

Mail Merge & Document Automation — Workbook

This workbook turns the course into a working document automation system you can reuse every month. You will build one clean merge-ready data source, design and test templates in Microsoft Word and Google Docs, run a tracked YAMM email campaign, and generate batches of PDFs like invoices and certificates. Work one section per module, doing each build step in your own files as you go and filling every worksheet. By the end you will hold reusable templates, a tested sending routine, and a pre-send checklist that prevents the multiplied mistakes that make merges go wrong.

Foundations: Data Sources and How Merge Works

Design and build the clean, validated data source that every later merge depends on, and decide which tool fits each document you need to automate.

Exercise: Map the Fields Your Documents Need

Before building anything, list the documents you currently personalize by hand and break each one into the exact pieces of data it needs. This becomes the column plan for your data source. Do this for your two or three most frequent documents.

- List every personalized document you send by hand today, such as welcome letters, invoices, or certificates.
- For your most frequent one, write out every personal value it contains as a separate field, splitting Full Name into First Name and Last Name.
- Mark which fields are required for the document to make sense and which are optional.
- Note for each field whether it is text, a number, currency, or a date, since formatting depends on this.

Worksheet: Data Source Design Sheet

Turn your field map into a concrete column plan. Fill one row per column you intend to create in your spreadsheet, so you build the table once and correctly. Keep this beside you while you set up the actual sheet.

Column header (short, unique, no leading spaces)

Data type (text / number / currency / date)

Required or optional

Example value

Display format needed in documents (e.g. \$#,##0.00 or MMMM d, yyyy)

Source of this data (CRM export / manual entry / form)

Worksheet: Tool Selection by Document Type

Decide the right tool for each document before you build, matching the job to the software you already own so you do not over-engineer. Complete one row per document you plan to automate.

Document or message

Job type (Printed doc / Personalized email / Bulk PDF / Labels or envelopes)

Platform you live in (Microsoft 365 / Google Workspace / both)

Chosen tool (Word merge / YAMM / Autocrat / Outlook merge)

Approximate recipient count per run

Within sending limits? (N/A for print, else yes/no)

Checklist: Merge-Ready Data Source Checklist

- Row 1 contains only column headers, with no title row or merged cells above them
- Every header is short, unique, and free of leading or trailing spaces
- There is exactly one record per row and no blank rows in the middle of the data
- Names and other separately-used values are split into their own columns
- Numbers, currency, and dates are stored as clean raw values, with display columns added where helpful
- Duplicates have been removed on the email or ID column
- Required columns have been checked for blanks using a filter or COUNTBLANK

Mail Merge in Microsoft Word

Build, format, and reliably preview Word merges for letters, labels, envelopes, and Outlook email driven by your Excel data source.

Exercise: Run a Letter Merge End to End

Produce a complete batch of personalized letters in Word using the Mailings tab and your data source. Follow the workflow left to right and finish to a single document so you can review every letter at once.

- Start a Letters merge and connect to your saved Excel file and the correct sheet.

- Write the letter body and insert at least three merge fields using Insert Merge Field.

- Preview the first, a middle, and the last recipient, checking for blank or misaligned fields.

- Finish and Merge to Edit Individual Documents, then skim the combined file for spacing and field errors.

Worksheet: Field Switch Reference Card

Record the exact field switches you will reuse so you never have to look them up again. Reveal field codes with Alt+F9, edit the switch, then hide and preview. Fill in a real result from your own data for each.

Field name (e.g. Amount, Invoice Date)

Switch applied (e.g. \# "\$#,##0.00" or \@ "MMMM d, yyyy")

Raw value in spreadsheet

Displayed result after switch

Notes (when to use this switch)

Exercise: Add Conditional Text with Rules

Use the Rules button to insert one If-Then-Else field so a line changes for some recipients, letting a single template serve different audiences. Test it across rows that should trigger each branch.

- Decide one sentence that should differ by recipient, such as a tax-receipt line only when Amount is 20 or more.

- Insert an If-Then-Else rule from the Rules menu comparing the right field to the right value.

- Preview a recipient who meets the condition and one who does not, confirming each sees the correct line.

- Note any edge cases, such as blank or zero values, and how your rule handles them.

Checklist: Word Merge Quality Checklist

Recipients are connected to the correct Excel file and sheet

All merge fields point to the intended columns, verified in Preview Results

Currency and date fields use a picture switch and display correctly, not as raw values

For labels, the exact Avery or vendor product number is selected and Update Labels was clicked

A single test page or test letter was printed and read before the full run

Any conditional Rules were previewed across both branches

Personalized Bulk Email with Google and YAMM

Set up, track, schedule, and protect personalized bulk email sent from your own Gmail address with Yet Another Mail Merge.

Exercise: Send and Test a YAMM Campaign

Install YAMM, build a Gmail draft with placeholders, and run a merge to a tiny test list you control before any real send. Treat the test send as mandatory, not optional.

- Create a Google Sheet with First Name, Email Address, and one custom column for two test addresses you own.

- Write a Gmail draft using two {{placeholders}} that exactly match your headers, and set a fallback value for blanks.

- Run Start Mail Merge from Extensions, pick the draft, and send a test to yourself first.

- Read the received test in full, then run the merge to the two test addresses and confirm the Merge Status column updates.

Worksheet: Campaign Plan and Follow-Up Sheet

Plan one real campaign including its follow-up before sending, so timing and quota are deliberate rather than accidental. Fill this for your next outreach or notice.

Campaign purpose and audience

Total recipients and your daily sending quota (about 500 free / 2,000 Workspace)

Send date and time (scheduled)

Placeholders used and fallback values

Follow-up trigger (e.g. status not RESPONDED or EMAIL_OPENED after 4 days)

Follow-up draft name and send date

Worksheet: Post-Send Tracking Review

After a real send, read the status columns YAMM writes back and turn them into next actions. Complete this within a day of sending while the data is fresh.

Count of EMAIL_SENT

Count of EMAIL_OPENED and EMAIL_CLICKED

Count of RESPONDED

Count of EMAIL_BOUNCED (addresses to remove)

Rows to include in follow-up (not opened / not responded)

List-cleaning actions taken before next run

Checklist: Deliverability and Send Checklist

- Recipient count is within today's sending quota, or the campaign is split across days
- The list contains only people who expect to hear from you
- Bounced addresses from the previous send have been removed
- A recognizable sender name and from address are set
- The email reads like a personal note, not a heavy promotional image block
- Outreach includes a way to reply or opt out, and opt-outs are honored
- A test send was received and read before the full run

Generating Documents: Invoices, Certificates, and PDFs

Produce batches of correct, professional PDFs from one spreadsheet, deliver them automatically, and turn the whole process into a reusable, well-tested system.

Exercise: Generate a PDF Batch with a Template

Create a document template with placeholders and run a spreadsheet-to-PDF merge so each row becomes its own saved file. Use a Google Doc with Autocrat, or a Word merge saved as PDF, on a small test sheet first.

- Build a certificate or invoice template with at least three placeholders matching your sheet headers exactly.
 - Set the merge job output to PDF, choose a Drive folder, and define a dynamic file name like Student Name Certificate.
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- Run the job against a five-row sheet and open two of the resulting PDFs to verify the layout.
- Confirm the file links were written back into the sheet so they can feed an email merge.

Worksheet: Invoice Calculation Columns Planner

Plan the spreadsheet columns that compute every money value, so the template only displays results and never calculates. Fill this before building the sheet that drives your invoices or statements.

Raw input columns (Quantity, Unit Price, Tax Rate)

Formula columns (Line Total, Subtotal, Tax Amount, Total Due)

Display columns formatted as text (e.g. \$1,250.00)

Date columns (Invoice Date, Due Date) and their display format

Unique identifier column (Invoice Number scheme)

Verification step (how you will check totals before generating)

Exercise: Stage a Run Before Going Live

Practice the staging routine that prevents a merge from multiplying a single mistake across your whole list. Run it on any real merge before sending or printing to the full audience.

- Deduplicate the list and check all required columns for blanks.
- Run the merge against two or three test rows or addresses you control.
- Read the test output end to end, checking names, numbers, dates, and any attachments.
- Fix issues in the data or template, re-test until clean, then run or schedule the full list.

Checklist: Permanent Pre-Send Checklist

- The data source is deduplicated and free of blank required fields
- A preview or test send was completed and the output was actually read
- All numbers, currency, and dates display correctly, not as raw values
- The correct attachments are linked to the correct rows
- An email run is within the daily sending quota
- A clear sender name is set, and outreach includes a way to reply or opt out
- The template and data structure are saved so next month is a five-minute job

Your Action Plan

1. Choose one document you currently personalize by hand and commit to automating it first.
2. Build a clean, merge-ready data source for it in Excel or Google Sheets, following the data source checklist.
3. Deduplicate the list and check every required column for blanks before going further.
4. Design the template in the matching tool: Word for print, Google Docs plus Autocrat for PDFs, or a Gmail draft for YAMM email.
5. Add correct number, currency, and date formatting using field switches or pre-formatted display columns.

6. Insert any conditional content so one template serves different recipient groups.
7. Run the merge against a two or three row test set and read the output end to end.
8. Fix any issues, re-test until clean, then run or schedule the full list within your sending quota.
9. For email, review the tracking columns afterward, remove bounces, and build a follow-up audience from non-responders.
10. Save the template and data structure as a reusable job, and keep your pre-send checklist beside it for next time.

