

EnMasse E-mail

Send E-mails en masse using a template

User Guide

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Chapter 0: Introduction and How to Execute

EnMasse E-mail is an application that allows you to send multiple e-mail one after the other by using a template and a file containing all the replacement data. You can specify different subject for each e-mail or the same for all, different attachments for each e-mail or the same for all, CC and BCC addresses, as well as a sender alias to appear instead of your e-mail address. It is also possible to have a placeholder value in the subject, if the same for all is selected.

In this user guide I will go through each section in the application and each option within that section. But first, let's start with running the application.

In order to run the application on a Windows PC, you will need to have a recent version of [Python](#) installed on your computer (version 3.10 or above is recommended). With Python installed, open Powershell and type the following commands, followed by pressing the Enter key after each one:

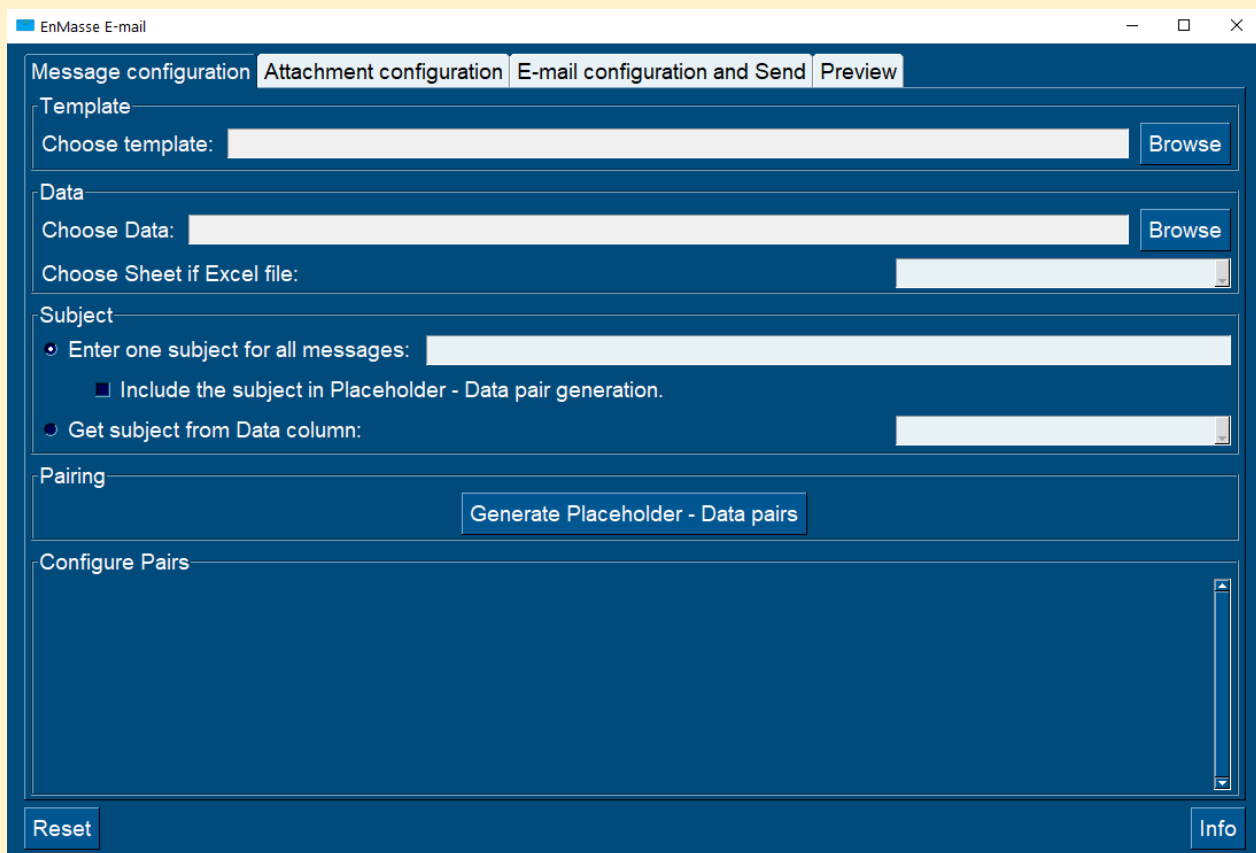
- 1) **cd "directory path"** : this sets the current directory. The directory path is where the main.py file is located (for example: cd "C:\EnMasse-Email").
- 2) **pip install -r requirements.txt** : this will install any dependencies that are required to run the application. Before this step, you can also create a new Python virtual environment and activate it.
- 3) **python main.py** : this will run the main.py file and start the application. The first thing you will see is the [Message configuration](#) tab.

If you don't have a lot of experience with coding, instead of the above, you can navigate to the [releases](#) page in the GitHub repository and download the latest release version, which contains a standalone executable file (without the need to install python or perform the above console commands).

If you want some examples, you can find some [here](#).

Thank you for using EnMasse E-mail!

Chapter 1: Message configuration



The screenshot shows a web application window titled "EnMasse E-mail". It has four tabs: "Message configuration" (selected), "Attachment configuration", "E-mail configuration and Send", and "Preview". The "Message configuration" tab contains several sections:

- Template:** A section with a "Choose template:" text input field and a "Browse" button.
- Data:** A section with a "Choose Data:" text input field and a "Browse" button, followed by a "Choose Sheet if Excel file:" dropdown menu.
- Subject:** A section with two radio button options: "Enter one subject for all messages:" (selected) and "Get subject from Data column:". The first option has a text input field and a checkbox "Include the subject in Placeholder - Data pair generation." The second option has a dropdown menu.
- Pairing:** A section with a "Generate Placeholder - Data pairs" button.
- Configure Pairs:** A large empty text area with a vertical scrollbar on the right.

At the bottom of the window, there are "Reset" and "Info" buttons.

The Message configuration tab

Starting from the top, we have the **Template** selection frame, where you can browse and specify the template file. Accepted template file extensions are .html and .txt.

- Note: In the template file, you can have any number of different placeholders, that will later be replaced by the appropriate data. In order to specify placeholder text, you need to enclose it in curly brackets, like {this}. If this paragraph was entered into a template, then {this} would be replaced by the selected data.
- **Warning:** Entering just numerical digits as the placeholder will result in an error, so please make sure to include at least one alphabetical character.

Next, we have the **Data** frame, where you can browse and specify the data file containing all the replacement data, as well as the recipient e-mail address(es), and optionally the subjects, attachment filenames, and any CC or BCC e-mail addresses. Each row of data must correspond to an individual e-mail message, with each column referring to a placeholder. Accepted data file extensions are .xls* (excel file, like .xls, .xlsx, .xlsm etc.) and .csv. If an excel file is selected, then after the selection you will need to specify the name of the sheet containing the data from the dropdown menu in this frame.

- Note: It's important to include a title on each data column, so you can recognize and match the data to the relevant placeholder and avoid errors. Additionally, the naming of the title matters. If the title of a column is the same as a placeholder text, then they will be matched by default after the pair generation in the next step. Similarly, appropriate naming for the Subject, Attachments, and Recipient, CC and BCC e-mail address columns could have the same result. Please refer to the examples for reference.
- Note: If you are specifying attachments, make sure to only include the filename, including the file extension (for example "file.txt"), and not the full path of the file in the system.
- Note: If you are adding more than one attachment file and/or recipient, CC or BCC e-mail address, you will need to separate the filenames and/or e-mail addresses with a comma (,).

Moving on, you can specify the subject in the **Subject** frame. If you wish to have a single subject for all e-mails, you can type it in the input field. This subject can also contain any number of placeholder text, and if you check the relevant box, you will be able to replace it with data later on. If, instead, each e-mail has its own subject in the data file, then you need to select the option *Get Subject from Data column* and after the next step, you will be able to specify the column name for the subject data.

The next frame called **Pairing** contains the button that will generate pairs of placeholder text from the template (and subject if selected) and a dropdown list containing all the column titles in the data file. You will see these pairs in

the **Configure Pairs** frame. If the values are not paired by default, you will need to specify the relevant column by its title for each placeholder text.

- Note: After the pairs are created, several dropdown lists will become enabled, specifically in the subject from data, attachment filenames from data, recipient, CC and BCC e-mail addresses. Their values will be the titles of the data columns.

Below is how the Message configuration tab will look like using the example 2 template and data.

The screenshot shows the 'EnMasse E-mail' application window with the 'Message configuration' tab selected. The interface includes several sections: 'Template' with a 'Choose template' field set to 'example_template_2.txt' and a 'Browse' button; 'Data' with a 'Choose Data' field set to 'example_data_2.csv' and a 'Browse' button, and a 'Choose Sheet if Excel file:' field; 'Subject' with two radio button options: 'Enter one subject for all messages:' (selected) with a text field containing 'Just an {example}', and 'Get subject from Data column:' with a dropdown menu; a 'Pairing' section with a 'Generate Placeholder - Data pairs' button; and a 'Configure Pairs' section with a table of four rows. Each row has a 'Placeholder' text field and a 'Data Column' dropdown menu. The first row has 'example' in the placeholder and an empty dropdown. The other three rows have 'vendor name', 'vendor code', and 'inv no' in the placeholders, with their respective dropdowns also set to the same values. At the bottom left is a 'Reset' button and at the bottom right is an 'Info' button.

Placeholder	Data Column
example	
vendor name	vendor name
vendor code	vendor code
inv no	inv no

Example of the Message configuration tab

After confirming that all values have been matched, you can move on to the next tab, Attachment configuration.

- Note: Once you have generated the pairs, you can no longer make any changes to the template or the data files, so if any changes are needed, you will have to reset the app.

Chapter 2: Attachment configuration

The screenshot shows a software window titled "EnMasse E-mail" with four tabs: "Message configuration", "Attachment configuration" (which is active), "E-mail configuration and Send", and "Preview". The "Attachment configuration" tab contains two main sections. The first section, "Select attachment(s)", has three radio button options: "No attachments" (selected), "Same attachment(s) for all e-mails.", and "Separate attachment for each e-mail.". Below the "Same attachment(s) for all e-mails." option is a text field "Select attachment file(s):" followed by a "Browse" button. Below the "Separate attachment for each e-mail." option is a text field "Select attachments directory:" followed by a "Browse" button, and below that is a text field "Select the Data column that contains the attachment filenames:". The second section, "Attachment filename validation and preview", contains the text "Validate if all attachments in the selected data column are in the attachment directory and preview the filenames." and "Validation is required only when adding separate attachments." Below this text is a "Validate and preview" button. At the bottom of this section are two empty list boxes: "In Data:" on the left and "In Directory:" on the right. At the very bottom of the window are two buttons: "Reset" on the left and "Info" on the right.

The Attachment configuration tab

In this tab, you can select any attachments you want in the **Select attachment(s)** frame. The default option is no attachment. The next option is same attachments for all e-mails, where you can select the attachment file(s) directly. If you have separate attachment files for each e-mail message, you will need to select the third and final option. You will then have to specify the directory where the attachment files are located, as well as the Column title where the filenames of the attachment(s) for each e-mail are specified.

If the third option is selected, then you will need to validate that the files specified in the data column actually exist in the directory. You can do this in the next frame, **Attachment filename validation and preview** by clicking the button. You will then see messages regarding the status, whether there are missing files, or if everything is in order. There is also a warning message if

there are files in the directory that are not specified in the data column, in case there is a forgotten attachment.

After the validation is complete, you can see a preview of all the files specified in the data column and all the files located in the specified directory.

- Note: Attachment validation is only required if you are adding separate attachments for each e-mail by specifying the filename in the data file.

Below is of how the Attachment configuration tab will look like using the example 1 data (please check the introduction for the example link).

EnMasse E-mail

Message configuration | **Attachment configuration** | E-mail configuration and Send | Preview

Select attachment(s)

- ☒ No attachments
- ☐ Same attachment(s) for all e-mails.
- ☐ Separate attachment for each e-mail.

Select attachment file(s):

Select attachments directory: /atta

Select the Data column that contains the attachment filenames:

Attachment filename validation and preview

Validate if all attachments in the selected data column are in the attachment directory and preview the filenames.

Validation is required only when adding separate attachments.

In Data:	In Directory:
INV088684089-41.png	INV088684089-41.png
INV194571939-72.xlsx	INV194571939-72.xlsx
INV239136864-83.csv	INV239136864-83.csv
INV677115128-93.txt	INV677115128-93.txt
INV728337212-83.ico	INV728337212-83.ico
	New Text Document.txt

Example of the Attachment configuration tab

Chapter 3: E-mail configuration and Send

The screenshot shows the 'EnMasse E-mail' application window. The 'E-mail configuration and Send' tab is active. The 'E-mail settings' section has 'Select e-mail service' set to 'Custom' and 'E-mail server' set to 'Custom'. The 'Recipients' section has a dropdown for 'Column of recipient e-mail addresses' and checkboxes for 'Include CC e-mail addresses from column' and 'Include BCC e-mail addresses from column'. The 'Alias' section has a checkbox for 'Set alias for sender'. The 'Send' section has a 'Setup and Send' button and a message 'Click to set sender credentials and send the e-mails.'. The 'Log' section is empty. At the bottom are 'Reset' and 'Info' buttons.

The E-mail configuration and Send tab

- **Warning:** It is advisable to first send a copy to yourself before you send it to someone else, in order to ensure that the formatting appears as intended. This application was created by a single individual, and while it was tested, there is no guarantee it works under every circumstance.

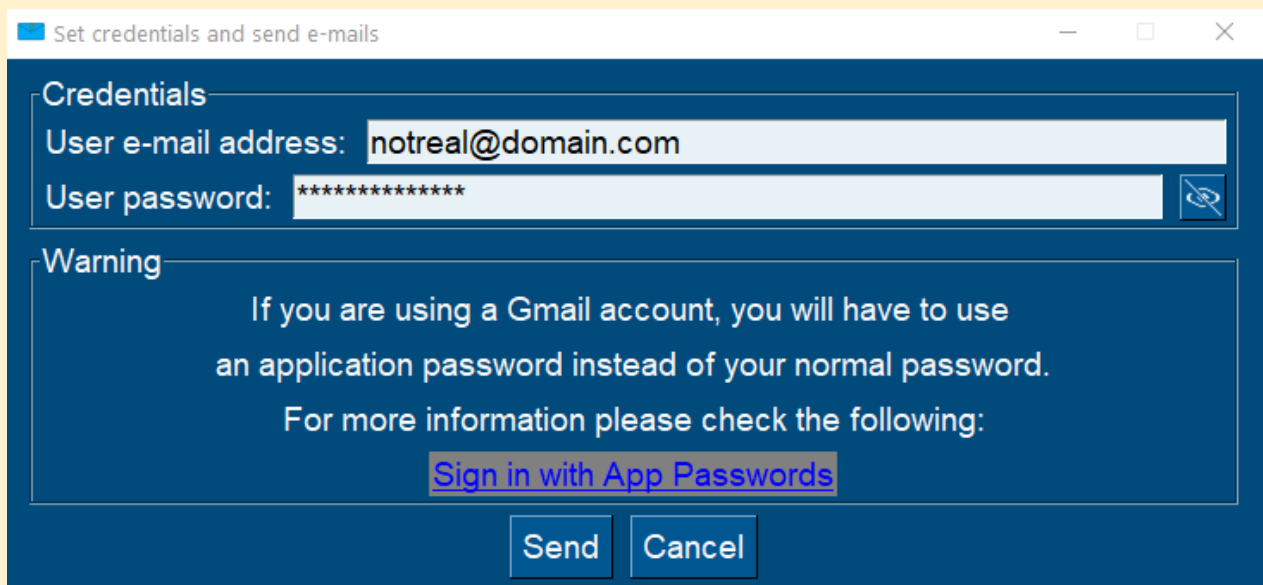
This is the last tab related to functionality. At the top, in the **E-mail settings** frame, you can specify the SMTP e-mail server, as well as the SMTP port for the connection. If you are using Gmail or Outlook, you can select the service from the dropdown and the settings will autocomplete.

Next, in the **Recipients** frame, you have to specify the data column title which corresponds to the recipient e-mail address(es), as well as any CC or BCC e-mail addresses, if you specify it via the checkboxes.

- Note: At this point, you can also preview your e-mails in the [Preview](#) tab.

In the **Alias** frame, you can optionally set an alias to appear instead of your e-mail address as sender, by checking the checkbox and adding the alias in the input field.

Finally, you can click on the "Setup and Send" button in the **Send** frame, in order to set your credentials and send the e-mails. Here is how the credentials window looks like:

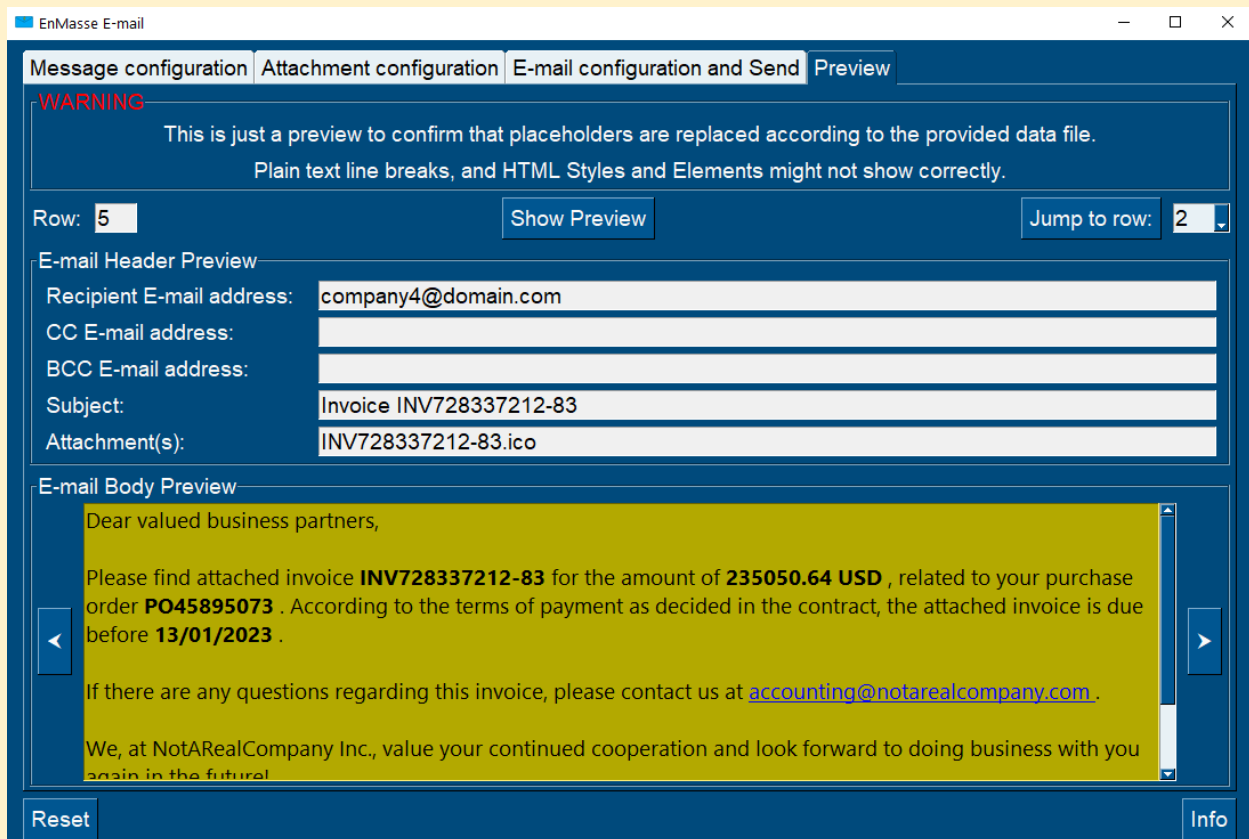


The Set credentials and send e-mails Window

Make sure to pay attention to the warning message if you are using a service that requires an application password, like Gmail. After setting our e-mail address and password, you can click "Send" and the application will start the connection and send the e-mails.

In the **Log** frame you will see the status of each e-mail being sent, as well as any potential errors that might occur, as well as a progress bar. After all the e-mails have been sent, you will get a confirmation message. If there were any errors, you will get an error message directing us to the log for troubleshooting.

Chapter 4: Preview



The screenshot shows a software window titled "EnMasse E-mail" with four tabs: "Message configuration", "Attachment configuration", "E-mail configuration and Send", and "Preview". The "Preview" tab is active. At the top, a red "WARNING" message states: "This is just a preview to confirm that placeholders are replaced according to the provided data file. Plain text line breaks, and HTML Styles and Elements might not show correctly." Below the warning, there is a "Row:" field set to "5", a "Show Preview" button, and a "Jump to row:" dropdown set to "2". The "E-mail Header Preview" section contains fields for "Recipient E-mail address" (company4@domain.com), "CC E-mail address", "BCC E-mail address", "Subject" (Invoice INV728337212-83), and "Attachment(s)" (INV728337212-83.ico). The "E-mail Body Preview" section shows a preview of the email body text on a yellow background. The text reads: "Dear valued business partners, Please find attached invoice **INV728337212-83** for the amount of **235050.64 USD** , related to your purchase order **PO45895073** . According to the terms of payment as decided in the contract, the attached invoice is due before **13/01/2023** . If there are any questions regarding this invoice, please contact us at accounting@notarealcompany.com . We, at NotARealCompany Inc., value your continued cooperation and look forward to doing business with you again in the future." Navigation arrows are visible on the left and right sides of the body preview. At the bottom, there are "Reset" and "Info" buttons.

An example of the Preview tab

In the preview tab, you can see a preview of how your e-mail message will look like after all the placeholders have been replaced with the relevant data. This is optional, and is only meant to show that the replacement was correct. As per the warning message, you might not be able to see all html styles, elements, or plain text line breaks in this preview, which is why sending a test copy to an e-mail address you own is encouraged.

After clicking the "Show Preview" button, if everything is in order, you will be able to see a preview of the e-mail message header and body. You can navigate to the preview of different messages by using the arrow buttons (keyboard arrow buttons also work), or by specifying the relative row (refers to the row containing the replacement data in the data file) to jump to.