

Yearly Counselor Appointments Procedures

- 1 month prior, Head Counselor sends an email to all teachers to let them know about the upcoming individual counseling appointments.
- Pull a report by counselor of student's w/elective classes, teacher, period and room number- Add a column for date and time. Save a copy on your desktop and print out a copy to keep organized in a binder. *Note: Make sure student ID is on the report.*
- Start booking appointments 2 weeks ahead of time. Keep record of appointments on desktop and on paper – student class list.
- Transfer appointment info on a Google sheet. Add a column for email addresses. Insert the following formula create the students' email addresses:

=cell &" ___"

Here is what it will look like:

A	B	C	D
ID	firstname	lastname	794667@seq.org >
794667	Orlando	Acosta Morales	=A2&"@seq.org"

- 1 week before, email appointment information to students using the FormMule (aka the Mule) in Google sheets (this app needs to be installed and once installed, you can launch formMule. To In Google menu, under the Add-ons menu, select **Get Addons...** and search for formMule, after which you can add it to Google Sheets.) Here are some basics of the FormMule:
 - Merge settings - Identify the sheet that you will use to create merged emails. This sheet must have unique headers in the first row, and one row of data per email you want to send. Indicate whether you want to run the merge manually or on form submit -- this means your merge source can be the same sheet that accepts Google Form responses.
 - Email template(s) and send conditions - indicate how many unique templates you want to use in your merge setup (up to 10 allowed). For simple cases, this will typically be just one, but imagine sending different templates for different reasons, depending on the values in your sheet. This is where "Send Condition" comes in -- use this to set a specific flag that must exist in a column in the source data in order for a particular template to send. Imagine the possibilities!
 - Build / preview your template(s) - Handy template editor lets you create and preview the To, CC, BCC, Reply-to, Subject, Body, and auto-translated Body via Google Translate language codes. With click-button menu for all available headers, dropping merge tags into your template has never been easier. Preview your template interacts with your sheet data in real-time.
- **Here is what the document will look like and the steps you will need to take to email each student his/her appointment information:**

ID	LN	FN	Grade	Per	Course	Room	Teacher	Couns.	Day	Date of Appt.	Time
790837	Torres	Kevin	11	2	ELD III	205	Frost, Anne S	JG	Wednesday	2/15/2017	8:45 AM
790736	Nunez	Ana	11	2	ELD III	205	Frost, Anne S	JG	Wednesday	2/15/2017	8:50 AM
790481	Tapia Ramirez	Hugo	11	2	ELD III	205	Frost, Anne S	JG	Wednesday	2/15/2017	8:55 AM
793534	Sandoval Rueda	Emmanuel	10	2	ELD III	205	Frost, Anne S	JG	Wednesday	2/15/2017	9:00 AM

- Launch the addon from the Add-ons menu. FormMule will ask you to select the sheet for data, in this example it's just **Sheet1**.

formMule - Email merge utility

Choose source data and set merge type

Select the sheet that contains your email addresses and merge source data

Sheet1

Form trigger	Time trigger
Off <input type="checkbox"/> Evaluate merge on form submit	Off <input type="checkbox"/> Send on a timer

With no triggers set, the formMule Email Merge Utility can still be configured to send bulk, merged emails manually using multiple templates and send conditions.

Next: Templates and send conditions

- Click the **Next** button. Click **Save template settings**.

formMule - Email merge utility

Set # of email template(s) and send conditions

How many unique email templates do you want to use?

1

Send conditions can be NULL, NOT NULL or a number or text value. No quotation marks needed.

Email template

Send Condition

Template 1

--Send for all rows

Back

Save template settings

Next: Edit templates

- Then click **Next: Edit templates**.

Next: Edit templates

- To create the template, enter the text you want in the message. You can also drag over fields from the right side.

Build / preview templates

×

Template 1 ⌵

Saved

Edit

Preview this

Preview and send all

To: * <<Student Email>>

CC: May use email or tag. Separate multiple with commas.

BCC: May use email or tag. Separate multiple with commas.

Reply-to: Single email address, or type "no-reply"

Subject: * Counseling Appointment Information

Body:

Dear <<FN>>,

You are scheduled to meet with your Counselor on <<Day>>, <<Date of Appt.>>, at <<Time>>.

Please present this email as your pass to leave class.

For any questions, please come to the Guidance Office.]

HTML friendly!

Lang: Use language code to include auto-translation

GradePerCourseRoomTeacherCouns.DayDate of Appt.TimeCurrent DateLive Form Url

- You can make the message more personal by including their first name in the salutation. Once you have the template looking the way you like, click **Preview and send all**.

Preview and send all

Number of emails formMule will attempt to send: 3	
Remaining daily send quota: 1500	
Template name	Template 1
Row in source sheet	2
To	790837@seq.org
Subject	Counseling Appointment Information
Body	Dear Kevin, You are scheduled to meet with your Counselor on Wednesday, 2/15/2017, at 8:45 AM. Please present this email as your pass to leave class. For any questions, please come to the Guidance Office.
Template name	Template 1
Row in source sheet	

- Check out the messages that are going to be sent, and when you are satisfied, click the **Send now** button. FormMule will then send out your personalized emails. To use the same sheet and send out more, you simply add the rows with the new student information. FormMule adds a column to your spreadsheet with information on when the emails were sent. This way you can add more rows and re-launch formMule and it will only send out emails for rows that haven't already been sent emails.
- Next, prepare passes with Mail Merge and sort by date and time. See Anilisa's instructions in the document entitled "Step by Step Instructions on Creating a Mail Merge for Student Passes".
- 2 days before, email teacher appointment information.
- 1 day before or day of, send passes out to classrooms.
- Call students out of class, if necessary.