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

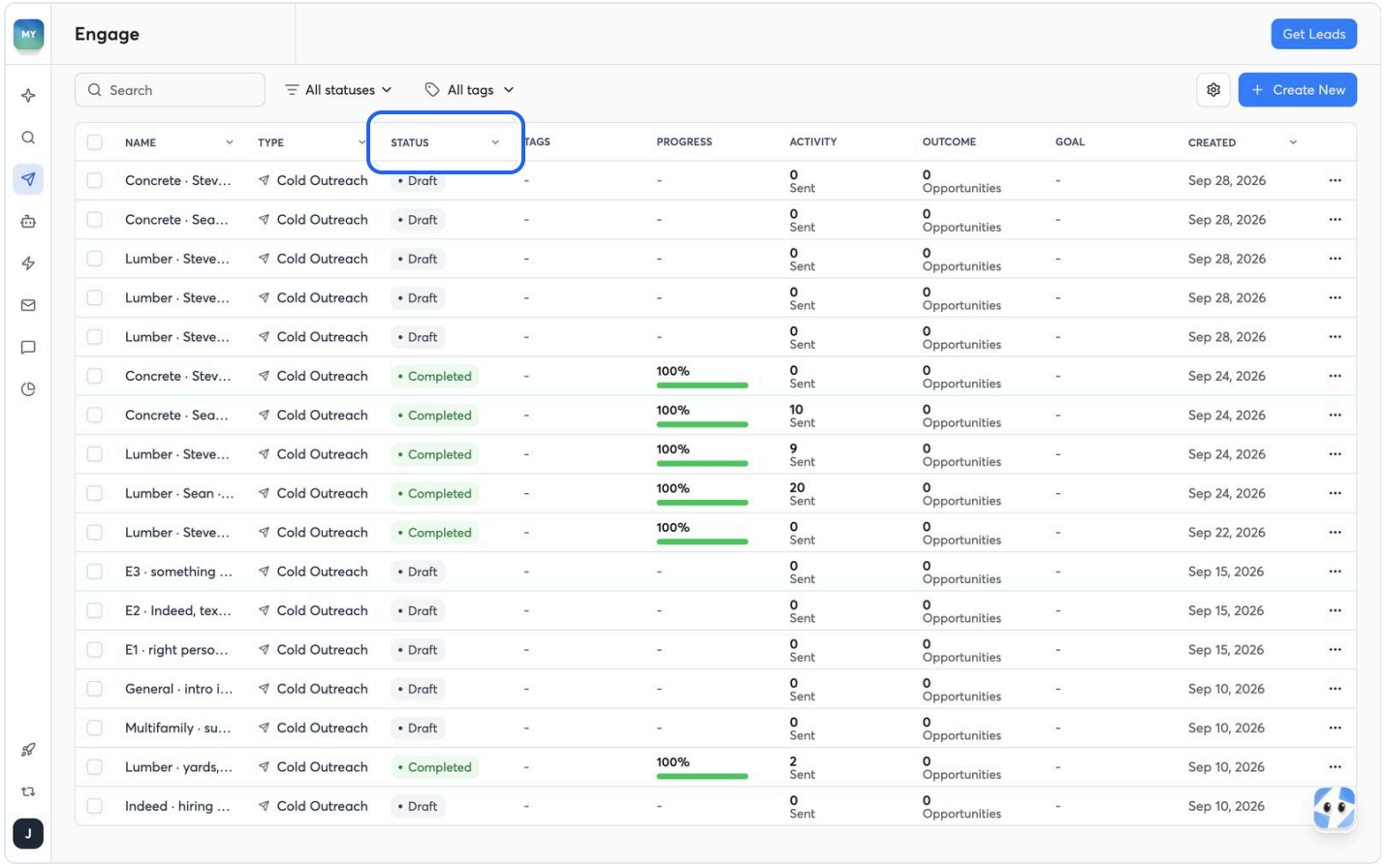
1. The campaign list
2. Analytics
3. Tracking stays off
4. Editor
5. Leads
6. Schedule
7. Sending rules
8. The brake

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.

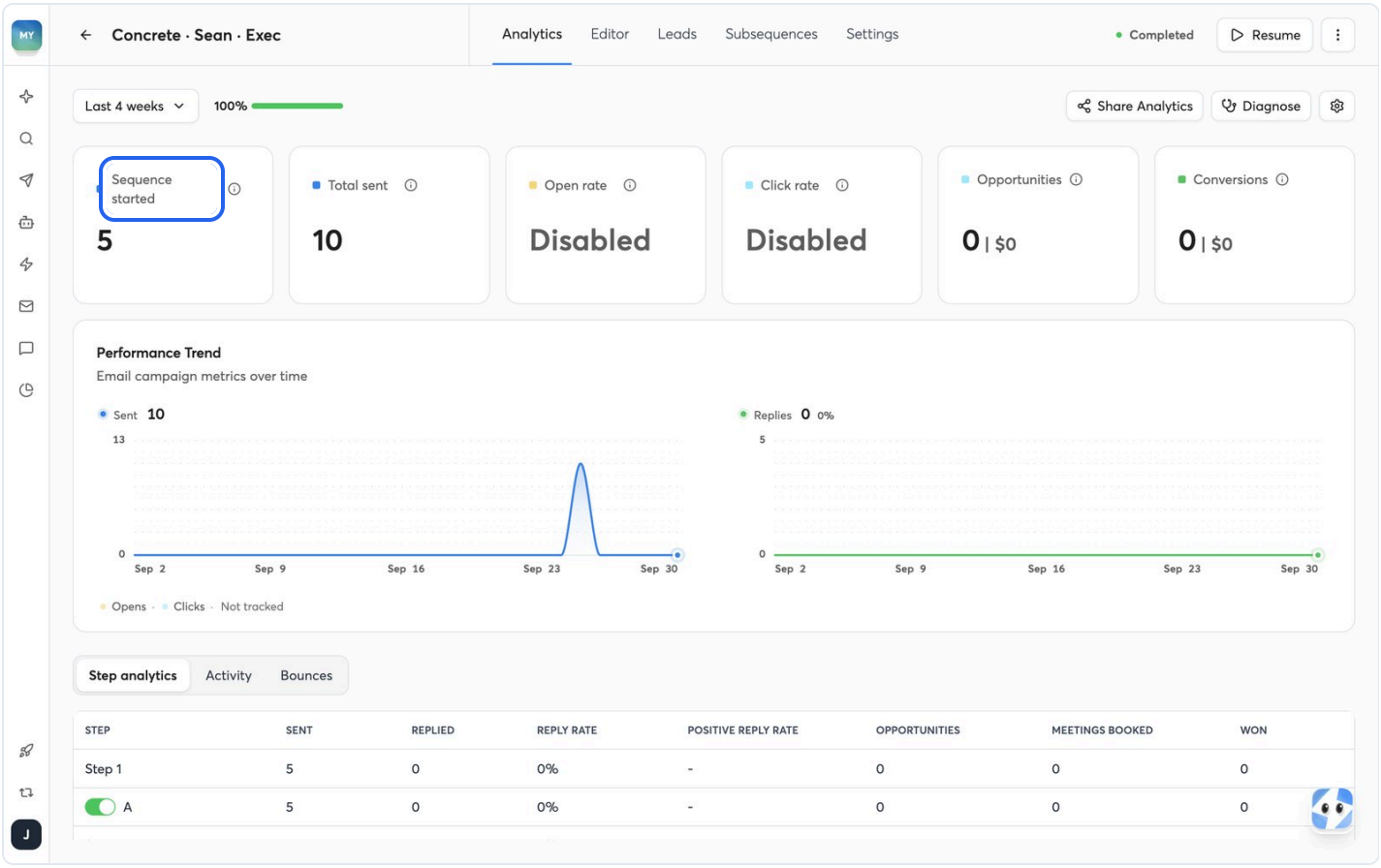
Engage lists every campaign. Status says where each one stands: Draft has never sent, Active is sending, Paused is on hold, and Completed has emailed its whole list.



2 Analytics

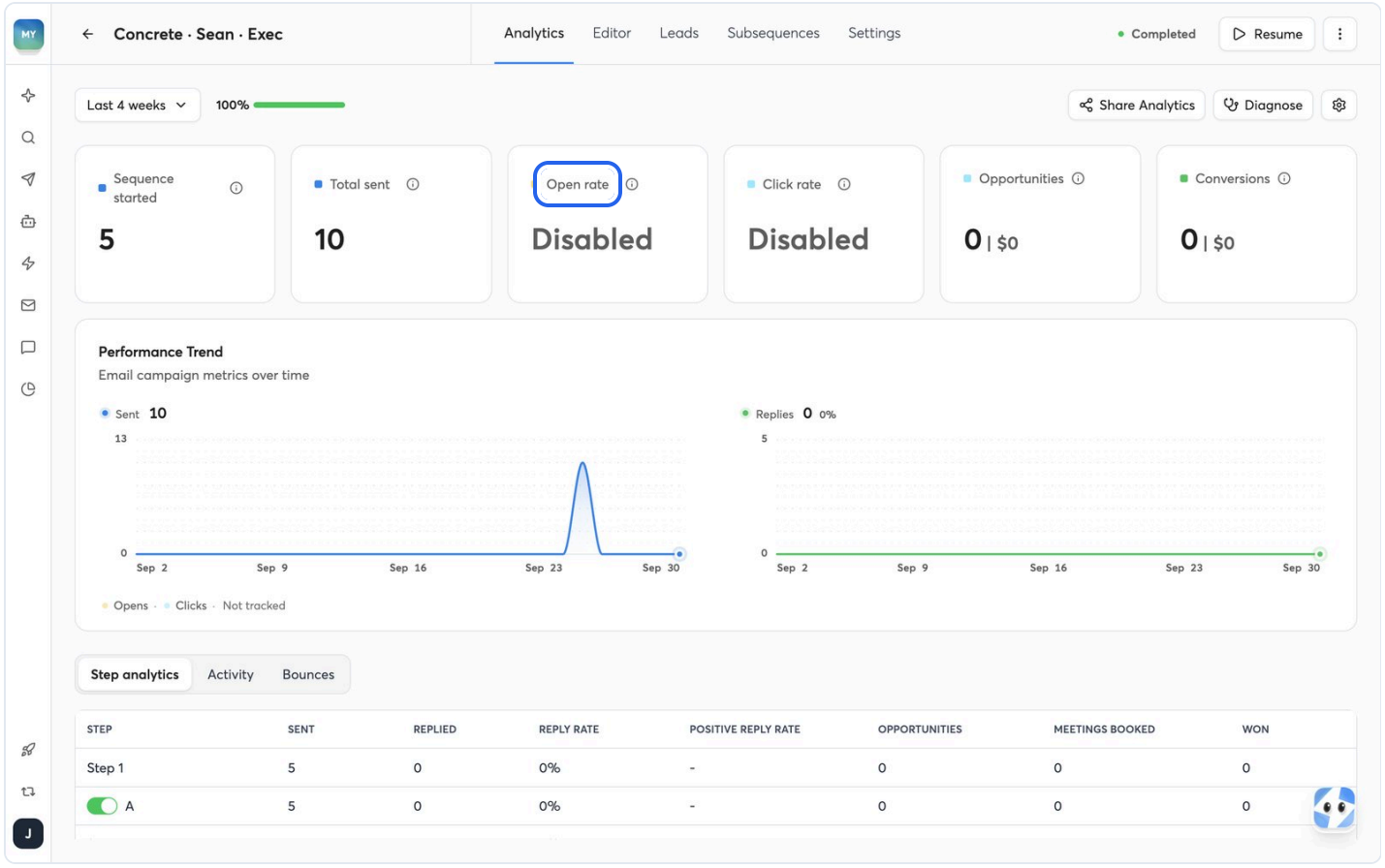
Click a campaign to open it.

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



3 Tracking stays off

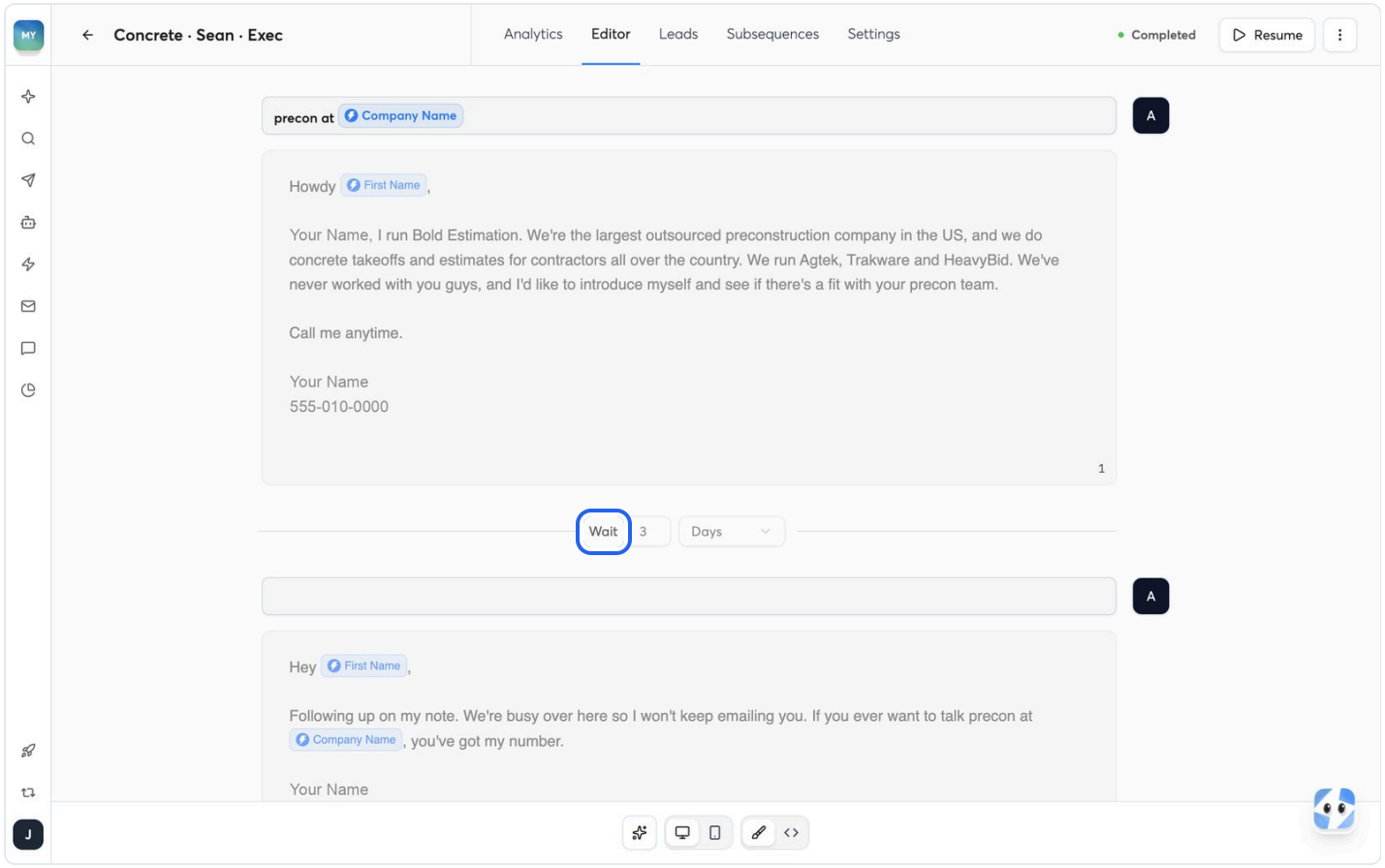
Open rate and click rate say Disabled on purpose. Tracking makes an email look like marketing, so it stays off in every campaign.



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.

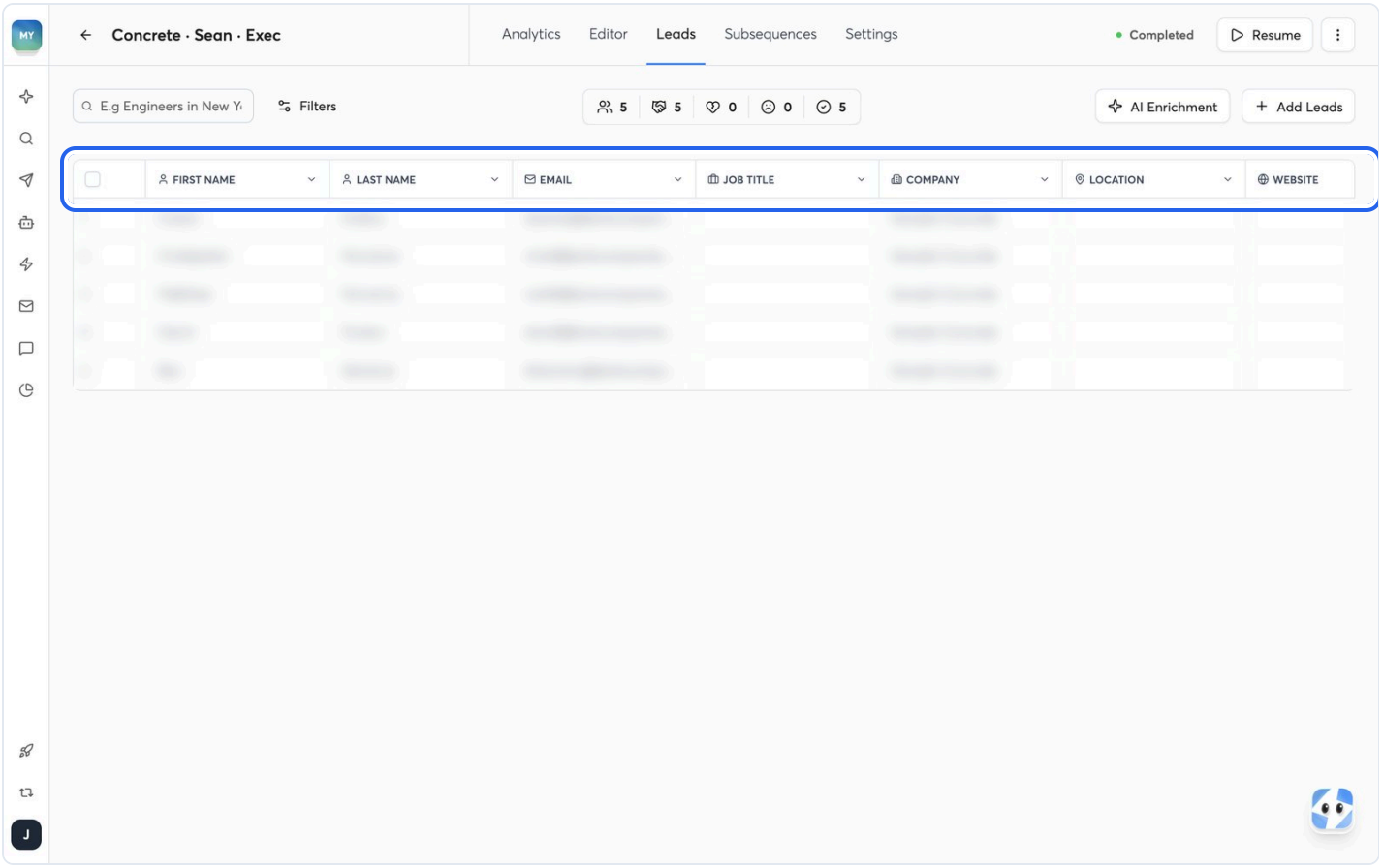


> ⚠ **Watch out.** The Editor saves as you type, straight into the campaign. Pause the campaign before you change a word, make the change, then resume it. New wording starts in the email templates doc (guide 13).

5 Leads

Open the Leads tab.

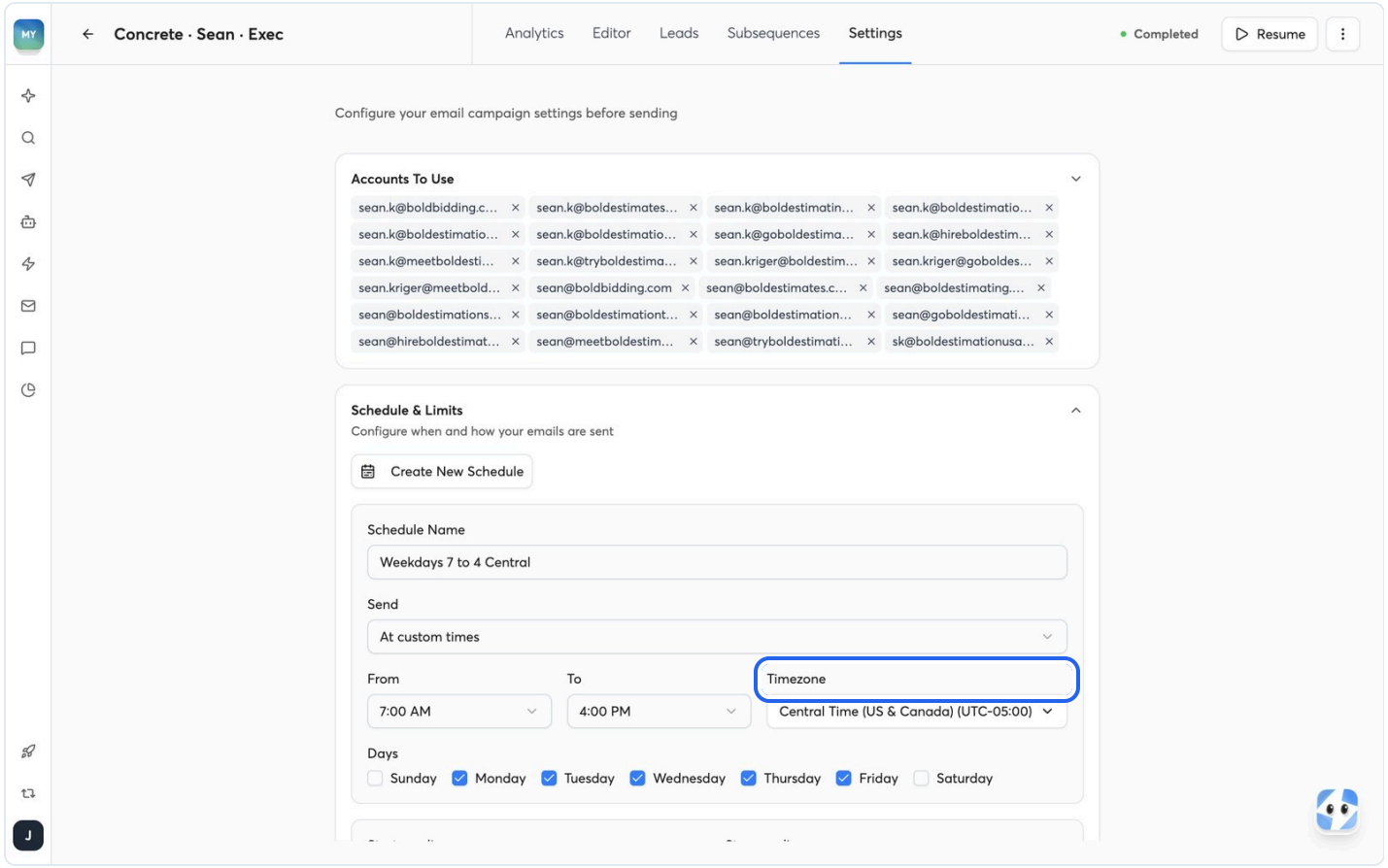
Leads lists every person in the campaign, with counts above the table for how many were contacted and how many bounced.



6 Schedule

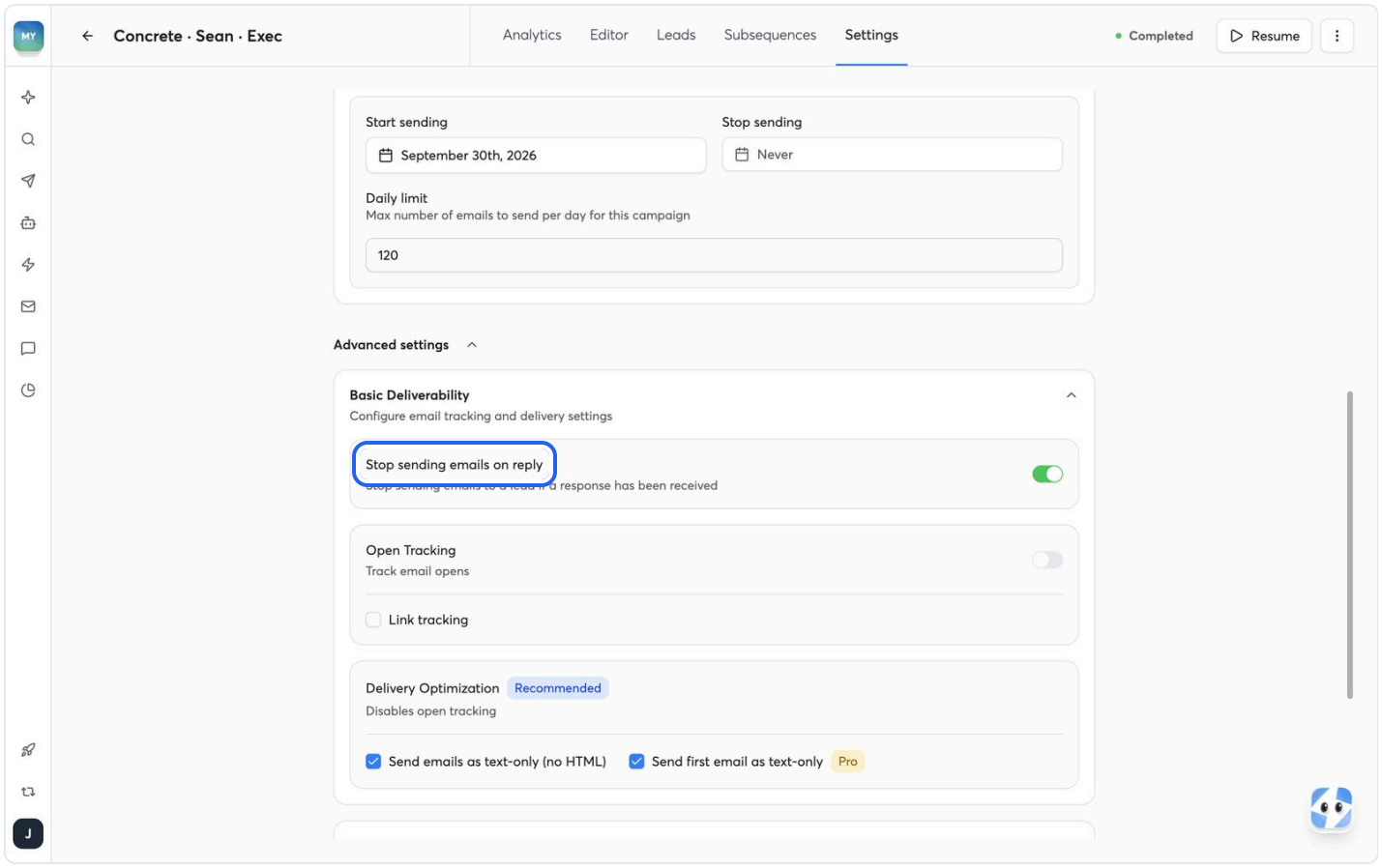
Open the Settings tab.

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.



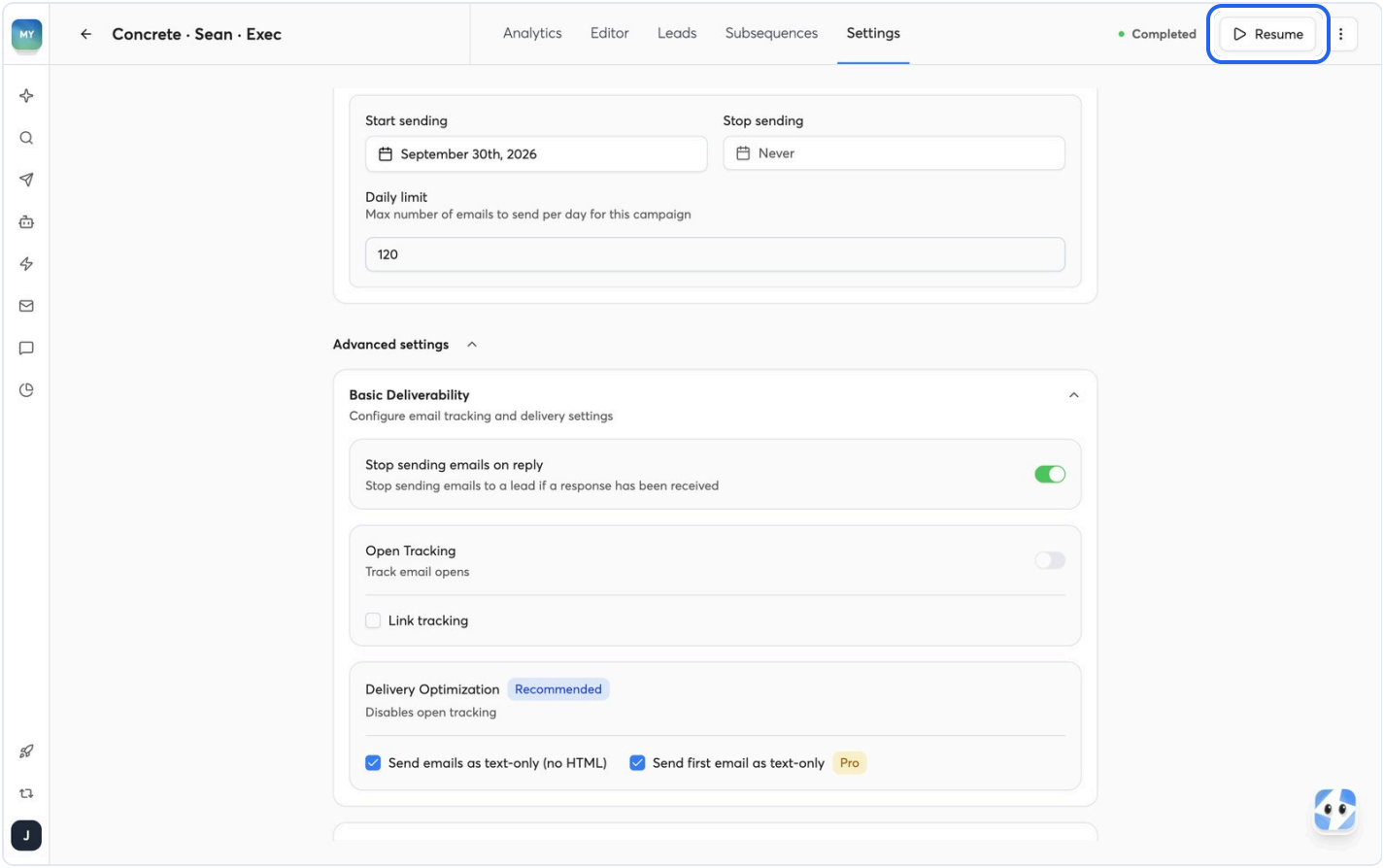
7 Sending rules

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).