

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:

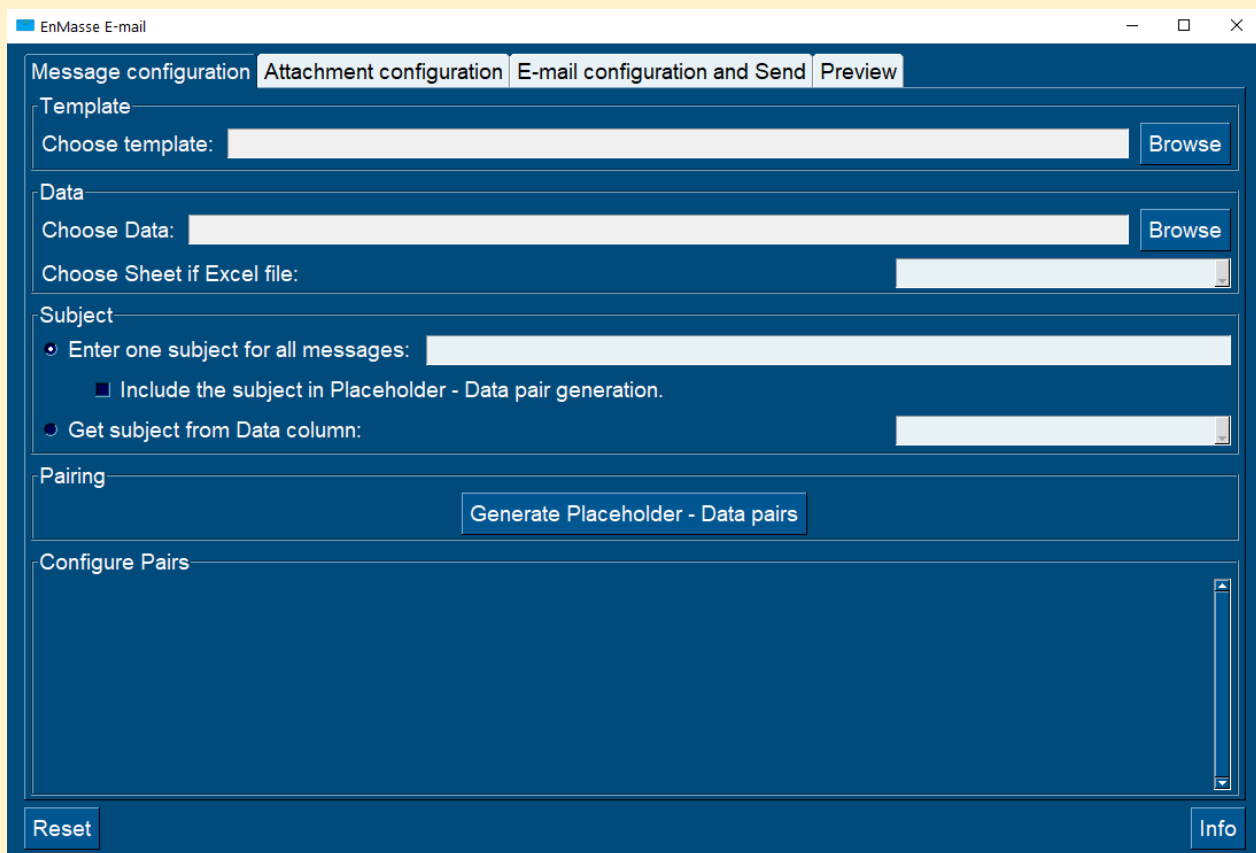
- 1) **cd "directory path"** : this sets the current directory. The directory path is where the main.py file is located (for example: cd "C:\enmasse-email").
- 2) **pip install -r requirements.txt** : this will install any dependencies that are required to run the application. Before this step, you can 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:" text input field.
- 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 text input field.
- 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. It is highly recommended to use an html file to get the best formatting.

- Note: In the template file, we can have any number of different placeholders, that will later be replaced by the appropriate data. In order to specify placeholder text, we 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 we 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 and any CC or BCC e-mail addresses. 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 we 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 we 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, that is the next step. This way you can avoid extra manual work. Similarly, appropriate naming for the Subject, Attachments, and Recipient e-mail address columns could have the same result.
- 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.

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

The next frame called **Pairing** contains only a single button, that will generate automatically pairs of placeholder text from the template (and subject if selected) and a dropdown list containing all the column titles in the data file. We will see these pairs in the **Configure Pairs** frame. If the values are not paired by default, we will need to specify the relevant column by its name 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 of how the Message configuration tab will look like using the example 2 data (please check the introduction for the example link).

The screenshot shows the 'EnMasse E-mail' application window. The 'Message configuration' tab is selected. It contains the following sections:

- Template:** 'Choose template:' with a text field containing 'example_template_2.txt' and a 'Browse' button.
- Data:** 'Choose Data:' with a text field containing 'example_data_2.csv' and a 'Browse' button. Below it is 'Choose Sheet if Excel file:' with an empty dropdown.
- Subject:**
 - 'Enter one subject for all messages:' with a text field containing 'Just an {example}'.
 - A checked checkbox 'Include the subject in Placeholder - Data pair generation.'
 - 'Get subject from Data column:' with an empty dropdown.
- Pairing:** A button labeled 'Generate Placeholder - Data pairs'.
- Configure Pairs:** A table with two columns: 'Placeholder' and 'Data Column'.

Placeholder: example	Data Column: [dropdown]
Placeholder: vendor name	Data Column: vendor name
Placeholder: vendor code	Data Column: vendor code
Placeholder: inv no	Data Column: inv no

At the bottom, there are 'Reset' and 'Info' buttons.

Example of the Message configuration tab

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

- Note: Once we have generated the pairs, we can no longer make any changes to the template or the data files, so if any changes are needed, we 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 the following elements:

- Select attachment(s)**: A section with three radio button options:
 - ☐ No attachments
 - ☐ Same attachment(s) for all e-mails. Below this is a text field "Select attachment file(s):" and a "Browse" button.
 - ☐ Separate attachment for each e-mail. Below this is a text field "Select attachments directory:" and a "Browse" button.
- Select the Data column that contains the attachment filenames:**: A text field with a dropdown arrow.
- Attachment filename validation and preview**: A section with the text "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." and a "Validate and preview" button.
- In Data:** and **In Directory:**: Two large, empty list boxes with vertical scrollbars.
- Reset** and **Info** buttons: Located at the bottom left and right of the tab respectively.

The Attachment configuration tab

In this tab, we can select any attachments we want in the **Select attachment(s)** frame. The default option is no attachment. The next option is same attachments for all e-mails, where we can select the attachment file(s) directly. If we have separate attachment files for each e-mail message, we will need to select the third and final option. We 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 we will need to validate that the files specified in the data column actually exist in the directory. We can do this in the next frame, **Attachment filename validation and preview** by clicking the button. We 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, we 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 we 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.

Select attachment file(s): Browse

☒ Separate attachment for each e-mail.

Select attachments directory: /atta Browse

Select the Data column that contains the attachment filenames: attachments

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.

Validate and preview

In Data:

INV088684089-41.png
INV194571939-72.xlsx
INV239136864-83.csv
INV677115128-93.txt
INV728337212-83.ico

In Directory:

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

Reset Info

Example of the Attachment configuration tab

Chapter 3: E-mail configuration and Send

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

- E-mail settings:** Includes a dropdown for "Select e-mail service:" with "Custom" selected. Below it is a text input for "E-mail server:" with "Custom" entered, and a "Port:" input field.
- Recipients:** Includes a dropdown for "Column of recipient e-mail addresses:". Below it are two checkboxes: "Include CC e-mail addresses from column:" and "Include BCC e-mail addresses from column:", each followed by a dropdown menu.
- Alias:** Includes a checkbox "Set alias for sender:" followed by a text input field.
- Send:** A large blue button labeled "Setup and Send" with the text "Click to set sender credentials and send the e-mails." above it.
- Log:** A large empty text area for logging.

At the bottom left is a "Reset" button, and at the bottom right is an "Info" button.

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 make sure that the formatting works as intended. This application was created by a single individual, and while it was tested, there is no guarantee it works under every circumstance.

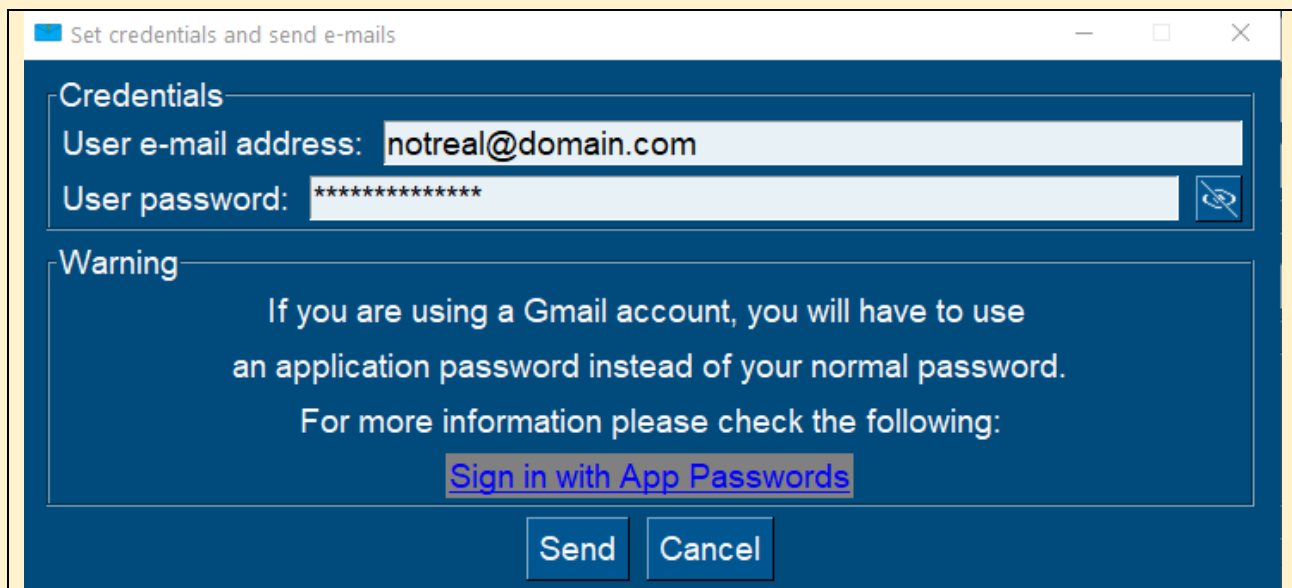
This is the last tab related to functionality. At the top, in the **E-mail settings** frame, we can specify the SMTP e-mail server, as well as the SMTP port for the connection. If we are using Gmail or Outlook, we can select the service from the dropdown and the settings will autocomplete.

Next, in the **Recipients** frame, we 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 we specify it via the checkboxes.

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

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

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

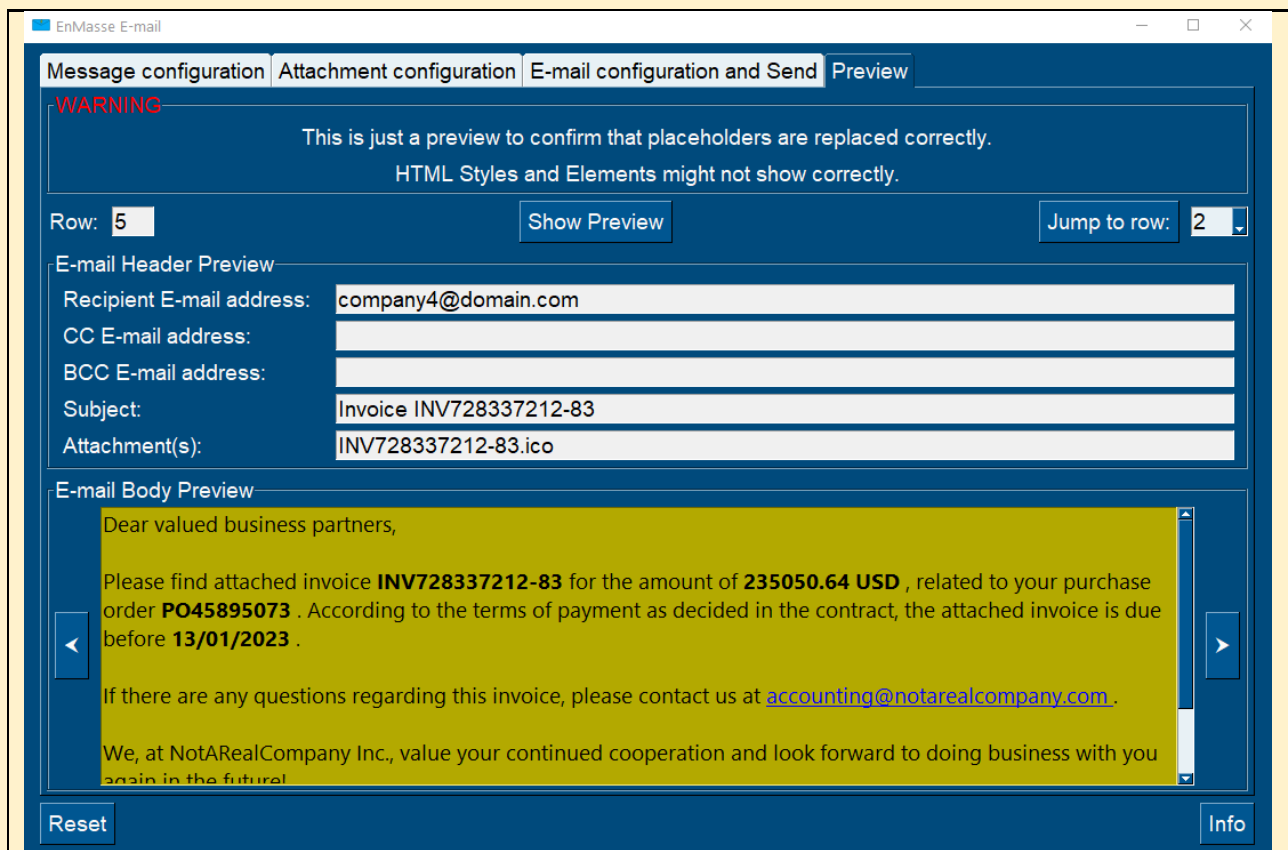


The Set credentials and send e-mails Window

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, we can click "Send" and the application will start the connection and send the e-mails.

In the **Log** frame we 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, we will get a confirmation message. If there were any errors, we will get an error message directing us to the log for troubleshooting.

Chapter 4: Preview



An example of the Preview tab

In the preview tab, we can see a preview of how our 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 and elements in this preview, which is why sending a 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, or by specifying the relative row (refers to the row containing the replacement data in the data file) to jump to.