

Automate sales prospecting / customer follow-up / recruitment

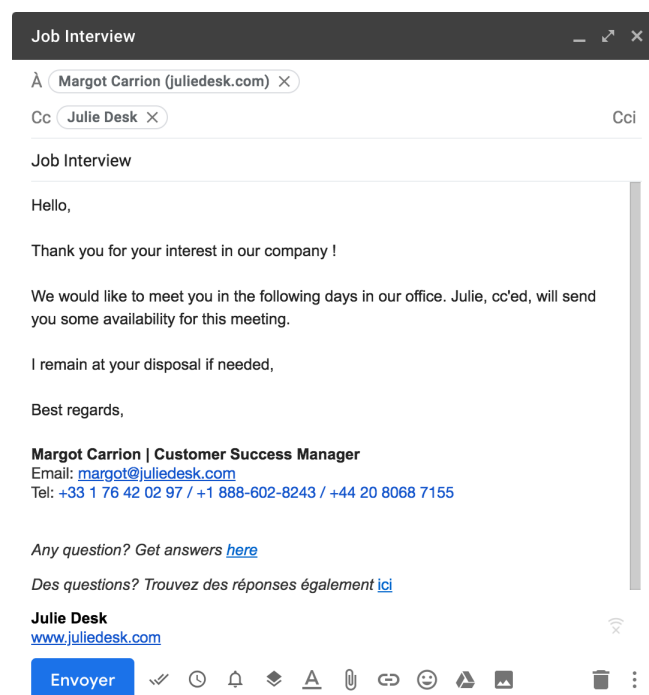
Last Modified on 27/07/2018 5:18 pm CEST

This tutorial is for those using Gmail.

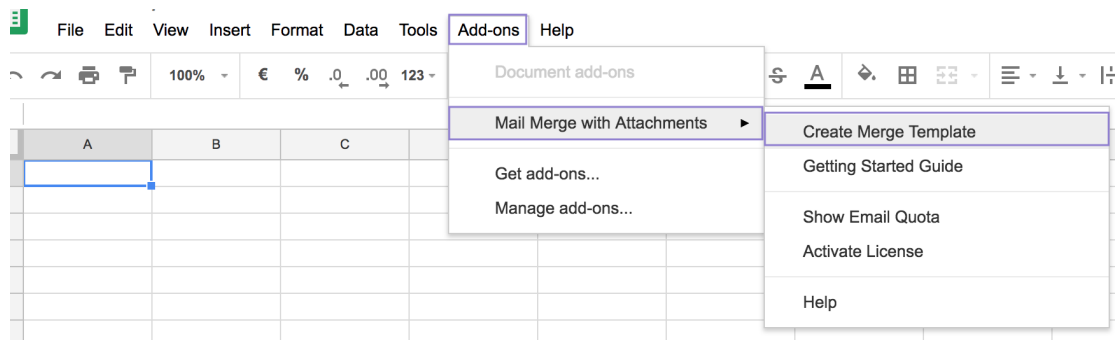
Want to automate your processes to concentrate on tasks with higher added value? Julie can help you!

- **Step 1:** Create a draft in your mailbox

Attention: Do not put the email addresses of the people expected at the meeting in BCC nor Julie's email address



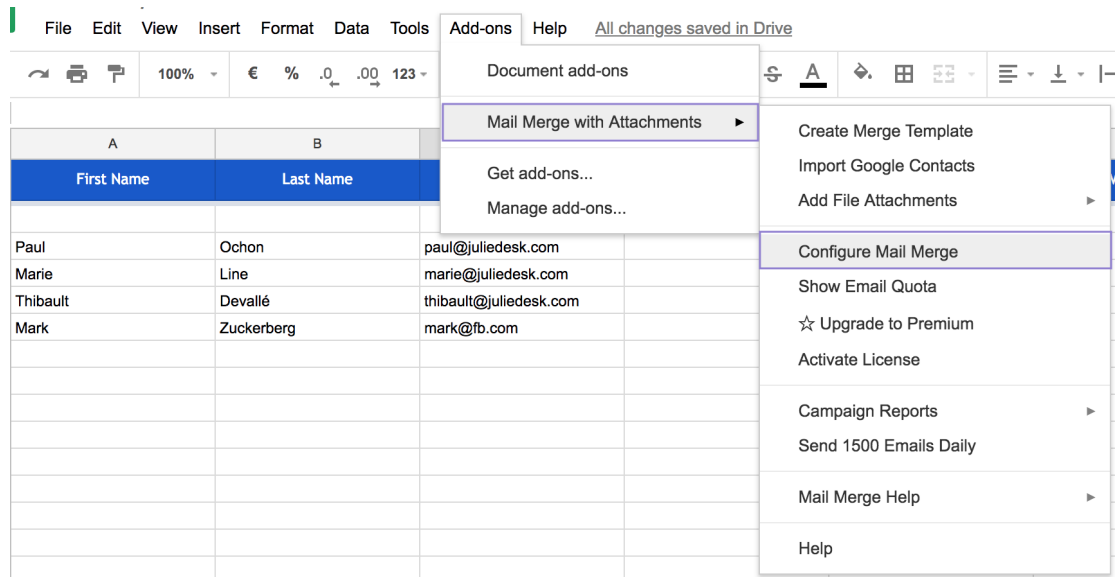
- **Step 2:** At the same time, you must create a new file either in google sheet or excel :
 - Click on "Add-ons", "Mail Merge with Attachments" and on "Create merge template".



- **Step 3 :** From there, you can import your contacts in First Name and Email address in this created file

First Name	Last Name	Email Address	File Attachments	Scheduled Date	Mail Merge Status
Paul	Ochon	paul@juliedesk.com			
Marie	Line	marie@juliedesk.com			
Thibault	Devallé	thibault@juliedesk.com			
Mark	Zuckerberg	mark@fb.com			

- **Step 4 :** Then you must click again on "Mail Merge with Attachments" and click on "Configure Mail Merge".



- **Step 5 :** Then, on the "Configure Gmail Mail Merge" page, you must indicate your first name in the "Sender's full name" box and in the "CC address" field put: the julie

address

Configure Gmail Mail Merge

Sender's Email Address: margot@juliedesk.com

Sender's Full Name: Margot Carrion

CC Address: julie@juliedesk.com

BCC Address: Auto BCC email address

Reply-to Address: margot@juliedesk.com

Campaign Name:

Enable Tracking

Track Email Opens Track Link Clicks Unsubscribe Link

You can email 50 recipients today. [Go Premium](#) and send up to 1500 emails per day.

[Continue](#) [Premium](#)

- **Step 6:** Then click on **Continue** and select **Select email template for Mail Merge**

Configure Gmail Mail Merge

✓ Select email template for Mail Merge..

Use an existing Gmail draft message as template

Write your own template in plain text or HTML

Need help? Check out our [Mail Merge tutorials](#).

[Run Mail Merge](#) [Send a Test Email](#) [Save Drafts](#) [Go Back](#)

- **Step 7:** Finally, click on "Use an existing gmail draft message as template" and in the "Select Gmail draft" field, you just have to select the template you made

Configure Gmail Mail Merge



Use an existing Gmail draft message as template

Select Gmail Draft:

[View Drafts](#)

[Jul-27] Job Interview

Need help? Check out our [Mail Merge tutorials](#).

Run Mail Merge

Send a Test Email

Save Drafts

Go Back

Click "Run Mail Merge" to send your message.
