



PRIVATE DESKTOP EMAIL AUTOMATION

CRD EMAIL AGENT

USER GUIDE AND OPERATING MANUAL

CRD Email Agent

A practical guide to setting up, running and supervising professional email campaigns - with or without external AI.

VERSION 1.0.9 | WINDOWS DESKTOP

LOCAL-FIRST | SINGLE USER | HUMAN CONTROLLED

Welcome

CRD Email Agent helps one Windows user prepare and run scheduled email campaigns from a dedicated mailbox. It sends approved templates, checks the Inbox for replies, stops follow-ups when a reply is matched, records opt-outs and brings conversations back to a person when attention is needed.

The most important point

The app works without AI. External AI is an optional assistant for classification, summaries and questions. Email sending, scheduling, reply checking and opt-out protection remain available in self-managed mode.

What the app is designed to do

- Send an initial email at a chosen date and time.
- Send follow-up templates after whole-day delays from the previous email.
- Create professional HTML emails with a logo, signature and plain-text fallback.
- Check one IMAP Inbox for replies and stop that contact's remaining follow-ups.
- Record unsubscribe requests globally and exclude that address from future campaigns.
- Let a user reply, close a conversation or email the available thread to a colleague with a note.

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1. Choose how you want to use the app

There are two operating choices. Both use the same mailbox, campaigns, templates and schedules.

Function	Self-managed mode	External AI-assisted mode
Campaign sending	Runs normally	Runs normally
Mailbox checks	Automatic or manual	Automatic or manual
Safety rules	Fixed rules identify opt-outs, bounces and common automatic replies	The same fixed rules remain active
Reply review	The user reads and decides what to do	AI can classify, summarise and answer questions; the user remains in control
App actions	The user clicks the controls	AI may propose a limited action, but the user must approve it
Cost	No AI-provider cost	The external provider may charge separately for API usage
Internet data sharing	Email travels through the configured mail provider	Selected campaign and reply information may also be sent to the AI provider

What AI cannot do

- It cannot delete campaigns, reverse opt-outs or change recipients.
- It cannot silently send direct replies on the user's behalf.
- It can propose only limited operations such as checking messages, running due emails, or pausing or starting a campaign.
- A proposed action is not carried out until the user approves it inside the AI Assistant.

Practical recommendation

Start in self-managed mode. Connect AI later only if the user wants assistance and understands the provider's API access, privacy terms and charges.

2. Install and start

The Windows installer includes its own private Python runtime. The user does not need to install Python.

1	Extract the complete release ZIP into a normal folder. Do not run the installer from inside the ZIP preview.
2	Double-click Install CRD EMAIL AGENT for WIN.exe and accept the installation prompt.
3	Open the app from the new Desktop shortcut or the Start menu.
4	The browser opens the local dashboard at 127.0.0.1:8765. This address works only on that computer.
5	The agent stays in the Windows notification area. Double-click its tray icon to reopen the dashboard; right-click it and choose Exit to close it properly.

What the top indicators mean

Indicator	Meaning
Automation running	Scheduled mailbox checks and due-email processing are enabled.
Automation off	Nothing is sent automatically. The user can still use the manual controls.
AI off	No AI is connected. The app remains fully usable in self-managed mode.
AI configured	AI details are saved but the current connection has not been confirmed.
External AI active	The endpoint, key and exact model ID passed the connection test.

First-time test

Before loading real contacts, use a dedicated sender mailbox and one recipient address that you control. Confirm sending, reply matching and follow-up cancellation.

3. Connect the mailbox and add branding

The mailbox must allow authenticated SMTP for sending and IMAP for receiving. A browser webmail address by itself is not enough.

1	Open Connections setup and choose Connect mailbox.
2	Choose Standard SMTP/IMAP, or choose Webmail-hosted account if the address is normally used through Roundcube, cPanel Webmail or a similar portal.
3	Enter the email address. The username is normally the complete email address.
4	Enter the mailbox password or provider-issued app password.
5	Enter the SMTP server, port and security setting supplied by the email host.
6	Enter the IMAP server, port and security setting supplied by the email host.
7	Click Test SMTP, then Test IMAP. Save only after both tests succeed.

Purpose	Common secure setting	Used for
SMTP	Port 587 with STARTTLS, or 465 with SSL/TLS	Sending campaign messages, replies and handoffs
IMAP	Port 993 with SSL/TLS	Reading and matching incoming replies

Webmail users

Look in the webmail portal for Configure Mail Client, Connect Devices or Manual Settings, or ask the hosting company for secure SMTP and IMAP details. Do not paste an <https://webmail...> webpage address into the server fields.

Branding and preview

- Upload the company logo. The app normalises supported images and embeds them in each HTML email.
- Upload a signature image and add optional signature text.
- Use the visual preview before creating the campaign. Check the logo size, spacing, signature, personalised fields and opt-out footer.
- Every campaign email also contains a plain-text version for mail clients that do not display HTML.

4. Create and run a campaign

A campaign contains contacts, an initial email, follow-up templates and a starting date and time.

1	Open Campaigns and select New campaign.
2	Give the campaign a clear name and choose when the first email should become due.
3	Add contacts in the requested name-and-email format. Check spelling carefully before continuing.
4	Write the initial subject and message. Use only the template fields shown as available in the app.
5	Add follow-up templates. Enter the delay in whole days from the preceding email - not from the campaign's original start date.
6	Preview the finished email with its logo, signature and opt-out footer.
7	Create the campaign. Start it with automation enabled, or keep it as a draft until it has been reviewed.

Understanding the campaign totals

Total	Meaning
Contacts	The number of people included in that campaign.
Pending	Individual scheduled emails that have not yet been sent or cancelled.
Sent	Individual emails successfully handed to the SMTP server.
Failed	Email jobs that exhausted their retry allowance or require correction.

Example

A campaign with 12 contacts and 3 sequence emails creates 36 email jobs. After the first email reaches all 12 contacts, the correct totals are 12 sent and 24 pending.

Pausing, stopping and deleting

- Pause temporarily prevents campaign processing. Resume when ready.
- Stop ends the campaign and cancels its remaining pending jobs.
- A campaign can be permanently deleted only when it is stopped or still a draft.
- Deleting a campaign does not remove global opt-out protection.

5. Understand automation and shutdowns

The app is local desktop software, not a cloud service. The computer must be able to run when work is due.

Computer state	What happens
On, awake, online, app running	Inbox checks and due emails run according to the saved settings.
Screen switched off	Normally fine, provided Windows itself remains awake.
Sleeping, hibernating or switched off	No mailbox checks or sending occurs.
Started again after a scheduled time	The app first synchronises the Inbox, then processes eligible overdue work.
Reply arrived while computer was off	The reply stays in the mailbox and is found during the next Inbox check.

Why overdue follow-ups do not all send at once

Later follow-ups are recalculated from the actual time the preceding email was sent. If the computer was off for several days, the app does not collapse every missed sequence step into one immediate burst.

Safe restart rule

The app requires a successful Inbox synchronisation before it sends due emails. This helps stop an overdue follow-up when the recipient already replied while the computer was off.

Manual controls

- Check for messages asks the IMAP server for new mail immediately.
- Run due emails now processes emails that are currently eligible to send.
- Manual controls do not change future sequence delays; they simply run work that is already due.

6. Manage replies, opt-outs and handoffs

A matched inbound reply stops that contact's remaining follow-ups and places the conversation under Needs attention, unless a fixed safety rule handles it automatically.

1	Open Needs attention or click Review replies from Overview.
2	Read the message and classification. Confirm that the message belongs to the expected contact and campaign.
3	Choose Write reply to compose a human-approved response from the system.
4	Choose Hand off to email the stored thread to a colleague. Enter the colleague's email address and an optional internal note.
5	Choose Close when no further response is needed.

Opt-out protection

- Each campaign email includes a visible opt-out link and an email-standard List-Unsubscribe instruction.
- A clear unsubscribe request globally suppresses that address.
- All pending sends to the address are cancelled across all campaigns.
- Future contact imports skip the suppressed address.
- Reverse an opt-out only when the original classification was genuinely wrong.

Human checkpoint

A positive or unclear reply should be reviewed by a person. Do not treat AI classification as proof of customer intent, agreement or consent.

Handoff rule

A handoff is marked complete only after the email to the colleague is successfully delivered through SMTP. The handoff contains the available stored conversation and the internal note, but campaign emails sent by very old versions may not have a complete stored outbound body.

7. Connect and use external AI

External AI is optional and separate from the mailbox connection. The app requires an OpenAI-compatible HTTPS API, an exact model ID and an API key.

Field	Plain-language meaning
HTTPS API endpoint	The provider's secure developer address. It begins with https:// and is not the normal chat webpage.
Model ID	The exact computer-readable model code copied from the provider's API catalogue.
API key	A private credential created in the provider's developer or API dashboard. It may create billable usage.

1	Create API access in the chosen provider's official developer dashboard. A normal ChatGPT, Claude or other chat subscription may not include API access.
2	Copy the provider's complete OpenAI-compatible HTTPS base URL.
3	Copy the exact model ID from the provider's current API model catalogue. Do not invent it from the friendly model name.
4	Create an API key and keep it private. Do not paste it into the AI chat window or send it by email.
5	Open Connections setup, choose Connect external AI, enter the three values and read the consent statement.
6	Click Test external AI. Save only after the exact model is confirmed for that API account.
7	Use the Assistant to ask questions such as: What needs my attention? or Which campaigns are active?

Privacy and cost

Selected campaign information, reply text and Assistant questions may be sent to the external provider. Set a sensible spending limit, review the provider's privacy terms and revoke the key if it may have been exposed.

Disconnecting AI

Choose Connections setup - Disconnect external AI and confirm the warning. The endpoint, model, encrypted key, consent and connection status are removed. The AI chat disappears, but mailbox settings, campaigns and email automation continue in self-managed mode.

8. Monitor activity and troubleshoot

Use Overview for current totals and Activity for a chronological record of application events.

Problem	What to check
SMTP authentication failed	Confirm the complete email address is used as username, the password or app password is current, SMTP access is enabled, and the server/port/security details are exact.
IMAP authentication failed	Confirm IMAP access is enabled and verify the username, password, server, port and SSL/TLS setting.
Failed to fetch	The browser could not reach the local app service. Confirm the tray agent is running, then reopen the dashboard from its tray icon.
Email did not send at the scheduled time	Check that the computer was awake and online, automation was running, the campaign was active, and the first-send date was correct.
Reply is not visible	Select Check for messages. Confirm the reply reached the configured Inbox and was sent from the expected address.
AI model unavailable	Copy the exact current model ID from the provider's API catalogue and confirm that the key has access to it.
AI HTTP 429	The provider rejected the request due to quota, credit, rate-limit or billing status. Check the provider's API dashboard.

Clearing activity

The Clear activity history control removes the local audit history only. It does not delete campaigns, email jobs, replies, messages or global opt-out records.

Do not repeatedly force-send

If the result is unclear, check Activity and the recipient mailbox before pressing Run due emails again. Repeated attempts can create duplicate customer contact.

9. Upgrade, uninstall and operate safely

Treat the app as a business communication tool. The user remains responsible for the contact list, message content and applicable marketing rules.

Upgrade to a newer version

1	Right-click the Email Agent tray icon and choose Exit.
2	Extract the complete new release ZIP.
3	Run the newer installer. It upgrades the existing installation and preserves campaigns, settings and branding.
4	Open the app and confirm the campaign totals and connection indicators before resuming automation.

Uninstall

Open Windows Settings - Apps - Installed apps, find CRD Email Agent and choose Uninstall. The uninstaller asks whether local campaign history, mailbox settings, saved credentials, templates and branding should also be deleted. Choose carefully: deleting local data cannot be undone.

Operating responsibilities

- Use only contact lists that the organisation is entitled to use.
- Keep the opt-out list intact and honour requests promptly.
- Review templates, personalisation fields, dates and recipients before activating a campaign.
- Use a dedicated mailbox with a strong password or app password.
- Protect the Windows user account because the app's mailbox credential is tied to that user and machine.
- Remember that the local SQLite database is not encrypted and contains campaign details and matched reply text.

Legal and compliance notice

The app does not determine whether a campaign is lawful or whether a person consented to receive marketing. The user and organisation remain responsible for recipient authority, privacy, suppression and all applicable email-marketing rules.

Quick-reference checklist

Use this one-page checklist before every live campaign.

Check	Ready when...
Mailbox	SMTP and IMAP tests both pass.
Sender	The From address, reply mailbox and signature are correct.
Branding	Logo and signature display correctly in Preview.
Contacts	Names and addresses have been checked and suppressed contacts are excluded.
Templates	Subject, wording, personalisation and opt-out footer have been reviewed.
Schedule	The first-send date, time and whole-day follow-up delays are correct.
Test	A test campaign to an address you control sent and stopped after a reply.
Computer	The machine will be on, awake and online when work is due.
Automation	The top indicator says Automation running.
AI, if used	The top indicator confirms the external AI connection, provider billing is understood, and the user knows actions still require approval.

Daily routine

Open Overview, check Needs attention and Failed jobs, select Check for messages when needed, review replies, and confirm the tray agent remains running.

CRD Email Agent

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