LEAD JEFE

The Boss of Leads

User Manual

Complete reference for every feature

HOW TO GUIDE

leadjefe.com

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Dashboard

The Dashboard is your command center. It shows what happened recently, what's ready to do next, and gives you one-click access to every major feature. Everything updates in real time.

Top bar

- **LIVE indicator (top-right):** a green dot and timestamp confirming the page is showing fresh data. If the indicator disappears, reopen the dashboard.
- **Page title:** always says *Dashboard — Overview of your outreach pipeline*.

Hero cards (the four big numbers)

These are the headline metrics. Each one is clickable — clicking a card jumps you to the page where you can act on that number.

TOTAL SENT

- The total number of emails you've sent in the last 30 days.
- Includes all successful sends from Review & Send AND Follow-ups.
- The spark-line graph on the right shows your daily send volume trend.
- Below the number: the daily average (e.g., `3.2/day avg`).
- **Clickable?** No — this card is informational only.

LEADS READY

- The number of unique email addresses saved in your `leads/` folder, ready to load and send.
- Counts every `.csv` and `.xlsx` file in that folder, deduplicated by email.
- If the number says 0, either the folder is empty or you haven't run Find Leads and exported yet.
- **Clickable?** Yes, if > 0. Clicking jumps you to Review & Send where you can pick a file and load it into the send queue.

LEADS THIS MONTH

- How many leads you've extracted this month, counted against your subscription quota.
- Only leads with a confidence score of 80 or higher count toward the quota. Low-confidence leads are free.
- Shows percentage used and lifetime total (e.g., `1% of 5,000 quota · 114 lifetime`).
- Color changes as you approach your limit: white under 70%, orange 70-90%, red above 90%.
- **Clickable?** Yes. Jumps to Find Leads.

FOLLOW-UPS

- The total number of leads waiting to receive a follow-up email.
- On the right side of the card, three pills break down the count by step:
  - STEP 2 — leads waiting for a soft bump (sent 3+ days ago)
  - STEP 3 — leads waiting for a new-angle follow-up (sent step 2 7+ days ago)
  - STEP 4 — leads waiting for a break-up email (sent step 3 14+ days ago)
- Counts exclude anyone who replied or unsubscribed.
- **Clickable?** Yes, if > 0. Jumps to the Follow-ups page.

> **TIP**
> All four hero cards are updated live. If you run Find Leads or send an email, come back to the dashboard — numbers refresh automatically the next time you open the page.

Quick Actions tiles

Below the hero cards, four tiles give one-click access to the main pages. Same as the sidebar, just bigger and more visible.

- **Find Leads** — opens the lead-generation page.
- **Review & Send** — opens the Review & Send page. A count in parentheses shows how many leads are ready if > 0.
- **Follow-ups** — opens the Follow-ups page. A count appears when leads are waiting.
- **Settings** — opens Settings.

> **NOTE**
> You can click anywhere on a tile — the icon, title, caption, or the empty space. Not just the border. Same for the hero cards.

Sidebar

The left sidebar is always visible with the same five navigation buttons. Below them you'll see:

- **Daily limit:** `15` — your warm-up-stage daily send cap (auto-ramps up as you send more).
- Total sent counter — lifetime.
- Your active email profile at the very bottom (e.g., `dj@frontdeskreply.com`).
- A Dark Mode toggle.
- Your app version number.

> **IMPORTANT**
> The daily limit is an advisory guard. Lead Jefe will still let you send more — but exceeding it increases the risk of Gmail/Outlook flagging your account. The limit ramps up automatically as you build send history: 5 → 10 → 15 → 25 → 50/day.

Find Leads

Find Leads is where you generate fresh prospect lists. Pick an industry and city, click Find Leads, and the app pulls real owner emails from Google Maps, public websites, or state licensing boards.

Search Configuration (left panel)

Industry

- Dropdown with common verticals (HVAC, dental, plumbing, yoga studios, etc.) plus a `Custom...` option.
- Picking a preset auto-fills the best search keywords behind the scenes.
- Pick `Custom...` to type your own search phrase (e.g., "nail salon" or "commercial real estate broker").

Keyword Search (shown only when Custom is picked)

- Free-text field. Type what you'd actually search on Google.
- Example: `"pet grooming"` or `"yoga"`.

City & State

- Dropdown with major US cities pre-listed.
- Format: `City, ST` (two-letter state code). Example: `Houston, TX`.
- Including the state code gives the best results — Google Maps needs the state to disambiguate similarly-named cities.
- You can also type a custom city if it's not in the dropdown.

Leads To Find

- Number input. How many leads to generate this run.
- Default: 15. Maximum depends on your subscription tier (Trial: 25/mo, Starter: 200/mo, Pro: 1,000/mo, Agency: 5,000/mo).
- Only leads with confidence ≥ 80 count against your monthly quota.

Data Sources (checkboxes)

- **TX State Board** — only for dental and plumbing searches in Texas. Pulls directly from the official state licensing databases. Higher quality, more real owner emails.
- **Scrape Google Maps** — uses Playwright to extract businesses from Google Maps. Works for every industry. **Best Results** badge — this is the default recommendation.

> **NOTE**
> If neither box is checked, Lead Jefe falls back to a plain web search. Works but returns lower-quality results. Check Scrape Google Maps unless you're on the Trial plan (Trial doesn't include Maps).

Find Leads button

- Big orange button. Starts the search immediately — no confirmation.
- During a search, the button greys out.
- **Cancel** button below — use to stop a search mid-run. Found leads so far are preserved.

Progress display (during search)

While Find Leads is running, the left panel shows:

- **Status line** (bold accent color) — current step (e.g., "Scraping Google Maps for yoga in Houston, TX...").
- **Progress bar** — live percentage from 0% to 100%.
- **Activity log** (scrolling box) — every step timestamped, so you can verify work is happening.

Results panel (right side)

Leads stream in as they're found. You'll see:

- **Results header** — shows state (IDLE, SEARCHING, COMPLETE, CANCELLED, ERROR), count of leads, and elapsed timer.
- **Results table** — Email, Contact (owner name), Company, Phone, Website, Confidence (0-100, green for ≥80, amber for 60-79, grey below).
- Double-click a row to open the source website in your browser (handy for verification).

After the search

Search Summary card

Appears below the action buttons when the search completes. Shows:

- FOUND (total), REQUESTED (what you asked for), COUNTED (≥80 confidence), TOTAL TIME.
- A footer line with exact start and end timestamps.

Prompt: Load into Review & Send?

Half a second after a successful search, you'll see a popup:

- *"Found N leads. Load these directly into Review & Send → Loaded Leads so you can start sending?"*
- **Yes** — leads get formatted and pushed into the Review & Send page automatically. You jump there immediately.
- **No** — nothing changes; you can still save manually.

Save to leads_to_review.csv

- Orange button at the bottom of the results pane. Saves to the root `leads_to_review.csv` (legacy path).

Export as New File

- Opens a Save As dialog. Defaults to the `leads/` folder so exports land where Review & Send can pick them up on the next reload.
- Excel (.xlsx) is the default — styled with a branded header, summary rows, and color-coded confidence column.
- You can also pick .csv if you prefer.

Delete Selected / Clear All

- Red outlined buttons on the right. Remove results from the current view before saving.

> **TIP**
> Your typical flow: set Industry + City → click Find Leads → wait → click Yes on the popup to go straight to Review & Send. From there you load a template, set your subject, preview, and send.

Review & Send

Review & Send is where emails actually go out. You load leads, pick a template, customize the subject line, preview what customers will receive, and hit Send.

Quick Send (single email, no CSV needed)

Collapsible card at the top. Use it when you just want to fire one email — no list loading.

Expand button

- Click **Expand** in the top-right of the Quick Send card to reveal the fields.

Lead fields

- **Email *** — required. The recipient's address.
- **Company** — optional business name (used in templates as `{company}`).
- **First Name** — optional; used in greetings.
- **Industry** — optional; used in templates. Defaults to "local business" if blank.

Saved Template dropdown

- Defaults to `— None (paste / upload below) —`.
- Pick any folder from your `templates/` library to use as the body.

Subject (optional)

- Overrides the auto-generated subject. If blank, one is generated at send time.

Custom Email Content

- **Upload Template File** — picks a .txt or .html/.htm file from your computer.
- **Or paste email text** — textarea where you can paste the exact email body. After you paste, the textarea collapses to a short confirmation (`✓ Pasted N characters · X words`) so you know it loaded.
- **Clear** — drops the uploaded/pasted content.

Preview / Send Email buttons

- **Preview** — opens a window showing exactly what will be sent (TO, FROM, SUBJECT, rendered body).
- **Send Email** — fires the email immediately. Confirmation dialog shows recipient, template, subject, and estimated time.

> **NOTE**
> If Saved Template is set to None and you haven't pasted/uploaded any custom content, Send and Preview will error with "No Email Content". Pick a saved template or provide your own.

Lead Source (optional)

Only needed if you're NOT loading leads straight from Find Leads. Use this when you want to re-open a saved file.

Dropdown

- Lists every .csv and .xlsx file in your `leads/` folder. Updates every time you open the page.
- If the folder is empty, the dropdown shows `(no saved files — use Find Leads or Upload)`.

Refresh button

- Rescans the `leads/` folder. Useful right after saving a new export from Find Leads.

Load Leads (yellow button)

- Reads the selected file, parses the rows, and populates the Loaded Leads table below.
- Handles both CSV and Excel (.xlsx) formats — auto-detects the data table even if the Excel file has summary rows on top.

Upload Leads CSV

- Opens a file picker so you can pull in a .csv or .xlsx from anywhere on your computer (not just the `leads/` folder).

Send limit

- Caps how many leads go out this run.
- If your CSV has 100 and the limit is 10, only the first 10 rows are contacted — the rest remain in the file for next time.

Email Body Template

The message body that gets sent to each lead.

Saved Template dropdown

- Lists every folder inside `templates/`.
- Picking a template here makes it the active one for Send.

Upload Email Template

- Opens a file picker. Accepts .txt, .html, .htm.
- Once uploaded, the dropdown is **disabled** to prevent confusion about which template is active.

Clear Upload

- Removes the uploaded file and re-enables the dropdown.

Status line

- Tells you what's currently active: `Using: default template` or `Using: my-campaign.html (uploaded)`.

Subject Line

Three options for setting subjects on your loaded leads:

1. **Leave blank** → a personalized subject is auto-generated for each lead at send time (e.g., "quick question about [Company]", "idea for [Company]").
2. **Type one subject + click Apply to All** → uses the same subject for every loaded lead. Supports variables like `{company}`, `{first_name}` that auto-fill per lead.
3. **Double-click any Subject cell** in the Loaded Leads table → popup to edit that one lead's subject individually.

Clear Subjects

- Wipes subjects on all loaded leads, reverting everyone to auto-generation.

Loaded Leads table

Header row (always visible at the top)

- **Send Emails** primary action (orange). Fires the send.
- **Dry Run** — simulates a send without delivering. Useful to verify quota and templates without committing.
- **Preview Selected** — opens the preview window for whichever row is highlighted.
- **Delete Selected** — removes highlighted rows from the send batch (doesn't touch the source file).
- **Clear All** — empties the loaded list after confirmation.

Filter bar

- Type anything in the Filter box — the table narrows to rows containing that text in email / company / first name / industry / subject.
- **Clear** button resets the filter.

Table columns

- Email, Company, First Name, Industry, Subject.
- Click any column header to sort A→Z; click again to reverse. Arrow appears next to the sorted column.
- Click one row to select. Ctrl-click to add; Shift-click for a range. Click-drag to sweep-select multiple rows.
- Press **Delete** (or Backspace) to remove highlighted rows.

- Double-click the Subject cell to edit that lead's subject; double-click any other cell to open the preview.

Send confirmation dialog

Before any real send, you'll see a dialog with full context:

- Recipients: how many leads will actually be emailed.
- Template: which template body is being used.
- Subject: auto-generated, custom, or mixed.
- Delay: your configured range (from Settings).
- Est. total: how long the batch will take.
- Warning if Send Limit cuts off some leads.

> **IMPORTANT**
> Once you click Yes, emails start going out. You can hit Cancel mid-batch to stop, but any email already sent cannot be unsent. Use Dry Run first if you're not sure.

Follow-ups

Follow-ups is where you automatically re-contact leads who didn't reply to your initial email. A 4-step sequence runs over 24 days: Day 0 is the first contact (sent from Review & Send), and Days 3, 10, and 24 are steps 2, 3, and 4.

Sequence Schedule (top card)

Four visual cards showing your fixed sequence:

- **Step 1 — Initial outreach** (Day 0). Sent from the Review & Send page.
- **Step 2 — Friendly nudge** (Day 3). Soft bump.
- **Step 3 — Value offer** (Day 10). New angle + proof point.
- **Step 4 — Breakup email** (Day 24). Close the loop.

> **NOTE**
> The schedule is fixed — you cannot change the day intervals from the UI. Intervals are 3, 7, and 14 days between consecutive steps.

Send Follow-ups (action card)

Select Step dropdown

- Pick 2, 3, or 4 — whichever step you want to send right now.
- Changing the step auto-updates the Email Template dropdown below to match the recommended template for that step.

Check Ready Leads button (green)

- Scans your `sent_log.csv` to find everyone eligible for the selected step.
- Eligible = (a) previous step was sent at least N days ago, (b) this step hasn't been sent yet, (c) lead hasn't unsubscribed, (d) lead hasn't been marked as replied.
- Results populate the Ready for Follow-up table below.

Send Follow-ups (All)

- Fires the selected step to every lead in the ready list. Large confirmation dialog appears first with total count, template, delay, and estimated duration.

Manage Replied List button (green outlined)

- Opens a dialog showing every email that's been marked as "replied" — they're excluded from all future follow-ups.
- Select one or more and click **Unmark Selected** to put them back into the follow-up queue.

Email Template row

- **Dropdown** — pick from your `templates/` library. Best-practice defaults: Step 2 → `step2-bump`, Step 3 → `step3-new-angle`, Step 4 → `step4-breakup`.
- **Refresh** the list without restarting the app.
- **Upload Template** — brings in a custom .txt/.html file. While an upload is active, the dropdown is disabled.
- **Clear** — drops the uploaded file and re-enables the dropdown.

Ready for Follow-up table

Header controls (right side)

- **Send Selected** (orange) — fires only the highlighted rows.
- **Mark as Replied** (green outlined) — flag these leads as having responded to you. They stay in `sent_log` for history but are excluded from all future follow-ups.
- **Preview Selected** — opens the preview window for the first selected row.

Filter + Subject row

- **Filter** — type any text to narrow the table to matching email/company/days/step/subject. Clear button resets.
- **Subject** — type a subject + Apply to All to use one line for every row. Leave blank + Apply to All to clear. Variables (`{company}`, `{first_name}`) are substituted at send time.

Table columns

- Email, Company, Days Since, Step, Subject. Click headers to sort, click-drag to multi-select, double-click the Subject cell to edit inline.
- Press **Delete** or **Backspace** to remove highlighted rows from the batch (they'll reappear on the next Check Ready Leads unless you also Mark as Replied).

> **TIP**
> Workflow: click Check Ready Leads → scan the list → drag-select the rows you DON'T want to send to → press Delete → now everyone left is who you'll actually email → click Send Selected.

Confirm dialog (before sending)

Same style as Review & Send — shows recipient count, template, delay, estimated time, and a "once sent, can't be unsent" warning. Click Yes to proceed.

> **IMPORTANT**
> If someone replied to your initial email, mark them as Replied! Otherwise they'll keep getting steps 2, 3, and 4 — which comes across as spammy and can damage your domain reputation.

Billing

The Billing page shows your current subscription, usage against your monthly quota, and how to upgrade or downgrade. All payment is handled through PayPal.

Current Plan (top card)

- Your active tier (Trial / Starter / Pro / Agency) with its price per month.
- Expiry date — when your subscription renews or ends.
- Your license key (truncated for display; never shown in full to keep shoulder-surfers honest).

Monthly Usage (progress bars)

- **Leads used** — how many high-confidence leads you've pulled this month, out of your tier's quota. Color changes as you approach the limit.
- **Emails sent** — total sends this month vs your tier's email cap.
- Both reset on the first of each month automatically.

Subscription Plans (4 cards)

Four tier cards side by side. Each shows: price, leads/mo, emails/mo, and feature availability (Maps Scraper, State Board Data, etc.).

CURRENT pill (on your active tier)

- Orange `CURRENT` pill appears on whichever tier you're on. Border around the card is highlighted.

Upgrade / Downgrade / ACTIVE buttons

- Any tier higher than yours shows **Upgrade** (orange button). Click → opens PayPal subscription page in your browser.
- Any tier lower than yours shows **Downgrade** (outlined, muted). Also opens PayPal.
- Your current tier shows `• ACTIVE` chip — no button.
- Trial tier is free and doesn't show any action button.

> **NOTE**
> After you complete a PayPal payment, you'll receive a new license key via email. That key replaces your current one.

Activate After Payment

- Text field + orange Activate Key button.

- Paste the new license key from your PayPal confirmation email and click **Activate Key**.
- On success: tier updates immediately across the whole app (dashboard, Find Leads limits, features like Maps/Board), and a new row appears in Payment History below.
- On failure: the error message explains why (expired, already used on another machine, typo).

Payment History

Local record of every activation, upgrade, and downgrade you've performed. Six columns:

- **Date** — timestamp.
- **Type** — Activation (green), Upgrade (green), or Downgrade (red).
- **Plan** — tier name.
- **Amount** — monthly price.
- **License Key** — truncated.
- **Expires** — key expiration date.

View Full History on PayPal

- Button below the table. Opens `paypal.com/myaccount/transactions` in your browser for the canonical source.

> **TIP**
> The in-app Payment History is your local record (fast, always available). PayPal's website is the source of truth for actual charges, refunds, and invoice IDs.

Settings

Settings holds your license key, business profile, AI API key, email credentials, and send preferences. Everything in this page is saved to a local file — nothing is transmitted except when you explicitly send emails or call AI.

License

License status block

- Current tier, expiry, activation email, and usage summary.
- Your active license key is shown in full (so you can copy it if needed).

Change License Key section (collapsed by default)

- Paste a new key and click **Activate** to switch. Everything in the app updates immediately — tier limits, feature gates, dashboard cards.

Business Profile

Your identity — gets injected into every email's signature and footer. Required for CAN-SPAM compliance.

- Founder name, business name, website, reply email, phone.
- **Postal address** — physically required by US law for commercial email. Lead Jefe refuses to send until this is filled.
- Pitch paragraph, tagline, pricing — used as template variables.

> **IMPORTANT**
> If Lead Jefe detects placeholder text (like "UPDATE via Settings before first send") anywhere in your profile, it will block every outgoing email until you replace it. This is a safety net to prevent accidentally shipping demo copy to real customers.

AI Configuration

- **Anthropic API Key** — where you paste your `sk-ant-...` key.
- **Get API Key** — opens `console.anthropic.com/settings/keys` in your browser.
- **How to get your key** — inline instructions explaining the 5-step process (sign up, add $5 credit, create key, copy, paste).

> **NOTE**
> Lead Jefe uses Claude (Anthropic) to generate personalized openers and subject lines. You bring your own API key — billed directly by Anthropic based on usage. Typical cost: a few cents per 100 emails.

Email Profiles

Holds your SMTP credentials. You can have multiple profiles (e.g., different sending addresses for different campaigns) and switch between them with one click.

Left column — the form

- **Profile dropdown** — pick which saved profile to load into the form.
- **+ Add** — creates a new blank profile. Prompts for a name.
- **Save** — saves the current form values to the selected profile.
- **Delete** — removes the selected profile (with confirmation).
- **Email Address, Password / App Key, Display Name, Reply-To Address** — the credentials.
- **Provider dropdown** — Gmail, Outlook/365, Yahoo, Zoho, or Custom SMTP. Picking a provider auto-fills SMTP Server and Port. Most providers require an App Password, not your regular account password.

Right column — LOADED PROFILES panel

- Lists every saved profile with a numbered badge, dot indicator, email address, and an ACTIVE chip on whichever one is currently sending.
- Click any row in the panel to instantly switch to that profile. The form on the left fills in with that profile's data.

Configuration Status

Bottom-of-page status panel showing at-a-glance whether each required field is filled:

- Email configured / Missing
- Password configured / Missing
- SMTP server
- Anthropic API key configured / Missing
- Refreshes every time you switch profiles.

Send Delay Between Emails

Controls the random pause between consecutive sends. Longer delays look more human to Gmail/Outlook and improve deliverability; shorter delays speed up large batches.

Two sliders

- **Minimum delay** — 5 to 180 seconds.
- **Maximum delay** — 10 to 300 seconds.
- Each email waits a random amount between the minimum and maximum.

Presets (one-click apply + save)

- **Fast (15–45s)** — for warmed domains or small, targeted batches.
- **Balanced (45–90s)** — default. Best deliverability for most users.
- **Cautious (90–180s)** — new accounts or sensitive SMTP providers.

Save button

- Persists your custom min/max values to your business profile file. Takes effect on the next email you send — no restart needed.

> **TIP**
> Start with Balanced (default). If you're sending to a new list and want to protect your sender reputation, bump up to Cautious for the first week.

Support & Resources

If you run into issues, have feature ideas, or need help with setup:

- **Email:** hello@leadjefe.com
- **Website:** leadjefe.com
- **Release notes:** leadjefe.com/releases.html