

Configuration Guide for IDAK Application

This document provides detailed instructions on how to configure the IDAK application after installation. Proper configuration is crucial to ensure the application functions correctly and securely.

Overview

Configuration of the IDAK application involves setting up necessary parameters that allow the application to send emails, locate files, and authenticate with your email server.

Configuring `config_secrets.py`

The `config_secrets.py` file contains all the configurable parameters of the IDAK application. Follow these steps to complete the configuration:

- 1. Locate Config File:**
 - Find the `config_secrets.py` file in the root directory of the application.
- 2. Open Config File:**
 - Use a text editor to open `config_secrets.py`.
- 3. Edit SMTP Settings:**
 - `SMTP_SERVER`: The SMTP server URL for the email service provider (e.g., `smtp.gmail.com` for Gmail).
 - `SMTP_PORT`: The SMTP port number (commonly `587` for TLS).
 - `SMTP_USERNAME`: The full email address used to authenticate with the SMTP server.
 - `SMTP_PASSWORD`: The password or application-specific password for the SMTP server.
- 4. Configure Sender Email:**
 - `SENDER_EMAIL`: The email address that will appear in the “From” field of sent emails.
- 5. Set Paths for Files:**
 - `HTML_FILE_PATH`: The path where the converted HTML files should be saved temporarily.
 - `TEMP_RTF_FILE`: The path for temporary storage of RTF files before conversion.
- 6. Save Changes:**

After entering the correct details, save and close the `config_secrets.py` file.

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Security Considerations

- Password Storage:** Avoid storing plain text passwords in the `config_secrets.py` file. Use environment variables or a secure credential management system.

- **Authentication:** If possible, enable two-factor authentication for your email account and use an application-specific password.
- **Permissions:** Restrict the permissions of the `config_secrets.py` file so that only authorized users can read or modify it.

Verifying Configuration

After setting up the `config_secrets.py` file:

1. Run a test instance of the application to ensure that it can send emails successfully.
2. Check that the application can correctly access and process the Excel file.
3. Verify that the application can find and attach files as specified in the Excel data.

If any errors occur, revisit the `config_secrets.py` settings to ensure all paths and credentials are correct.

Support

For additional support with configuration, please refer to the `SUPPORT.txt` file or contact the designated support personnel within your organization.

By following this guide, you should be able to configure the IDAK application successfully for use in sending bulk personalized emails.