

Mail Merge Using Gmail & Google Sheets



YET ANOTHER MAIL MERGE (YAMM) ADD-ON

Yet Another Mail Merge (YAMM) lets you send an email from your gmail account and include dynamic content from a google sheet. The premium account features are free for University of Notre Dame email accounts.

Key Features:

- Send personalized emails from Gmail referencing dynamic data in Google Sheets
- Receive or send email notifications from Google Forms with the content you want from the sheet
- Track email open rates
- Include images in your email
- Import contacts from a contact group

Notes:

- You are limited to 1500 email recipients per day per mailing account.
- You must leave the template for the mail merge in your "Drafts" label in gmail

CREATING THE DATA FILE USING GOOGLE SHEETS

A *data source*, also called a data file, is simply a collection of records that store data. This data is used to populate merge fields in mail merges. The data source is typically a spreadsheet or a database which has a field or column headings for each variable in the file.

To create a data file from Google Sheets, enter the fieldnames and data for each record.

Or

To use data from an Excel file, it is better to copy the fieldnames and data from the Excel file and paste it into a Google Sheet. This way you do not have to upload the Excel file to Google Drive and then import it into Google Sheets.

To copy/paste data from Excel:

1. Open the Excel file containing the data to use in the merge
2. Select the fieldnames and data to copy
3. Click Copy (or press CTRL+C)
4. Open a Google Sheet
5. If necessary, click in cell A1
6. Click Paste (or press CTRL+V)

Note: When data from Excel is brought in to Google Sheets, the leading zero of a number will not display, like a Zip Code for instance. To display the leading zero where the zip code is 5 digits, **select the column for Zip Code**, click **Format > Number > More Formats > Custom Number Format**, and then enter 5 zeros -- **00000** -- and click **Apply**.

TIPS ON CREATING THE DATA FILE

- One of the columns must contain the email address for the individuals who will receive the message
- You can re-use this file by replacing or updating the variable data, and deleting the *Merge Status* column that is automatically added when a merge is completed

CREATING THE EMAIL MESSAGE

Open Gmail and **Compose** the message you want to send.

1. Leave the *To: field* empty
2. Enter the desired Subject for the message
3. Enter the content of your email
4. Wherever you want to insert data, enter the field name and enclose with <<>>. Example:
<<FirstName>>

Note: You can also use field names in the Subject line. Example:

<<FirstName>>'s Comments

5. To ensure Gmail has saved the final message in *Drafts*, close the *Compose* message window and then open the draft again

TIPS ON CREATING THE EMAIL MESSAGE

- Create the original email within Gmail; if you import from another program (i.e., Word), it may add hidden codes that will cause the merge to fail
- Make sure your field names in the message exactly match the column heading in your Google Sheet

SENDING THE MESSAGE

When you are ready to send the message:

1. Open the Google Sheet that contains the data to merge
2. Click **Add-ons > Yet Another Mail Merge > Start Mail Merge**
3. Select the **Recipients column** (the column that contains the email addresses) and click **Save**.
4. Select which **Draft message** to use with the merge
5. Enter the **name of the Sender** (optional).
6. Click **Send me a test email** to see how the message will display to the recipients. This way you can determine if any modifications need to be made before sending to all.
7. When you are ready to send the message to all recipients, click **Send Emails**

The screenshot shows the 'Yet Another Mail Merge' interface. It includes a 'Draft' field with a dropdown menu showing '<<FirstName>>'s Comments - 692 B' and a refresh icon. Below that is the 'Sender name' field with 'Maureen Hogue' entered. The 'Send from' field shows 'mhogue1@nd.edu'. There is a checked box for 'Track emails opened'. A note at the bottom states: 'You can still send 1500 emails from this app today. Emails will be sent to recipients in column G (the 'Email address' column)'. At the bottom are three buttons: 'Send Emails', 'Send me a test email', and 'Cancel'.

8. Click **OK** to close the message that all emails have been sent.

Once all messages have been sent, a new column is added to data file called Merge Status. This confirms the message was sent and when you sent it. You could also check your Sent box in Gmail. If an email address was left blank, it skips over that record and moves on to the next record that has an email address.

	A	B	C	D	E	F	G	H
1	FirstName	LastName	Address1	City	State	Zip	Email Address	Merge status
2	A. J.	Myszka	65286 Milestrip F	Reading	PA	06430	hogue.3@nd.edu	EMAIL_SENT
3	Anne	Smolkovich	693 Northcutt Bl	Burlington	VT	05401	train3@nd.edu	EMAIL_SENT
4	Ben	Willenbecher	87 Country Lane	Charlottesville	VA	22901	train4@nd.edu	EMAIL_SENT
5	Brandon	Karkhanis	32 Burgundy Lar	Nashua	NH	03060	train5@nd.edu	EMAIL_SENT
6	Breanna	Arken	6725 Chatsworth	Reading	PA	19606	train6@nd.edu	EMAIL_SENT
7	Carlos	Santos	145 Windsor Dr.	Alexandria	VA	22314	train7@nd.edu	EMAIL_SENT
8	Carol	Olsen	209 Pamish St.	Eugene	OR	97401	train8@nd.edu	EMAIL_SENT
9	Darcy	Neyman	159 Rutgers St.	Dayton	OH	45439	train9@nd.edu	EMAIL_SENT
10	Elizabeth	Milko	23 Pebble Beach	Lakeville	NY	14480	train10@nd.edu	EMAIL_SENT
11	James	Kling	596 Blossom Rd	Rochester	NY	14610	train11@nd.edu	EMAIL_SENT
12	Joanne	Hope	172 Eastland Av	Portland	OR	97201	train12@nd.edu	EMAIL_SENT
13	Joel	Marian	7141 Ramona St	Westboro	MA	01581	train13@nd.edu	EMAIL_SENT
14	Jordan	Shrier	47 Jean Dr.	Peekskill	NY	10566	train14@nd.edu	EMAIL_SENT
15	Joseph	Ferguson	345 Torrington A	Hartford	CT	06101	train15@nd.edu	EMAIL_SENT
16	Julia	Nicholson	777 Garcia Ave.	Washington	DC	20001	train16@nd.edu	EMAIL_SENT
17	Karen	Frank	169 Portsmouth	Concord	NH	03301	train17@nd.edu	EMAIL_SENT
18	Kevin	Knorel	812 Stewart Ave	Tucson	AZ	85705	train18@nd.edu	EMAIL_SENT
19	Kevin	Morrisville	839 East End St	Fort Wayne	IN	46801	train19@nd.edu	EMAIL_SENT

Note: If you run the YAMM app again, with newly added records and/or email address added to the blank cells, YAMM will only send the message to the new records and to those who did not have an email address during the first run through.

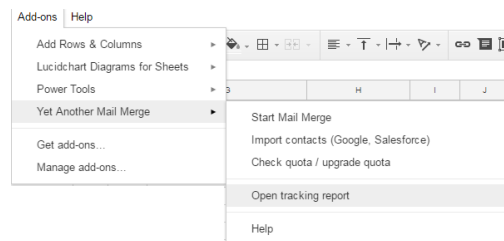
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SENDING LIMITS

Although YAMM allows up to 1500 messages to be sent all at once (or 1500 messages per day), here at ND you are limited to sending 250 individual messages at one time. If you send more than 250 individual messages at once, the email server will hold your remaining outgoing messages for a period of 20 minutes. After that time, the server will then send the remaining messages, but only up to 250 at a time. If your job requires needing to send more than 250 individual messages at one time, call the OIT Help Desk at 631-8111 to request approval to have this limitation removed.

OPENING TRACKING REPORTS

You can re-open the tracking reports in the YAMM menu:



SENDING FROM ANOTHER EMAIL ADDRESS

YAMM allows you to send emails from another address that you have access to. To do this, the alias settings for the second email must be turned on, the mail merge sent, and the alias setting turned back off:

1. Go to <https://gmail.nd.edu>.
2. Click on the gear icon in the top right and select **Settings**:
3. Click on the **Accounts** tab.
4. Next the email you would like to send the mail merge from, click **edit info**.
5. In the dialog box, check the box next to **Treat as an alias**, then click **Save Changes**.
6. Navigate to the mail merge Google Sheet.
7. Begin the mail merge as normal. In the **Start Mail Merge** dialog box, click on **+ Alias, filters, personalized attachments...**
8. In the **Send from:** drop-down, select the email you would like the mail merge to be sent from.
9. Click **Back** and complete the mail merge as normal.
10. Navigate back to your Gmail Account Settings page and *uncheck* the box next to **Treat as an alias** (steps 1 through 6 above).