

This document contains the details to send mass emails to recipients with customized content and customized attachment.

A. Requirements

- Python 3 (available by default on UOM PCs): <https://www.python.org/downloads/>
- PowerShell (available by default for Windows 7 and Windows 10)

B. Overview

The process is carried out in 2 steps:

- Step 1: Rename the existing certificate PDFs, aggregate the first name/last name/email/certificate for each recipient. Step 1 outputs a recipients.csv which is used to generate emails in Step 2.
- Step 2: Generate emails with corresponding names and attachments for corresponding email addresses.

C. Step 1: Rename PDFs and generate recipient list

This step requires 2 inputs:

Input 1: The spreadsheet of all recipients in CSV format.

	A	B	C	D
1	First_Name	Last_Name	Account Name	Email
2	Emily		Deakin University	
3	Azam		The University of M	
4	Rebecca		Monash University	
5	Alyssa		The University of M	
6	Abanti		University of Techn	

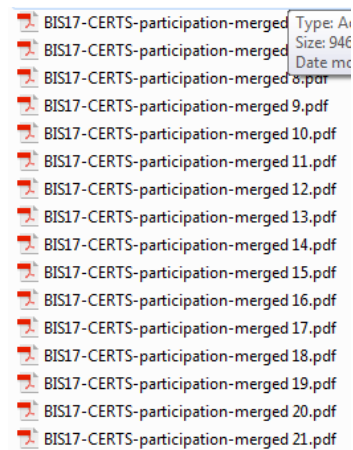
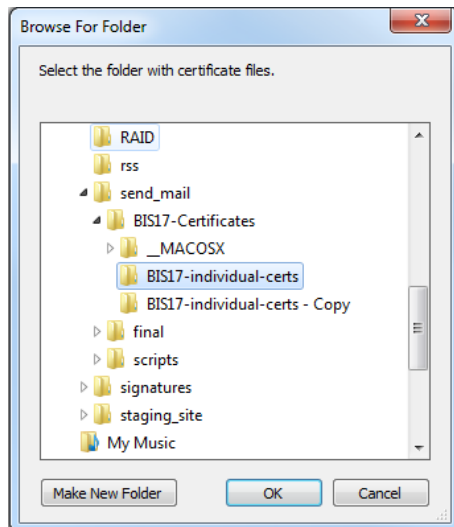
The spreadsheet needs to contain at least 3 columns (in those exact same names, case-sensitive – the order is not important):

First_Name
Last_Name
Email

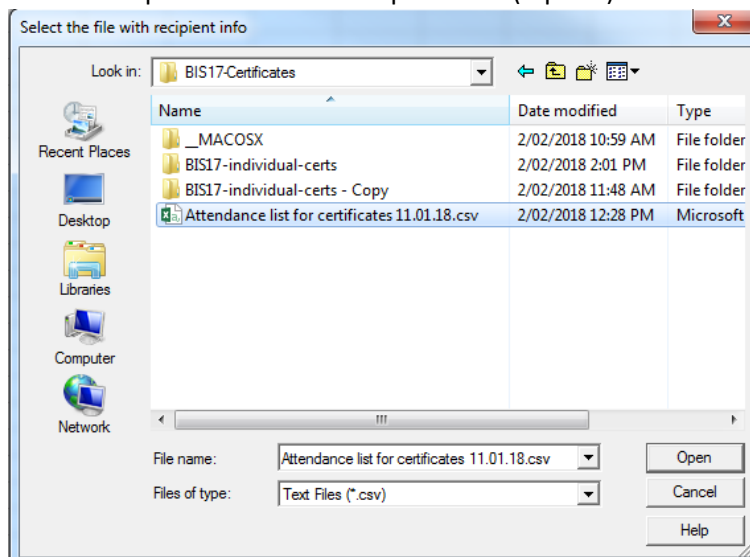
Input 2: The directory where all the certificates are stored. These certificates are splitted from a large PDF file. They have a common part in the final with incremental IDs (see below). The IDs need to be in the same order as in the spreadsheet above.

To start:

1. Double click **Step 1 - GENERATE_RECIPIENT_LIST.bat**
2. Select the folder where the certificates are stored (Input 2). Note that this folder **must** contain the certificates with the conventional filenames (as described above)



3. Select the spreadsheet with recipient info (Input 1)



4. Enter file prefix (The common part in the file name of the certificates)

If the filenames are

BIS17-CERTS-participation-merged 1.pdf

BIS17-CERTS-participation-merged 2.pdf

BIS17-CERTS-participation-merged 3.pdf

the prefix is 'BIS17-CERTS-participation-merged ' (without quotes, and with the space at the end)

Press Enter

5. If there's WARNING messages, something probably went wrong (files couldn't be renamed, files not found, etc.)
6. If there's no WARNING message, verify:
 - a. The recipients.csv is generated

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	id	firstname	lastname	email	attachment										
2	1	Emily													strong.pdf
3	2	Azam													ijarani.pdf
4	3	Rebecca													amert.pdf
5	4	Alyssa													y.pdf
6	5	Abanti													ua.pdf
7	6	Adele													igahare.pdf

b. The certificates are renamed

7. Proceed to Step 2

D. Step 2: Generate emails and saved as drafts (to be manually reviewed before sending out)
This step requires 2 inputs

Input 1: recipients.csv generated by Step 1. This file basically controls what to send, and how to greet each recipient.

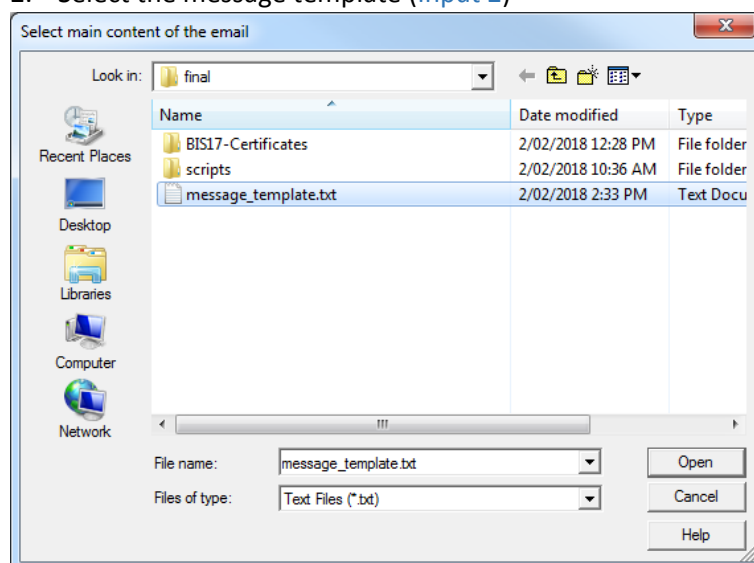
Input 2: The message template. This is the body of the emails to be sent to recipients.
 An example is as below:

Dear {first_name},
 Please find attached the certificate for...
 The first name of the recipient is {first_name}
 The last name of the recipient is {last_name}
 The email of the recipient is {email}

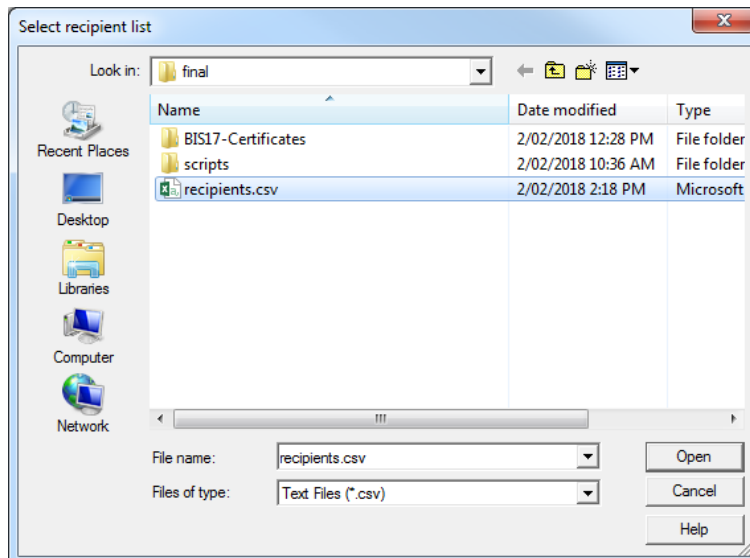
The message template can be saved in a .txt file

To start:

1. Double click Step 2 - SAVE_EMAIL_DRAFT.bat
2. Select the message template (Input 2)





3. Select the list of recipients (Input 1 – generated by Step 1)



4. Enter the email subject. Then press Enter
5. Enter your full email address. This is the address from which emails are sent.
6. Enter your email password. Note that it won't be updated, or shown as stars on the screen
7. Verify from the messages on the screen if there's any error
8. Verify that emails are created in Drafts folder.

Using the message template above, the email will look like

 Send	From ▼	[Redacted]
	To...	! [Redacted]
	Cc...	[Redacted]
	Subject	Test sending certificates
Attached	 Emily, [Redacted] 947 KB	

Dear Emily,

Please find attached the certificate for...

The first name of the recipient is Emily

The last name of the recipient is [Redacted]

The email of the recipient is [Redacted]@deakin.edu.au