

Lesson 5 Merging Google Docs and Spreadsheet Data



- 1) Create a folder called **MERGING INFORMATION**
- 2) Create spreadsheet with Data (**PROVIDED FOR YOU**)
 - a. Must have a header row
 - b. Must have at least 2 rows of data information
- 3) Create a Google Doc that will contain the information you wish to send out. (**PROVIDED FOR YOU**)
 - a. Place the headers in the space you wish for each header to printout
 - b. All headers must be spelled the same as on the spreadsheet and contain << **before and** >> after.
- 4) Must use Add on from Spreadsheet called **Autocrat** this add on will merge the spreadsheet with information to the document.

THE FOLLOWING ARE THE STEPS YOU MUST USE IN THE ORDER THEY ARE PRESENTED. The video will also assist if you needed.

- 1) Place the information (spreadsheet & Google Doc in the folder called **MERGING INFORMATION**. Important the folder must have this information contained in it.
- 2) On the spreadsheet click on (Add-ons) then type in **AUTOCRAT** so it will work on your lesson. Choose Open and it should say working.
- 3) Click on new job called (**STUDENTS REPORT**) and place in the space provided to merge job. Click **NEXT**.
- 4) Choose template (From Drive)if not listed choose type in **STUDENT REPORT**. **NEXT**.
- 5) Map Source data to template Merge tab (Sheet1) Header Row 1 First data row 2. **NEXT** (If error appears you have not clicked on **SHEET1**)
 - a. File Settings – File name <<**Students name**>> This is the first field in the spreadsheet. YOU must spell it correctly. **Type** Click down arrow for **PDF**
 - b. Multiple output mode (Classic mode) **NEXT**.
- 6) Choose destination folder **MERGING INFORMATION**. **SELECT**
- 7) Next window will appear click on **NEXT** Note: says merged docs will go into these folders. **NEXT**.
- 8) Add dynamic folder reference (optional) **NEXT**
- 9) Set Merge condition (optional) **NEXT**.
- 10) Share docs & send emails **NO and NO** **NEXT**
- 11) Run on form trigger **YES** – Run on time trigger **NO**
 - a. Yes and no **SAVE** will take a minute then Click run job little icon.
 - b. The computer will display work being done and on spreadsheet.