

# BatchMailer User Guide

Version 1.0

Controlled batch email module for Dolibarr ERP/CRM

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## 1. Introduction

**BatchMailer** is designed to help you send **small to medium-sized batches** of personalised emails safely, clearly, and with confidence.

It is not a marketing tool, and it is not designed for high-volume or automated mailing lists. Instead, it focuses on **control, transparency, and recoverability**, so that you always know what will be sent, to whom, and when.

The main rationale for BatchMailer is to give the user careful control over the recipients. Most mass email tools take the recipients from a database. BatchMailer deliberately takes the recipients from a plain CSV file. This means that the user can carefully ensure that the list matches exactly the purpose of the email.

For simple emails requiring just an email address, or email and names, this can easily be generated by Dolibarr. For more complicated cases, human intervention is required, and this is most easily achieved in a CSV file, or, if the user prefers, a CSV exported from a spreadsheet that they have used to manipulate the list.

Sometimes it is necessary to export from Dolibarr more fields than are required in the email in order to provide the information the user needs to massage the file. BatchMailer handles this by asking the user to specify the fields to be used when creating the email template.

The use case that prompted this approach was the need by a small charitable organisation to send subscription renewal notices to members that included a personalised payment page that was provided by Dolibarr's PayPal and Stripe integrations. It was clearly necessary not to email members who had already paid, and certain types of members, such as honorary or subsidiary joint members.

## 1.1 What BatchMailer Is

BatchMailer is a Dolibarr module for sending personalised emails using:

- A **recipient list** (CSV file)
- An **email template**
- A **controlled batch process**

Typical uses include:

- Membership renewals
- Event reminders
- Administrative notices
- Small announcements to known contacts

Each email is:

- Individually generated
- Logged permanently
- Sent in manageable batches

BatchMailer is especially suited to organisations that:

- Send emails infrequently
- Need accountability and audit trails
- Prefer human oversight over automation

## 1.2 Design Principles

BatchMailer is built around a small number of clear principles.

### Safety First

- Emails are never sent accidentally
- Sending requires explicit approval
- Campaigns can be paused, aborted, or restarted
- Dry runs are mandatory before sending

### Transparency

You always see:

- What will be sent
- How many emails are involved
- How far a campaign has progressed
- Every attempt is written to a permanent log file

### Human Control

- No background or “fire-and-forget” sending
- Batches are triggered manually
- You decide when to continue

### Forgiveness

- Mistakes can be stopped early
- Partial sends are clearly reported
- Logs allow you to understand exactly what happened
- You can restart cleanly when needed

### Non-Technical Usability

- No programming knowledge required
- Clear messages explain what to do next
- Common actions are guided step by step
- Advanced tools are available but not intrusive

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BatchMailer assumes that **you want to stay in control**, even if that means going a little more slowly. That trade-off is deliberate — and it is what makes BatchMailer reliable.

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## 2. Quick Overview

### 2.1 Typical Workflow

BatchMailer is designed to guide you through a safe, repeatable process for sending emails to a selected group of recipients. The workflow is intentionally structured to prevent accidental mass sending and to give you clear visibility at every stage.

A typical BatchMailer workflow looks like this:

#### 1. Prepare your recipient list

- Export member or contact data from Dolibarr (or another source) as a CSV file.
- Upload or select the CSV file in the *Prepare recipient list* tab.
- Review the preview to confirm headers, email validity, and row counts.

#### 2. Create or select a template

- Choose an existing email template, or create a new one.
- Select which CSV fields the template will use.
- Write and format the email body using placeholders such as {{firstname}} or {{url}}.

#### 3. Preview and approve

- Preview how the email will look for real recipients.
- Explicitly approve the campaign once you are satisfied.
- Run a dry-run to verify counts and detect obvious problems before sending.

#### 4. Send in batches

- Choose a batch size appropriate for your mailing.
- Send the first batch and review the results.
- Continue sending further batches until the campaign is complete.

#### 5. Review results

- View detailed logs showing which emails were attempted, sent, or failed.

- Download or retain logs for audit and record-keeping.

At any point during sending, you can **abort** the campaign if something looks wrong. BatchMailer records exactly what has already been sent, so you always know where you stand.

This structured workflow ensures:

- No emails are sent without explicit approval
- Progress is visible and auditable
- Problems can be detected early and safely handled

## 2.2 What You Need Before You Start

Before using BatchMailer for the first time, it is helpful to ensure a few basic requirements are in place. BatchMailer is designed to work with minimal setup, but preparing these items in advance will make the process smooth and predictable.

### A recipient list (CSV file)

BatchMailer sends emails based on a CSV (Comma-Separated Values) file that contains your recipients.

Your CSV file must:

- Contain a **header row** (column names in the first row)
- Include at least one column named `email`
- Use one row per recipient

Other columns are optional and can be used for personalisation, such as:

- `firstname`
- `lastname`
- `url`
- or any custom fields you choose

If you are using Dolibarr, you can generate suitable CSV files using the built-in **Exports** feature. BatchMailer provides a direct link to this tool from the *Prepare recipient list* tab.

### An email template

BatchMailer requires an email template before sending can begin.

A template defines:

- The email subject
- The email body (HTML)
- Which CSV fields are used
- Which fields are required for sending

Templates use placeholders in the form:

`{{fieldname}}`

For example: - `firstname` - `email` - `url`

Only the `email` field is always required. All other fields are optional and controlled by the template.

Templates can be reused across campaigns and edited at any time before approval.

## Appropriate permissions

To use BatchMailer, your Dolibarr user account must have permission to:

- Access the BatchMailer module
- Send emails

Some administrative features (such as safety overrides and campaign recovery tools) are restricted to administrators and appear in the **Admin** tab.

## A moment to review and approve

BatchMailer is intentionally not a “fire-and-forget” tool.

Before any emails are sent, you will always be required to:

- Preview the message
- Explicitly approve the campaign
- Confirm sending using batch controls

This extra step is deliberate and protects both you and your recipients.

Once these prerequisites are met, you are ready to begin preparing your campaign.

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# 3. Preparing Your Recipient Data

BatchMailer sends emails to a **recipient list**. This list tells BatchMailer who to email and what personal information can be inserted into the message (such as names or links).

This section explains what that list is, how to create it, and how to prepare it correctly.

## 3.1 What a Recipient List Is

A recipient list is simply a table of information, with:

- **One row per recipient**
- **One column per piece of information**, such as:
  - Email address
  - First name

- First name
- Last name
- Membership reference
- Payment link

BatchMailer reads this table and uses it to personalise each email.

## 3.2 Creating a Recipient List from Dolibarr

Dolibarr already includes an excellent export tool for creating recipient lists.

Typical steps are:

1. Go to **Members / Adherents**
2. Use filters to select the members you want to contact
3. Choose **Export**
4. Select the fields you want to include
5. Export the result as **CSV or Excel**

BatchMailer works best with **CSV files**, but Excel files must be saved as CSV.

Tip: You do not need to include every available field - only include what you plan to use in your email.

## 3.3 CSV Format Explained

A CSV file is simply: - A plain text file - With rows separated by line breaks - And columns separated by commas

You can open a CSV file in Excel, LibreOffice, Google Sheets, or a simple text editor.

Example:

```
text email,firstname,lastname jane@example.com,Jane,Smith
john@example.com,John,Brown
```

Important points: - The first row must contain column names (headers) - Each header becomes a field you can use in your email template - Header names are not case-sensitive

## 3.4 Required and Optional Fields

- email is the only field that is always required

- email is the only field that is always required.
- All other fields are optional (unless you mark them required in the template).

If a field exists in the CSV but is not used in the template, that is fine.

## 3.5 Uploading or Selecting a CSV File

In the **Prepare recipient list** tab you can upload a new CSV file, or select a previously uploaded file.

Once selected, BatchMailer will:

- Check that the file is readable
- Detect the column headers
- Preview a small number of rows
- Warn you about common problems (missing email, invalid addresses, duplicates)

Nothing is sent at this stage.

## 3.6 Common Issues and How BatchMailer Helps

BatchMailer actively protects you from mistakes:

- Missing email column -> clearly flagged
- Invalid email addresses -> listed for review
- Duplicate addresses -> detected and reported
- Empty optional fields -> allowed, but visible in preview

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# 4. Creating and Managing Email Templates

An email template defines what your message says and how recipient data is inserted.

## 4.1 What an Email Template Contains

Each template consists of:

- Name (for your reference)
- Description (optional notes)
- Subject line (can include placeholders)
- From name and email address
- HTML message body
- Optional footer (if enabled)
- Field selections (which CSV fields are used, and which are required)

## 4.2 Creating a New Template

1. Go to the **Templates** tab
2. Click **Create New Template**
3. Enter name, subject, and sender details
4. Write your email content
5. Save the template

## 4.3 Writing the Email Content

BatchMailer uses an HTML editor for the main email body. You do not need to know HTML.

A plain-text version of the email is automatically generated for recipients whose email software does not support HTML.

## 4.4 Using Fields from Your Recipient Data

Fields from your CSV file can be inserted using placeholders like:

```
{{firstname}}
```

Example:

```
text Dear {{firstname}},
```

Tip: Placeholders must match the column names in your CSV. BatchMailer normalises case and spacing when matching fields.

## 4.5 Selecting Fields Safely

BatchMailer detects CSV headers and shows them in a field selection table. For each field, you can choose:

- Use
- Required

If a required field is missing for a recipient, BatchMailer will warn you before sending.

## 4.6 Required vs Optional Fields

- email is always required.
- Mark other fields required only if the email would not make sense without them.

## 4.7 Editing, Copying, and Deleting Templates

From the template list you can: - Edit - Copy - Delete

Deleting a template does not affect past logs or sent emails.

## 4.8 Template Safety Checks

BatchMailer checks: - A name and subject are present - At least one message body exists - Email addresses are valid - Required fields are defined correctly

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# 5. Review, Approval & Dry-Run

Before any emails can be sent, BatchMailer requires you to review and approve the campaign.

## 5.1 Reviewing Your Campaign

Once you have selected a recipient list and a template, go to the **Send batch** tab.

You will see: - The selected recipient list - The selected template - How many emails will be sent - Any detected issues

## 5.2 Approval Step

BatchMailer will not allow sending until the campaign is explicitly approved.

Safety note: Approval is required every time you start a new campaign.

## 5.3 Dry-Run (Recommended)

A dry-run: - Does not send any emails - Simulates the campaign - Reports how many emails would be sent - Identifies invalid or missing email addresses

## 5.4 Understanding Dry-Run Results

The dry-run report includes: - Total rows - Emails to send - Invalid email addresses - Duplicates (if any)

## 5.5 Ready to Send

Once approved and dry-run has completed successfully, BatchMailer will show **Ready to Send**.

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# 6. Sending Emails in Batches

BatchMailer sends emails in controlled batches.

## 6.1 What Is a Batch?

If you have 120 emails and a batch size of 20, BatchMailer will send 6 batches of 20 emails.

## 6.2 Choosing a Batch Size

Typical values: - 1-5: careful testing - 10-25: normal use - 50+: only if your email setup supports it

## 6.3 Sending the First Batch

Click **Send Batch**. BatchMailer will send only the selected number of emails and record results in the log.

## 6.4 Sending Subsequent Batches

BatchMailer continues from where it stopped and does not resend previously sent recipients.

## 6.5 Aborting a Campaign

Click **Abort Sending** to stop further batches. Already sent emails remain sent.

## 6.6 After Sending Completes

A summary is shown, and full details are available in the logs.

## 6.7 Where to Find Logs and Controls

Logs and safety controls are available from the **Admin** tab.

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# 7. Logs, Recovery & Troubleshooting

## 7.1 What Is a Campaign Log?

A campaign log is a text record created each time emails are sent.

## 7.2 Viewing Logs

Logs can be accessed from the **Admin** tab. For each log you can: - View - Download - Delete

## 7.3 Understanding Log Entries

Typical entries:

```
text ATTEMPT | member@example.com SUCCESS | member@example.com
```

## 7.4 What to Do If a Campaign Is Aborted

Review the log, fix the issue, then resume or restart safely.

## 7.5 Resuming or Restarting Safely

Resuming continues from where it stopped. Restarting should normally use a new CSV or template.

## 7.6 Common Issues and What They Mean

- "Invalid email": malformed or missing address
- Batch stops unexpectedly: campaign may have been aborted - check Admin panel
- No emails sent: approval/dry-run incomplete, or sending locked

## **7.7 When to Check the Admin Tab**

If anything feels unclear or unexpected, check the Admin tab first.

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# **8. Admin Tools & Safety Controls**

## **8.1 The Purpose of the Admin Tab**

The Admin tab answers: 1. What is happening right now? 2. What has already happened? 3. How do I recover safely?

## **8.2 Campaign State Panel**

Shows whether a campaign is active, progress, and whether sending is locked.

## **8.3 Send Lock**

Prevents emails being sent until unlocked by an administrator.

## **8.4 Admin Override**

Advanced option to bypass certain protections in exceptional cases.

## **8.5 Log Management**

View, download, and delete log files.

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# **9. Frequently Asked Questions**

## **9.1 Sending and Delivery**

- BatchMailer sends in batches for safety and mail server limits.
- You should not close your browser while a batch is sending.

## **9.2 Templates**

- Templates can be reused.
- Changes apply to future batches only.

## 9.3 CSV Issues

- CSV must have a header row and an email column.
- Extra columns are fine.

## 9.4 Logs and Recovery

- Logs are accessible from the Admin tab and are your source of truth.
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# 10. Best Practices and Warnings

- Always run a dry-run.
- Start with small batches.
- Treat CSV files as read-only during sending.
- Use logs as your source of truth.
- When in doubt, stop and review.

# 11. Appendix

## 11.1 CSV Examples

Minimal:

```
text email member1@example.com member2@example.com member3@example.com
```

Typical:

```
text email,firstname,lastname jane.smith@example.com,Jane,Smith  
john.brown@example.com,John,Brown
```

Payment link example:

```
text email,firstname,lastname,url  
jane.smith@example.com,Jane,Smith,https://example.org/pay?id=123
```

john.brown@example.com, John, Brown, https://example.org/pay?id=456

## 11.2 Template JSON Example

```
json { "name": "Membership Renewal", "description": "Annual renewal reminder", "subject": "Your membership renewal", "from_name": "Your Membership Society", "from_email": "memsec@example.org", "reply_to": "memsec@example.org", "body_html": "<p>Dear {{firstname}} {{lastname}},</p><p>Please renew here: <a href=\"{{url}}\">Renew now</a></p>", "body_text": "Dear {{firstname}} {{lastname}},\n\nPlease renew here:\n{{url}}", "fields": { "email": { "use": true, "required": true }, "firstname": { "use": true, "required": false }, "lastname": { "use": true, "required": false }, "url": { "use": true, "required": true } }, "required_fields": [ "email", "url" ], "include_logo": false, "include_footer": true }
```

## 11.3 Glossary

- **Batch:** A group of emails sent together.
- **Campaign:** A complete send operation using one CSV and one template.
- **CSV:** Comma-Separated Values - a plain text list with a header row.
- **Dry run:** A simulation that checks data and templates without sending emails.
- **Field/placeholder:** A value taken from the CSV and inserted into the email, e.g. {{firstname}}.
- **Log file:** A permanent record of what was attempted, sent, or failed.
- **Offset:** The number of rows already processed.
- **Template:** The email content and configuration used for a campaign.