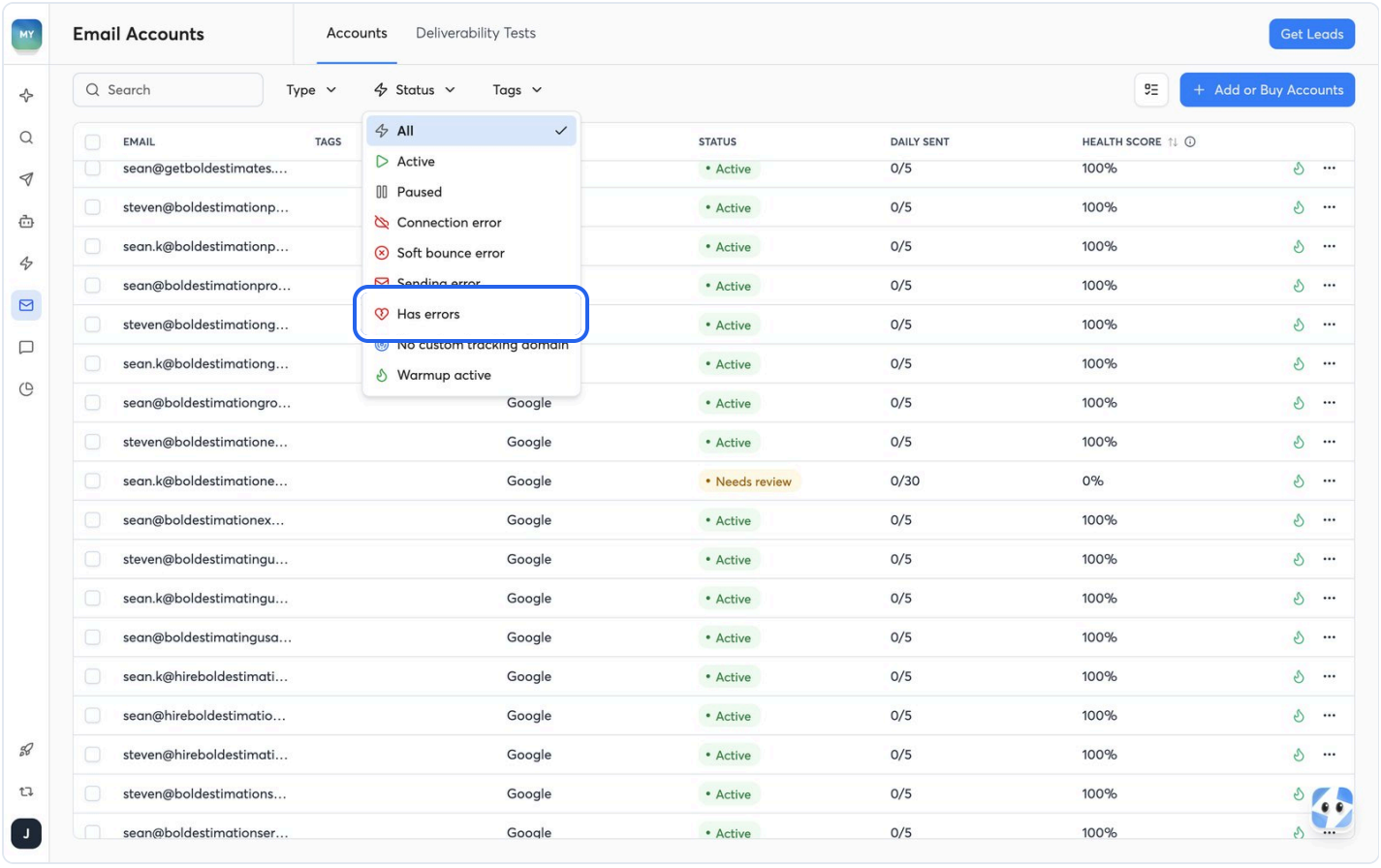
Look down the list for anything that is not green. Here one mailbox says Needs review, with a health score of zero.



> ⚠ **Watch out.** A mailbox under 95 percent, or with any status other than Active, comes out of its campaigns today. Its Campaigns tab shows which ones; in each, open Settings, then Accounts To Use, and remove it. Keep warmup on, and put it back after a full week at 100 percent.

3 Filter for errors

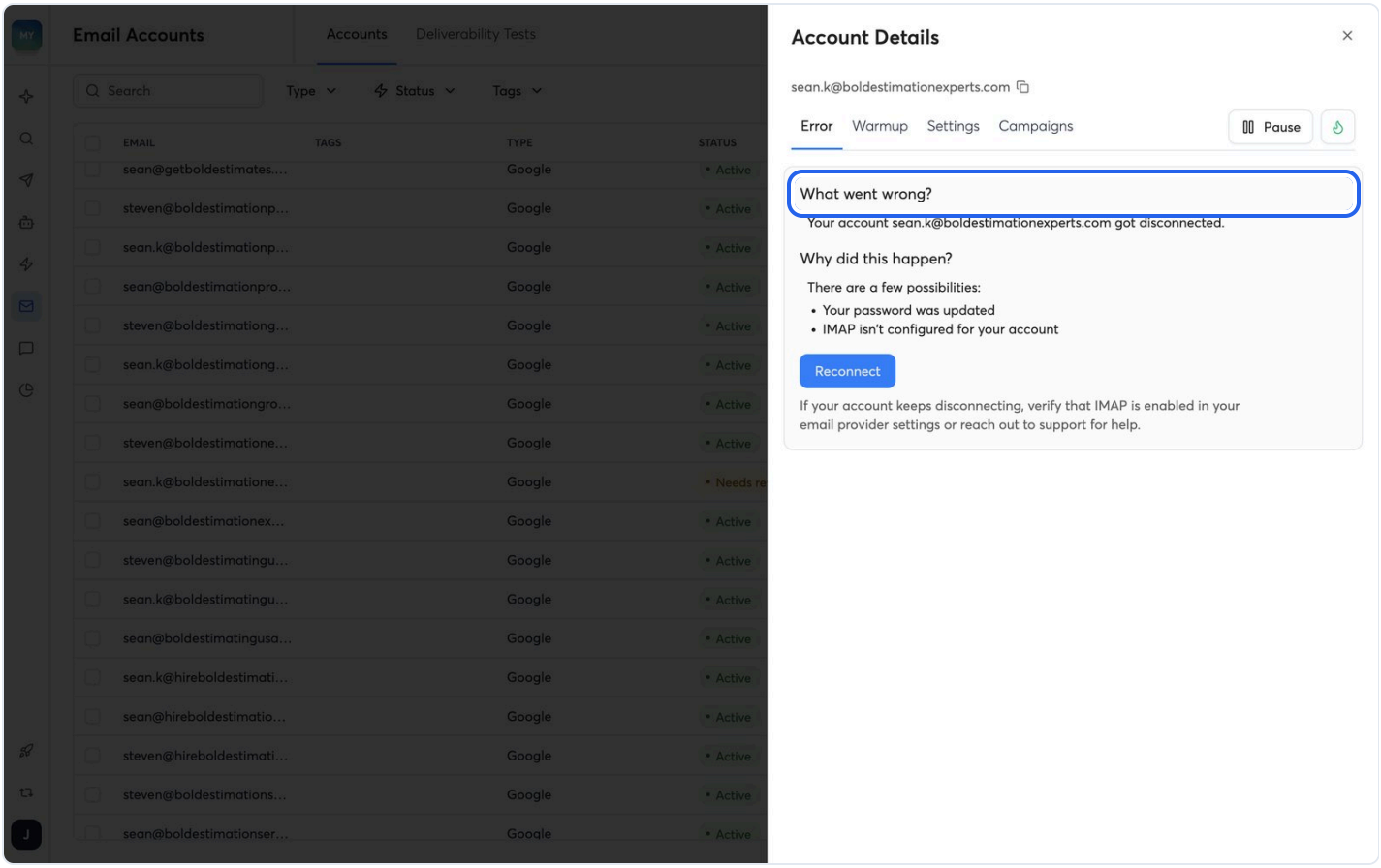
The Status filter shows only mailboxes with problems. Has errors, Connection error and Warmup has errors are the ones to check.



4 See what went wrong

Press Escape to shut the menu.

Click the mailbox. Its Error tab says what went wrong. This one got disconnected.



> ⚠ **Watch out.** A disconnected mailbox sends nothing and gets no warmup. Press Reconnect and sign in to that mailbox again with its login from Zapmail. If it keeps disconnecting, ask Zapmail support to check that IMAP is turned on for it.

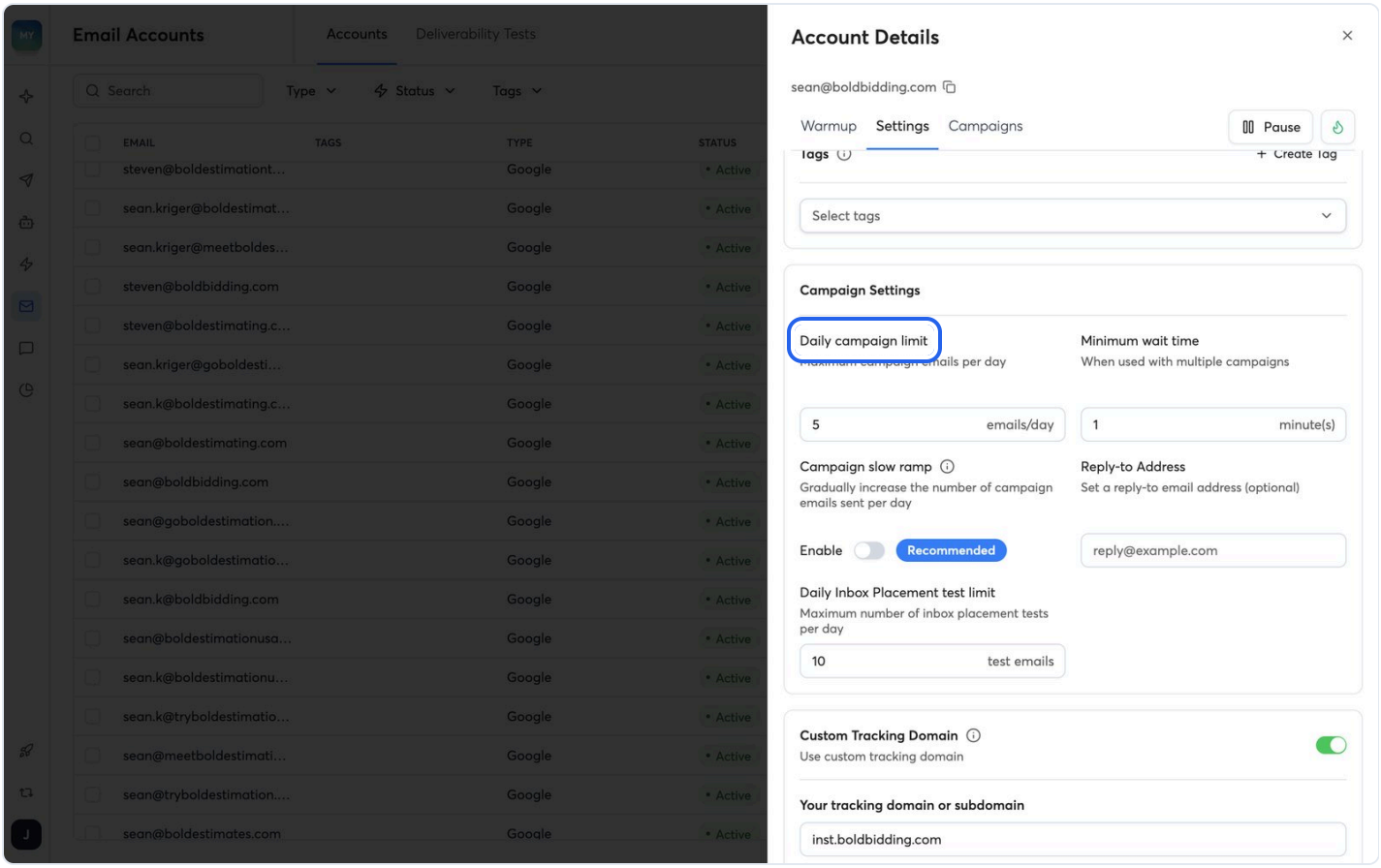
5 Check the daily limit

Press Escape, then open a healthy mailbox.

Open its Settings tab.

Scroll down to Campaign Settings.

Daily campaign limit is how many campaign emails this mailbox sends per day. Start new mailboxes at five. Each week, add three, up to twenty, and only while bounces stay under two percent.

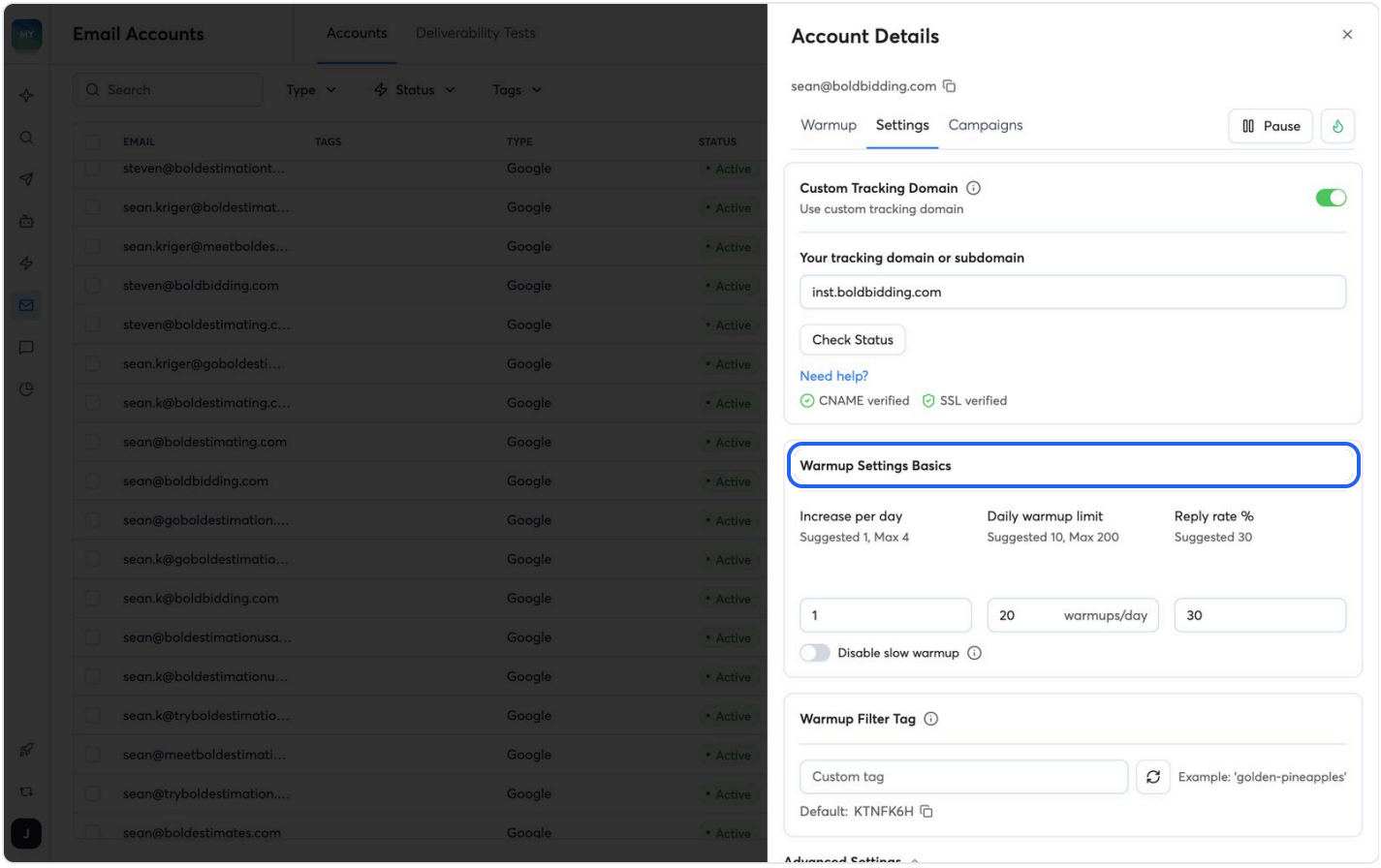


> ⚠ **Watch out.** If bounces pass 2 percent, set every mailbox back to last week's number and check the list before you raise the limits again.

6 Check the warmup settings

Further down, Warmup Settings holds the warmup profile. Leave it as it is: up to twenty warmup emails a day, with a thirty percent reply rate.

Press Escape. Repeat for any mailbox that looked off, and note what you changed.



3 watch-outs to keep in mind

Before you click

- ⚠ A mailbox under 95 percent, or with any status other than Active, comes out of its campaigns today. Its Campaigns tab shows which ones; in each, open Settings, then Accounts To Use, and remove it. Keep warmup on, and put it back after a full week at 100 percent.
- ⚠ A disconnected mailbox sends nothing and gets no warmup. Press Reconnect and sign in to that mailbox again with its login from Zapmail. If it keeps disconnecting, ask Zapmail support to check that IMAP is turned on for it.

⚠ If bounces pass 2 percent, set every mailbox back to last week's number and check the list before you raise the limits again.

Guide 6 of 13 · Instantly

Inside an Instantly campaign, tab by tab

Updated Sep 30, 2026

A campaign is one group of people, the two emails they get, and the mailboxes that send them. This guide opens a finished campaign and walks each tab: Analytics, Editor, Leads and Settings.

8 steps · 4 min · 2 watch-outs

Watch it first: inside a campaign in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/instantly-inside-a-campaign.mp4

8 steps, each with the screen you will see

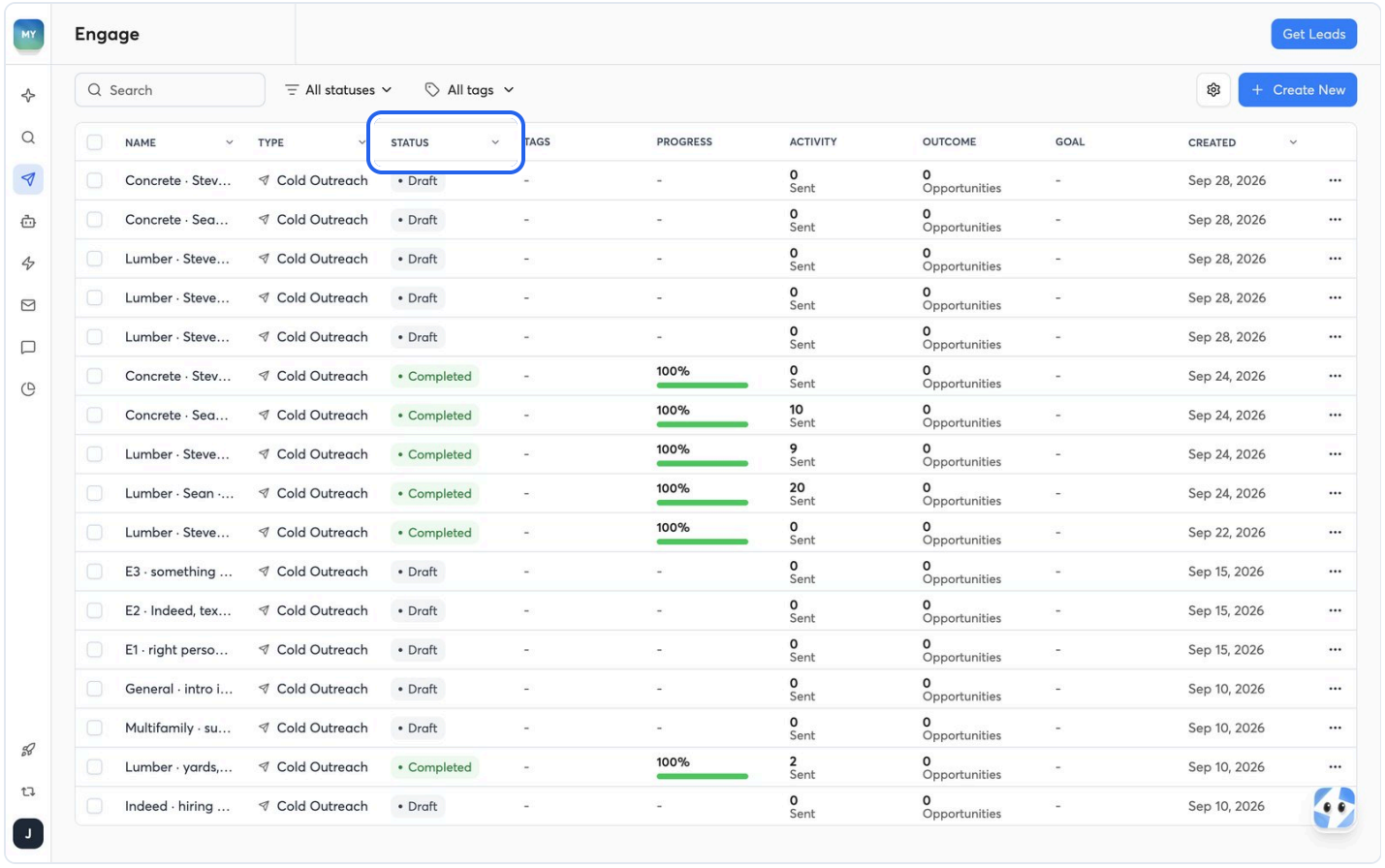
1. The campaign list
2. Analytics
3. Tracking stays off
4. Editor
5. Leads
6. Schedule
7. Sending rules
8. The brake

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 The campaign list

Open Engage in Instantly.

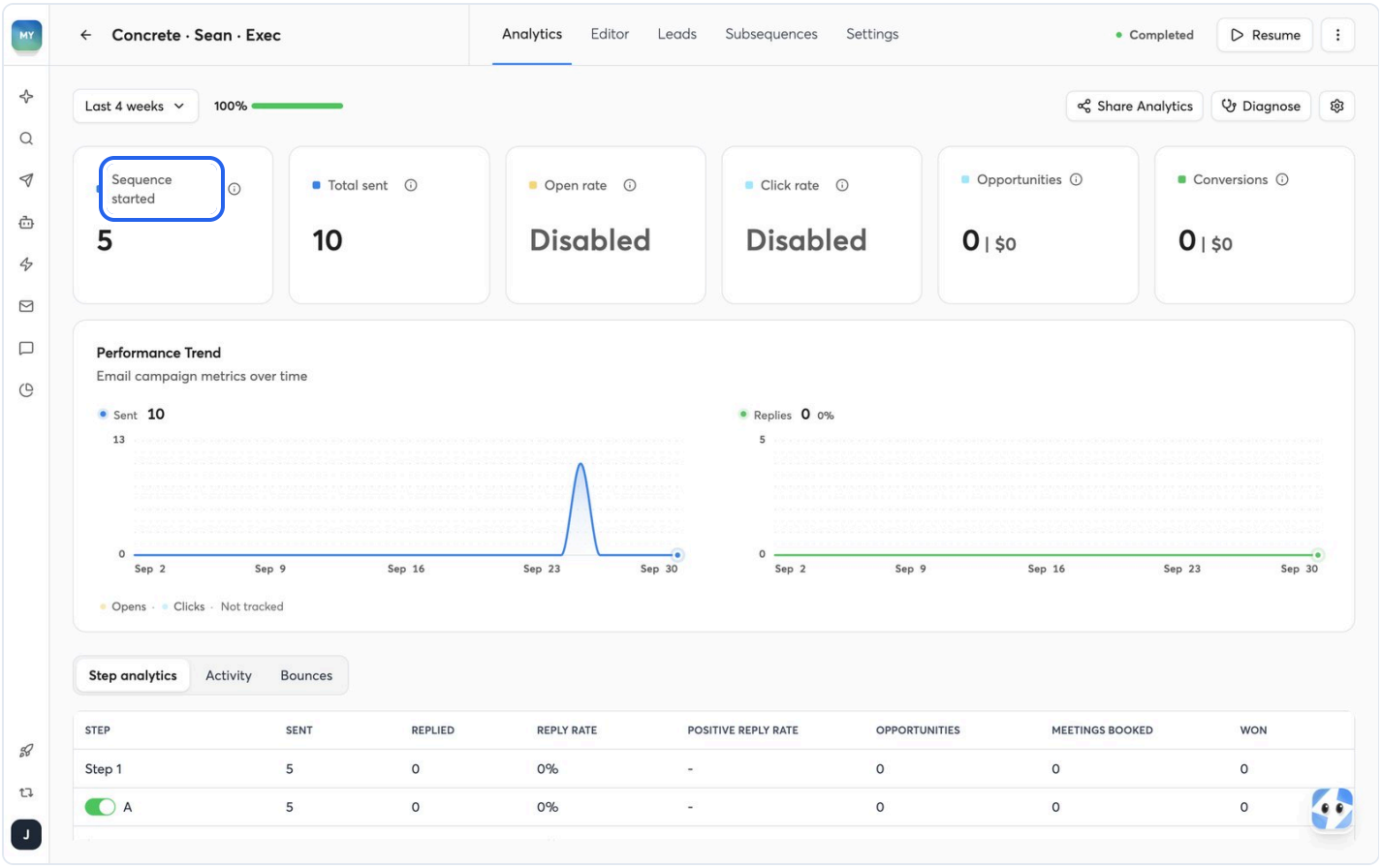
Engage lists every campaign. Status says where each one stands: Draft has never sent, Active is sending, Paused is on hold, and Completed has emailed its whole list.



2 Analytics

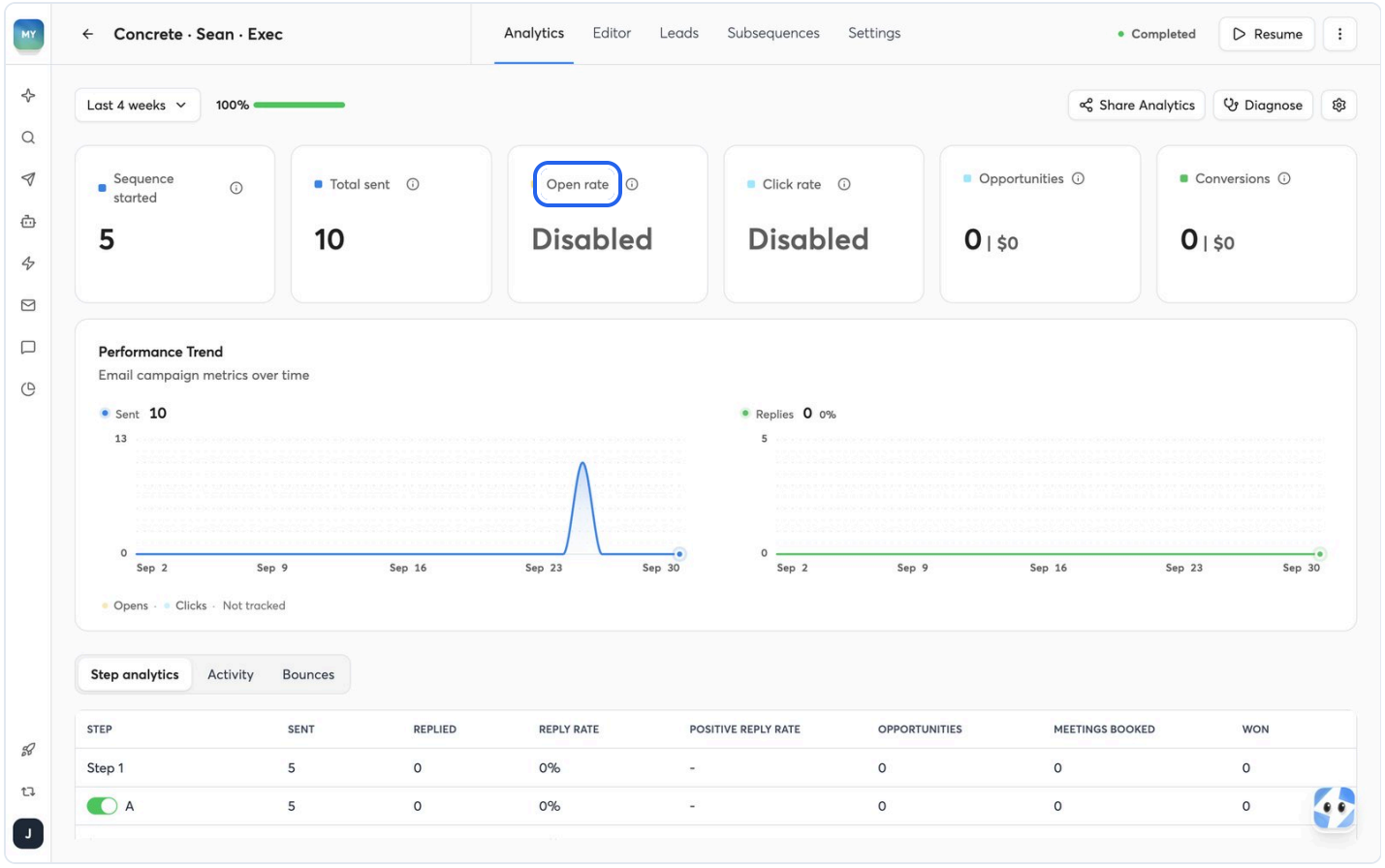
Click a campaign to open it.

It opens on Analytics, with how many people got the first email and how many emails went out in all.



3 Tracking stays off

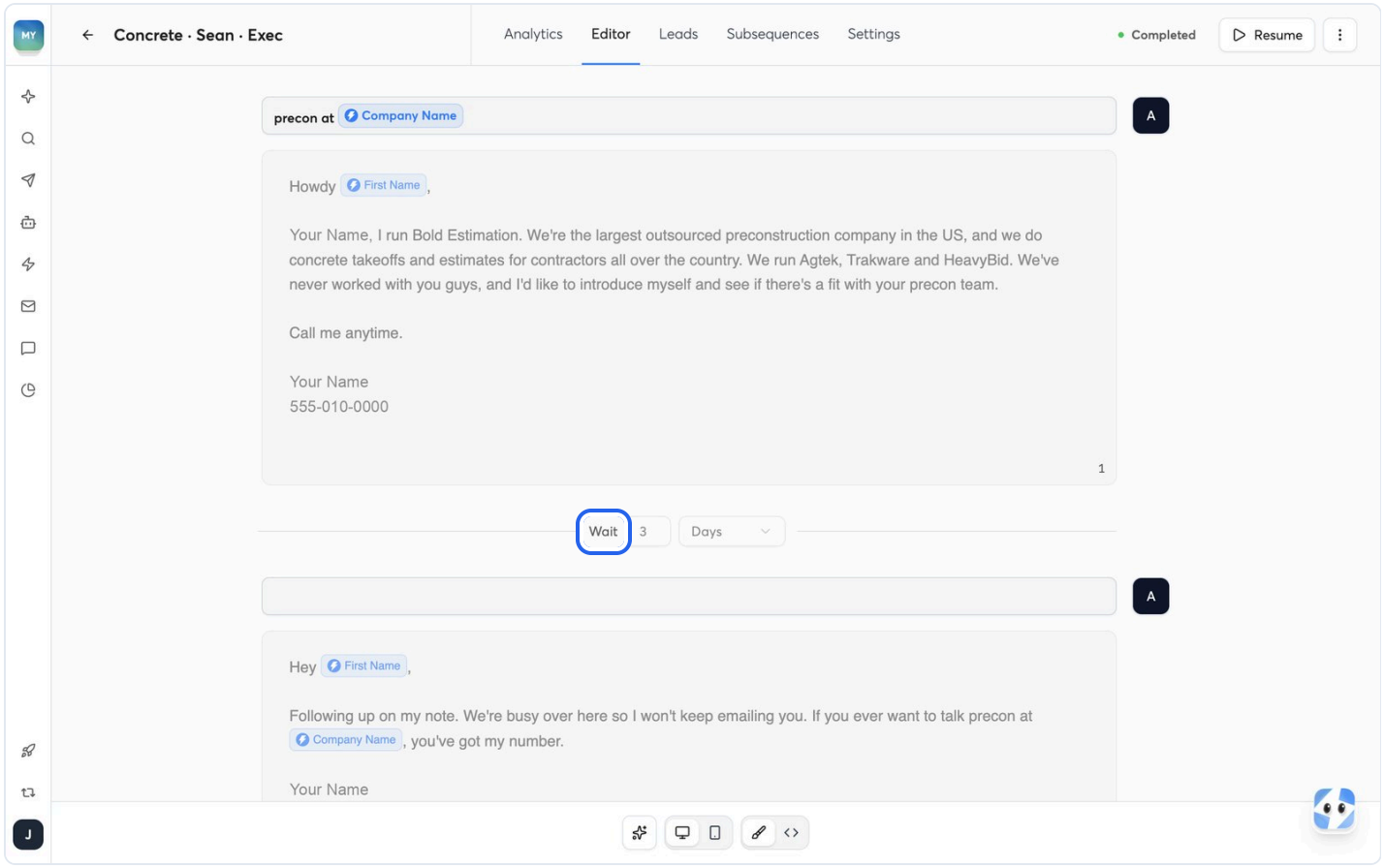
Open rate and click rate say Disabled on purpose. Tracking makes an email look like marketing, so it stays off in every campaign.



4 Editor

Open the Editor tab.

Editor holds the two emails: the first one, then a follow up three days later to anyone who has not replied.

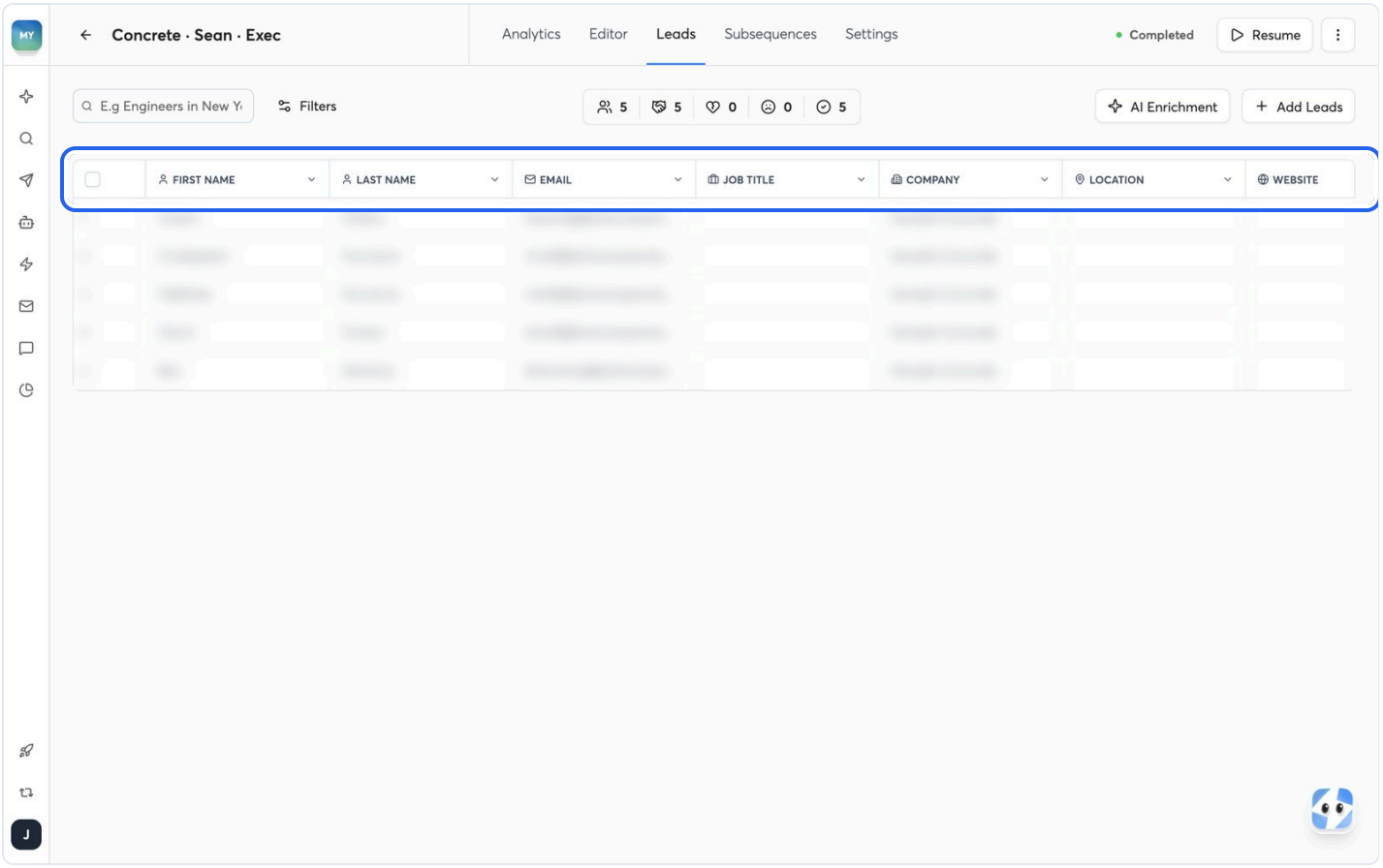


> ⚠ **Watch out.** The Editor saves as you type, straight into the campaign. Pause the campaign before you change a word, make the change, then resume it. New wording starts in the email templates doc (guide 13).

5 Leads

Open the Leads tab.

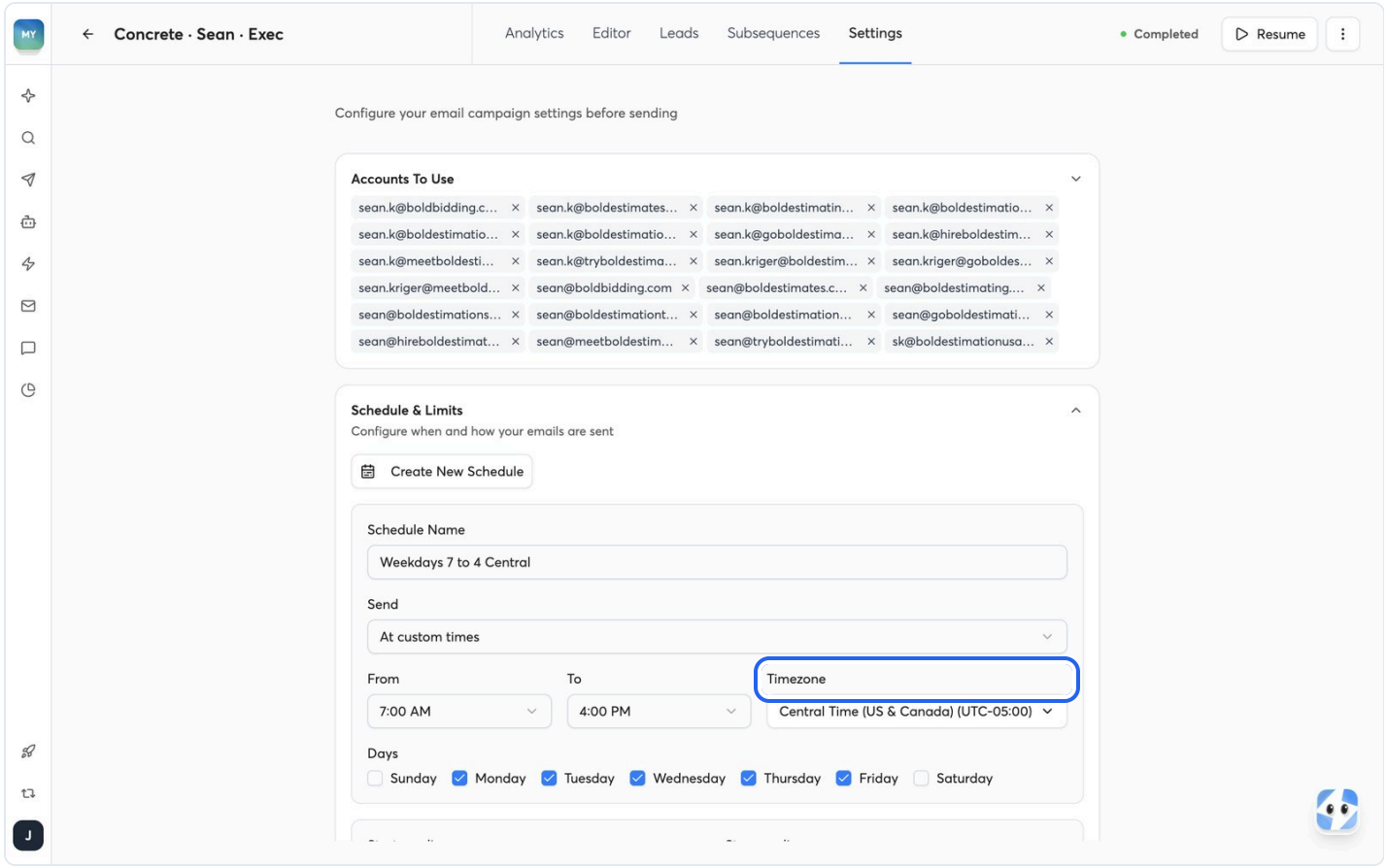
Leads lists every person in the campaign, with counts above the table for how many were contacted and how many bounced.



6 Schedule

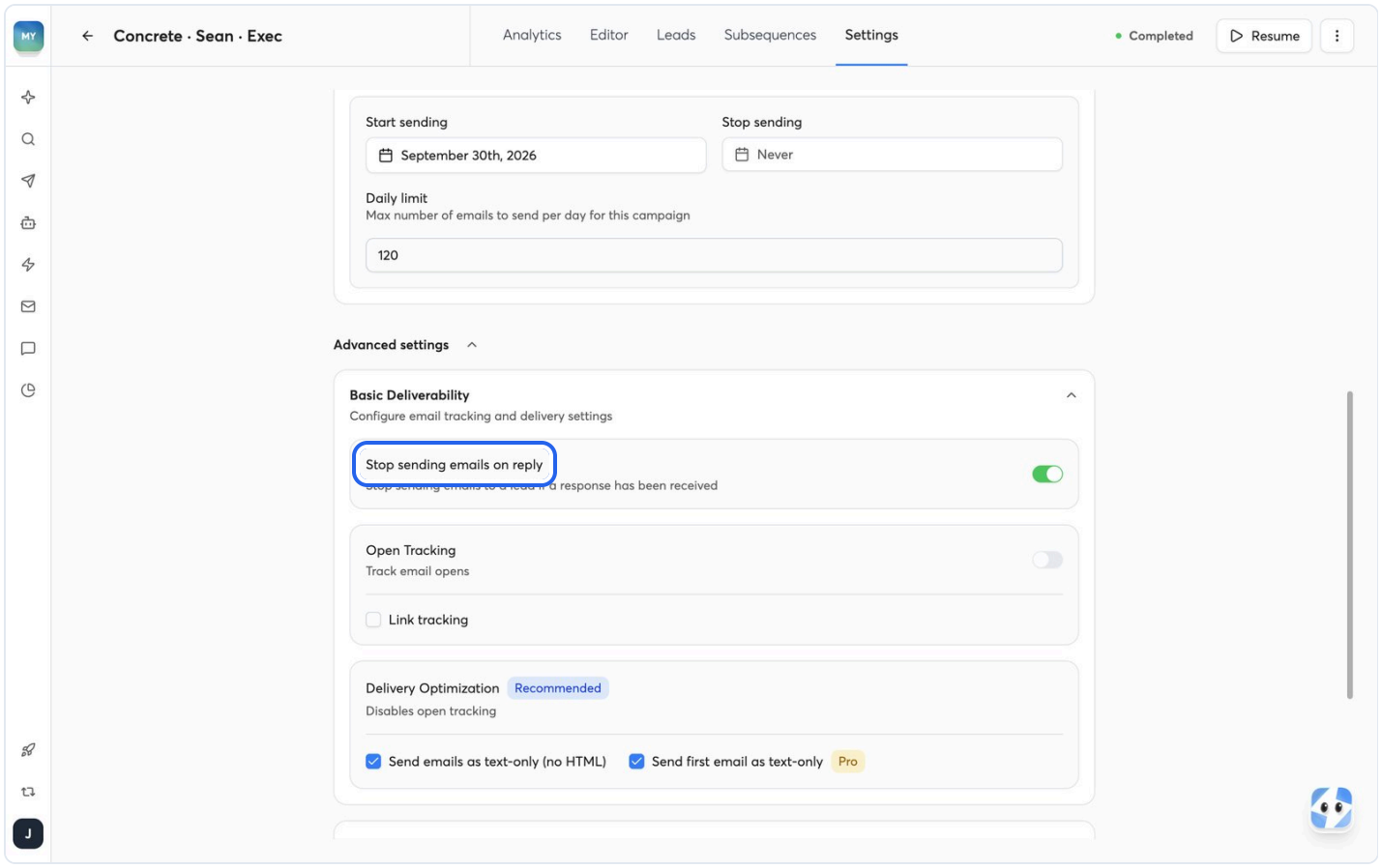
Open the Settings tab.

Settings holds who sends, when, and how many. Under Schedule and Limits, Bold sends on weekdays, seven in the morning to four in the afternoon, Central time.



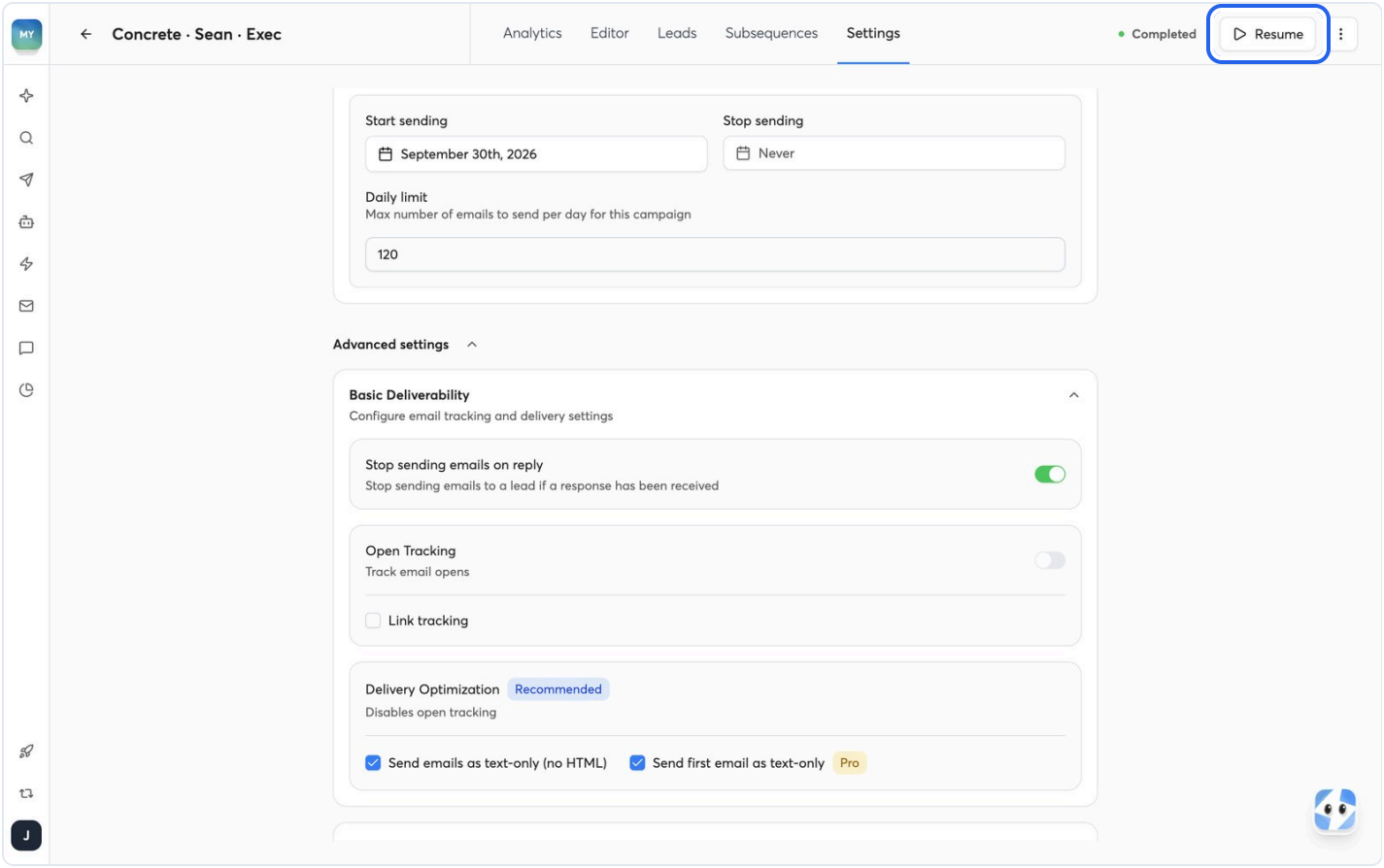
7 Sending rules

Further down, stop sending on reply stays on, both kinds of tracking stay off, and emails go out as text only.



8 The brake

The button at the top right is the brake. It says Pause while a campaign sends, and Resume once it has finished.



> ⚠ **Watch out.** Pause when bounces pass 2 percent or anything looks wrong, fix the cause, then resume. Never press Resume on a Completed campaign: it has already emailed everyone on its list. Duplicate it instead (guide 9).

2 watch-outs to keep in mind Before you click

> ⚠ The Editor saves as you type, straight into the campaign. Pause the campaign before you change a word, make the change, then resume it. New wording starts in the email templates doc (guide 13).

⚠ Pause when bounces pass 2 percent or anything looks wrong, fix the cause, then resume. Never press Resume on a Completed campaign: it has already emailed everyone on its list. Duplicate it instead (guide 9).

Add leads to a campaign in Instantly

Updated Sep 30, 2026

A lead is one person a campaign will email. The team adds people to the list drop sheet (guide 11); whoever loads campaigns brings the list into Instantly from the campaign's Leads tab. This guide walks up to the upload screen and stops there, so no real list is uploaded.

4 steps · 5 min · 1 watch-out

Watch it first: add leads to a campaign in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/process-add-leads.mp4

4 steps, each with the screen you will see

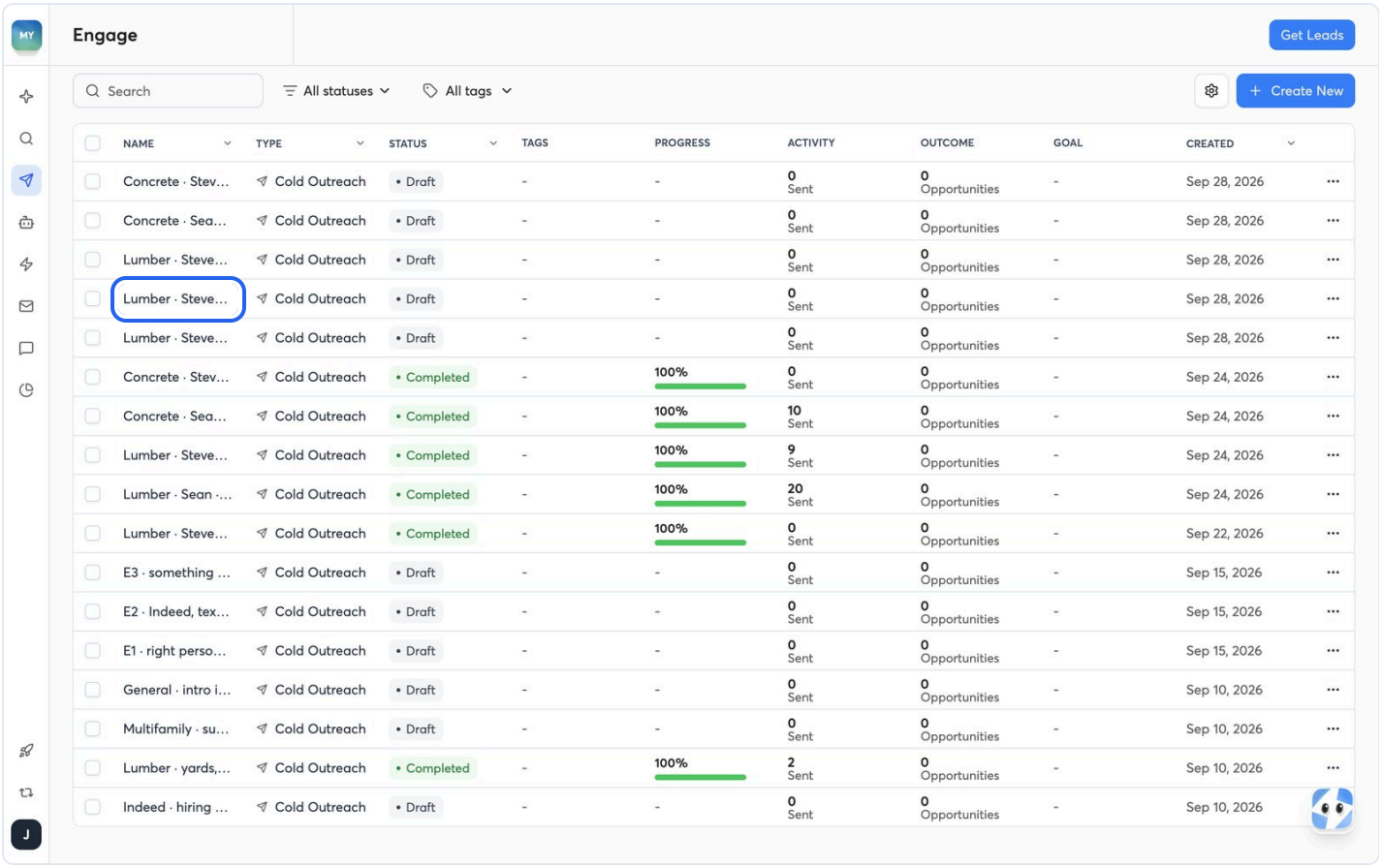
1. Open the campaign
2. Open Leads
3. Pick Upload CSV
4. The upload screen

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Open the campaign

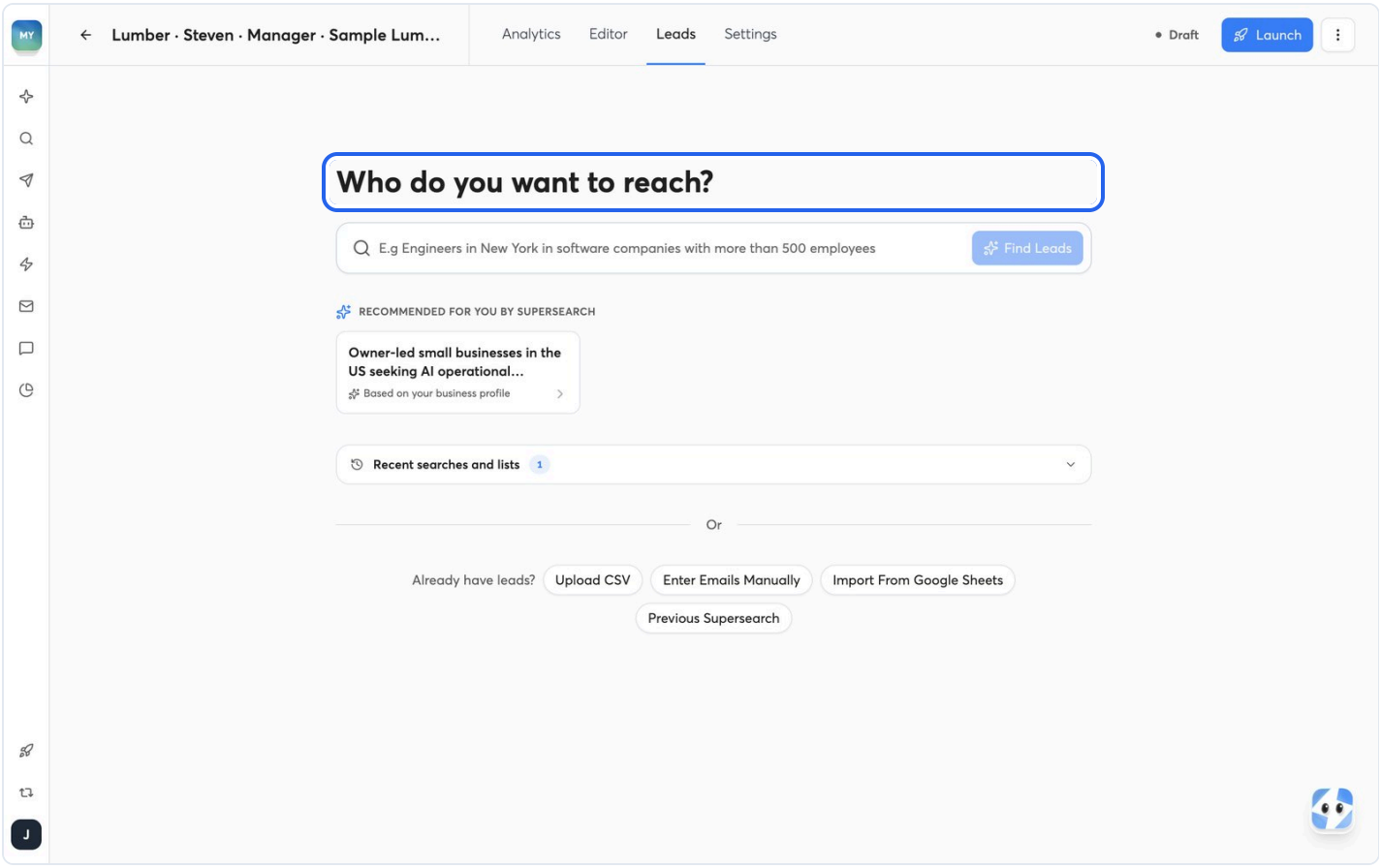
Open Engage in Instantly.

Click the campaign the list is for. A new campaign says Draft.



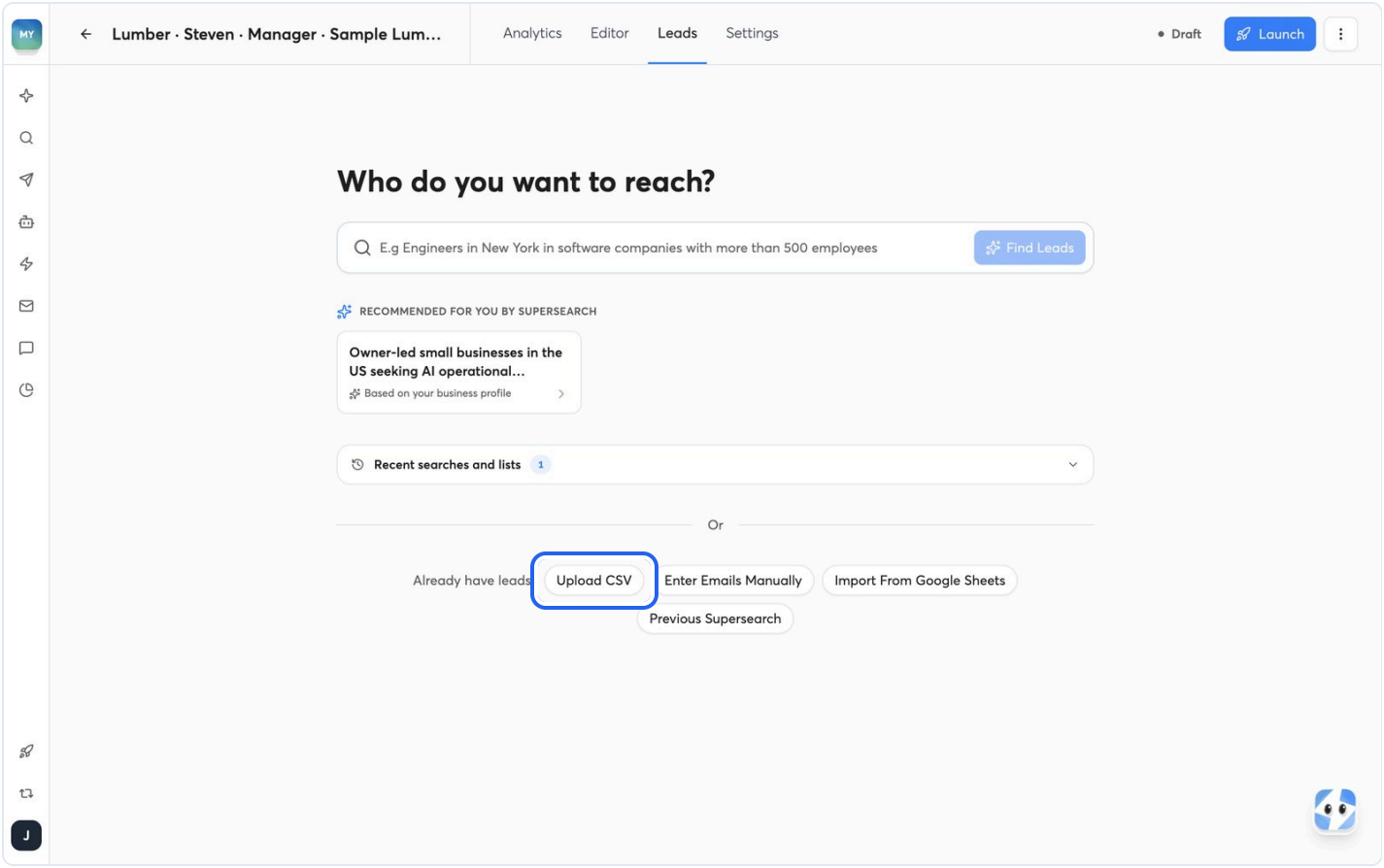
2 Open Leads

Open the Leads tab. An empty campaign asks who you want to reach.



3 Pick Upload CSV

Skip the search box. It finds new people in Instantly's own database, which uses paid credits. Your list is ready, so click Upload CSV.

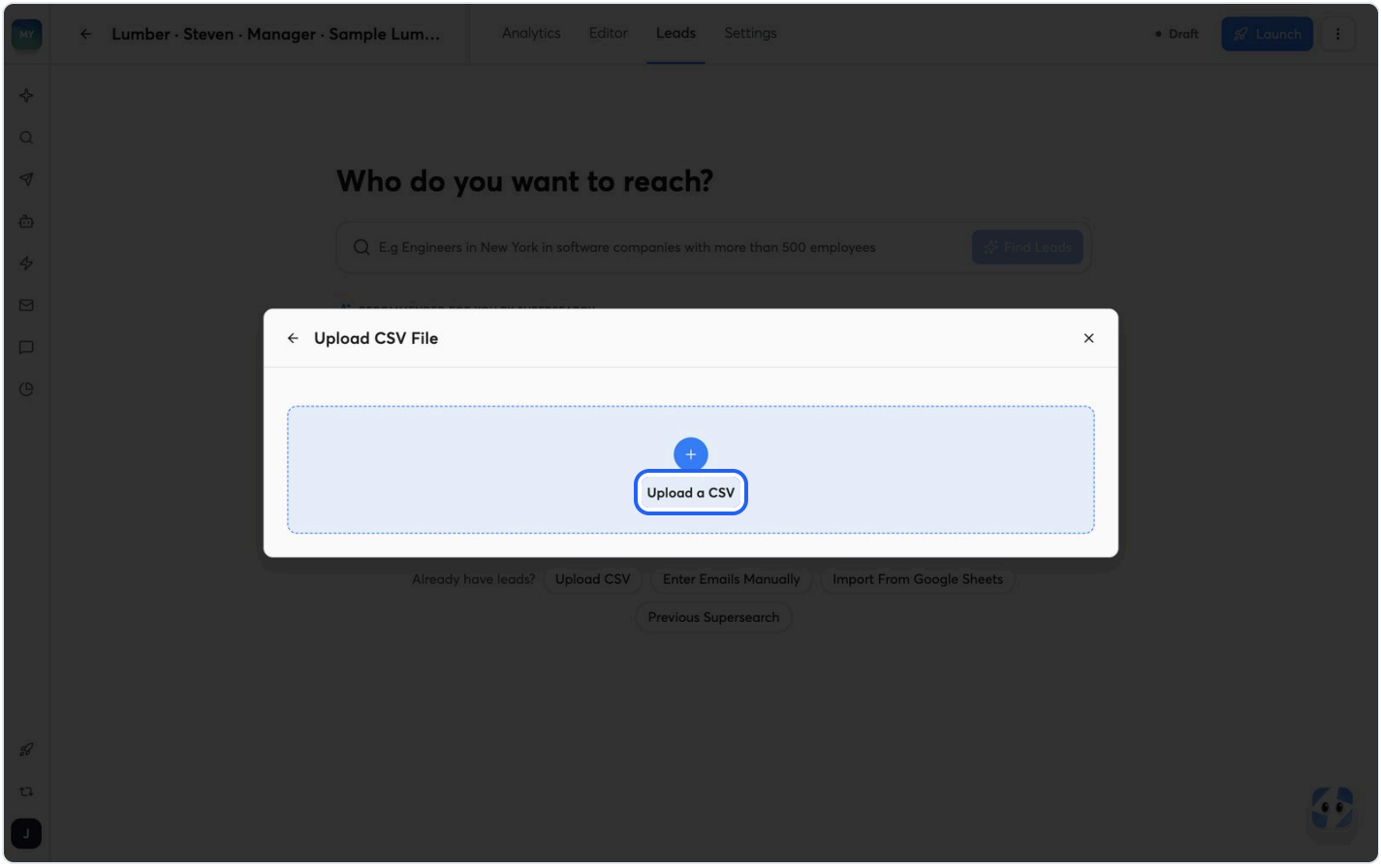


Tip. A CSV is a spreadsheet saved as plain text. In Google Sheets, use File, then Download, then Comma-separated values.

4 The upload screen

Upload a CSV opens. The file needs one line per person, with email, first name and company name. After you pick the file, match each column to its field, then confirm. This guide stops here.

Press Escape to leave without uploading anything.



> ⚠ **Watch out.** Add at most 5 people from one company per day. A new campaign starts with 50 people; wait 2 days and check bounces before you add more.

1 watch-out to keep in mind Before you click

> ⚠ Add at most 5 people from one company per day. A new campaign starts with 50 people; wait 2 days and check bounces before you add more.

Launch a campaign in Instantly

Updated Sep 30, 2026

A new campaign waits as a Draft until someone presses Launch. Before that, four things get checked: the people, the emails, the mailboxes and the schedule. This guide walks the checks on a real draft and stops at the Launch button without pressing it.

6 steps · 10 min · 1 watch-out

Watch it first: launch a campaign in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/process-launch-a-campaign.mp4

6 steps, each with the screen you will see

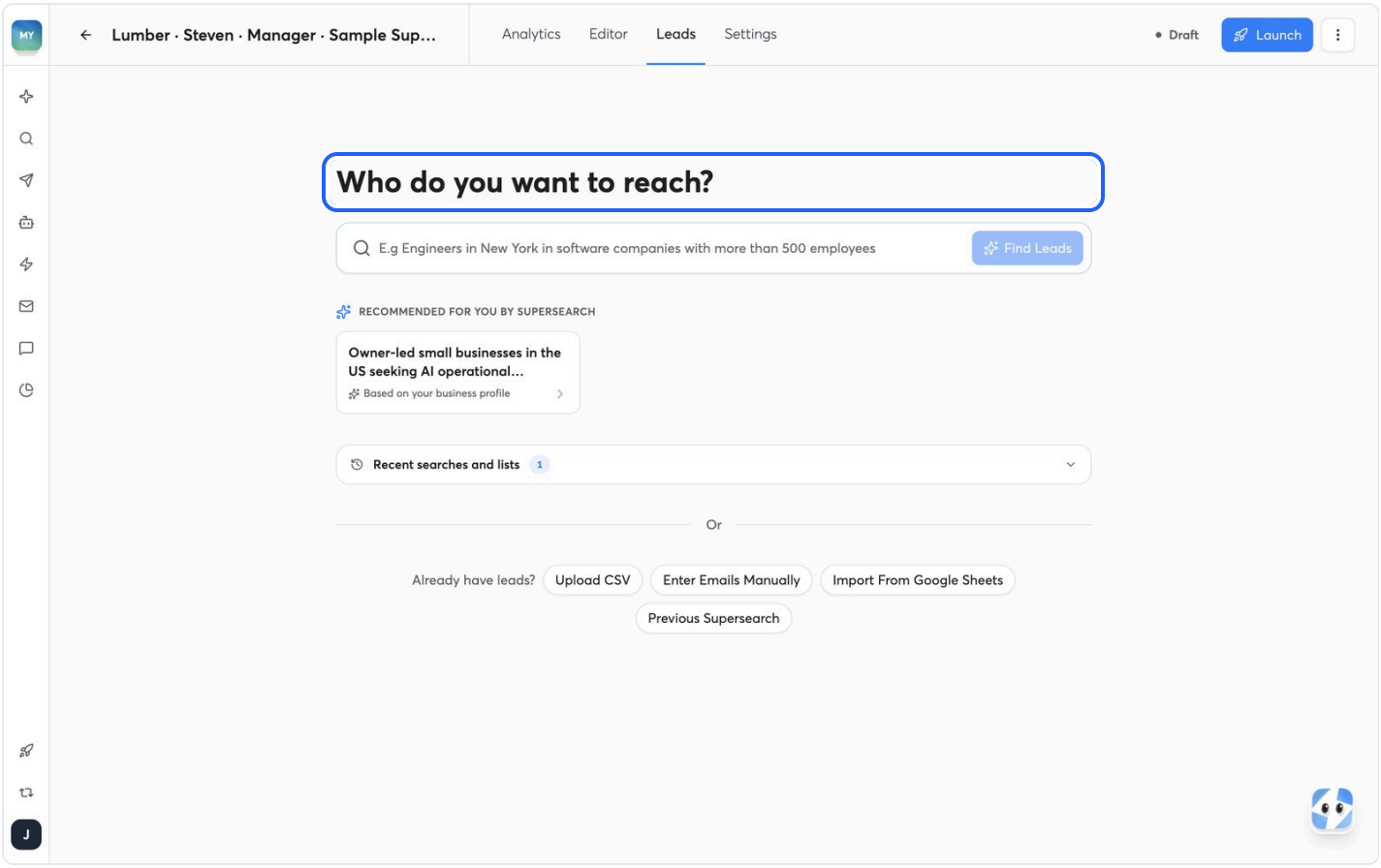
1. Open the draft
2. Check the emails
3. Check the mailboxes
4. Check the schedule
5. Check the sending rules
6. Launch

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Open the draft

Open the draft campaign from Engage.

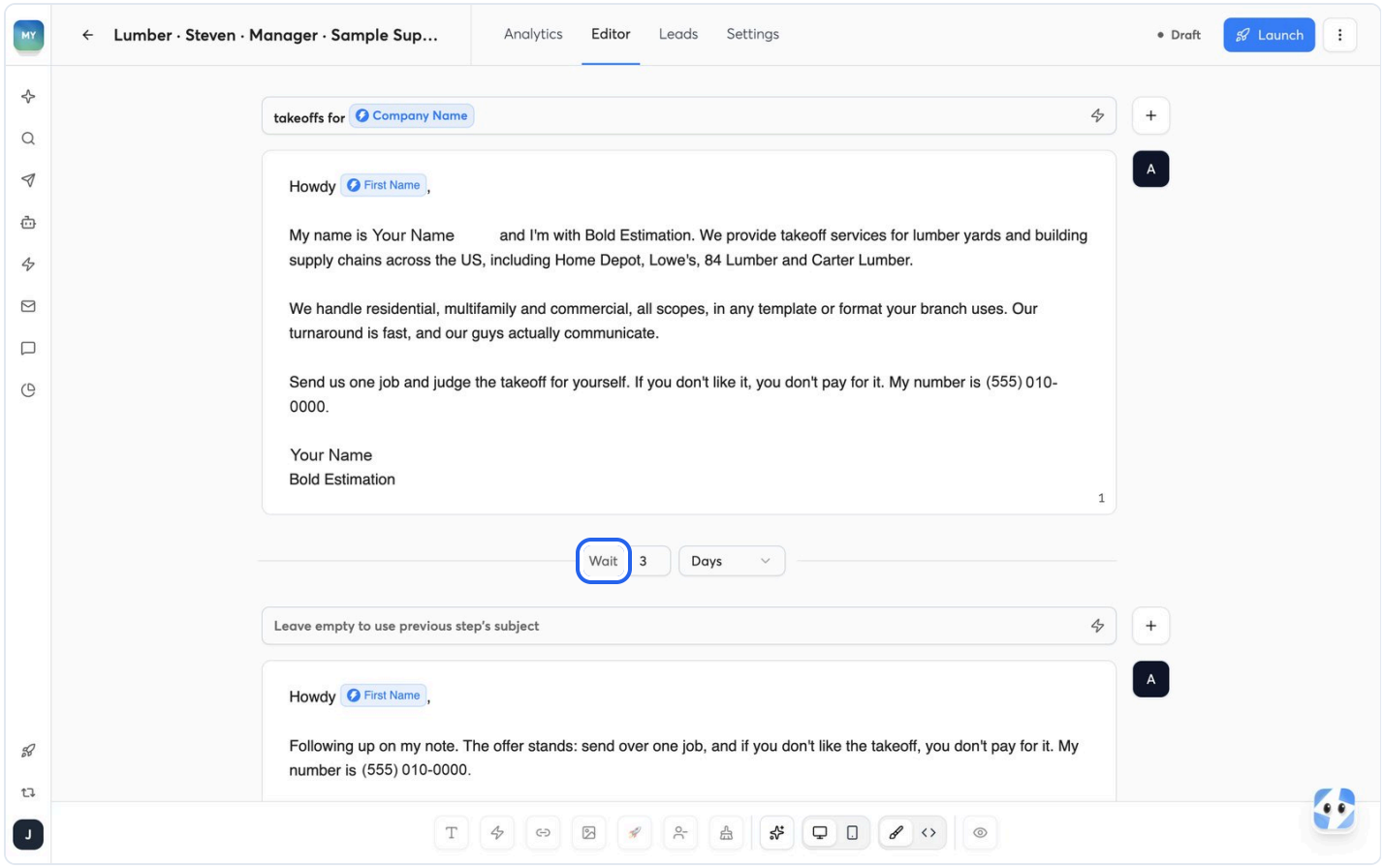
Before launch, the Leads tab must hold your first 50 people. This draft is still empty, so it is not ready yet.



2 Check the emails

Open the Editor tab.

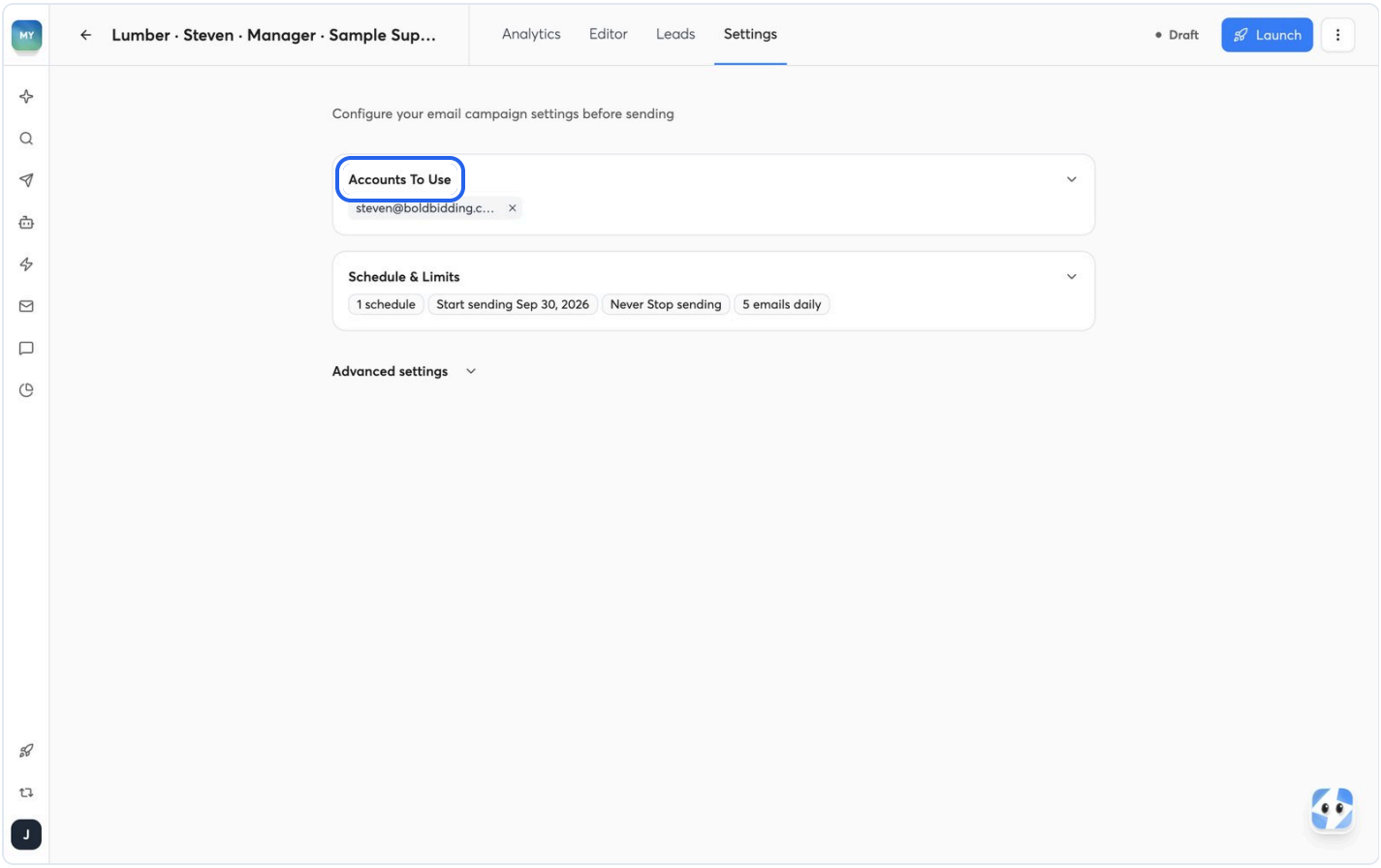
Check both emails against the templates doc: the subject, the first email, the three day wait and the follow up.



3 Check the mailboxes

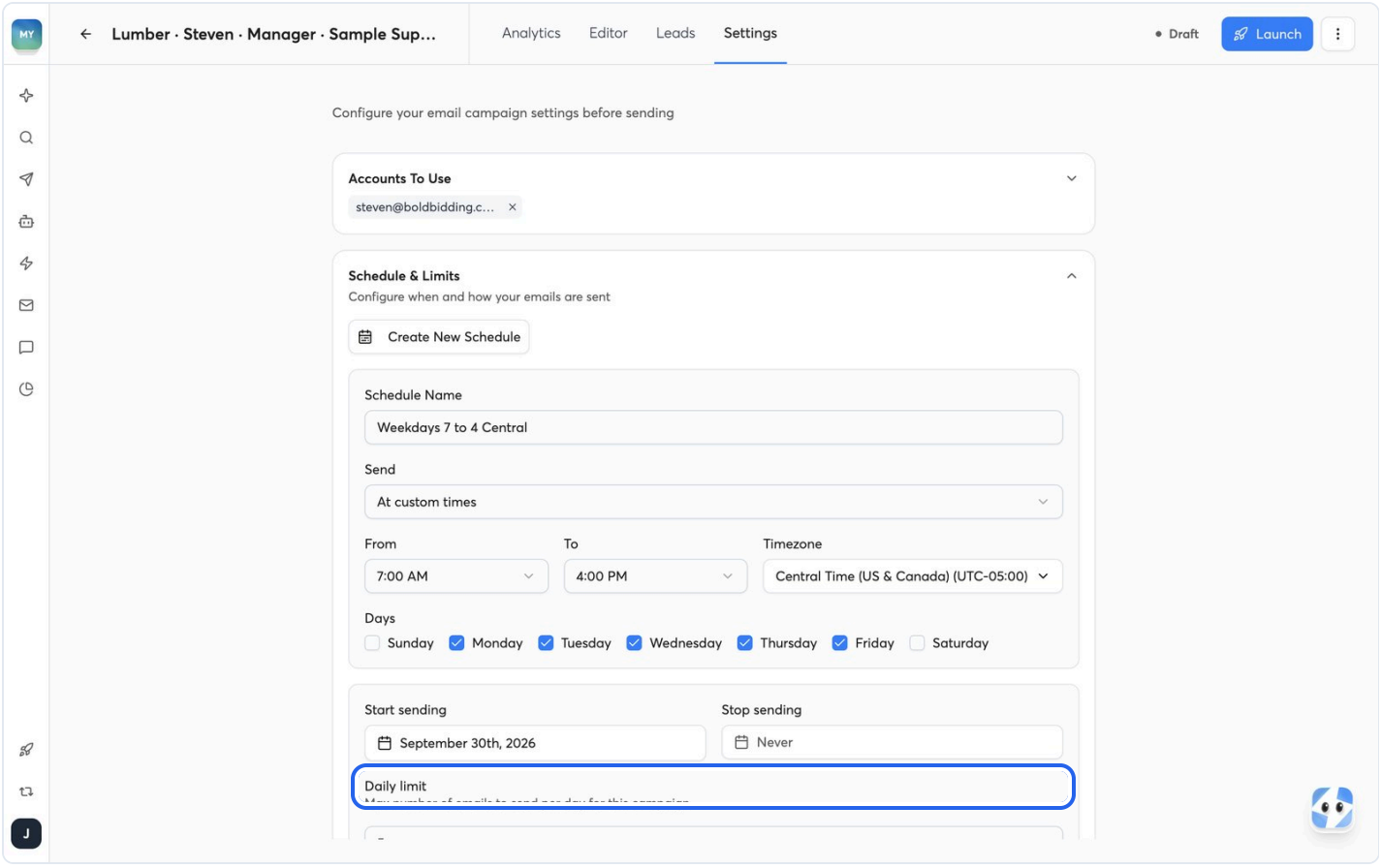
Open the Settings tab.

Accounts To Use lists the mailboxes that send. Use only mailboxes with 19 days of warmup and a health score of 95 percent or more.



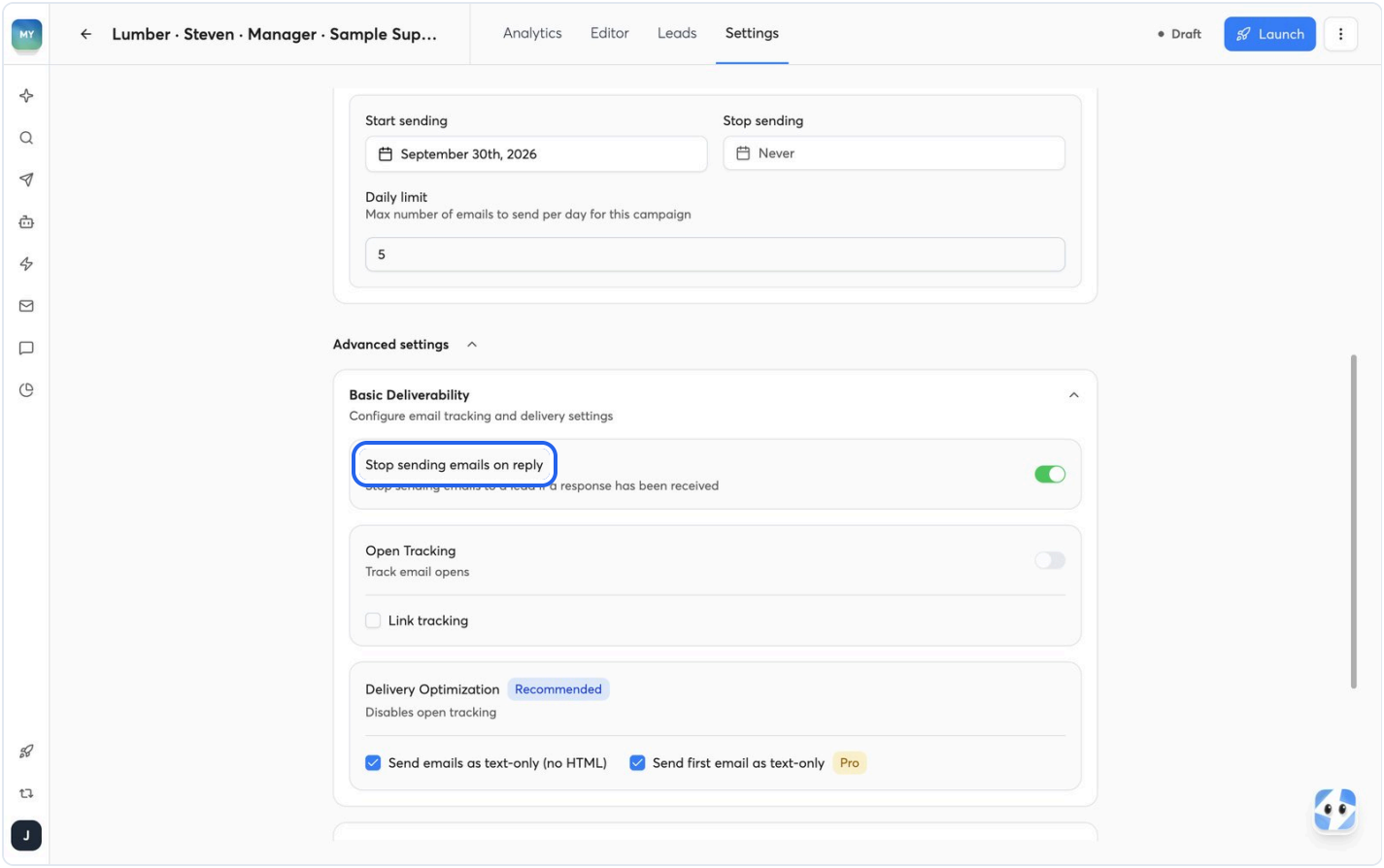
4 Check the schedule

Open Schedule and Limits. Weekdays, seven to four, Central time. Daily limit caps the campaign's total emails per day, across all its mailboxes.



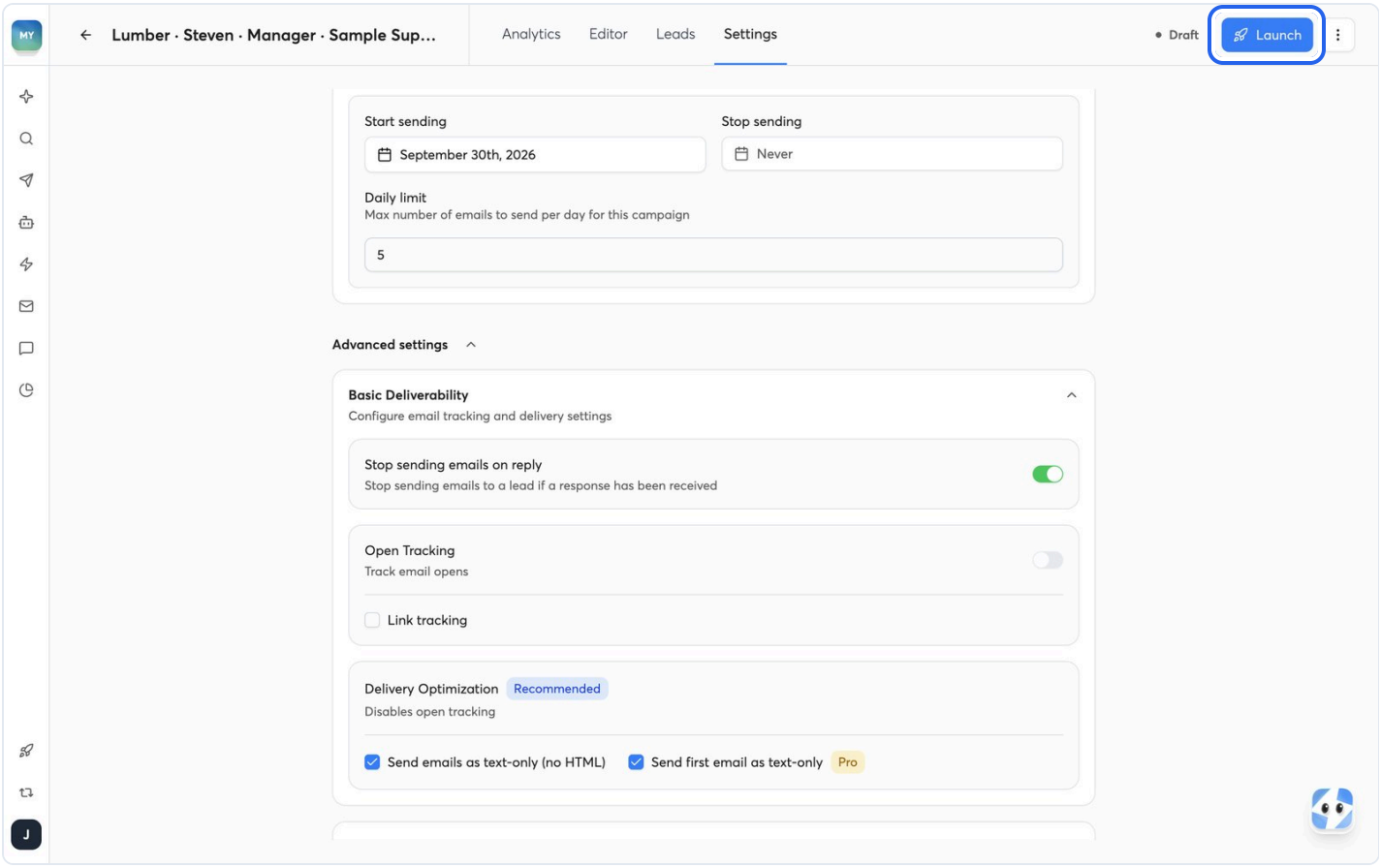
5 Check the sending rules

Further down, Stop sending emails on reply stays on, open tracking and link tracking stay off, and emails go out as text only.



6 Launch

When all four checks pass, Launch starts sending to real people.



> ⚠ **Watch out.** Launch sends real emails and cannot be taken back. Check bounces the next morning and again two days later. If they pass 2 percent, pause the campaign and check the list before sending more.

1 watch-out to keep in mind Before you click

> ⚠ Launch sends real emails and cannot be taken back. Check bounces the next morning and again two days later. If they pass 2 percent, pause the campaign and check the list before sending more.

Manage running campaigns in Instantly

Updated Sep 30, 2026

Once a campaign is sending, three habits keep it healthy: check bounces every day, pause before any change, and duplicate a finished campaign instead of restarting it. This guide shows where each one happens.

4 steps · 5 min · 3 watch-outs

Watch it first: manage running campaigns in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/process-manage-campaigns.mp4

4 steps, each with the screen you will see

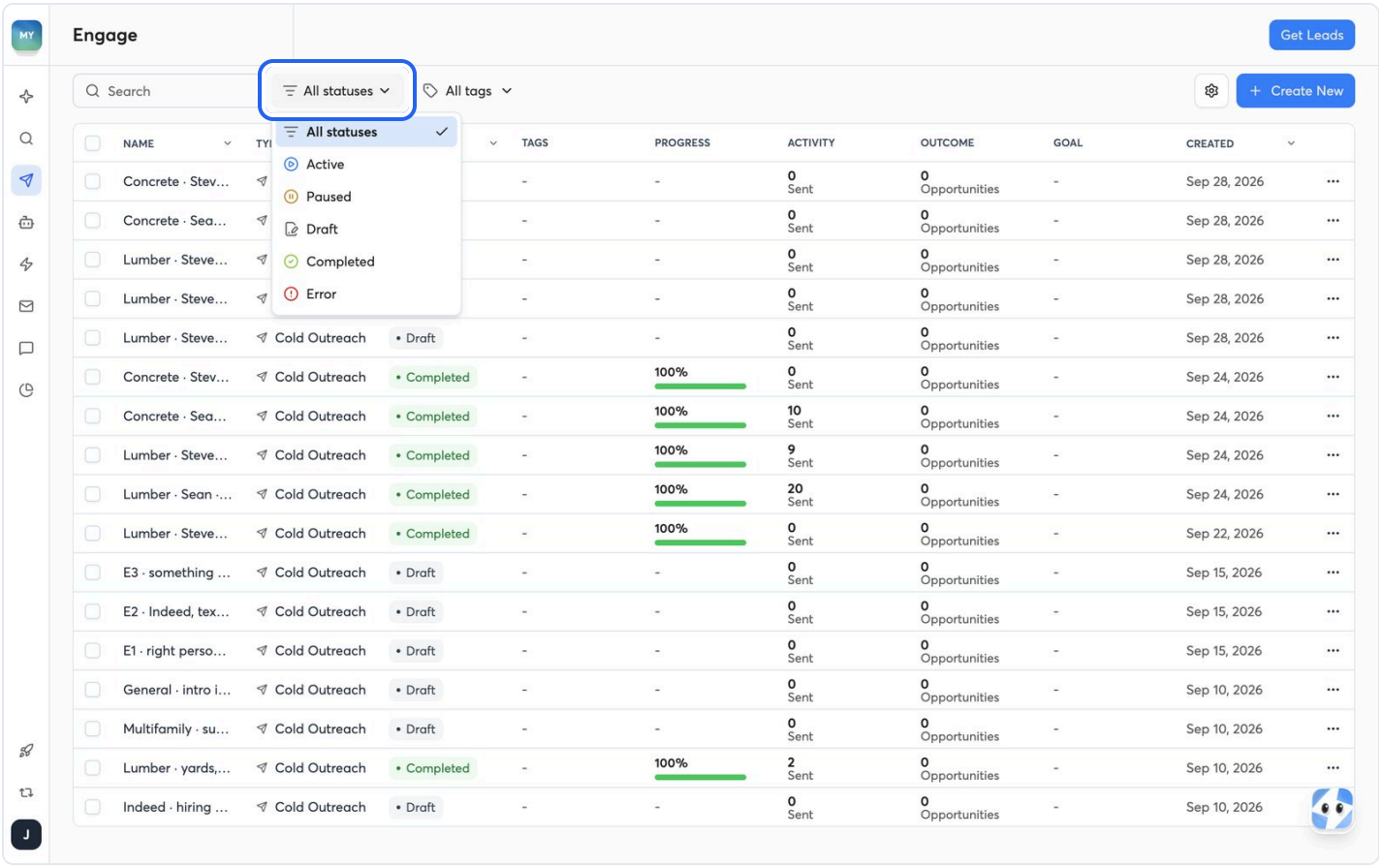
1. Filter by status
2. Check bounces
3. Pause and resume
4. Duplicate a finished campaign

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Filter by status

Open Engage in Instantly.

All statuses lets you see one kind of campaign at a time. Pick Active to see only the ones sending.

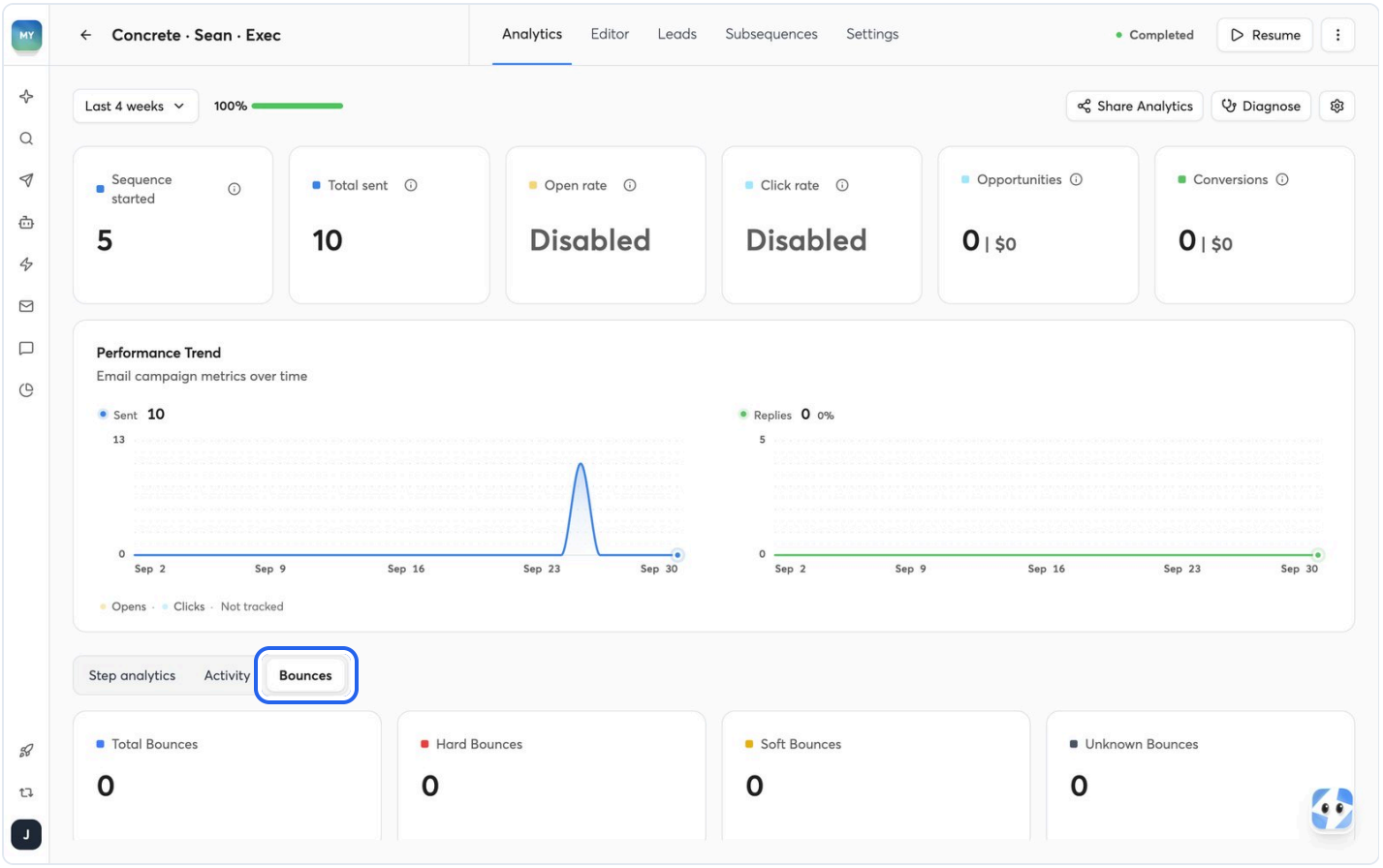


2 Check bounces

Press Escape, then open a campaign.

Under the chart, open the Bounces tab.

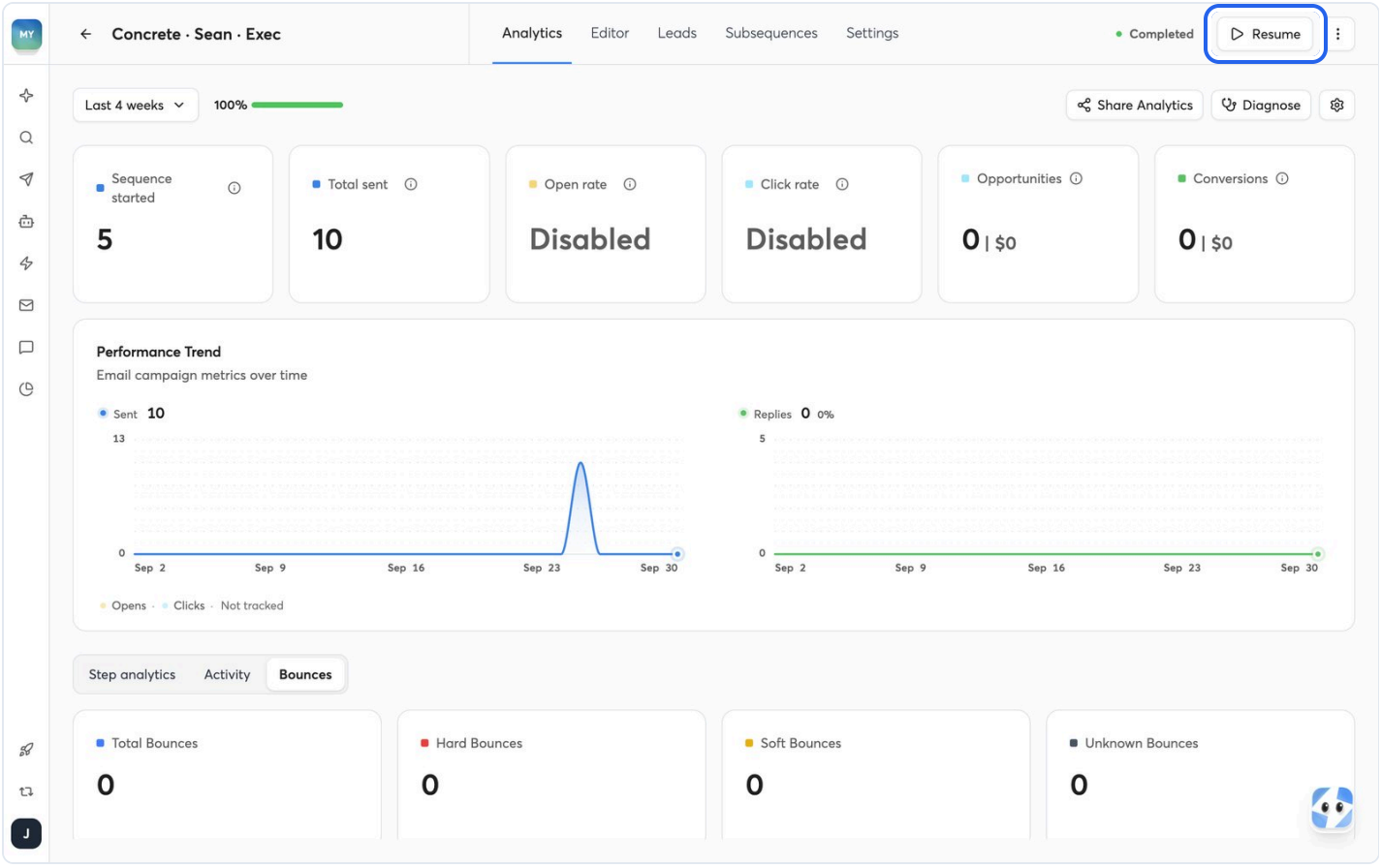
Check bounces every day. They must stay under two percent of the emails sent, which is two bounces in every hundred.



> ⚠ **Watch out.** Over 2 percent, pause the campaign, set each mailbox's daily limit back to last week's number, and check where the list came from before you resume.

3 Pause and resume

On a campaign that is sending, the top right button says Pause. Pause before you edit the emails. This one has finished, so the same button says Resume.



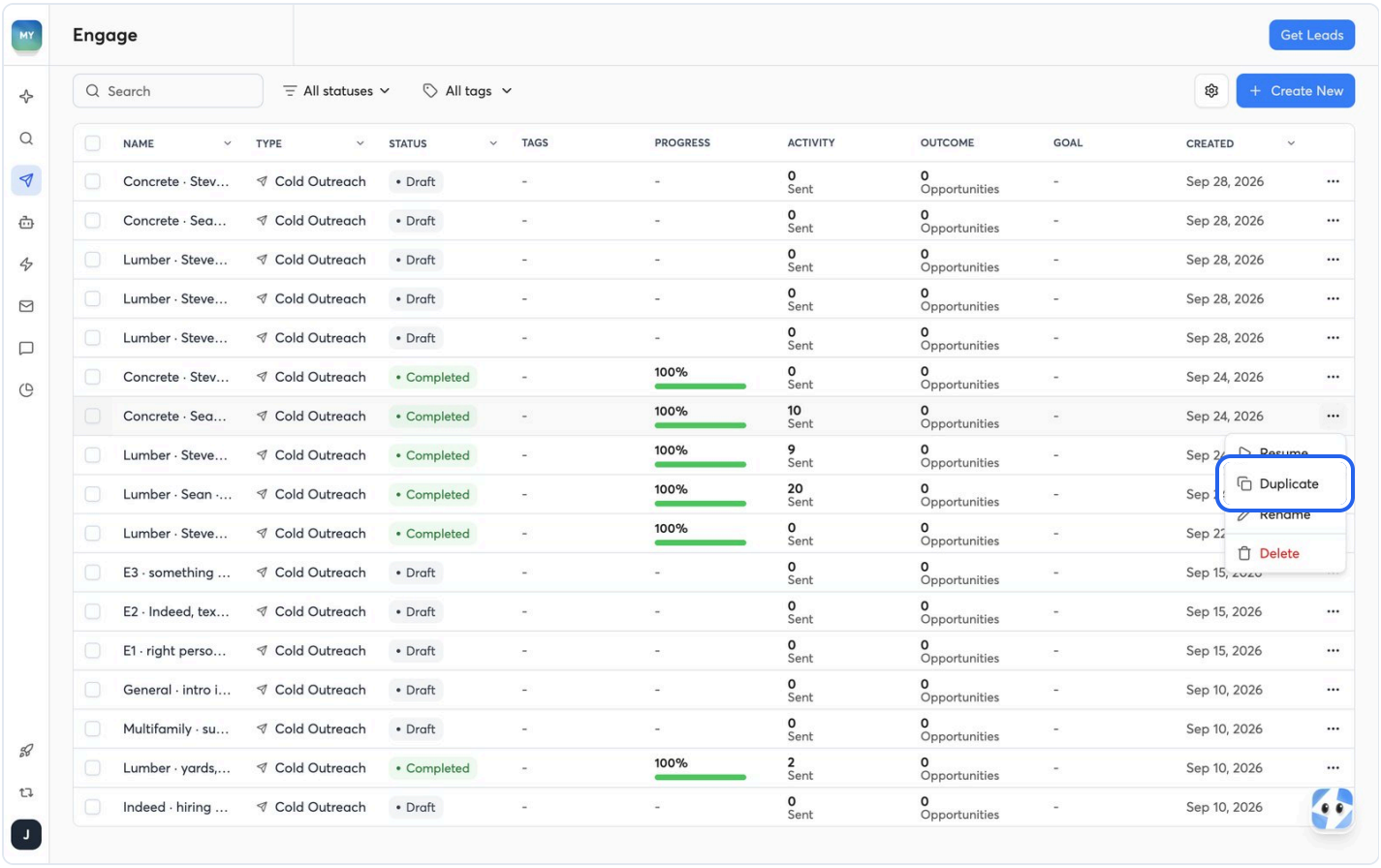
> ⚠ **Watch out.** Edit the emails only while the campaign is paused. The Editor saves as you type.

4 Duplicate a finished campaign

Back in Engage, find a campaign marked Completed.

A Completed campaign has emailed everyone on its list. To reach new people with the same emails, open the three dots on its line and pick Duplicate. Give the copy a new list, then launch the copy.

Press Escape to shut the menu.



> ⚠ **Watch out.** Resume and Delete sit in the same menu. Resume on a Completed campaign emails no one new, and Delete removes the campaign and its history. Pick Duplicate.

3 watch-outs to keep in mind Before you click

- ⚠ Over 2 percent, pause the campaign, set each mailbox's daily limit back to last week's number, and check where the list came from before you resume.
- ⚠ Edit the emails only while the campaign is paused. The Editor saves as you type.

⚠ Resume and Delete sit in the same menu. Resume on a Completed campaign emails no one new, and Delete removes the campaign and its history. Pick Duplicate.

Handle replies in the Unibox

Updated Sep 30, 2026

Every reply to every mailbox lands in Instantly's Unibox, and a copy goes to the outreach core sheet. This guide shows how to find a reply, give it a status, and block a company that says no. An interested reply gets a phone call within 15 minutes.

5 steps · 5 min · 1 watch-out

Watch it first: handle replies in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/process-handle-replies.mp4

5 steps, each with the screen you will see

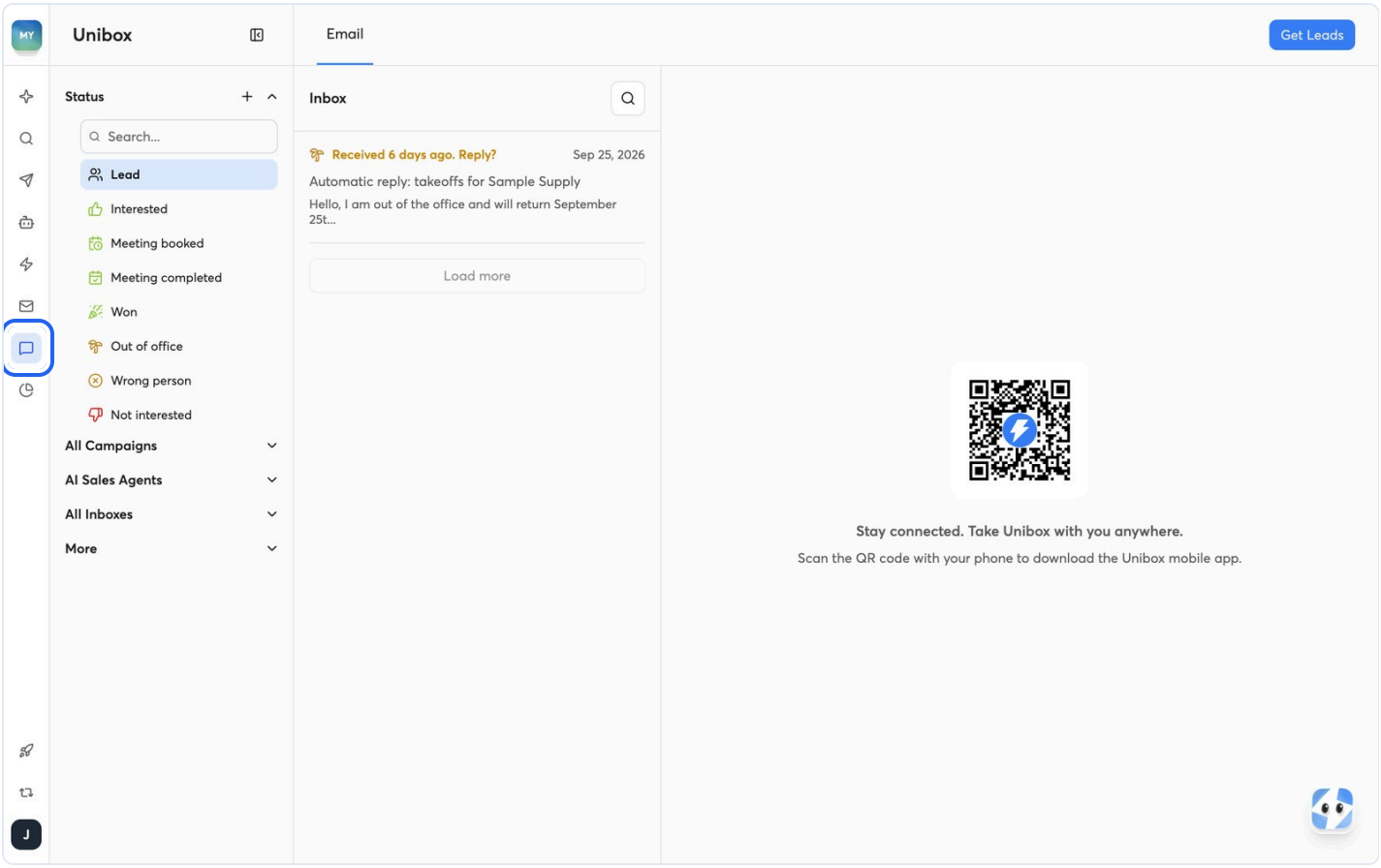
1. Open the Unibox
2. Reply statuses
3. Open a reply
4. Set the status
5. Block a clear no

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Open the Unibox

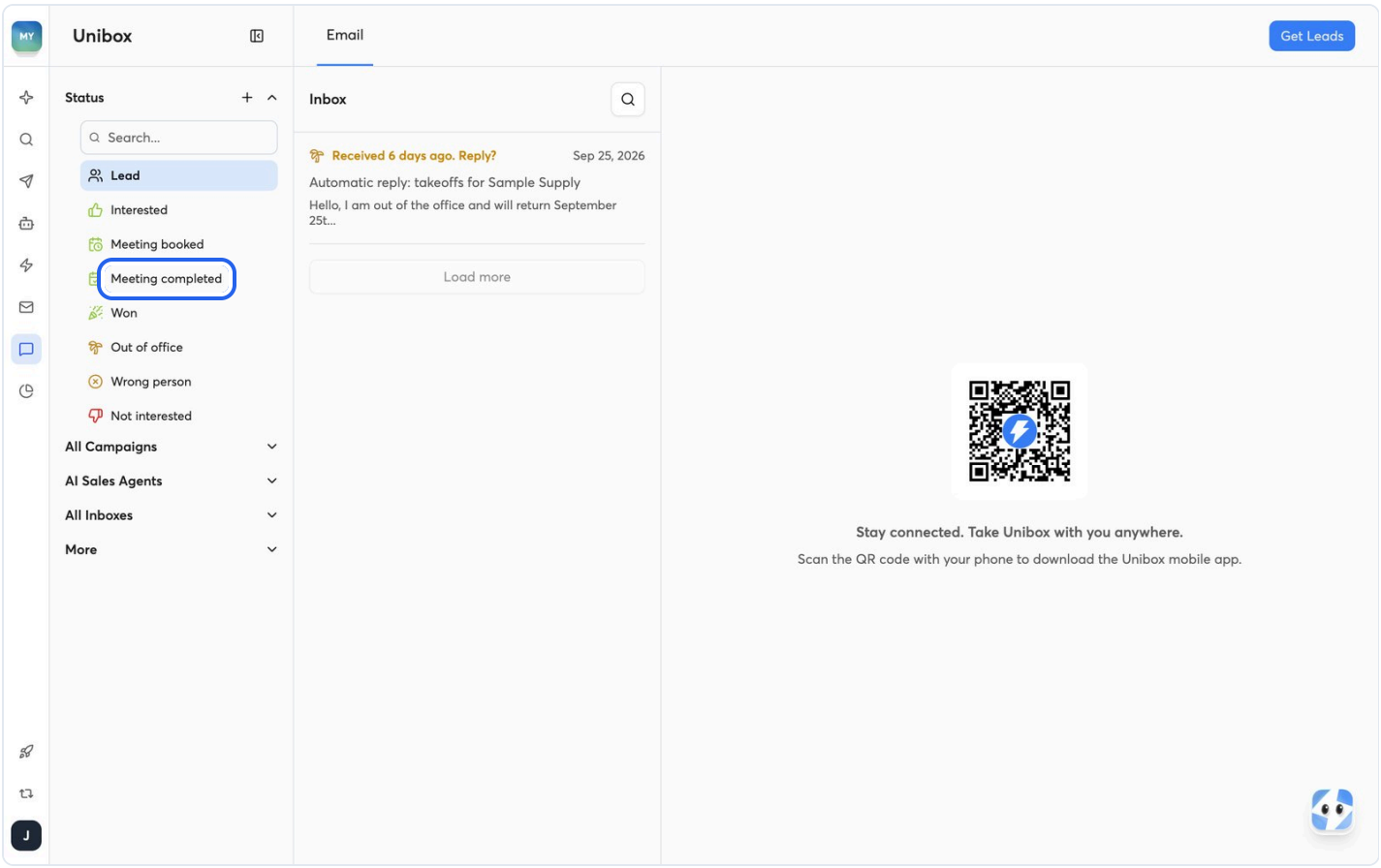
Open Instantly.

Replies to every mailbox land in the Unibox, the speech bubble in the left bar.



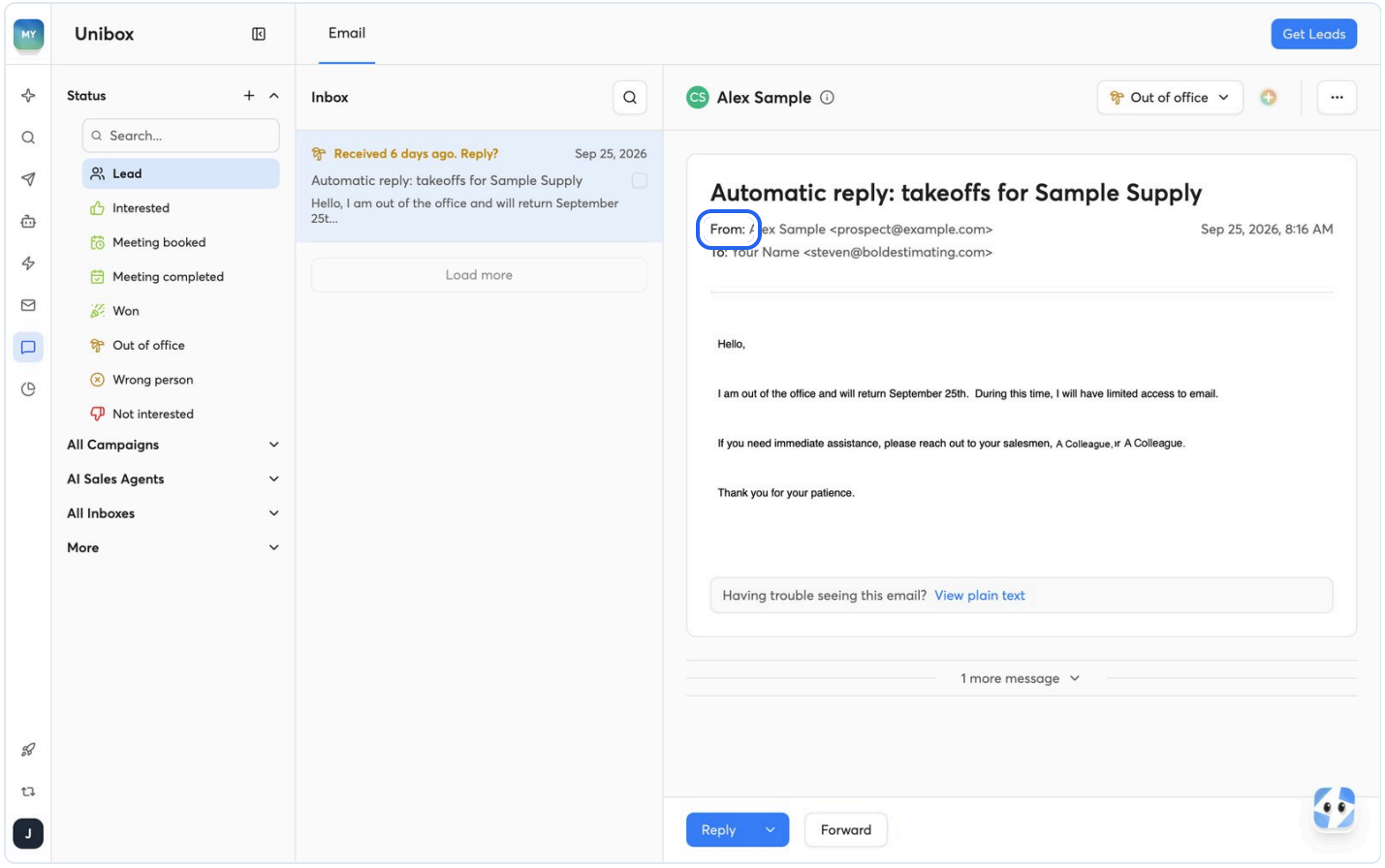
2 Reply statuses

On the left are the reply statuses: Interested, Meeting booked, Meeting completed, Won, Out of office, Wrong person and Not interested. Click one to see only those replies.



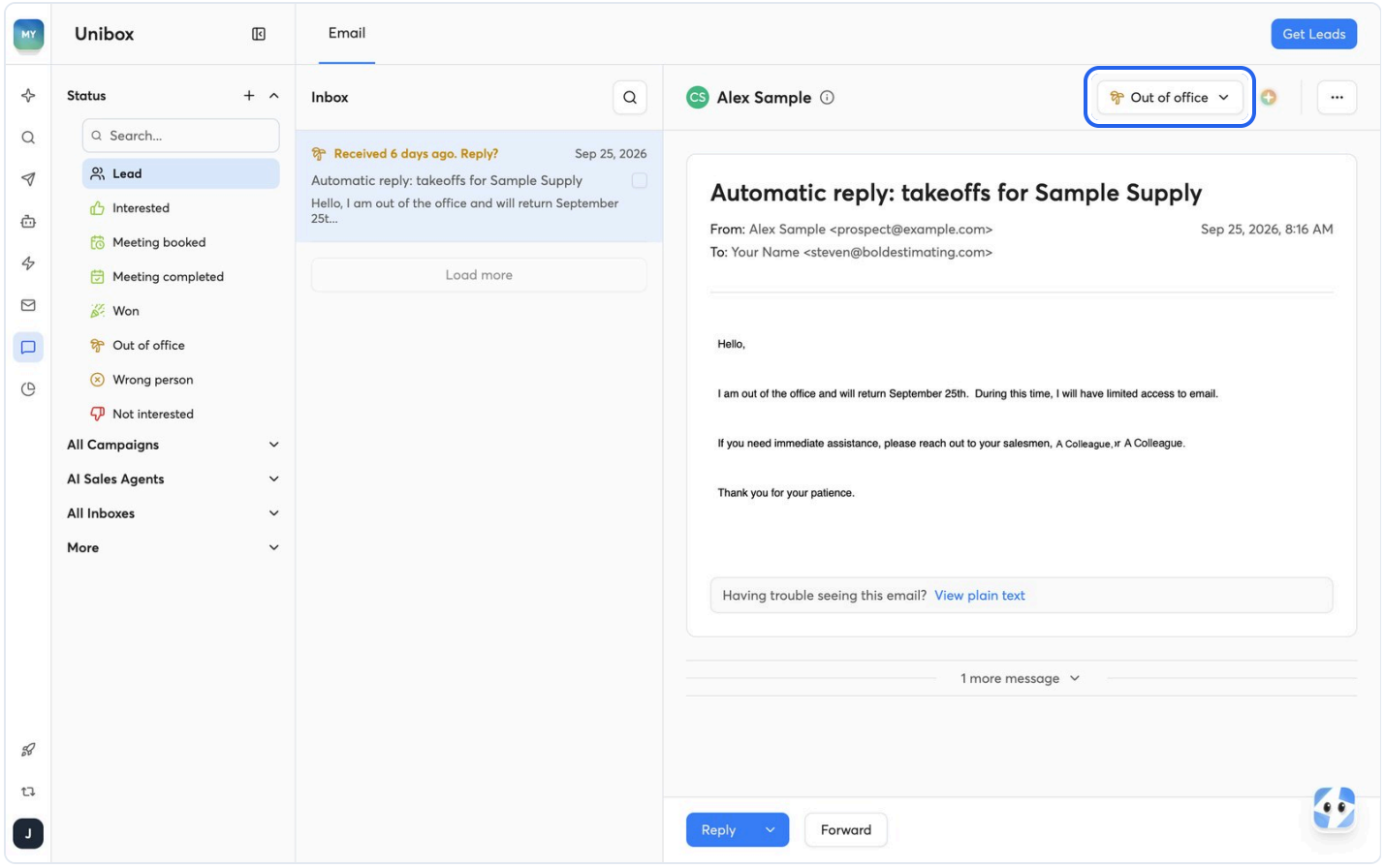
3 Open a reply

Click a reply to open it. This one is an automatic out of office reply. It needs nothing from you.



4 Set the status

The status sits at the top right. Instantly guesses it; correct it on every real reply, so the numbers in the sheets stay right.



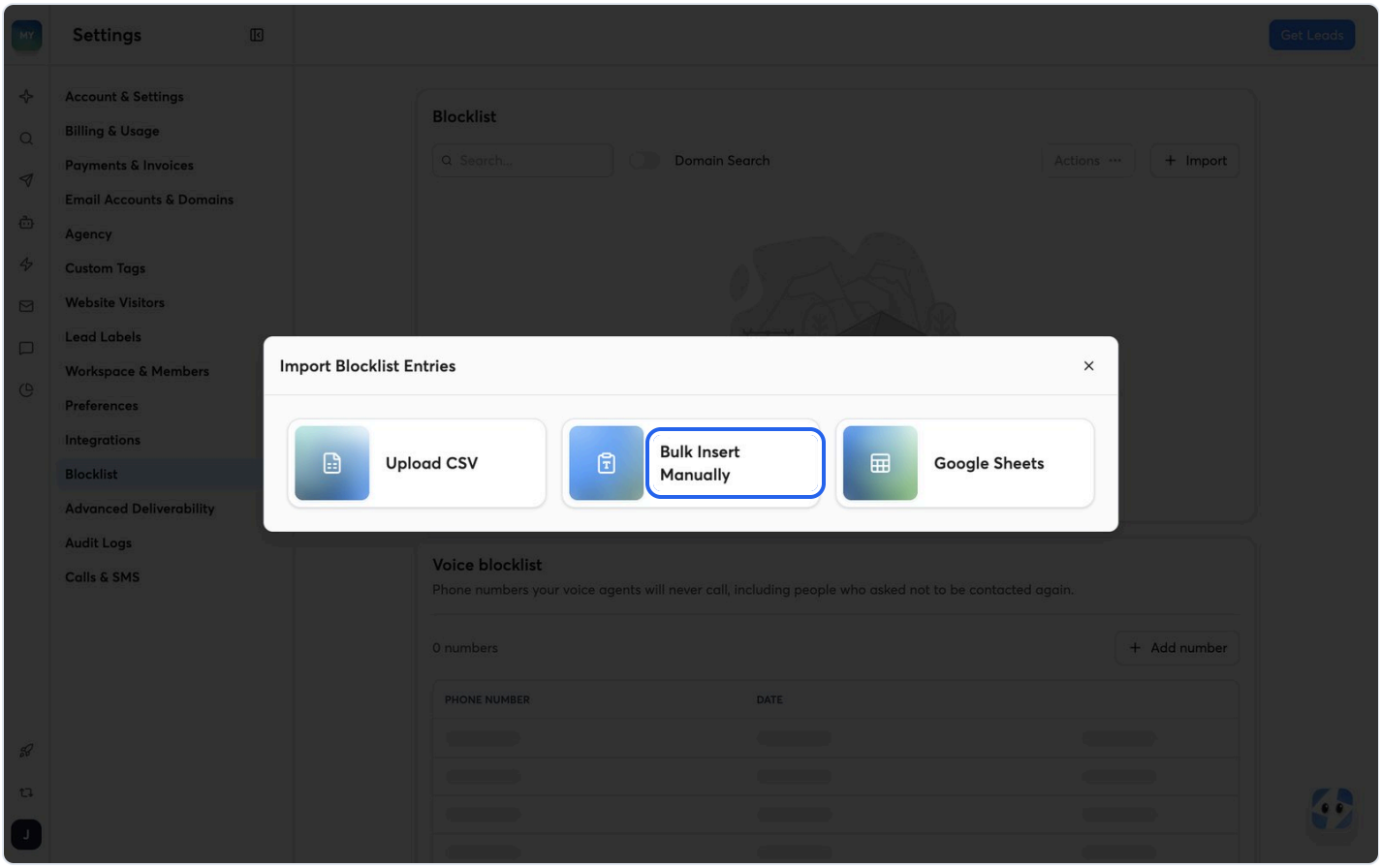
> ⚠ **Watch out.** Call an interested reply within 15 minutes. The phone number is on its line in the Replies tab of the outreach core sheet. Answer every reply yourself, in your own words, and never send a bulk reply from the Unibox.

5 Block a clear no

A clear no gets a short, polite thank you, and the company goes on the blocklist.
Open Settings from your profile at the bottom left, then Blocklist.

Click Import, then Bulk Insert Manually, and type the company's domain.

Press Escape to leave without adding anything.



Tip. Blocking the domain, like example.com, stops every address at that company. Also add the company to the Do not contact tab in the outreach core sheet (guide 12), so it never goes back on a list.

1 watch-out to keep in mind Before you click

Call an interested reply within 15 minutes. The phone number is on its line in the Replies tab of the outreach core sheet. Answer every reply yourself, in your own words, and never send a bulk reply from the Unibox.

The list drop sheet

Updated Sep 30, 2026

BOLD LIST DROP is the Google Sheet where the team adds the people Bold should email, any day, one line per person. Each weekday morning the ready lines go into their campaign. This guide shows the tabs and the few rules that keep a line from being held.

4 steps · 5 min · 2 watch-outs

Watch it first: the list drop sheet in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/docs-list-drop-sheet.mp4

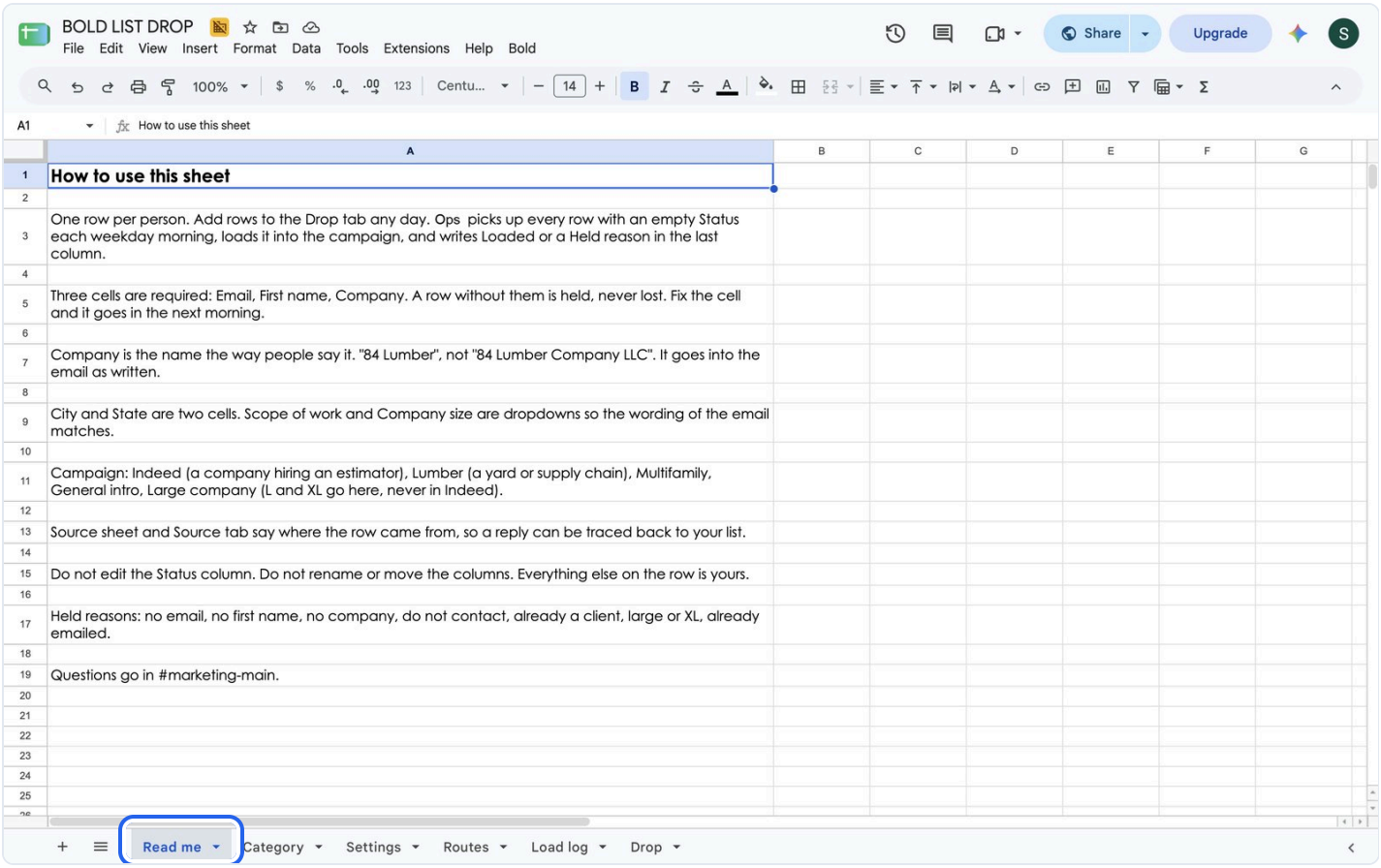
4 steps, each with the screen you will see

1. The Read me tab
2. The Drop tab
3. The Bold menu
4. The other tabs

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

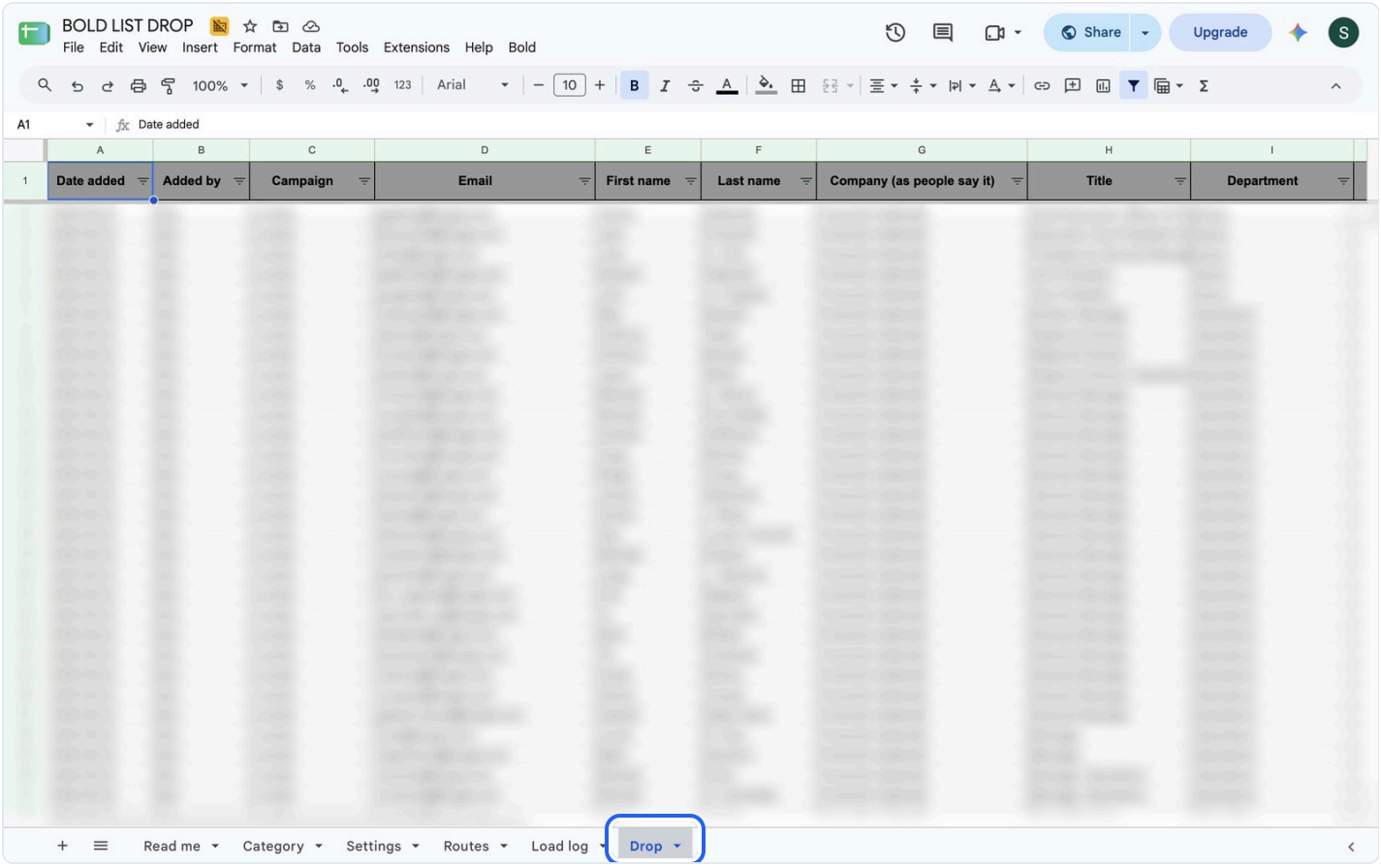
1 The Read me tab

The Read me tab holds the sheet's rules on one page.



2 The Drop tab

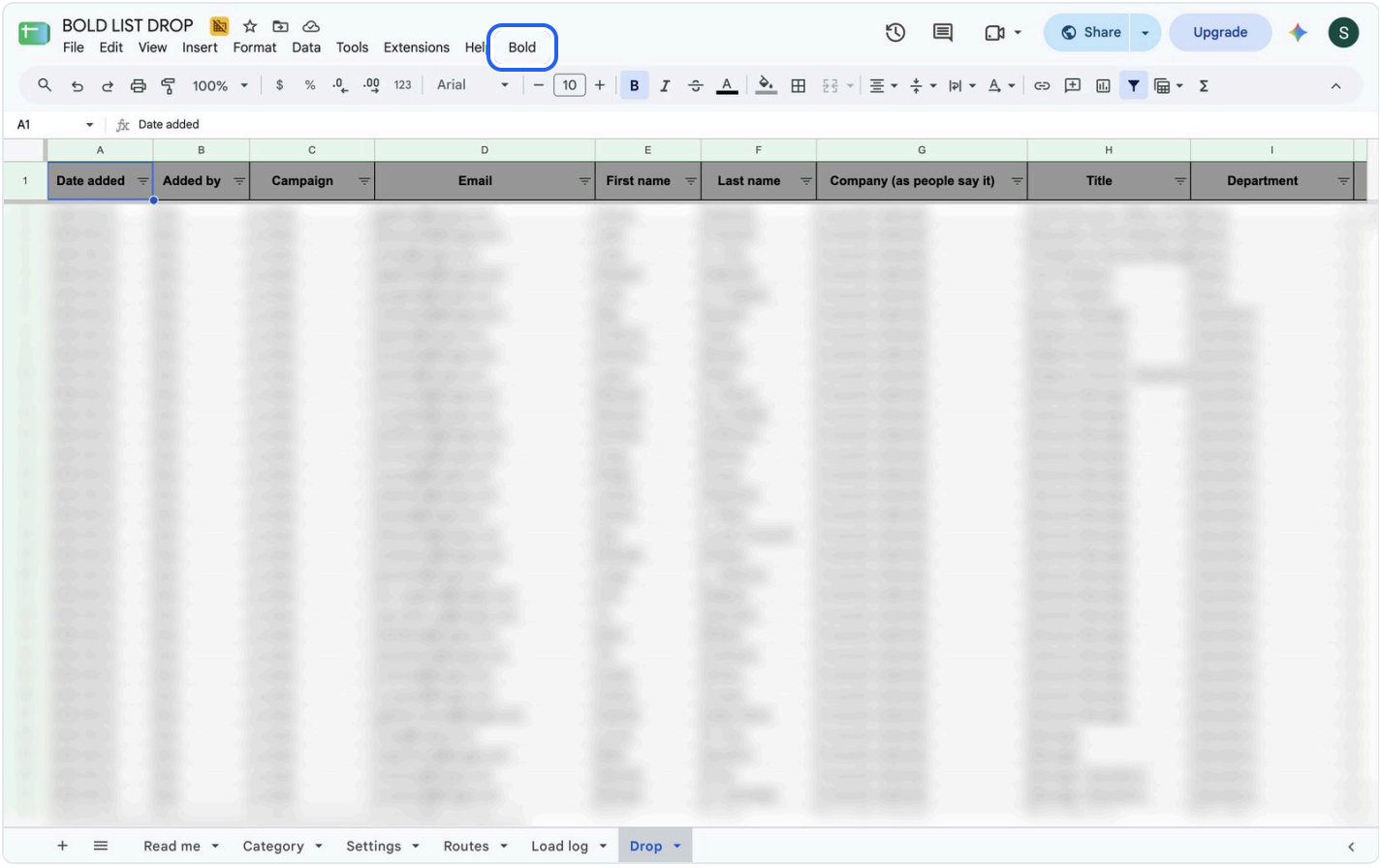
Open the Drop tab and add one line per person. Email, First name and Company are required. Write the company the way people say it, like 84 Lumber.



> ⚠ **Watch out.** Leave the Status column empty, and never move or rename a column. Each weekday morning the ready lines load into their campaign and Status turns to Loaded, or to a Held reason like no email or already emailed. A held line is never deleted: fix the cell and it loads the next morning.

3 The Bold menu

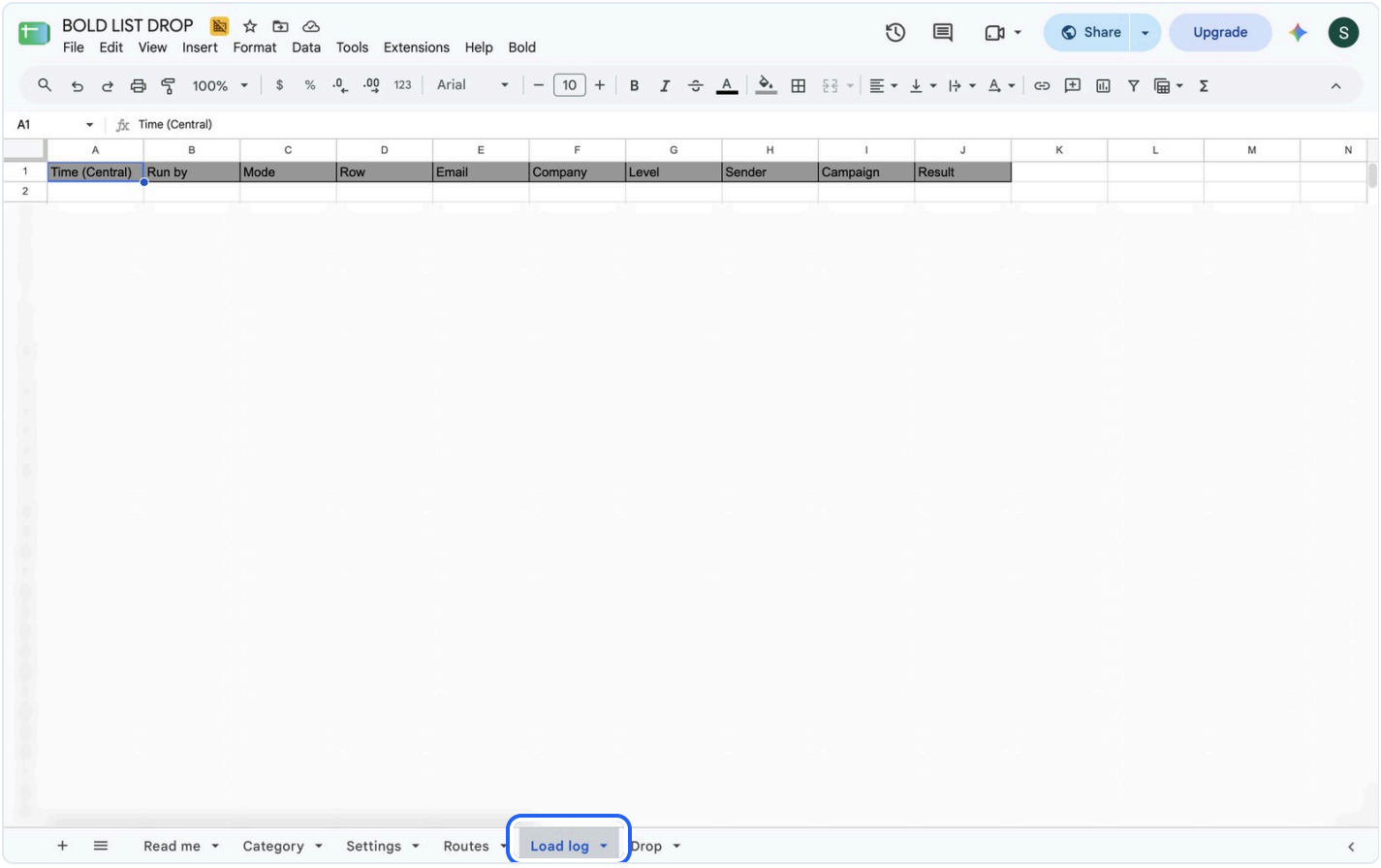
The Bold menu at the top holds the sheet's own buttons. Check rows marks each new line ready or held, and sends nothing.



> ⚠ **Watch out.** Load ready rows and the daily load switch put real people into a campaign. Only the person who runs the campaigns uses them.

4 The other tabs

Load log keeps a line for every load, and nobody edits it. Category, Settings and Routes belong to whoever runs the campaigns. Leave them as they are.



2 watch-outs to keep in mind

Before you click

- ⚠ Leave the Status column empty, and never move or rename a column. Each weekday morning the ready lines load into their campaign and Status turns to Loaded, or to a Held reason like no email or already emailed. A held line is never deleted: fix the cell and it loads the next morning.
- ⚠ Load ready rows and the daily load switch put real people into a campaign. Only the person who runs the campaigns uses them.

The outreach core sheet

Updated Sep 30, 2026

BOLD OUTREACH CORE fills itself in from Instantly within seconds: every email sent, every reply, and a scoreboard per campaign. The team works from its Replies tab and adds to Do not contact; the tracker fills in the rest.

6 steps · 4 min · 2 watch-outs

Watch it first: the outreach core sheet in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/docs-outreach-core-sheet.mp4

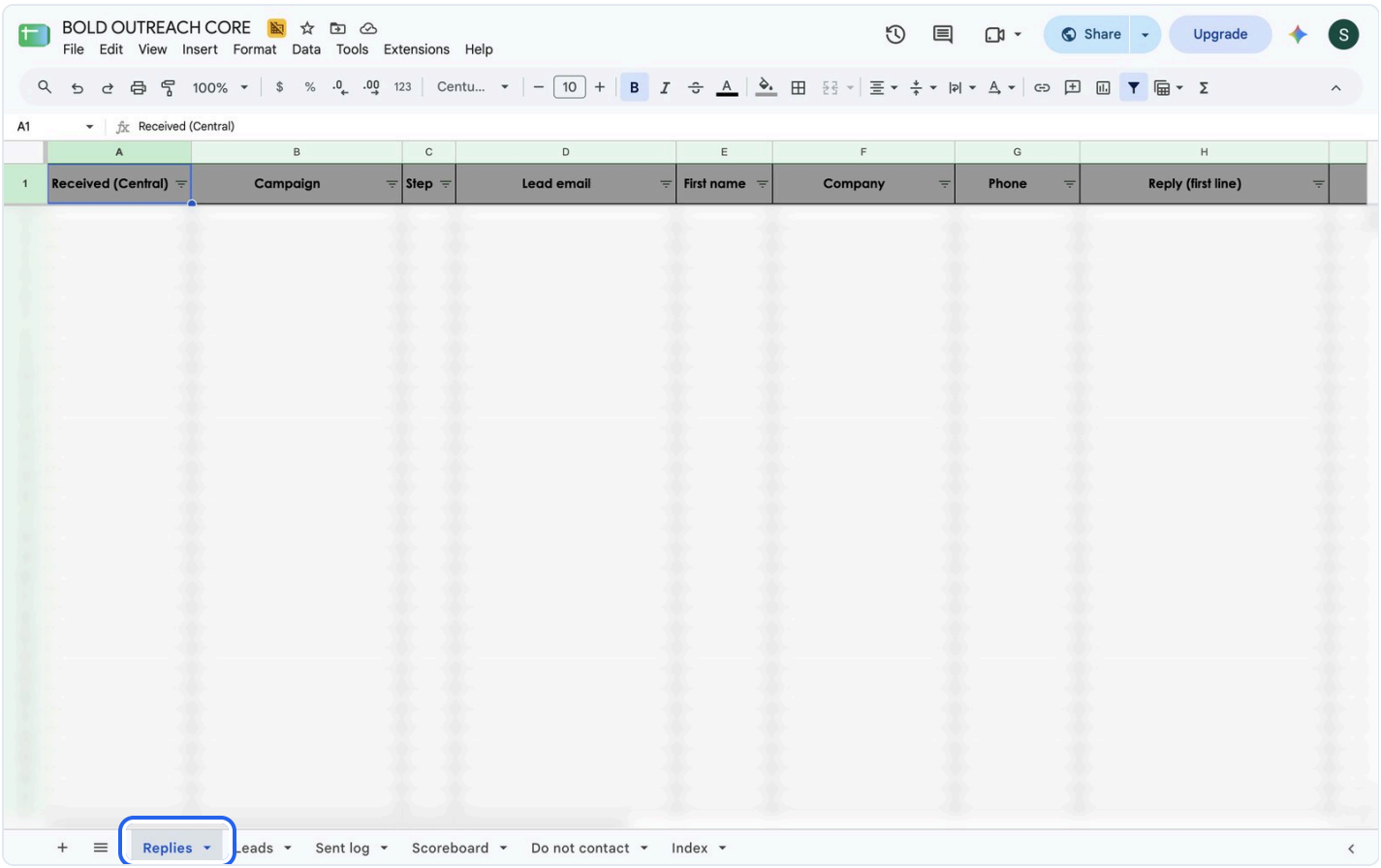
6 steps, each with the screen you will see

1. Replies
2. Leads
3. Sent log
4. Scoreboard
5. Do not contact
6. Index

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

1 Replies

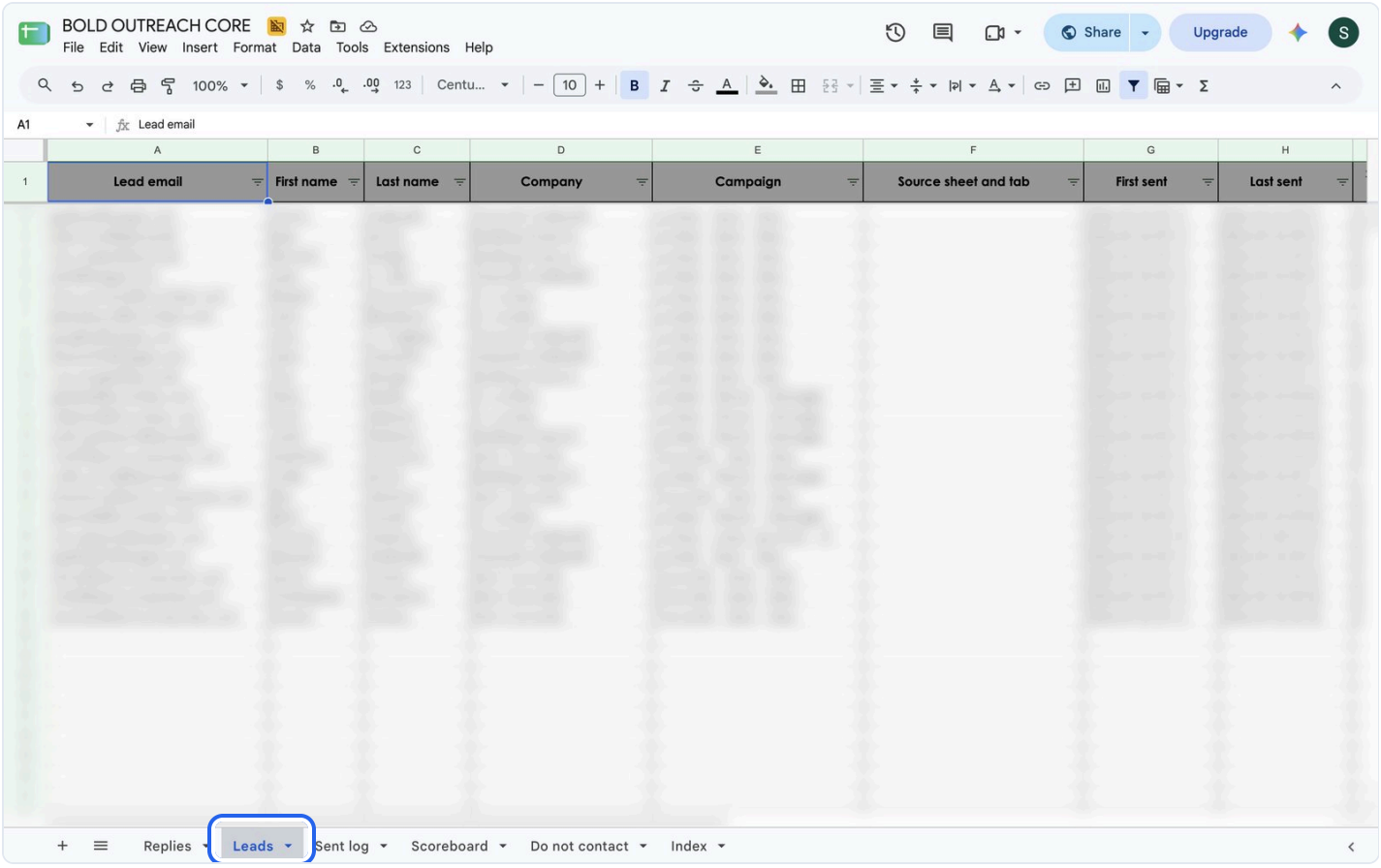
Replies gets one line per reply, newest on top, with the person's phone number and what they wrote. You fill in the last five columns: owner, next action, called, outcome and notes.



> ⚠ **Watch out.** Type only in those last five columns. The tracker writes the others, and a changed cell can break the line it belongs to.

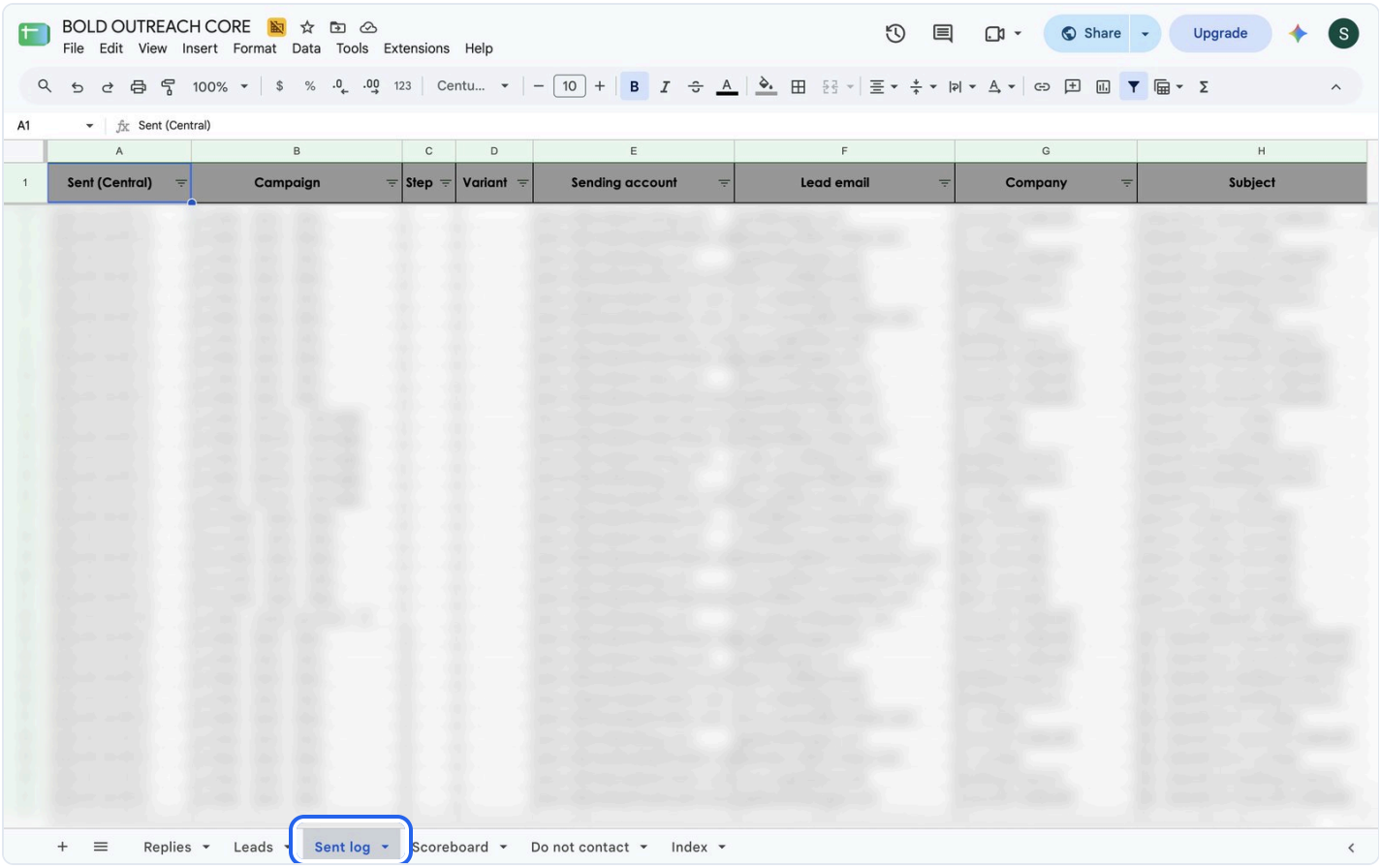
2 Leads

Leads has one line per person emailed, with the campaign and when the first and last emails went out.



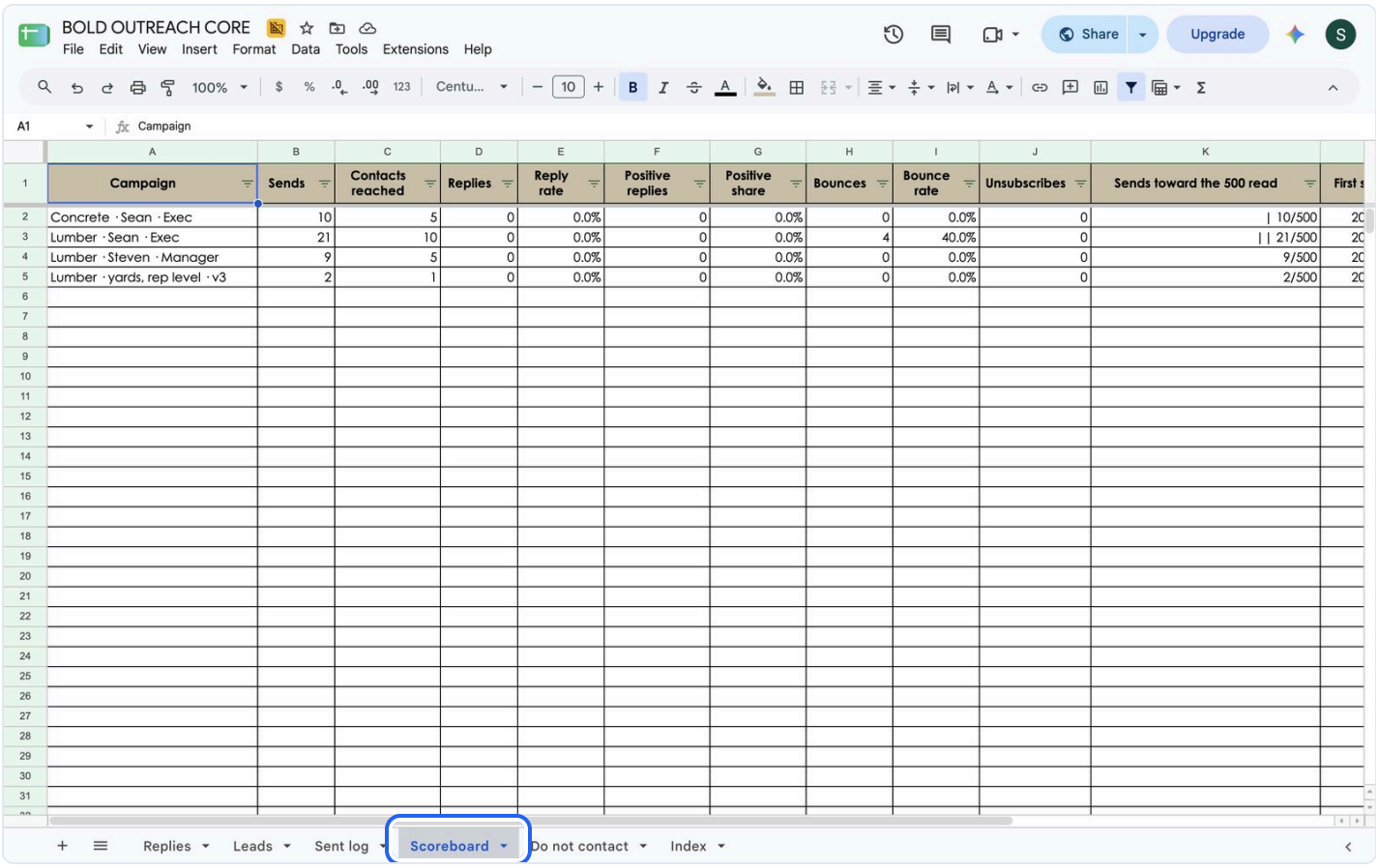
3 Sent log

Sent log lists every single email sent, one line each.



4 Scoreboard

Scoreboard adds it up per campaign: emails sent, replies, bounces and the bounce rate. Here one campaign shows a bounce rate of 40 percent, far over the limit of two.

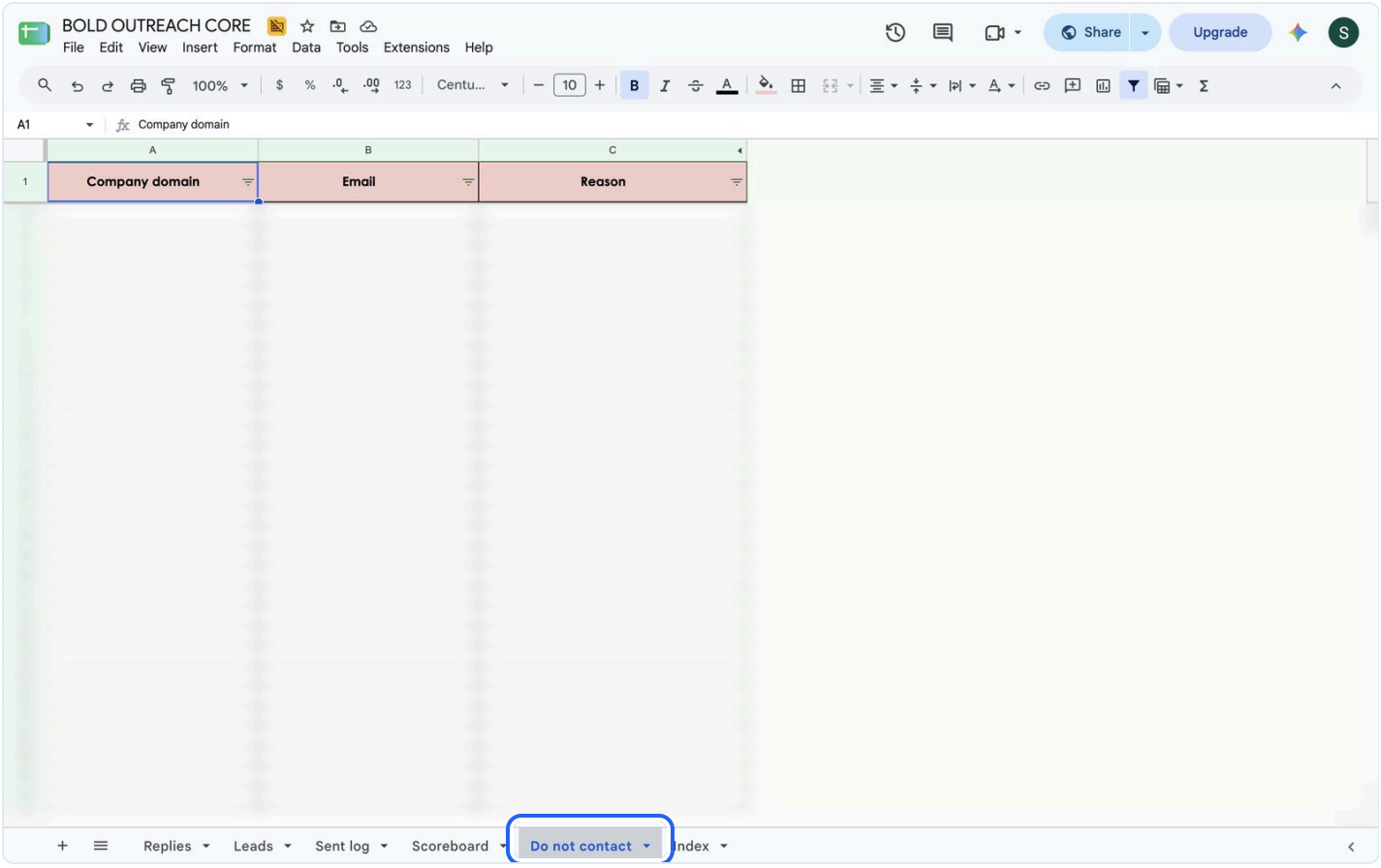


Campaign	Sends	Contacts reached	Replies	Reply rate	Positive replies	Positive share	Bounces	Bounce rate	Unsubscribes	Sends toward the 500 read
Concrete · Sean · Exec	10	5	0	0.0%	0	0.0%	0	0.0%	0	10/500
Lumber · Sean · Exec	21	10	0	0.0%	0	0.0%	4	40.0%	0	21/500
Lumber · Steven · Manager	9	5	0	0.0%	0	0.0%	0	0.0%	0	9/500
Lumber · yards, rep level · v3	2	1	0	0.0%	0	0.0%	0	0.0%	0	2/500

> ⚠ **Watch out.** A bounce rate over 2 percent means the list had bad addresses. Pause that campaign in Instantly and check where its list came from before it sends again.

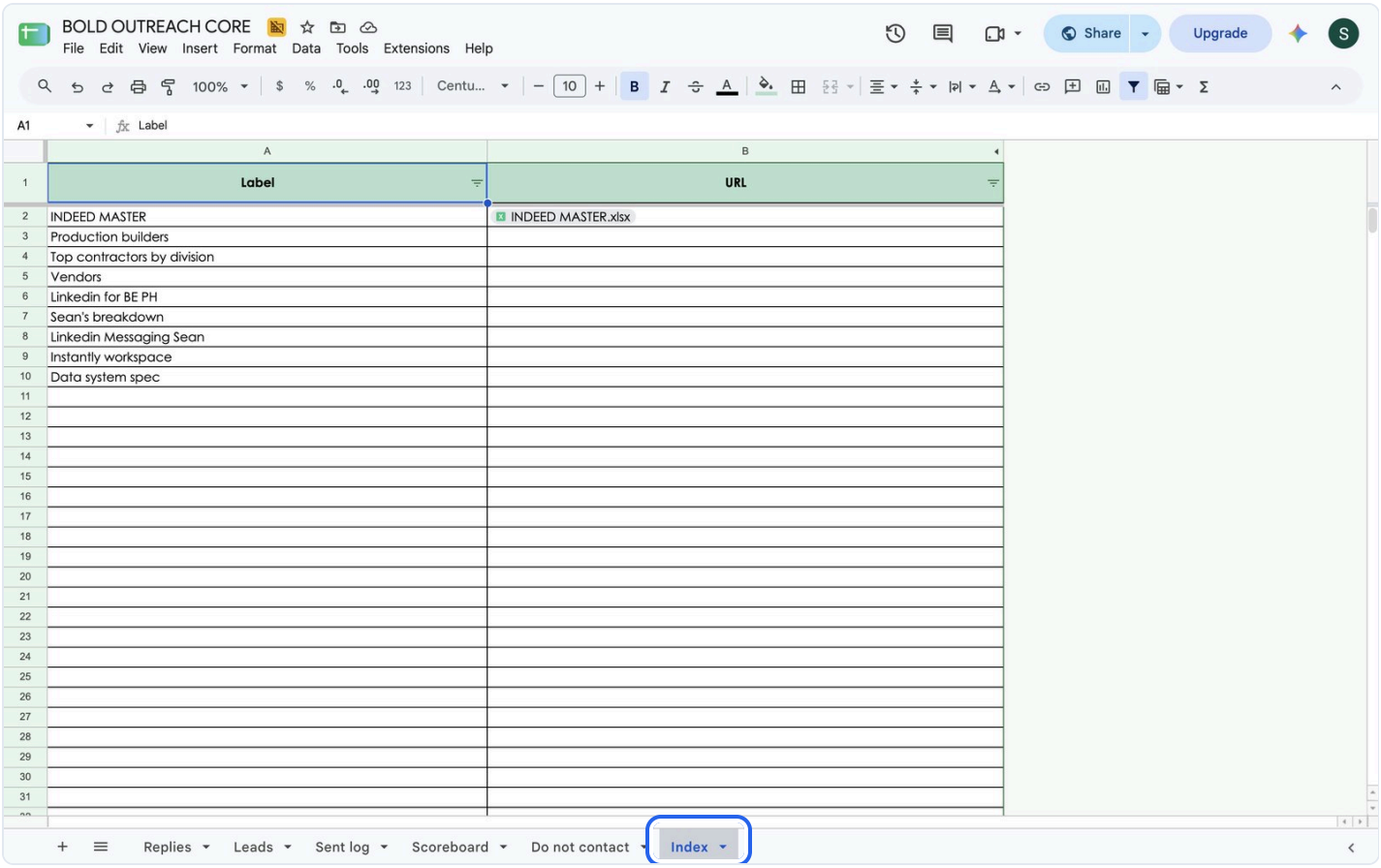
5 Do not contact

Do not contact is for current clients, past clients and anyone who said no. Add a company here when it asks not to be emailed, and every future list skips it.



6 Index

Index links to the other sheets the team uses.



2 watch-outs to keep in mind

Before you click

- ⚠ Type only in those last five columns. The tracker writes the others, and a changed cell can break the line it belongs to.
- ⚠ A bounce rate over 2 percent means the list had bad addresses. Pause that campaign in Instantly and check where its list came from before it sends again.

The email templates doc

Updated Sep 30, 2026

Bold Email Templates is the Google Doc that holds every cold email before it goes into Instantly. Writers draft and change emails here, never in Instantly. This guide shows how the doc is laid out and the rules that keep an email out of spam.

4 steps · 4 min · 1 watch-out

Watch it first: the email templates doc in one short video

The narrated video of this guide is in the library: https://campus.boldestimations.com/video/docs-email-templates.mp4

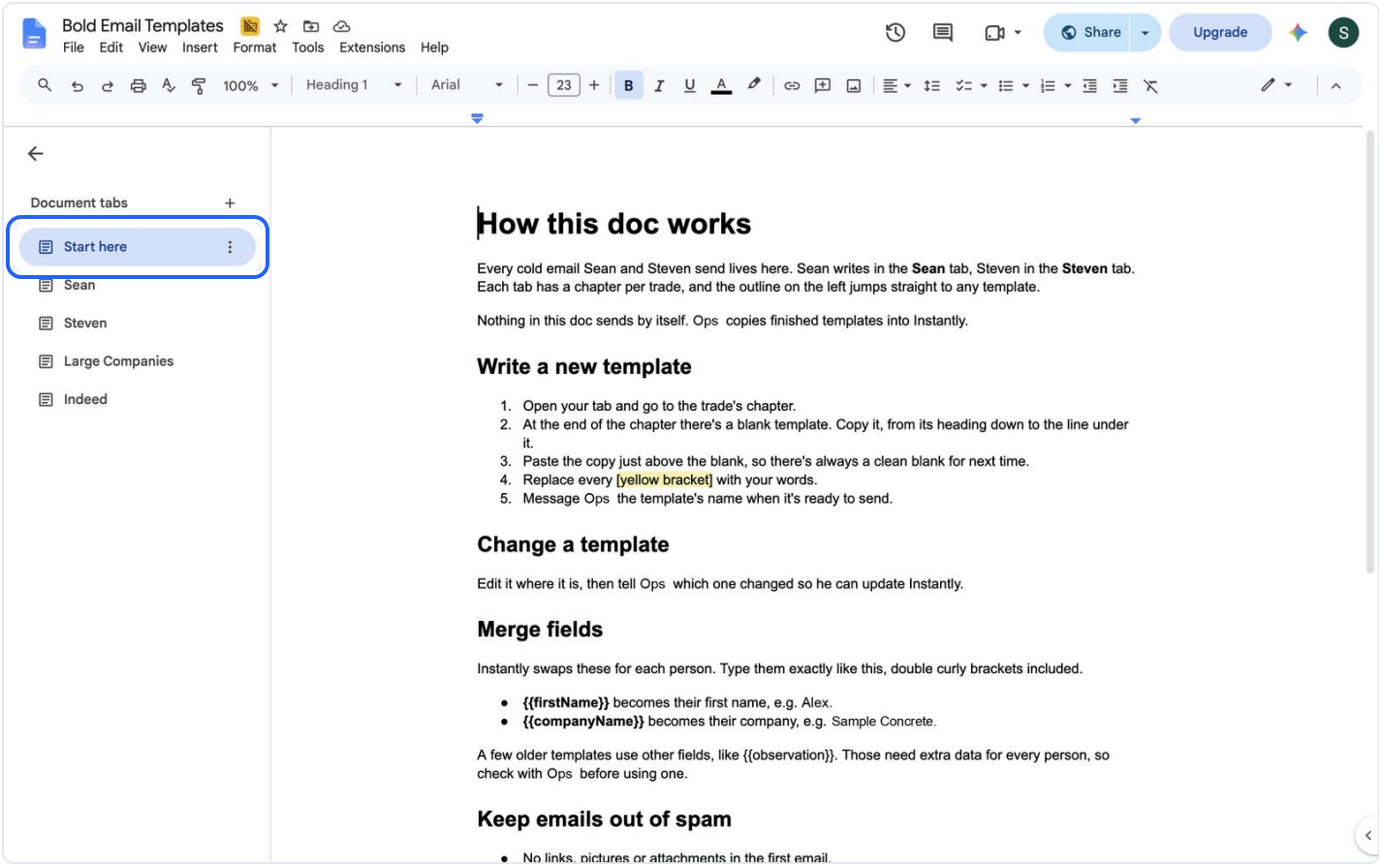
4 steps, each with the screen you will see

1. How the doc works
2. The tabs
3. A template
4. The spam rules

Screens recorded Sep 30, 2026 in Bold Estimation's Zapmail, Instantly and Google accounts. Names, email addresses and phone numbers of real people are replaced with placeholders or blurred, and typed examples are made up. If a screen looks a little different, the tool has updated: find the same label nearby.

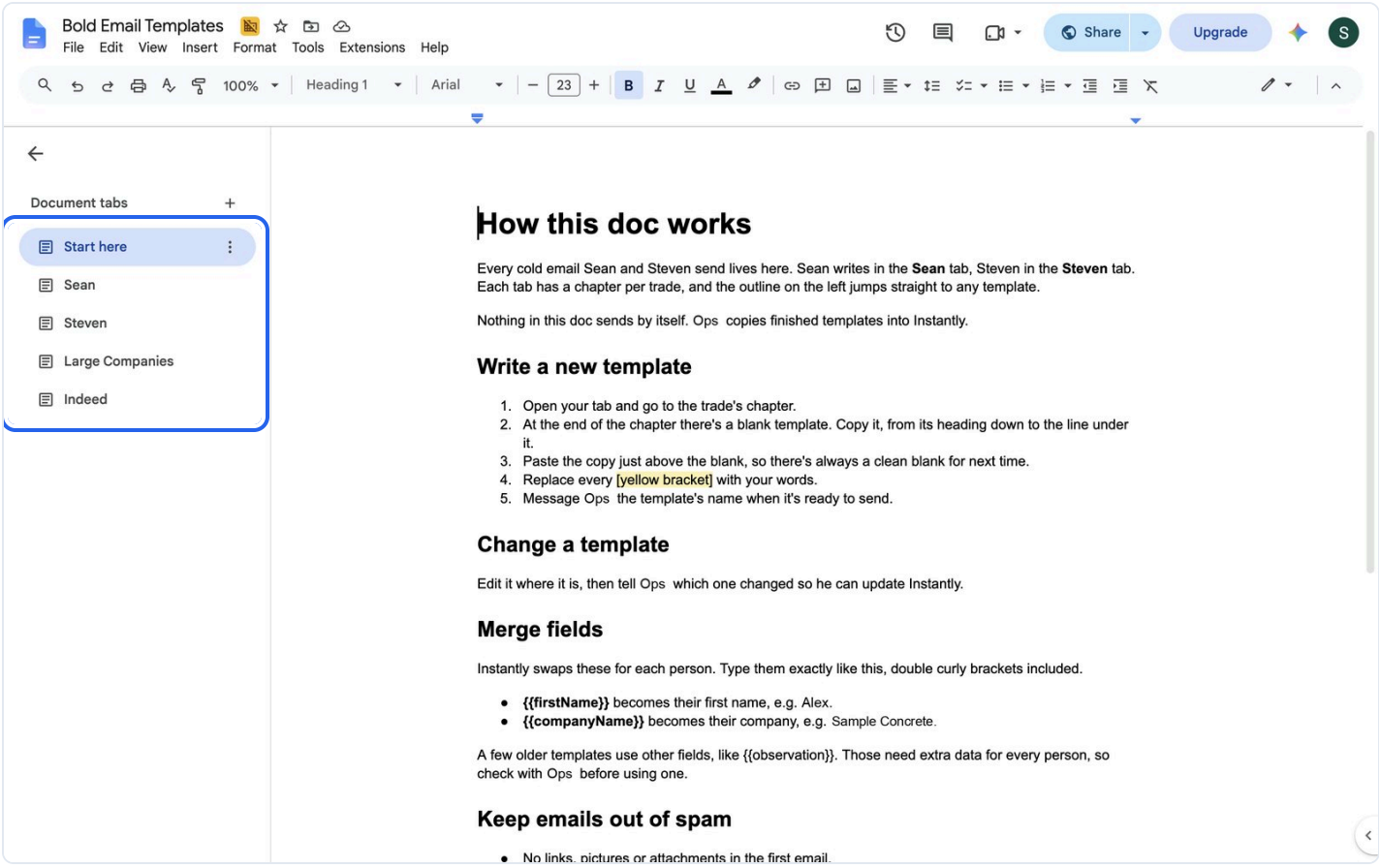
1 How the doc works

The Start here tab explains how the doc works. Nothing in it sends by itself: finished emails are copied into Instantly by whoever runs the campaigns.



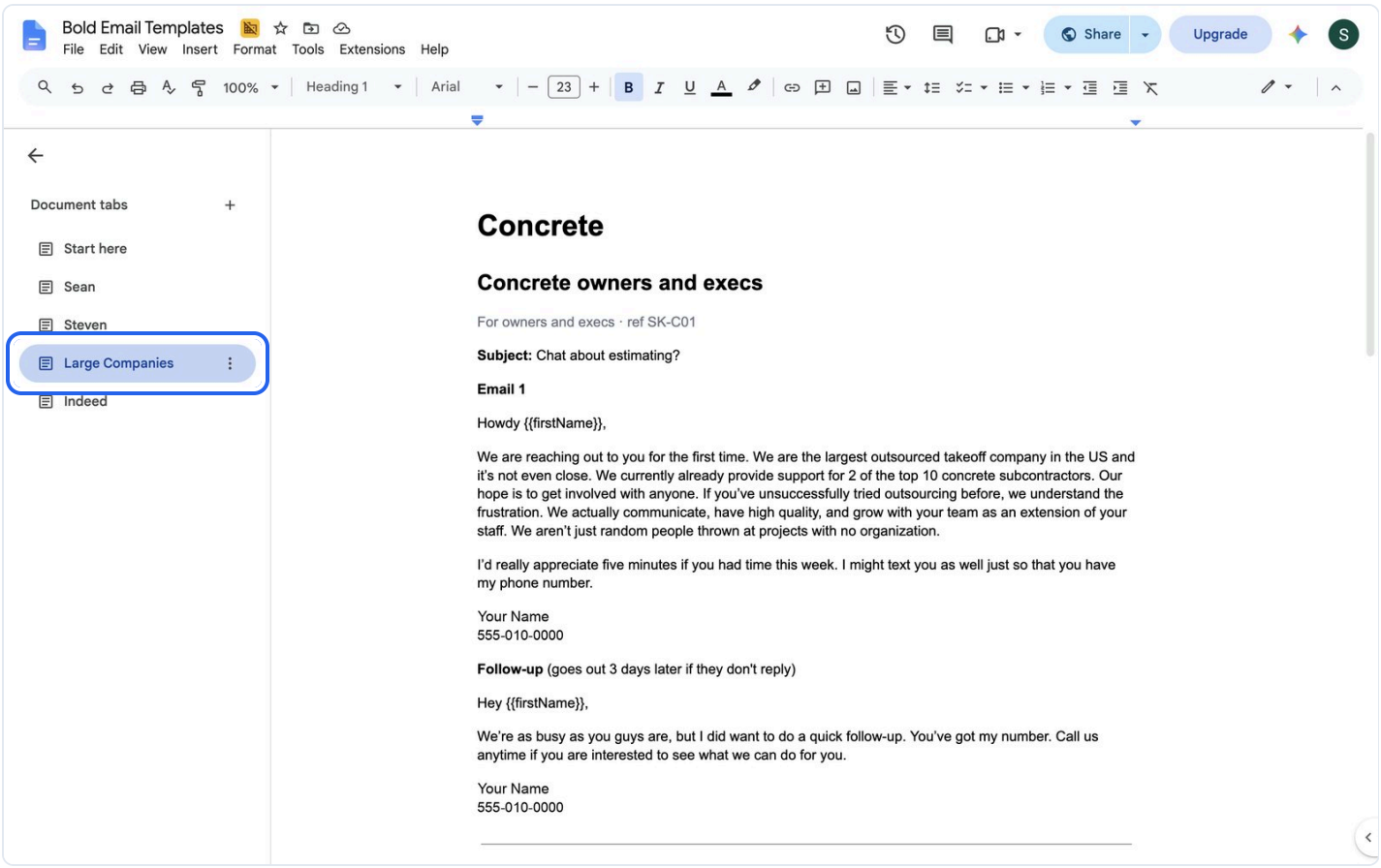
2 The tabs

Each writer has a tab, and Large Companies and Indeed hold the emails for those campaigns. Inside a tab there is a chapter per trade.



3 A template

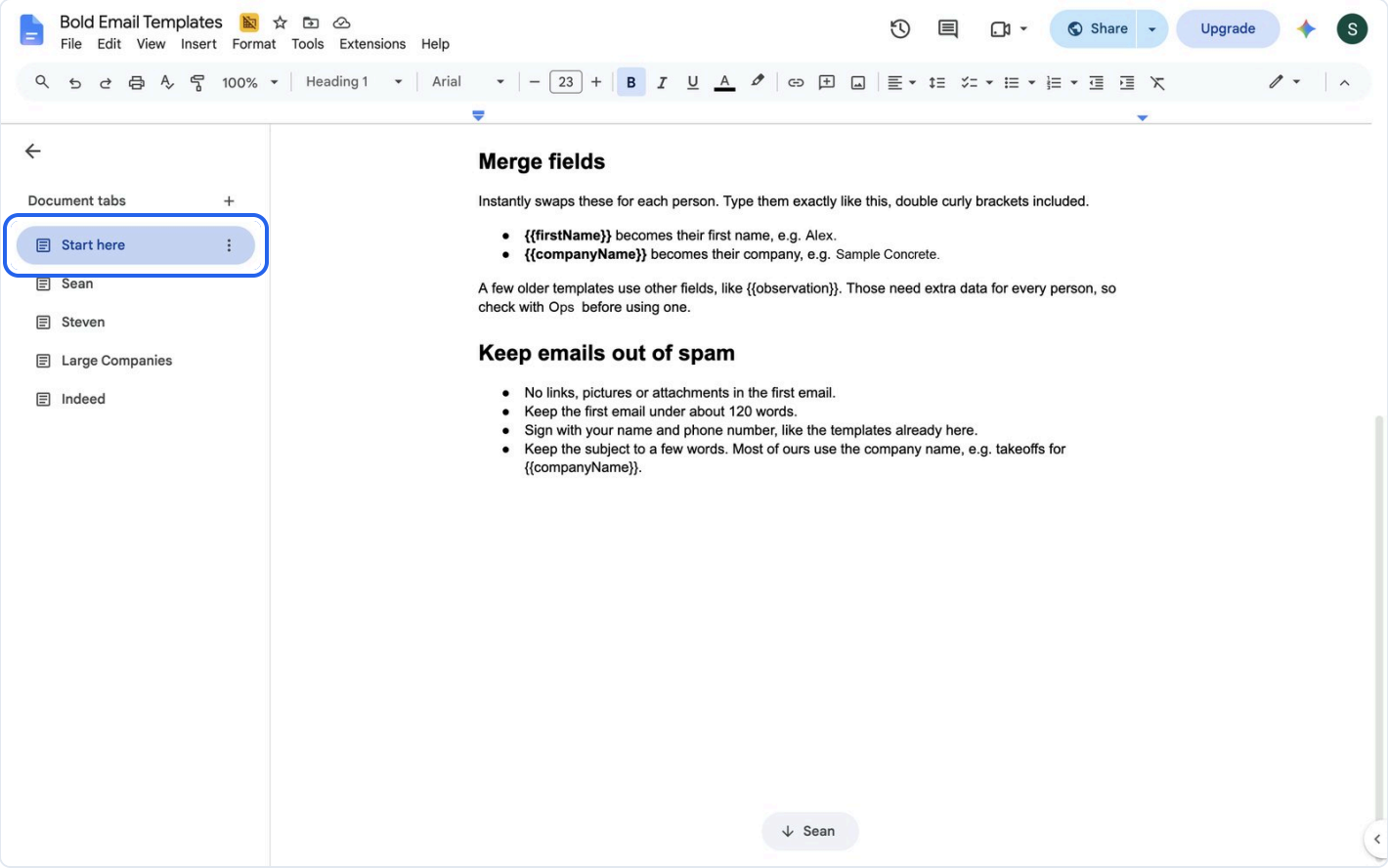
Open a tab to see its emails. Each one has a subject line, the first email and the follow up. Merge fields in double curly brackets, like first name, fill in for each person.



4 The spam rules

Go back to Start here.

At the bottom are the spam rules: no links, pictures or attachments in the first email, under about 120 words, a short subject, and your name and phone number at the end.



> ⚠ **Watch out.** To change an email, edit it here, then tell the person who runs the campaigns which one changed. They pause the campaign, copy the new wording into Instantly, and resume it.

1 watch-out to keep in mind Before you click

> ⚠ To change an email, edit it here, then tell the person who runs the campaigns which one changed. They pause the campaign, copy the new wording into Instantly, and resume it.