Steps to mail merge with a Gmail account

1.   Create a draft email without any recipients

(DON'T change the content within {{}} as these MUST match the column headers in the spreadsheet)

-       Subject: Invitation for a stakeholder survey from {{MyCompany}}

-       Content: Copy from the template below as it is

Steps to Mail Merge with Gmail and Google Sheets

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1. Prepare Your Google Sheet

Obtain the GSheet with recipients and links –> *called **[survey_name]_links_[date]***

Login to your GMail account. *NOTE: Emails will be sent using the email ID you used to login.*

Make a **COPY** of   Gmail/Sheets Mail Merge updated

(DON'T change the column headers)

- Edit the **METADATA** sheet with sender's details
- Import data from **links_sheet** into **RECIPIENTS** sheet
- Each row should contain the information for one recipient.
- Example:

	A	B	C	D	E	F	G	H
1	Title(Optional)	Name	Surname(Option	Email	Status	Survey link	Reject Survey Link	
2	Mrs.	John	Doe	johndoe@mycompany.com		https://examplelink.com,	https://examplerejectlink.com/1662	
3								
4								

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2. Draft Your Email in Gmail

● Open Gmail and **compose a draft email**.

● In the **Subject** and **Body**, use placeholders with double curly brackets that match your column headers in Google Sheets.
(DON'T change the content within {{}} as these MUST match the column headers in the spreadsheet)

Example:

Subject: Invitation for a stakeholder survey from {{MyCompany}}

Content: *Copy from the template below and edit the text, but ensure the placeholders remain unaltered.*

Dear {{Title(Optional)}} {{Name}} {{Surname(Optional)}},

{{MyCompany}} is currently in the process of identifying areas that could represent risks and opportunities for the company now and/or in the future, based on insights captured by Datamaran.

These insights are informed by an objective analysis of regulatory developments, industry best practices, peer activity, and public opinions on financial, environmental, social, and corporate governance issues. We recognize you as an important stakeholder and we would greatly appreciate the chance to gain your perspective via this short survey.

Thank you for taking the time to contribute to our assessment, the results of which will inform the identification of issues that have a relevant impact on us as a company as well as on our stakeholders.

Click on the link below to begin the survey:

{{Survey link}}

For the optimal user experience, please use the latest version of Firefox, Chrome, Safari or Edge. You will not be able to access the survey using Internet Explorer - in case other browsers are unavailable, please consider responding via your mobile device.

Sincerely,

{{Sender}}
{{MyCompany}}

Click on the link below if you don't want to receive more notifications.

{{Reject Survey Link}}

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3. Test the Mail Merge

- In a test copy of the sheet, add your own email address as a row.

- Select **Apps Script** in that sheet, click **Run** ▶ next to `sendEmails`.

- The first time, Google will ask for authorization — approve it.

- Check your inbox to confirm the placeholders were replaced correctly.

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4. Send to All Recipients

- Once the test looks good, remove the test row with the recipient's data.

- Run the script again — it will send emails to all recipients in the sheet.

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5. Monitor & Notes

- **Quotas:** Gmail free accounts can send ~500 emails/day, Google Workspace up to 2,000/day. [Quota reference](.).

- **Aliases:** If you use an alias, set it up in Gmail first ([instructions](.)).

- Always test with a small batch before sending to all recipients.