MOST FORM TO EMAIL NOTIFICATIONS

Customer User Manual

This guide follows the current six-tab interface in Sidebar.html. Examples use illustrative data, not real customer details.

QUICK START: SEND A TEST ROW SAFELY

1. Open the response spreadsheet in Google Sheets. Row 1 should contain column headings; data starts in row
2. For example: Timestamp, Name, Email, Status and Amount.
2. Open Extensions > Most Form to Email Notifications, then choose Most Form to Email Notifications. Approve the requested Google permissions if prompted.
3. Use the Google account that owns your settings and any paid license. The Basic, Advanced and Pro buttons select an interface mode; selecting Pro does not purchase or unlock a Pro license.
4. In 01 Create Email, enter your own test address in To, write a subject, and create a short message. Leave CC and BCC blank unless needed.
5. In Advanced or Pro mode, use 02 Insert Table and 03 Format Table to choose the table columns and style.
6. Click Save. Open 05 Preview & Send to inspect the latest row's email.
7. For a manual test in Advanced or Pro, open 06 Pro, enable Send Email from any row, select a test row and click Send Row Email. Review the confirmation carefully before accepting.
8. Verify the actual inbox, recipient, merged values and any attachments before turning on automation.

Important: Preview and Copy Email do not send mail. The manual send action is Send Row Email. A manual test can send Email 2 as well if that option is enabled.

1. OPEN THE STUDIO AND UNDERSTAND THE CONTROLS

The top account area shows the detected Google account and plan. Basic is free; Advanced and Pro features require their respective license. If already paid, use I have Paid / Refresh Plan with the same Google account used for payment. Locked controls are not unlocked merely by selecting a mode.

The numbered navigation tabs are:
01 Create Email
02 Insert Table
03 Format Table
04 Functions
05 Preview & Send
06 Pro

The last tab is named Pro, but Send Email from any row remains available in Advanced and Pro modes. Copying rows to another spreadsheet is a Pro feature.

Keep the source sheet tab you intend to configure active when loading the studio. Click Reload after changing spreadsheet data or switching the source tab. Reload reads sheet data and saved settings again; save first if you want to keep unsaved edits.

At the bottom:
- Save stores the current settings.
- Reload reads the sheet and saved settings again.
- The email icon is green with On when Auto Email is enabled, and light orange with Off when disabled.
- The filter icon is green with On when Conditional send is enabled, and grey with Off when disabled.
- The status message reports results and errors.

The indicators reflect the switches, not a guarantee of successful delivery. Conditional send can run independently of the Auto Email switch. To stop all automatic row emails, turn Auto Email off AND disable Conditional send, then save/install the automation configuration.

The resize grip at the lower-right changes the floating dialog's width and height. Drag it, or focus it and use arrow keys; hold Shift for larger steps. Fields adapt to the available width. Google Sheets' native docked sidebar does not support this resizing.

2. TAB 01 CREATE EMAIL

In the Email Creator card:
1. Enter the recipient in To. For multiple addresses, separate them with semicolons.
2. Add optional CC and BCC recipients. Neither is required.
3. Enter the Subject.
4. Write the message in the Message editor.
5. Click Save.

Use merge fields to personalize each row. If the spreadsheet has headings Name and Email, examples are:
To: {{Email}}
Subject: Response received for {{Name}}
Message: Hello {{Name}}, thank you for your response.

Use the exact sheet heading inside double braces. For the subject, Choose column to merge inserts a field. In the message editor, place the cursor where needed and use the column dropdown. You can also type a merge field directly into To, CC, BCC, Subject or the message.

The toolbar begins with a font selector. It also provides size and formatting controls, alignment, lists, colors, links and merge insertion. Format the message separately from the table: table fonts and colors are configured in 03 Format Table.

Never assume a merge field resolves to a valid address. Preview a representative row and verify its recipient before sending.

3. TAB 02 INSERT TABLE

Available in Advanced and Pro modes with the appropriate license.

The Select and Re-Order Columns card controls the table included in a row email:
1. Choose the columns to include. All selects every column; None clears the selection.
2. Add columns using the column picker.
3. Reorder the selected columns using the card's row controls.
4. Rename displayed headings if desired.
5. Save and inspect the result in Preview Table or the email preview.

Display-name changes affect the generated email table, not the original spreadsheet headings. Keep merge tokens consistent with your source headings and verify them after any rename.

4. TAB 03 FORMAT TABLE

Available in Advanced and Pro modes with the appropriate license.

Table Layout:
- Portrait displays the selected fields vertically.
- Landscape displays them horizontally.

Table appearance:
1. Set the Table header name.
2. Choose the title font, size and style.
3. Set Title background and Title text colors.
4. Set Header background, Header text and Border color.
5. Choose Table font and Table font size.
6. Click Preview Table to see a table-only preview using the current settings.

The table preview uses the latest available data row. It does not send an email. Save to retain changes for future automated sends. Use readable color contrast and check wide tables before sending them.

5. TAB 04 FUNCTIONS: ATTACHMENTS

Available in Advanced and Pro with the appropriate license.

The Attachments card has two independent options:
- Attach PDF with Email
- Attach CSV with Email

Select either or both, then Save. These shared options apply to individual row emails, including Email 2 when enabled, whether sent manually or automatically.

PDF contains the formatted email content. CSV contains the row's selected table headers and values. Email 2 can add its own row and recent-table attachment options.

Daily summaries have separate attachment selections; the shared row options do not replace them.

6. TAB 04 FUNCTIONS: EMAIL DAILY SUMMARY

Available in Advanced and Pro with the appropriate license.

1. Expand Email Daily Summary using its header checkbox.
2. Enter Email to send Summary.
3. Set the Summary title.
4. Select the consolidated PDF and/or CSV attachment options.
5. Enable Automatically send the daily summary.

6. Choose Daily Send time and select the weekdays.
7. Click Permanently save automation triggers to send.
8. Use Send selected attachments summary once for testing to test the summary immediately.

The report covers rows identified as filled during the preceding 24 hours, not only the calendar day. It consolidates all columns. Timestamp/Date columns and tracked-row records help identify eligible rows. Hand-typed rows without dates can only be tracked after automation triggers are installed.

The time dropdown uses hourly choices from 1:00 AM through 11:00 PM. Google Apps Script schedules execution around the chosen hour, not at a guaranteed exact minute. The spreadsheet's timezone applies, with the script timezone used as a fallback.

The test button sends a real summary to the entered recipient. It is not merely a preview. It can be used independently of waiting for the scheduled run.

7. TAB 04 FUNCTIONS: CONDITIONAL SEND

Pro only.

1. Enable the Conditional send checkbox.
2. Choose Select field, an Operator and a Compare with value.
3. Example: Status = Approved.
4. Click Permanently save automation triggers to send.

Operators include =, not equal, <, >, less/greater than or equal, Contains, Does not contain, Starts with and Ends with. Text comparisons ignore case; numeric comparisons require numeric values.

This rule automatically sends only a qualifying last data row of the configured sheet. It also filters Auto Email when both are enabled. Existing rows are not automatically backfilled when triggers are first installed. A pending new row can become eligible after a later edit makes the rule match.

This rule is for automatic row sending; it is not a restriction on an explicit manual Send Row Email action. To disable the rule, clear its checkbox and save/install the automation configuration.

8. TAB 04 FUNCTIONS: A SECOND EMAIL

Pro only.

1. Expand Set to send a second message.
2. Open Email 2 Creator if needed.
3. Enable Send Email 2 after Email 1. Expanding the cards alone does not enable sending.
4. Enter Email 2's To, optional CC/BCC, subject and message.
5. Configure Email 2's own column selection, layout and appearance.
6. Choose any additional Email 2 attachments and Save.

Email 2 attachment groups:
- Email row: PDF and/or CSV for the row being emailed.
- Table: PDF and/or CSV covering the recent 24-hour table, including the current row.

The shared Attachments settings also apply to Email 2. Selecting the same row attachment in both places does not duplicate it.

Email 2 is sent after Email 1 for row-email sending; it is not a separate daily-summary schedule. Check the status for warnings: Email 1 can succeed even if Email 2 fails.

9. TAB 05 PREVIEW & SEND

The Preview and Send card is visible in every mode. Opening this tab loads the email preview when row data is available.

By default, the preview uses the last available row. If Send Email from any row is enabled in Advanced or Pro mode, it instead uses the selected row and displays that row number.

- Refresh icon: rebuild the preview after changing settings or row selection.
- Copy Email icon: copy Email 1's formatted email content. It does not send an email or copy file attachments.

For Pro, the separate View and preview Email 2 card has a checkbox. Check it to load/show Email 2 and use Refresh Email 2 to update it. Uncheck it to hide the preview. This checkbox never turns Email 2 sending on or off.

Check recipients, subject, merge values, message and table before sending. Previewing a message does not prove that triggers, permissions or actual delivery are working.

Auto Email:
1. Configure and save a valid recipient and message first.
2. Click the Auto Email OFF/ON button to change automatic sending.
3. The button saves the settings and installs the applicable automation triggers.
4. Add a new test Google Form response, or carefully fill a new sheet row.
5. Confirm actual receipt in the test inbox.

Show details only expands the explanatory text; it does not change the Auto Email switch. Google Form submissions arrive as completed rows. Manual edits can become eligible once the row readiness checks pass; with no explicit required columns configured, a valid resolved recipient can be enough. Avoid using a real customer address while composing a new test row.

Existing rows are baselined when automation is first installed, rather than automatically emailed in bulk. Clearing and refilling a previously processed row can make it eligible again. Avoid destructive row edits during live automation.

10. TAB 06 PRO: SEND EMAIL FROM ANY ROW

Available in Advanced and Pro modes with the appropriate license, despite the tab name.

1. Enable/open Send Email from any row.
2. Use Choose data row to select a row.
3. Review the row data shown below it.
4. Optionally inspect that row in 05 Preview & Send.
5. Return to the row card and click Send Row Email.
6. Check the confirmation, accept it, and inspect the status and inbox.

This is a real manual send. It can resend a row previously sent automatically. If Email 2 is enabled, it is attempted after Email 1. Clear the row-selection checkbox to return the preview to the latest row.

11. TAB 06 PRO: COPY ROWS TO ANOTHER SHEET

Pro only.

1. Expand Copy form response / Row to another Google Sheet.
2. Paste the full destination Google Sheets URL into Destination Spreadsheet URL. The app extracts its spreadsheet ID.
3. Click Load tabs and choose Destination tab name.
4. Ensure your Google account has access to the destination spreadsheet.
5. For a manual transfer, select the source row(s) in Google Sheets and click Transfer selected row(s).
6. For future new rows, enable Auto-transfer every new row to the destination. Save, then use Permanently save automation triggers to send in 04 Functions to install the updated automation.

Review the destination after a test transfer. Use a test destination until the column mapping and copied content are confirmed. Transferring is separate from emailing; one is not proof the other succeeded.

12. FINAL CHECKLIST AND TROUBLESHOOTING

Before going live:
- Correct Google account and licensed mode.
- Correct source spreadsheet tab and headers.
- Valid recipients after merge replacement.
- Both Email 1 and Email 2 checked where applicable.
- Table, PDF and CSV inspected with representative data.
- Summary time, timezone and weekdays reviewed.
- Destination URL/tab and access tested where applicable.
- Settings saved and required automation triggers installed.
- Actual inbox and destination verified with test data.

No data in preview: confirm there is a data row below the headings, then Reload. Choose a valid row if selected-row mode is on.

Blank or incorrect recipient: check the exact merge heading and the selected row's address. Separate multiple addresses with semicolons.

Feature greyed out: check the licensed account and plan. Refresh Plan if already paid. Mode selection alone does not grant access.

No automatic email: inspect the Auto Email and Conditional send switches, Google authorization and trigger installation. Test a newly added row, not an old baseline row. Check the condition, selected source tab and valid recipient.

Auto Email Off but mail still sends: Conditional send is independent. Disable it as well and save/install the automation configuration.

Summary missing: check the recipient, daily enable switch, selected weekdays, timezone, trigger installation and eligible rows in the preceding 24 hours.

Destination tabs fail to load: confirm the full Sheets URL and account access, then click Load tabs again.

Attachment missing: distinguish shared row attachments, Email 2 extra attachments and daily-summary attachments. Save the intended selections and check any status error or warning.

Delivery failures: Google account sending limits, authorization and recipient issues can prevent delivery. A green switch or successful preview is not delivery confirmation.

Help: use the Email Us link in the fixed Follow Us strip.

Privacy note: previews, copied email content, PDFs, CSVs and destination sheets can contain spreadsheet data. Use only authorized recipients and destinations, and keep sensitive information out of demonstration materials.

Based on the current Sidebar.html and Code.gs interface. Sample values are illustrative. Google permissions, account limits and licensed feature availability apply.