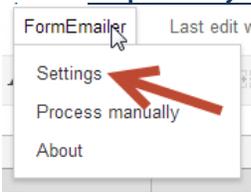




## FormMailer Script Step Sheet – By Jason Borgen

Install the script by following directions here: <http://bit.ly/formemailerinstall>



### Preparing the Email

1. Click on FormMailer menu.
2. Select settings.
3. Change the text in the **Sender Name**: Field to who you would like the email to be sent from (i.e., YourName, Summer School Registration, Classroom Walkthrough Report, etc.).
4. Change the text in the **To**: Field to who you would like the email to be sent to -- if you have a question in the form for participants to add their email address select that question from the dropdown menu in the top right corner and click on "Insert Placeholder" adjacent to the "To:" Field. You can add multiple addresses by separating by commas.
5. Click on **Reply To**, **CC**, or **BCC**, if you would like to have an email address CC'd ,BCC'd, or have a reply to the message sent to a specific email address for each email. You can add multiple addresses by separating by comma. *Note: You probably want to at least add yourself in the CC field.*
6. Change the text in the **Subject**:Field to the subject of the email. Note: You can include a subject as well as a variable from the form submitted by typing text and inserting a place older like done in step 4 into the text (i.e., **Classroom Walkthrough: #name#** this subject will change based upon the name of the person in the "Name" field on the form submitted).
7. Add some basic information at the top or bottom of the body (i.e, **Thank you for the observation. Your results are below**).The body automatically populates with ALL fields from the spreadsheet/form. See [Formatting HTML](#) section for customizations of the body.
8. Click **Save and Close**.
9. Fill out a form with bogus data to test.

FormMailer Settings

Email Advanced

Answers placeholders: Last Name

Sender Name: TICAL Leading Edge Certification **3** — insert placeholder

Reply To: jborgen@santacruz.k12.ca.us — insert placeholder

To: #Email Address# **4** — insert placeholder

CC: jborgen@santacruz.k12.ca.us, tdinsmore@santacruz.k12.ca.us **5** — insert placeholder

Subject: LEC Registration: #First Name# #Last Name# **6** — insert placeholder

Body: Submitted values: <br>  
 html  
<b>Timestamp: </b>#Timestamp|M/d/yyyy H:mm:ss#<br>  
<b>Date of Incident: </b>#Date of Incident#<br>  
<b>Time of Incident: </b>#Time of Incident#<br>  
<b>Name of Victim: </b>#Name of Victim#<br>  
<b>Name of Offender: </b>#Name of Offender#<br>  
<b>Name of Person Reporting Incident: </b>#Name of Person Reporting Incident#<br>  
<b>Where did the bullying incident occur?: </b>#Where did the bullying incident occur?#<br>  
<b>Type of bullying (select most significant):: </b>#Type of bullying (select most significant):#<br>  
<b>Please describe the incident in as much detail as possible.: </b>#Please describe the incident in as much detail as possible.#<br>  
<b>Do you know the names of any other people who witnessed this incident?: </b>#Do you know the names of any other people who witnessed this incident?#<br>  
<b>Can we contact you about this incident? (optional): </b>#Can we contact you about this incident?#

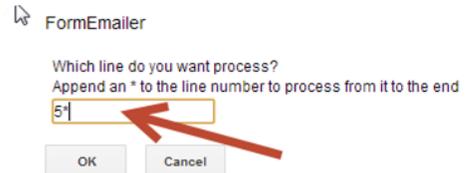
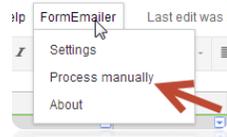
**5** Add field: ReplyTo Bcc **7** Save and Close ↑ insert placeholder

## Sending the Emails (Manually or automate)

You now have set-up the email design, format, and recipient(s). Before any emails are sent you have to decide if you would like to manually send the information or if you would like the emails to be sent automatically when a form is submitted.

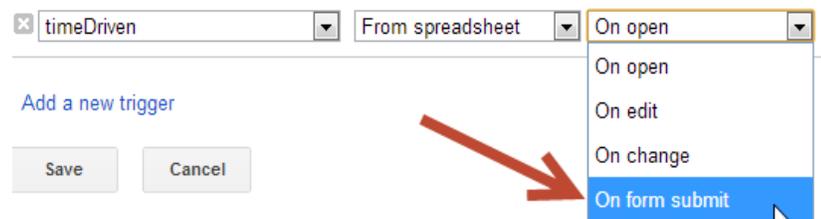
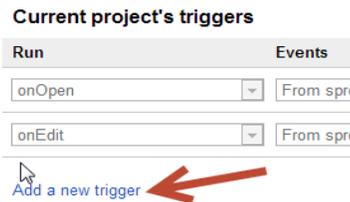
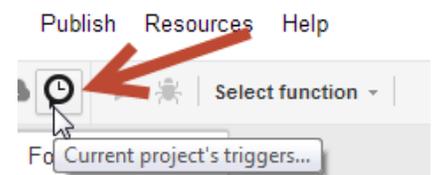
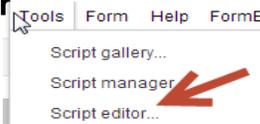
### Manually

1. Click on FormMailer Menu.
2. Select Process manually.
3. Type which row you would like the information sent. *Note: if you add an \* after the row number it will send an email for each row starting at the row you entered to the last row of data (i.e., If you have data submitted in row 2-15, by typing in 5\* will send emails starting at row 5 through row 15).*

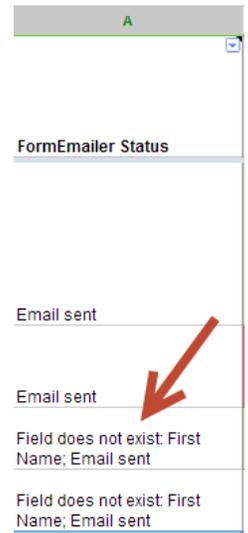


### Automatic – Setting Up a Trigger

1. Click on Tools Menu.
2. Select Script Editor .
3. Click on Current project triggers icon or the Resources Menu and select *All your triggers...*
4. Click on *Add a new trigger*.
5. Keep *timeDriven, From Spreadsheet*,
6. Change last menu to *On form submit*.
7. Click *Save*.



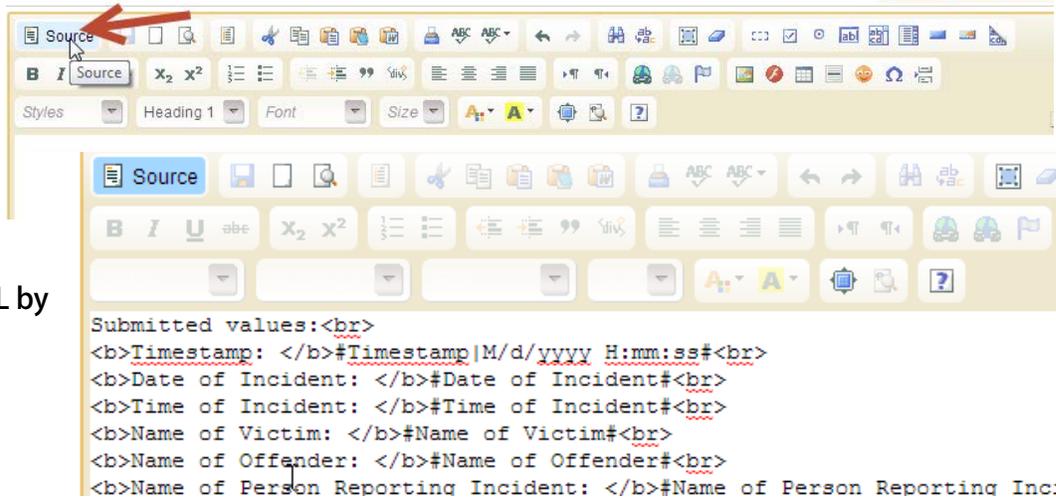
8. Click *Save* on the script menu.
9. Close the window/tab for script editor.
10. Test the form to make sure the trigger works.
11. Check status of FormMailer in Column A of the spreadsheet. If any fields are not found the email will still be sent, but will not populate that specific field in the email. Recheck the settings of FormMailer in that case.



## Formatting HTML

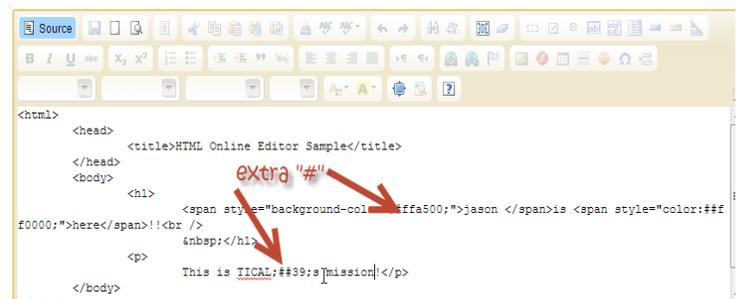
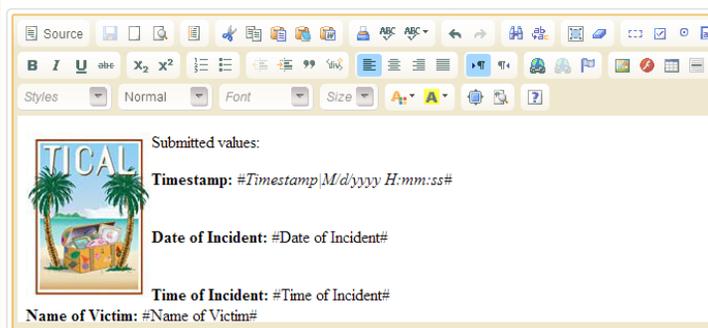
1. Click on FormEmailer menu.
2. Select settings.
3. Copy the HTML text to paste into an [HTML editor](#) to customize. *Note: the default settings provide simple formatting that may be OK for your needs--send yourself a test.*

4. Click on Source.



5. Paste in HTML text from FormEmailer.
6. Toggle off HTML by clicking Source again.

7. Add/modify content, spacing, or add rich text including images, bullets, bold, italics, etc. *Note: Any content's HTML code that contains a "#" needs to be modified with an extra "#" (i.e, You can change color of text/background by adding color and then going back into the code by clicking source and adding an extra "#" to the code for the color. Also, any apostrophes used need to be updated in the code to include an extra "#" as well to tell the script that this is not a field in your email)—this should be the final step as you will no longer see this formatting show up in the window.*



## After Editing - Adding new Content to FormEmailer

8. Click on Source to insure HTML code is displaying.
9. Copy all HTML code.
10. Go into FormsEmailer Settings in Google Spreadsheets
11. Replace existing code by selecting all code, delete, and paste in code created in the editor.
12. Test the email design by completing a form.

