



✦ OutreachFlow Automation ✦

Automate Your Outreach. Amplify Your Results.

Our powerful automation platform helps you:

Streamline email campaigns

Track engagement instantly

Scale outreach effortlessly

Start Email Outreaching today — Transform Your Workflow!

 techitically.official@gmail.com





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1 What is OutreachFlow Automation

OutreachFlow Automation is a privacy-first, locally operated cold email platform built for B2B sales teams, solo founders, agencies, and growth marketers who demand complete ownership over their outreach pipeline. Unlike cloud-based CRM tools that charge monthly fees and store your leads on remote servers, OutreachFlow installs directly on your Windows or Mac desktop — keeping every contact, every campaign template, every SMTP credential, and every reply log sealed inside your own machine.

10

**DRIP SEQUENCE
STEPS**

100%

**LOCAL DATA
CONTAINMENT**

0

**MONTHLY
SUBSCRIPTION FEES**

∞

**LEADS YOU CAN
IMPORT**

- Import any spreadsheet file with smart column mapping. OutreachFlow automatically detects Name, Email, Phone, Company, Company Size, Location, and Website fields and validates every row before it enters the local database. Supports double-quoted fields, custom separators, and complex CSV structures. All file parsing happens in local memory — your lead list never touches an external server.

- Organise your contacts into unlimited marketing categories — by industry, product line, region, or deal stage. Each Lead Type category maintains its own completely isolated 10-step email drip sequence, so your SaaS pitch, your Web Development outreach, and your HRMS campaign never cross-contaminate. Create, rename, and delete categories at any time without losing campaign history.
- Build sophisticated multi-touch email sequences with up to 10 steps, each with its own configurable wait delay — from minutes to days. Every step can be individually enabled or disabled without breaking the sequence. Subject lines and body copy support dynamic variables: {{Name}}, {{Company}}, {{Location}}, and {{Size}} are injected at dispatch time from each lead's local record, making every email feel personally written.
- OutreachFlow routes all outbound email through your own SMTP server — Gmail, Yahoo, Zoho, or any custom mail provider. Your app password is AES-encrypted and stored only on your local machine. The dispatch engine simulates a full production send pipeline, allowing you to test sequences, review timing logic, and validate personalisation before going live. One click on Run Campaign Dispatcher initiates the full drip pipeline locally.
- A full-featured mailbox synced via IMAP sits directly inside OutreachFlow. Read warm replies from leads in the Inbox, audit every dispatched email in Sent Mail, and review your dedicated Outreach Mailbox — all without switching to a separate email client. The Inject Mock Thread button lets you simulate inbound replies to test your follow-up logic before deploying live campaigns. Search and filter across all directories in real time.

- The Outreach Command Dashboard gives you an instant overview of your entire pipeline. See your total lead database size, outbound dispatch count, inbound reply rate, and a visual 10-step funnel chart showing exactly how many leads sit at each stage — from Raw Leads Imported through to Warm Conversions. The Recent Campaign Dispatches panel on the right logs every SMTP delivery event as it happens, so you always know what went out and when.
- OutreachFlow was designed from the ground up for operators who cannot afford data exposure. Every piece of data — leads, credentials, campaign logs, reply history — is stored in a locally encrypted database on your machine. The CSV parser loads file contents directly into browser memory without any upload. SMTP and IMAP passwords are AES-encrypted before being written to disk. No telemetry, no analytics callbacks, no third-party trackers. Works completely offline once installed.
- The Outbound Settings Console lets you manage your User Licensing Profile, SMTP configuration, and IMAP sync settings from one screen — with live connection testing before you save. The Backup & Restore module lets you export your full workspace (leads, templates, logs) to a local file and restore it on any machine. Workspace Maintenance tools let you purge leads and logs or perform a full factory reset when needed.

2 Onboard at OutreachFlow Automation

Get started in less than 2 minutes

A screenshot of a web-based onboarding form for OutreachFlow Automation. The form is titled "Welcome to OutreachFlow" and includes fields for "YOUR NAME", "BUSINESS EMAIL", "PHONE NUMBER", and "OUTREACHFLOW ACCESS KEY". Each field has a placeholder text starting with "e.g.". At the bottom, there is an orange button labeled "Complete Onboarding" and a small link for "Forgot your access key?". The form is displayed on a light gray background within a rounded rectangle with a teal border.

When you purchase OutreachFlow Automation, the very first thing you will do is register your workspace. This is a one-time process that takes less than two minutes to complete. Registration links your purchase to your local machine, activates your license, and sets up your personal profile — which is used later to auto-fill personalization variables across all your email campaigns. Once registered, you will never need to go through this process again.

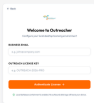
What you need to fill in:

- **Company Name** — Enter the name of your business or agency. This will appear as your sender identity across campaign templates and is used as a dynamic variable in outreach emails wherever your company name needs to appear.
- **Business Email** — Enter the email address associated with your OutreachFlow purchase. This becomes your login identity for all future sessions and is also used to pre-fill the sender details in your SMTP configuration.

- **Phone Number** — Your contact number is stored locally in your profile and can be referenced in email templates when you want to include a direct call-to-action with your phone number. It is never shared or transmitted to any external server.
- **Outreach License Key** — This is the unique key you received at the time of purchase. Enter it exactly as provided — for example, OUTREACH-2026-PRO. OutreachFlow verifies this key locally against your profile. Once verified, your workspace is unlocked and you are taken directly into the software dashboard. No internet validation ping is required.

3 Login at OutreachFlow Automation

Access your software again anytime in less than 1 min



1 min

Welcome to OutreachFlow
Configure your local desktop configuration

BUSINESS EMAIL
e.g. john@company.com

OUTREACHFLOW LICENSE KEY
e.g. OUTREACHFLOW-1234-5678

Authenticate (1 min)

[Forgot your email or license key?](#)

Once you have registered OutreachFlow on your machine, every future login is even faster. The software remembers your workspace configuration locally, so you only need to confirm your identity with two pieces of information – your business email and your license key. That's it. No new password to create, no two-factor authentication delay, no session expiry, no cloud verification call. The entire login process takes less than one minute.

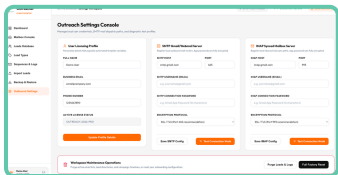
What you need to enter:

- **Business Email** – The same email address you used during your initial registration. This identifies your local profile and pulls up your saved workspace configuration, SMTP settings, lead database, and campaign sequences automatically.

- **Outreach License Key** — Your license key acts as your secure credential. Since it was verified once during registration and stored in your encrypted local profile, the login check happens entirely offline. Enter the key, hit Authenticate License, and you are in.
- **Why this approach is better:** Traditional software forces you to remember a separate password, wait for an OTP SMS, or reset credentials every few months. OutreachFlow eliminates all of that friction. Your license key is your permanent, unchanging credential — long enough to be secure, simple enough that you never forget it. Because authentication is handled locally, it also works in environments with no internet connection, including air-gapped office networks and travel situations with limited connectivity.

4 Outbound Settings — The First Thing You Do

Before your first campaign, configure where your emails come from.



The moment you log in or complete registration, OutreachFlow will guide you straight to the Outbound Settings console. This is the single most important configuration step in the entire software. Without it, nothing moves. No emails go out. No replies come in. Think of it as connecting your engine before you start driving — you only do it once, and after that, everything runs automatically in the background every time you use OutreachFlow.

Why this setup is required:

- OutreachFlow Automation is built to send cold outreach emails directly from your own email account — not from a shared sending pool, not from a third-party relay, and not from any cloud server owned by us. This is intentional. When emails go out from your own domain and your own mailbox, deliverability is dramatically better, your sender reputation stays under your control, and your leads see a real, trustworthy email address — not a generic bulk-sender domain.

- **To make this work, OutreachFlow needs two things from you:**
 - 1. SMTP credentials — so it knows how to send emails on your behalf.
 - 2. IMAP credentials — so it can pull replies back into your inbuilt mailbox inside the software.
 - Both are configured once, saved in encrypted form on your local machine, and reused automatically for every campaign you run going forward.

SMTP — Simple Mail Transfer Protocol

- **What it is:** SMTP is the protocol your email provider uses to send outgoing mail. When OutreachFlow dispatches a campaign email to a lead, it connects to your SMTP server and sends the message exactly as if you had typed it and hit send yourself — just automated and personalised at scale.
- **What you need to enter:**
 - **SMTP Host** — This is your email provider's outgoing mail server address. For Gmail it is `smtp.gmail.com`. For Zoho it is `smtp.zoho.com`. For Outlook it is `smtp.office365.com`. Your provider's help documentation will always list this.
 - **Port** — The port number tells OutreachFlow which channel to use when connecting to your SMTP server. Port 465 with SSL/TLS is the most secure and widely recommended option. Some providers also support port 587 with STARTTLS. OutreachFlow defaults to 465 and SSL/TLS, which works for the vast majority of Gmail and webmail accounts.
 - **SMTP Username (Email)** — This is simply the full email address of the account you want to send from. For example, `yourname@gmail.com` or `hello@yourcompany.com`.

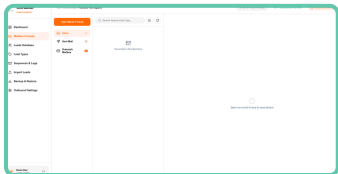
- SMTP Password — For Gmail and most modern providers, this is not your regular login password. You will need to generate an App Password — a 16-character code your email provider issues specifically for third-party software. This keeps your main account password safe while still giving OutreachFlow the access it needs to send on your behalf. App Passwords are generated in your Google or provider account's security settings and take less than a minute to create.
- Encryption Protocol — Always choose SSL/TLS when using port 465. This ensures every email dispatched by OutreachFlow is transmitted through an encrypted channel between the software and your mail server.

IMAP – Internet Message Access Protocol

- What it is: IMAP is the protocol that allows OutreachFlow to read and sync your incoming emails. This is what powers the inbuilt Mailbox Console inside the software – the feature that lets you see replies from leads, review sent mail, and track your entire outreach conversation history without ever leaving OutreachFlow or opening a separate email client.
- What you need to enter:
 - IMAP Host – Your email provider's incoming mail server address. For Gmail this is `imap.gmail.com`. For Zoho it is `imap.zoho.com`. For Outlook it is `outlook.office365.com`.
 - Port – Port 993 with SSL/TLS is the standard secure port for IMAP connections and is what OutreachFlow recommends by default. It ensures all incoming mail data is fetched over an encrypted connection.
 - IMAP Username (Email) – The same email address you used for SMTP. Both protocols talk to the same inbox – SMTP handles outgoing, IMAP handles incoming.
 - IMAP Password – Again, use your App Password here, the same one you generated for SMTP or a separate one if your provider requires it. Your actual account login password should never be entered into third-party software.
 - Encryption Protocol – Select SSL/TLS for port 993. This is non-negotiable for any serious outreach operation – it protects your email data in transit between your mailbox and the software.

5 Mailbox Console

Track every conversation — sent, received, and outreach — without leaving the software.



The Mailbox Console is your built-in email client inside OutreachFlow Automation. Once your IMAP credentials are configured in Outbound Settings, this screen becomes a live, synced communication hub that shows you everything happening across your outreach operation in real time — replies coming in, emails going out, and a dedicated log of every message fired by the software itself.

Most outreach tools make you work blind. You send campaigns from the software and then switch to Gmail or Outlook to check if anyone replied. OutreachFlow eliminates that entirely. Everything lives in one place.

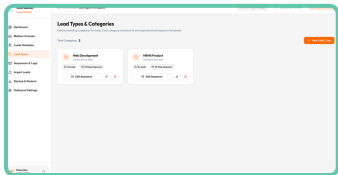
The Mailbox Console is divided into three dedicated tabs:

- **Inbox** — This is your live incoming mail feed, synced directly from your connected email account via IMAP. Every reply a lead sends back to your outreach emails appears here automatically. You can read the full thread, understand the context of the conversation, and decide your next move — all without opening a separate email client. The Inbox updates in real time so warm replies never get missed or buried in a crowded personal inbox.
- **Sent Mail** — A complete log of every email that has left your connected account. This includes both manually written emails and campaign dispatches. Use this tab to verify that your sequences are firing correctly, confirm delivery timings, and review the exact content that was sent to any individual lead. If a lead asks "did you send me something last week?" — this tab gives you the answer instantly.
- **Outreach Mailbox** — This is the most important tab for active campaign operators. It is a completely separate, dedicated folder that captures only the emails dispatched by OutreachFlow's campaign engine. Every automated sequence email — Step 1 cold outreach, Step 2 follow-up, Step 3 value add — is logged here independently from your regular sent mail. This separation keeps your outreach activity clean, organised, and easy to audit. You can see at a glance how many campaign emails have fired, filter by date or lead category, and trace the exact sequence path any individual lead has gone through.

This three-tab structure means your personal inbox stays clean, your outreach activity stays organised, and you always have full visibility into every touchpoint across every campaign — from the first cold email to the warm reply that turns into a meeting.

6 Lead Types & Categories

Organise your leads by campaign intent — separate sequences, separate templates, zero overlap.



Lead Types are the foundation of how OutreachFlow structures your entire outreach operation. Before you import a single contact or write a single email, you define your Lead Types — and the software builds a completely isolated campaign environment for each one.

A Lead Type is simply a category label that tells OutreachFlow what kind of leads belong to a particular group and which email sequence should run for them. The concept is straightforward but the impact on campaign quality is enormous. Different audiences need different messages. A lead who runs a web development business should not receive the same email as a lead who manages an HR software product. With Lead Types, they never will.

How it works in practice:

A software agency might create Lead Types called Web Development, Mobile App Development, and E-commerce Solutions — each targeting a different service vertical with tailored messaging that speaks directly to that prospect's world.

A full-service digital agency managing multiple clients might use client names as Lead Types — Acme Corp, BrightMedia, and Stellar Retail — giving each client their own completely separate email sequence, their own template library, and their own lead pool, all managed from a single OutreachFlow installation.

A B2B SaaS company might structure Lead Types by company size — SMB Outreach, Mid-Market, and Enterprise — using different value propositions and call-to-actions for each tier.

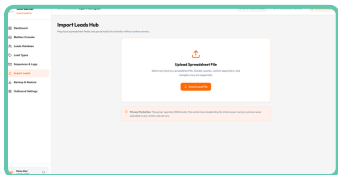
What each Lead Type gets:

- Every Lead Type you create is assigned its own isolated 10-step drip sequence. The templates you write for Web Development have no connection to the templates you write for Mobile App Development. They can have completely different subject lines, different email bodies, different follow-up angles, and different timing intervals. When you fire a campaign, OutreachFlow knows exactly which sequence to run based on the Lead Type assigned to each contact.
- You can create as many Lead Types as your operation requires. Each one displays its total lead count, the number of sequence steps configured, and quick-access buttons to edit the sequence or manage the category directly from the Lead Types dashboard. Creating a new Lead Type takes seconds — give it a name, save it, and its sequence builder is ready and waiting.

7

Lead Import Hub

Bring your contact list in, map your columns, assign a category, and you are ready to campaign.



The Lead Import Hub is where your raw prospect data becomes an active, organised campaign-ready lead database inside OutreachFlow. It supports any standard CSV spreadsheet file and is built to handle real-world data — messy column headers, inconsistent formatting, double-quoted fields, custom separators, and complex row structures are all handled without issue.

The import process is designed to be fast, accurate, and completely private. Your file is loaded directly into local memory and parsed on your machine. Nothing is uploaded. Nothing is transmitted. Your contact data never touches an external server at any point during the import.

Step 1 — Upload your CSV file

- Click Select Local File and choose your spreadsheet from anywhere on your machine. OutreachFlow immediately reads the file, detects the number of rows, and identifies the column headers present in your data. You will see a confirmation of how many records were detected before anything is committed to the database.

Step 2 – Verify and correct column mapping

- This is where OutreachFlow's intelligence saves you time. The software automatically attempts to map your CSV columns to the correct lead fields — Name, Email, Phone, Company, Company Size, Location, and Website. It reads your column headers and makes a best-guess assignment for each field.
- However, not every spreadsheet is perfectly labelled. Your CSV might have a column called "First Name" instead of "Name", or "Organisation" instead of "Company", or "City" instead of "Location". The column mapping interface lets you review every auto-assigned match and correct any that are wrong with a simple dropdown selection. You are in complete control of what data lands in which field. A live Mapped Records Preview on the right side of the screen shows you exactly how your first few real records will look once imported — so you can catch any mapping errors before they reach your database.

Step 3 – Assign a Lead Type category

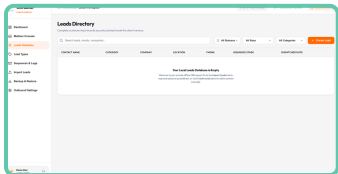
- Before processing the import, you assign every lead in this file to a Lead Type category. This is a single selection that applies to all records in the current import batch. If you are importing a list of web development agencies, select the Web Development Lead Type. Every contact from that file will be tagged to that category and will automatically enter that category's 10-step email sequence when campaigns run.
- This design is intentional. Each import file represents a focused, targeted list — and focused lists belong to a single campaign category. If you have contacts that belong to different Lead Types, import them in separate batches with the appropriate category assigned to each.

Step 4 – Process the import

- Click Process Import Queue and OutreachFlow validates every row, filters out any records missing a required email address, and writes the clean data to your local lead database. The entire process completes in seconds regardless of file size.

8 Leads Database

Your complete contact directory – view every imported lead or add new ones manually.



The Leads Database is the central repository of every contact inside OutreachFlow. Every lead imported through the Import Hub lands here, organised, validated, and ready for campaign activity. This screen gives you full visibility into your entire prospect pool and the ability to manage it with precision.

Viewing your leads:

- The database displays all imported leads in a clean, searchable list showing each contact's Name, Email, Company, Location, Phone, Website, Company Size, and assigned Lead Type category. You can sort and filter the list to find specific contacts, review which category they belong to, and check the status of their campaign journey. Whether you have 50 leads or 5,000, the database keeps everything accessible and easy to navigate.

Adding leads manually:

- Not every contact comes from a bulk CSV export. Sometimes you meet a prospect at an event, get a referral from a client, or come across a specific company you want to target directly. The Leads Database lets you create individual lead records manually from the same screen — no spreadsheet required. Simply fill in the contact's details, assign them to the appropriate Lead Type category, and they are immediately added to the database and enrolled in that category's campaign sequence.
- This combination of bulk import and manual entry means your lead database is never limited by the format your data arrives in. Spreadsheet from a data provider? Import it. Business card from a networking event? Add it manually. Both routes lead to the same place — a clean, organised, campaign-ready contact record inside OutreachFlow.

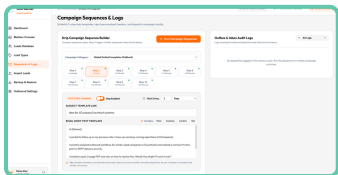
Why this matters:

- Your Leads Database is the single source of truth for all campaign activity in OutreachFlow. Every sequence, every email dispatch, every follow-up step runs against the records stored here. Keeping it accurate, well-categorised, and up to date is what ensures your campaigns reach the right people with the right message at the right time.

9

Campaign Sequences & Logs

Build your multi-step email drip, set your timing, and let OutreachFlow handle the rest automatically.



The Campaign Sequences & Logs screen is the operational core of OutreachFlow Automation. This is where you write your outreach emails, define how many follow-ups to send, decide exactly how much time passes between each one, and then let the software execute the entire sequence on autopilot — for every lead in your database, personalised with their individual contact details, fired at precisely the intervals you configured.

Building your sequence:

- Each Lead Type category supports up to 10 sequence steps. You build them one by one, selecting each step from the sequence navigator at the top of the screen. Step 1 is your initial cold outreach — the first email a lead receives. It fires immediately when a campaign run is triggered. Every step after that fires automatically based on the wait interval you define.

- Step 2 might be set to fire 2 days after Step 1. Step 3 might follow 3 days after that. Or you might want a rapid-fire sequence where Step 2 goes out 30 minutes later, Step 3 an hour after that, and Step 4 the next morning. OutreachFlow gives you complete control — intervals can be set in minutes, hours, or days, giving you the flexibility to build anything from a slow, thoughtful nurture sequence to an aggressive short-window follow-up cadence.

Writing your templates:

- Each step has its own Subject Line template and Email Body template. These are not generic, one-size-fits-all messages. OutreachFlow supports dynamic personalisation variables that are automatically replaced with each lead's real data at the moment of dispatch. Use {{Name}} to insert the lead's name, {{Company}} to reference their business, {{Location}} to mention their city or region, and {{Size}} to acknowledge their company scale. A single template instantly becomes a personalised email for every contact in your database — no manual editing required.
- The result is that every lead receives an email that reads as if it was written specifically for them, even when you are running a sequence across hundreds of contacts simultaneously.

Enabling and disabling steps:

- Not every campaign needs all 10 steps. Each sequence step has an individual enable/disable toggle, so you can activate exactly the steps you need and leave the rest dormant. A 3-step sequence, a 7-step sequence, or a full 10-step sequence — the choice is yours, and you can adjust it at any time without losing the templates you have already written.

Running your campaign:

- When your sequence is ready, hit the Run Campaign Dispatcher button. OutreachFlow processes your entire lead database for the selected Lead Type, evaluates which step each lead is currently at, checks whether their interval has elapsed, and fires the appropriate email through your connected SMTP server. The engine runs the logic automatically — you do not manually select who gets which step. OutreachFlow tracks each lead's position in the sequence and advances them through the steps on schedule.

The Audit Logs panel:

- The right side of the screen houses the Outbox and Inbox Audit Logs. This is your real-time record of everything the campaign engine has done. Every email dispatched is logged with the lead's name, the step number, the subject line, and the timestamp. Every reply that comes back through your IMAP connection is also captured here. The logs give you complete accountability over your campaign activity — you always know exactly what went out, when it went out, and what came back in response.
- You can filter the log view between All Logs, Outbound only, and Inbound only, making it easy to focus on dispatches when you are monitoring a new campaign launch, or focus on replies when you are tracking warm response activity.

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Before You Go — Read These First

A few critical things every OutreachFlow user must be aware of before they start operating the software.

Note 1 — Logging out will erase all your local data permanently

- OutreachFlow Automation stores everything — your leads, your campaign templates, your email sequences, your SMTP credentials, your dispatch logs, and your mailbox history — exclusively on your local machine. There is no cloud backup. There is no server-side copy. This is by design, because your data privacy is the entire foundation this software is built on.
- However, this comes with one critical responsibility you must understand before you use the software: if you hit the Logout button, all data stored in your local OutreachFlow workspace will be wiped completely. Your lead database, your sequence templates, your settings, your logs — everything will be gone. The logout action is permanent and irreversible.
- Do not log out unless you are absolutely certain you no longer need the data on that machine, or unless you have taken a backup first. If you are switching machines, finishing a project, or simply closing the software for the day — close the window or exit the application. Do not use the logout button unless you intend to reset the workspace entirely.

Note 2 — Backup is a protected feature, contact the admin team to activate it

- OutreachFlow includes a Backup and Restore module that allows you to export your full workspace — leads, templates, sequences, settings, and logs — to a secure local file that can be restored on any licensed machine. This feature is your safety net against accidental data loss, hardware failure, or machine migration.

- However, the Backup feature is hidden by default and is not accessible to all users out of the box. This is a deliberate protection measure to ensure backups are handled responsibly and not misused to transfer workspace data across unlicensed devices.
- If you want the Backup option activated for your account, reach out to the OutreachFlow admin team directly. Once your request is verified, the Backup and Restore panel will be unlocked in your Outbound Settings console. We strongly recommend requesting this activation as early as possible — before you have built up significant lead data and campaign templates — so that your safety net is in place before you ever need it.

Note 3 — Gmail users must use an App Password, not their Google account password

- This is one of the most common points of confusion for new OutreachFlow users, and getting it wrong will cause your SMTP and IMAP connections to fail every time.
- When you connect Gmail as your outgoing mail server (SMTP) or your incoming mail sync (IMAP), Google will not accept your regular Gmail login password. Google blocks direct password access for third-party software as a security policy. Instead, you need to generate an App Password — a special 16-character access code that Google issues specifically for external applications like OutreachFlow.
- Here is how to generate one: Go to your Google Account at myaccount.google.com, navigate to the Security section, find the App Passwords option under the Two-Step Verification settings, select Mail as the app type, and generate the password. Copy the 16-character code Google gives you and paste it directly into the SMTP Password and IMAP Password fields in OutreachFlow's Outbound Settings.

- Your regular Gmail password should never be entered into OutreachFlow. Always use the App Password. This applies to both SMTP and IMAP configuration fields. If your Gmail account does not yet have Two-Step Verification enabled, you will need to enable that first before the App Passwords option becomes available. The entire process takes less than three minutes and only needs to be done once.

Note 4 – One licence key works on one device only

- Your OutreachFlow licence key is tied to a single device. Once you register the software on a machine using your licence key, that key is locked to that device. You cannot use the same key to activate OutreachFlow on a second laptop, a team member's computer, or any other machine. Attempting to do so will result in an authentication failure.
- This is a deliberate design decision that protects the integrity of the licensing system and ensures every active user has a dedicated, clean workspace tied to their own machine.
- If you need OutreachFlow on additional devices, each device requires its own separate licence key. Additional device licences are available at a significantly reduced rate compared to the original software purchase — additional keys are priced at ₹2,500 INR per device or \$25 USD per device. This is a one-time cost per device, not a subscription, and covers permanent activation on that machine.
- To purchase additional device licences, contact the OutreachFlow admin team with your original licence key as a reference. The team will issue new keys promptly, and each additional device can be activated and running in under two minutes following the standard registration process.

Thank You