



# An Introduction to the application

## The Role of Secret Santa

The Secret Santa app helps groups of people (friends, family, coworkers, etc.) **organize gift exchanges** during the holiday season or special events. The main goal is to **randomly assign each participant someone to buy a gift for**, without revealing the pairings until the gift is given. This keeps the experience fun, fair, and secret !

🎯 Key features include :

- Collecting participant names and emails
- Randomly assign gift givers and receivers while keeping it secret
- Allow organizers to set custom rules, like avoiding pairings between people who don't get along
- Sending automatic email notifications to all participants

🔑 **Note:** Only organizers with a **whitelisted Gmail address** can create a Secret Santa exchange. Make sure your Gmail is approved by the app creator before getting started.

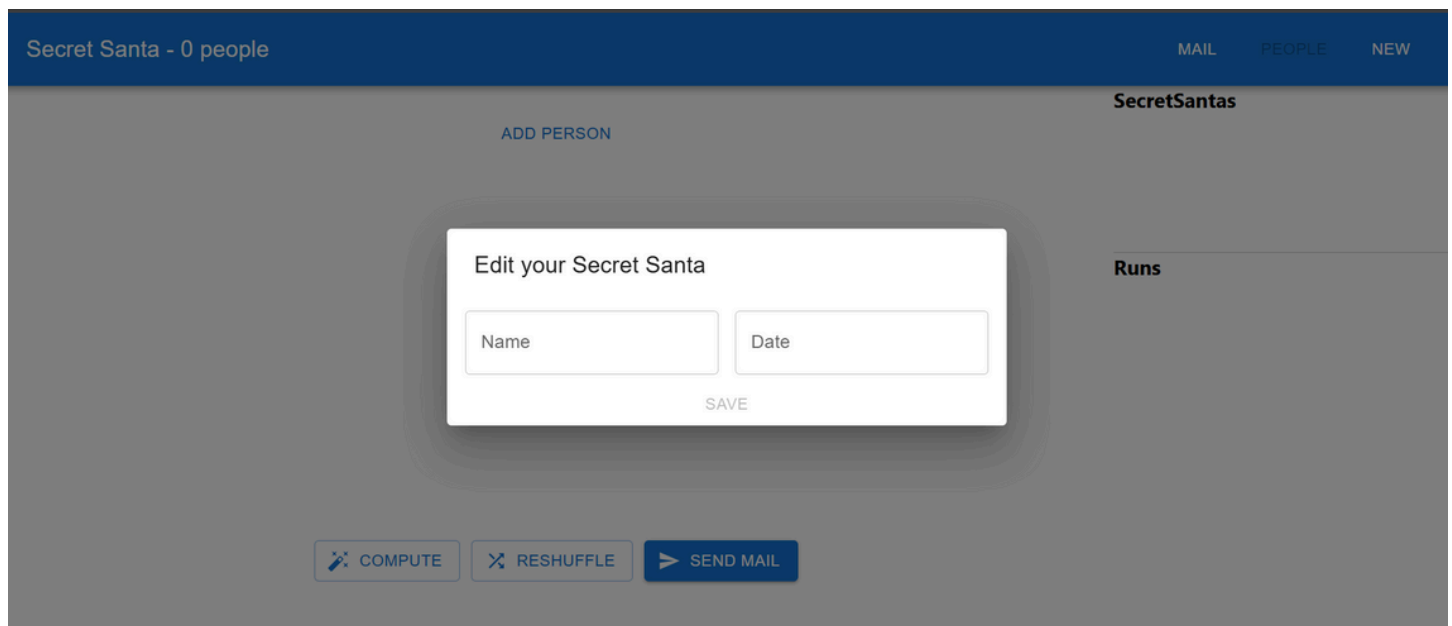
## Creating a New Secret Santa Exchange

When you first launch the app, a **pop-up window** will automatically appear asking you to enter the **name** and **date** of your Secret Santa project.

👉 Steps:

1. **Enter a project name** – Something like "Team Holiday Exchange" or "Marketing Dept. Secret Santa".
2. **Enter the exchange date** – This is the date when gifts will be revealed or exchanged.
3. Click the **"Save"** button

💡 This pop-up should open automatically the first time you connect.



If the pop-up doesn't appear:

- Click the **"New"** button located in the top-right corner of the main page screen

This will manually launch the project setup window so you can get started. You can create as many Secret Santa project as you want.

## Adding people on the project

Once your exchange is created, you can start adding the people who will take part in the gift exchange.

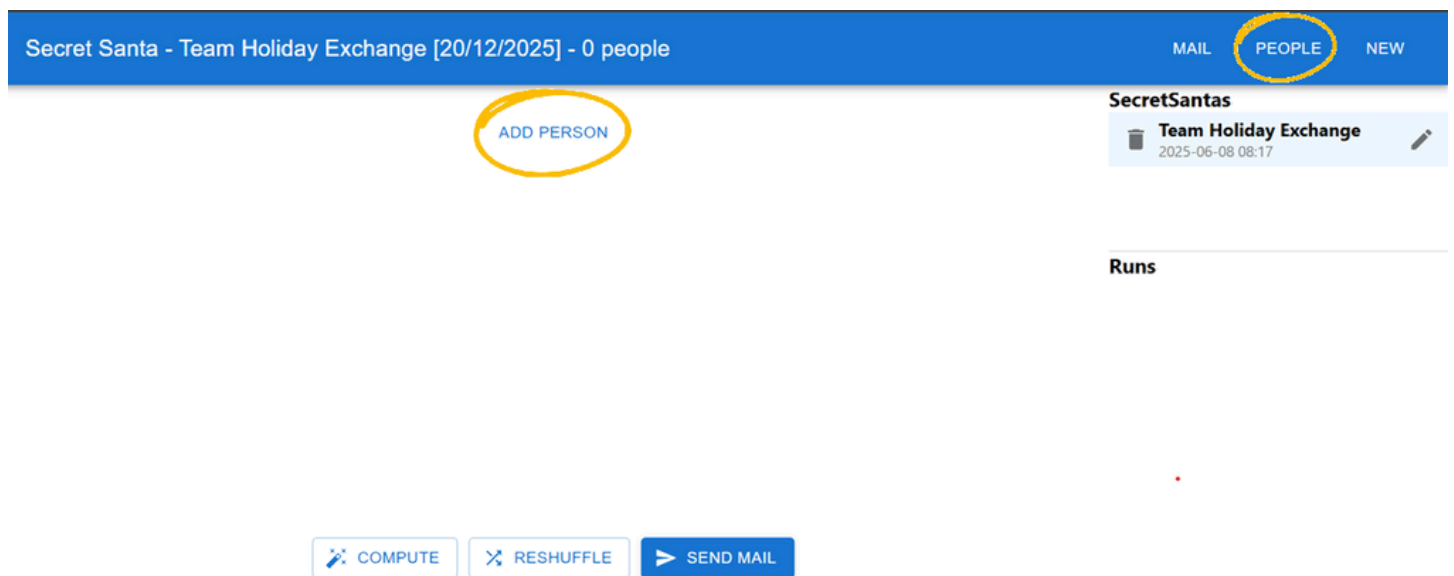
👤 To add participants, you have two options:

1. **Click on "Add Person"**

Located in the **center of the main screen**, this button opens the form to manually enter participant details.

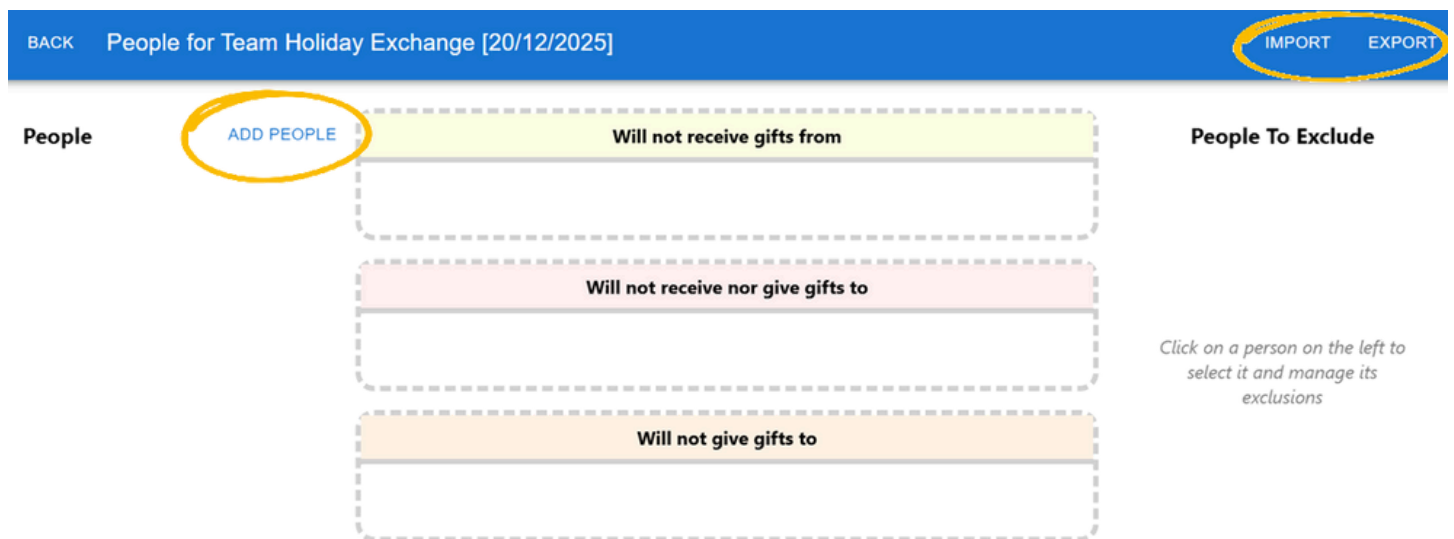
2. **Click on "People"**

Found in the **top menu bar**, this section also lets you manage your participant list—add, edit, or remove people at any time.



💡 **Tip:** Both options will lead you to the **same page and process**—choose whichever is most convenient for you.

Once you're on the **“People”** page, you have two ways to add participants to your Secret Santa exchange :



### 1. Import a CSV file (for bulk creation)

Click on the **“Import”** button to upload a list of participants all at once.

- To make this easier, click on **“Export”** to download a **CSV template**.
- This template shows you exactly what information is required (e.g., name, email).
- Fill it in, save it, and import it back into the app.

First Name	Surname	Email Address	Group (optional)
Jane	Doe	<a href="mailto:jane.doe@company.com">jane.doe@company.com</a>	Manager

📌 Important Notes:

- **First Name, Surname, and Email Address** are **mandatory** fields.
- The **Group** field is optional and can be left blank if not used.
- Each participant should have their own row.
- Make sure to save the file in **CSV format (.csv)** before importing.

## 2. Add participants manually

Click on “**Add Person**” to open a pop-up window that allows you to:

- Enter participant details manually
- Add one person at a time to the list

Edit person

×

Name

Jane

Surname

Doe

Email

jane.doe@company.com

Group

Manager

SAVE NEW GROUP

+

DELETE

SAVE

💡 Use the import option for large teams and the manual method for quick, one-off additions.

Once your list of participants is created—either by **manual entry** or **CSV import**—the names of all added people will appear in the **left section of the screen** on the “**People**” page.

From this list, you can:

- See all participants at a glance
- Select a name to view or edit their details
- Remove participants if needed

## Selecting participants for the draw

⚠ **Important:** Before launching your Secret Santa project, you must **select all the participants** who will take part in the exchange.

Steps:

1. On the **“People”** page, review your list of added participants.
2. **Select the checkboxes** next to the names of everyone you want to include in this project.
3. Once your selection is complete, go back to the homepage

🔍 **Note:** Only the participants you select will be included in the draw. Make sure you haven’t missed anyone before proceeding!

The screenshot shows a web interface for managing a Secret Santa project. At the top, a blue header bar contains the text 'BACK People for Team Holiday Exchange [20/12/2025]' and two buttons: 'IMPORT' and 'EXPORT'. Below the header, on the left, is a list of participants under the heading 'People'. Each participant has a blue checkbox and a pencil icon for editing. The participants are: Daisy Duck (daisy.duck@company.com), Frodo Baggins (frodo.baggins@company.com), Jane Doe (jane.doe@company.com), John Smith (john.smith@company.com), Mickey Mouse (mickey.mouse@company.com), and Peter Pan (peter.pan@company.com). To the right of the participant list are three exclusion rule boxes: 'Will not receive gifts from' (yellow), 'Will not receive nor give gifts to' (pink), and 'Will not give gifts to' (orange). On the far right, under the heading 'People To Exclude', there is a list of names that have been excluded: Daisy Duck, Frodo Baggins, Jane Doe, John Smith, and Mickey Mouse. A note above this list says '(Drag and Drop a name to exclude it)'.

## Setting up custom rules before the draw

Setting rules allows you to define **who should not be assigned to whom**—for example, avoiding direct manager-employee pairings or people who shouldn’t exchange gifts.

How to Set Rules:


1. On the **left side of the “Rules”** page, select:
  - The names of **all participants** you want to use in your rule setup.

- The name of the **specific person you want to create rules for** (this must be the **last selected or highlighted name** on the left list).
2. Once selected, all these names will appear in the **right column**.
  3. From the list on the right:
    - **Drag and drop names** into the appropriate categories or exclusions (depending on the rule you want to set).

 Example:

Let's say you want to define specific exclusions for **Frodo**. Here's how to do it:

1. **Select Frodo** on the left side (Frodo's name must be the **last selected or highlighted**—he is the target of the rules you're setting).
2. From the **list of names on the right**, drag and drop the relevant people into the appropriate exclusion categories in the center:
  - **Daisy and Peter** → Drag into the **"Will not receive gifts from"** category.  
**Resulting Rule:** Frodo will not receive gifts from Daisy or Peter.
  - **Jane** → Drag into the **"Will not receive nor give gifts to"** category.  
**Resulting Rule:** Frodo will not receive nor give gifts to Jane.
  - **Mickey** → Drag into the **"Will not give gifts to"** category.  
**Resulting Rule:** Frodo will not give gifts to Mickey.

 **Important:** Only the last person you tick or highlight on the left will be the subject of the rule you are setting.

[BACK](#)
People for Team Holiday Exchange [20/12/2025]

[IMPORT](#)
[EXPORT](#)

+

People

ADD PEOPLE

☒ Daisy Duck  
daisy.duck@company.com
 ☒ **Frodo Baggins**  
frodo.baggins@company.com
 ☒ Jane Doe  
jane.doe@company.com
 ☐ John Smith  
john.smith@company.com
 ☒ Mickey Mouse  
mickey.mouse@company.com
 ☒ Peter Pan  
peter.pan@company.com

Will not receive gifts from

Daisy Duck

Peter Pan

Will not receive nor give gifts to

Jane Doe

Will not give gifts to

Mickey Mouse

People To Exclude

(Drag and Drop a name to exclude it)

Daisy Duck

Jane Doe

Mickey Mouse

Peter Pan

## Running the Secret Santa Draw

Once all rules are set and participants are selected, return to the **homepage**.

- You will see the names of **all the people selected to participate in the draw** displayed on the screen.

To launch the random draw:

1. Review the list to make sure all intended participants are present.
2. Click the **“Compute”** button to generate the Secret Santa assignments.

⚠ **Important:** Once you click “Compute,” the app will automatically process the draw based on the rules you’ve set.

## 🔍 Previewing & Adjusting the Draw Results

If you're curious or want to **double-check the Secret Santa pairings**, you can preview the name allocations before finalizing the draw:

- Click on the **“?” button** to reveal who is assigned to whom.

🔄 Need to redo the draw?

- Click **“Reshuffle”** to generate a new random set of assignments.

🔒 Want to keep some pairings fixed?

- Before reshuffling, click the **lock icon** 🔒 next to any assignment you want to keep. This ensures that even after reshuffling, the **locked pairings remain unchanged**.

💡 **Tip:** Use the lock feature to preserve special assignments (like a manually decided pairing) while letting the rest reshuffle freely.

The screenshot shows the 'Secret Santa - Team Holiday Exchange [20/12/2025] - 6 people' interface. The main table displays the following assignments:

From	To	Locked
?	Daisy Duck (daisy.duck@company.c...)	?
?	Peter Pan (peter.pan@company.com)	?
Mickey Mouse (mickey.mouse@compa...)	Jane Doe (jane.doe@company.com)	?
?	Mickey Mouse (mickey.mouse@compa...)	?
?	Frodo Baggins (frodo.baggins@compa...)	?

At the bottom, there are buttons for **COMPUTE**, **RESHUFFLE**, and **SEND MAIL**.

The sidebar on the right shows the 'SecretSantas' section with a list of runs:

- Team Holiday Exchange (2025-06-08 08:17)
- Runs:
  - 3 [#6] (2025-06-09 09:00)
  - 2 [#4] (2025-06-09 08:38)
  - 1 [#6] (2025-06-09 08:36)

## Preparing the Email Notification

Once you are happy with the draw results, it's time to **set up the email template** that will be automatically sent to all participants with their Secret Santa assignment.

Steps:


1. Go to the **“Mail” tab** or section.
2. **Customize the email template:**
  - You can edit both the **subject line** and the **message body**.
  - You can also **create a new template** if needed.
  - Use **placeholders** (such as `{{secretSantaName}}` or `{{fromSurname}}`) to automatically personalize each participant's message.
  - The **full list of available placeholders** is visible on the left side of the screen.
3. Carefully **review your message** to ensure all placeholders are used correctly.

 **Want to preview your email?**

Use the **preview feature on the left** to see exactly how your final email will appear to participants.

## Sending the final Email

- Go back to the homepage and click **“Send Mail”** to automatically notify all participants of their Secret Santa match.

 **Important:** Once emails are sent, the draw is **final and cannot be changed**, unless you run a new draw from the beginning.

 **And that's it! Your Secret Santa exchange is ready to go. We hope you and your participants have a wonderful time filled with joy, surprises, and great gifts! 🎁**