Email Merge with YAMM

Accessing YAMM

YAMM is already installed and available to everyone at Swarthmore. To access YAMM:

1. Open your Google Sheet
2. Click the Add-ons menu option along the top of your Sheet
3. Choose Yet Another Mail Merge
4. Then choose Start Mail Merge

If you are accessing YAMM for the first time, you will be asked to choose the account you wish to use with it (your Swarthmore account will be available for you to choose). The next step will show you the list of permissions YAMM needs. You can go ahead and click Allow for these.

Preparing Your Google Sheet

You will need to use a Google Sheet to access YAMM. This means that you will need to use Sheets to compile your list of recipients.

Things you will need to include in your Sheet:

- A header row, labeling what each column is for
- At least one column of full email addresses

Things you may want to include in your Sheet:

- Recipient names, to help sort your list and/or to add personalization to your draft
- A column for each additional type of information that you would like to pull into/merge with your draft

If you already have an Excel sheet that includes all the information you need to use:

- Upload that Excel sheet into Google Drive (if it is not already there)
- Right-click on the file
- Choose Open with
- Select Google Sheets

This will create a copy of your Excel sheet in Google Sheets formatting. Now you can double check that the new Sheet version of your information has all of the things you need for a mail merge and use it to access YAMM.

Preparing Your Email Draft

In Gmail, you will need to prepare a draft email for YAMM to use for your mail merge.

- Start a new email, leaving the recipients space blank (YAMM will fill this in for you during the merge)
- Add a Subject that is both easy to identify your draft from YAMM, as well as fitting and appropriate for your recipients to receive
- Enter the text, and signature, you wish your recipients to receive

Merging Info from Your Sheet Into Your Draft
You are also able to pull information from your Sheet into your email for the merge - adding individualized information to each of your recipients messages. You will need to use the exact same wording as the header you have for that column of information in your Google Sheet. You will then enter that wording into the desired location in your draft surrounded by double brackets {{ }}.

For example- If you have a column called First Name, you would enter it into your draft like this: {{First Name}}

It may be easiest to simply copy and paste the header of the column you’re using into your draft and add the brackets.

Sending your Mail Merge

Once you have both your Sheet and your email draft you are ready to send your mail merge. You can access the YAMM mail merge through the Google Sheets add-ons menu (detailed above). This will open a new window on top of your Sheet where you will type in the name you wish to appear with the email and the draft you wish to use. The sending options will include to Send # emails, Delay delivery, and Receive a test email. To immediately send your mail merge, simply choose Send # emails.

Checking Quota and Email Address Column

This new window for YAMM will also note at the top how much quota you have remaining (users can send to up to 1,500 recipients within a 24 hour period) and what column YAMM is using for email addresses. Knowing what column is being used for email addresses is especially helpful if you Sheet has multiple columns for email addresses or multiple headers that mention email. You can change which column is being used if YAMM has not selected the correct one.

Receive a Test Email

We always recommend you send a test email before sending your full mail merge. When you choose Receive a test email, it will use the draft you have chosen and any fill in any necessary fields using the information of the first recipient in your list - only it sends that email to you. This is a great way to make sure the mail merge is filling in information correctly and allow you to make any adjustments before sending out your merge.

Delay Delivery

To set up a mail merge that will be received at a later date and/or time, you can choose the Delay delivery option. You will be given the options to specify the date and time you wish your mail merge to begin. Please note that depending on how many recipients you are sending to, it may take up to an hour after the time you chose for all merges to have been sent.

You may also reserve some of your quota while setting up your delayed delivery. This is especially useful if you send a lot of merges, or are sending to a lot of recipients. Simply enter the number of recipients your delayed merge will be going to - this will hold that number of your quota to ensure it is available when the delayed merge is ready to send.

You do not have to keep your Gmail, Sheet, or YAMM open for the delayed delivery to work. It will send automatically at the date and time you chose.

Additional Resources for Mail Merging with YAMM

YAMM has a lot of great features that you may want to continue to explore, and they have a great collection of documentation to assist you. If you are looking to use some of the additional features that are available, or you want to walk through the mail merge process with video tutorials, you can visit YAMM’s official documentation here: https://support.yet-another-mail-merge.com/hc/en-us