

Example “Email sendout”

The example demonstrates sending customized extracts to multiple recipients. Here is what it does:

- Import a list of recipients from an Excel file: recipient name, email and 2-letter state abbreviation.
- For each recipient on the list, pull from a database a list of companies in the recipient's state.
- Send the list to the recipient as an email attachment. The email's subject and text are customized for the recipient.
- If the list is empty, the project sends a short email notification saying that no companies found for the specified state.

In terms of EasyMorph features this example demonstrates the following:

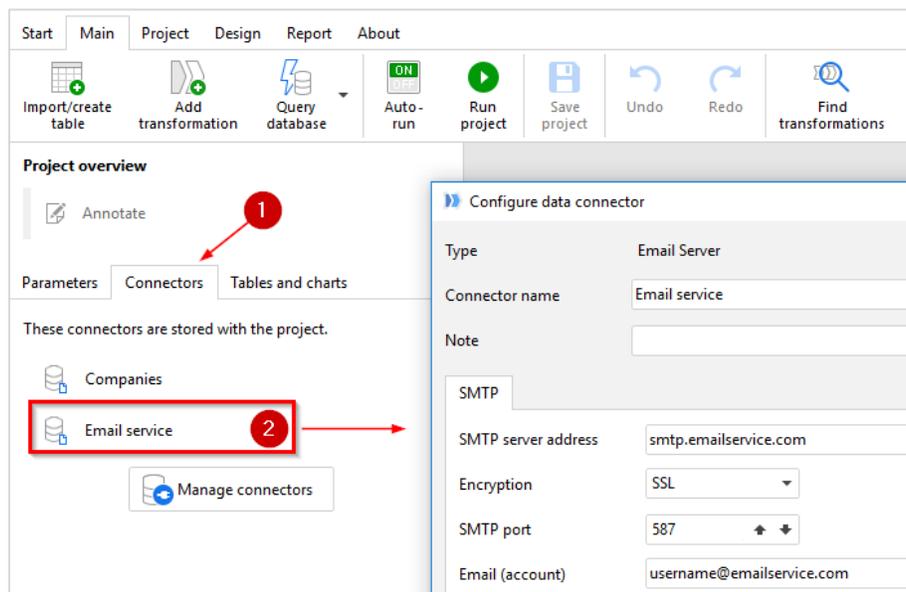
- Iterations
- Sending emails
- Conditional IF/THEN logic
- File command: delete file
- Use of parameters in various transformation properties

The example requires understanding [project parameters](#) and [iterations](#) in EasyMorph.

How to use this example

In order to use the example you will need to configure it first:

- 1) Edit “Recipients.xlsx” in Excel, enter real names and emails. Add/remove lines if necessary.
- 2) Open "Send email.morph" and edit properties of the embedded email service connector -- provide the SMTP server name, account, password, etc.



3) Once everything is configured, open "Send all.morph" and run it. If everything was configured correctly, the recipients should receive emails with customized lists attached.

4) In the recipients list, specify a non-existing state (e.g. ZZ) for one person. Run "Send all.morph" again. Now that person should receive a different email that has no attachment and saying that no companies found for the specified state. This happened because in "Send email.morph" another derived table was activated. See this blog article on conditional IF/THEN workflows:

<http://blog.easymorph.com/2017/12/conditional-workflows-in-easymorph.html>

5) Edit the email message template. Modify the expression used for email subject. Also, edit the message text. Notice how parameters are inserted into the message text in curly braces.

Send email

Send an email with attachment to one or more recipients. [More](#)

Connector: Email service

Send to: Recipient's email
Use commas to separate multiple recipients.

Subject: 'Companies for: ' & {State_upper} fx

Message: This is HTML
Hello {Recipient's name},
this email is sent by a sample project in EasyMorph.
It's attachment is a subset of companies from the Inc5000 list generated for state: {State_upper}.

Attach file
extract.xlsx

Parameterized text editor

Parameters: Edit Preview Wrap lines

Recipient's email
Recipient's name
State
State_upper
click to insert

Hello {Recipient's name},
this email is sent by a sample project in EasyMorph.
It's attachment is a subset of companies from the Inc5000 list generated for state: {State_upper}.

Simplion Technologies	ca	Milpitas	San Jose
PowerON Services	ca	Roseville	Sacramento...
AnswerLab	ca	San Francisco	San Francisco
Sensis	ca	Los Angeles	Los Angeles
Mindbody	ca	San Luis Obispo	San Luis Obispo