

Young Alumnae Salon Host Follow Up Instructions

You must have a Gmail Account for this automation.

Make a copy of the spreadsheet

1. Click this [link](#) to open a Google Spreadsheet
2. Select “File,” then “Make a Copy”
 - a. Enter a new name for this spreadsheet
 - b. Be sure you are working in the new spreadsheet

Set up the Automation

1. At the top find the tab called **formMule** (next to Help).
 - a. Select “run initial installation.”
2. A pop-up will say “authorization required,”
 - a. Select “ok”
 - b. Select from the open Gmail accounts, or select **Add Account** to open a new account
 - c. Select “accept”*
3. Click the formMule tab, and select “**run initial installation**”
 - a. *You may receive a pop up about tracking usage - this is only for schools, so you can ignore this.*
4. Click the formMule tab, and select “**Step 1 - define merge source settings**”
 - a. Select “**Guest List**” (It should already be selected)
 - b. Select “**Save Settings**”
 - c. *You may get a pop-up that says, “Auto-email and Auto-calendar-event options availalbe...” select “ok”*
5. Click the formMule tab, and select “**Step 2a - set up email merge**”
 - a. Check “**turn on email merge**”
 - b. Find “Email1 Template if,”
 - i. Select **Status** from the dropdown and
 - ii. Type **Attending** in the blank space
 - c. Select “**Submit settings**”

Personalize the Email

1. Open the second sheet called “**Email1 Template**” (at the bottom)
2. Change the body of the email, but do **not** touch any of the tags (anything with `{“--”}` or `<a href= --- `)
3. Don’t forget to add your name at the bottom of the message (it says “Enter your name here”)

Create a Test

1. Open the first sheet called “Guest List”
 - a. Enter your own **email** in cell B2 (in pink)
 - b. You can also change the **private message** (in pink too)
2. Click the formMule tab, and select “**preview and perform manual merge**”

If you have questions, please email Laila Plamondon '08 at laila.plamondon@gmail.com

- a. Double check your message. The links will be missing - do not worry about this!
 - b. If you are not happy, select **Exit** and go back to personalize the email
 - c. If it looks good, select **Run Merge Now**
- 3. Taadaaaa!** Check your email - You should receive an email (from yourself)

Create the Spreadsheet

1. Go back to the Guest List sheet
2. Enter the **name**, **email**, and **status** (attending, or not attending) of each guest. If you used Paperless Post, you can download and paste this information in!
 - a. Name should be First Name only!
 - b. Your guests will not receive an email unless the status is “attending”
3. If you would like, enter a **private message** for each guest.

Send!

1. Click the formMule tab, and select “**preview and perform manual merge**”
2. Double check your message. The links will be missing - do not worry about this!
3. If you are not happy, select **Exit** and go back to personalize the email
4. If it looks good, select **Run Merge Now**

*I use formMule all the time, and I even know the creator of the script. Many schools use formMule. For these reasons, I am very comfortable allowing formMule to access my email.

Exporting Guest List from Paperless Post

Select “**Export Spreadsheet**” under All Guests

This will open a Microsoft Excel Spreadsheet, copy the cells and paste it in the Google sheet

All Guests 29	Total Attending 17	Regrets 9	Not Yet Replied 5	Undeliverable 0
Messages 10	Bringing Other Guests 2		Opened 4	
Export Spreadsheet			Unopened 1	
Print List				

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