Postline Mail Merge

Your first mail merge, step by step

Send one personal email to every row of a Google Sheet, from your own Gmail

What you will do

Postline is a Google Sheet with a mail merge built in. You make your own copy, put your list in it, write one email with placeholders like `{{First name}}`, and Postline sends a separate, personal email to every person on the list, from your own Gmail account. Each person sees only their own email, addressed to them.

This guide walks you through it once, end to end, using a real example. Every step says **what to select** and **what it does**. In the pictures, the parts you click are outlined in red with a numbered badge 1 2 in the order you click them.

The example used in this guide

Priya runs **Brightpath Events** and wants to invite three people to a free Google Sheets workshop on 5 Dec 2026. Her list looks like this:

First name	Email	Company	Workshop date
Asha	asha@example.com	Brightleaf Foods	5 Dec 2026
Ravi	ravi@example.com	Northwind Tools	5 Dec 2026
Meera	meera@example.com	*(empty)*	5 Dec 2026

Meera's company is left empty on purpose: you will see how Postline fills a gap like that with a friendly fallback instead of leaving a hole in the sentence.

What you need

- A Google account (a normal @gmail.com account works, so does a work or school Google account).
- The Postline copy link. It looks like this:
  `https://docs.google.com/spreadsheets/d/1dML7z0v5t6-D_j0vSgt0Ir-eNjK87_BE-cg0HoslCsY/copy`
- About 10 minutes the first time. After that, a mail merge takes 2 or 3 minutes.

> **About the pictures.** The Postline sidebar pictures are taken from the real add-on. The Google screens (the copy dialog, the permission pages and the sheet around the sidebar) are drawn to look like Google's, so their exact wording and colours may differ a little from what you see. The buttons to click are the same.

In this guide

Part A: One-time setup 2
Part B: Your first mail merge (the workshop invite) 6
Part C: Useful extras 11
Part D: Limits and troubleshooting 13

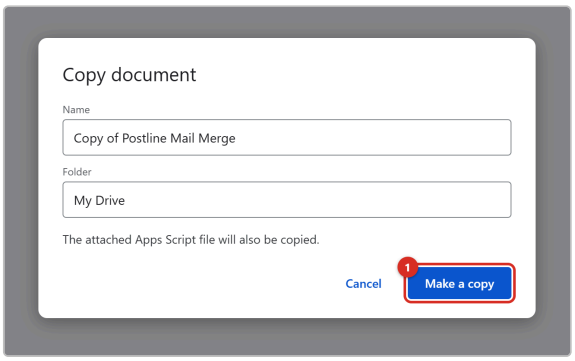
Part A: One-time setup

You do Part A only once. After that, your copy of the sheet keeps Postline, and you can reuse it for every mail merge (or make a fresh copy for each list; both work).

Step 1 Make your own copy

WHAT TO SELECT

Open the copy link in your browser (signed in to the Google account you want to send from). Leave the name as it is or type your own, then click **Make a copy** 1.



WHAT THIS DOES

Google creates a copy of the Postline sheet in **your** Google Drive. The mail merge script comes with it and runs only under your account. Nobody else, including the person who gave you the link, can see your copy or your emails.

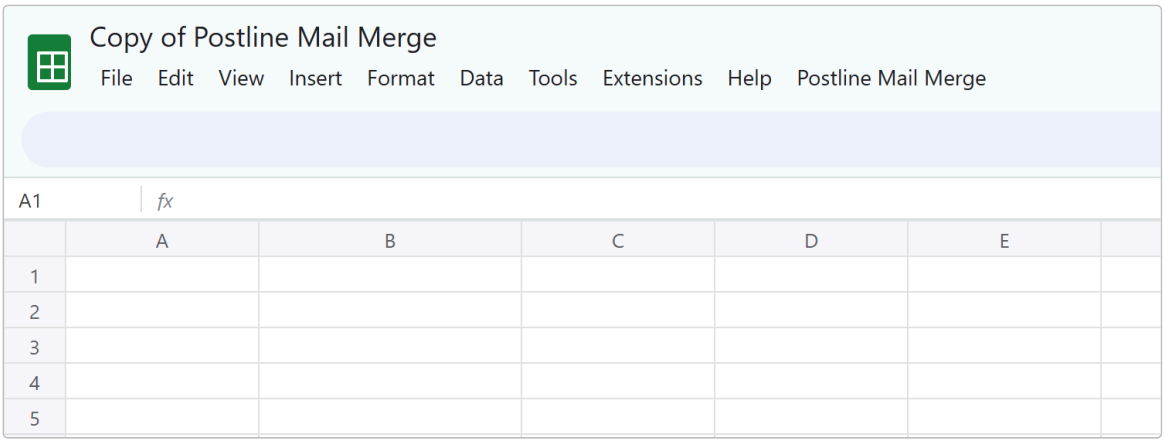
Step 2 Wait for the Postline menu

WHAT TO SELECT

Nothing to click yet. Wait 5 to 10 seconds after the copy opens.

WHAT THIS DOES

A new menu called **Postline Mail Merge** appears on the menu bar, after **Help**. If it does not appear after 20 seconds, reload the page (F5).



Step 3 Put your list in the sheet

WHAT TO SELECT

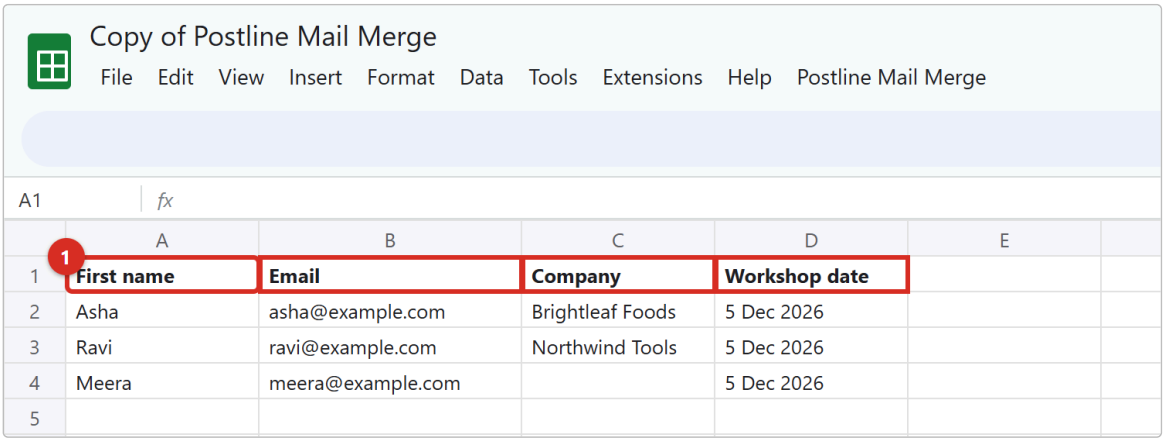
Type or paste your list into the sheet, starting in cell A1:

- **Row 1 holds the column names** (the headers) (1). Use short, clear names such as `First name`, `Email`, `Company`.
- **One column must hold the email addresses.** Calling it `Email` is simplest.
- **Every row below is one person.** No empty rows in between.

For the example, type the four columns and three people from page 1.

WHAT THIS DOES

Each column name becomes a placeholder you can put in your email, for example the column `First name` becomes `{{First name}}`. When Postline sends, it swaps each placeholder for that person's own value.



> **Tip:** you can also paste a list from Excel or another sheet, or import it from a CSV with **File → Import**. Just keep the headers in row 1.

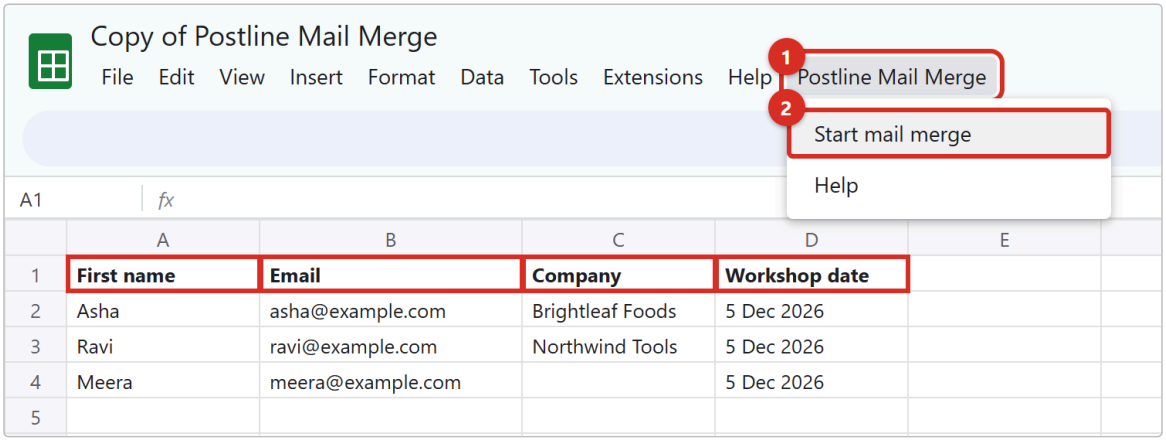
Step 4 Open Postline

WHAT TO SELECT

Click **Postline Mail Merge** (1) on the menu bar, then **Start mail merge** (2).

WHAT THIS DOES

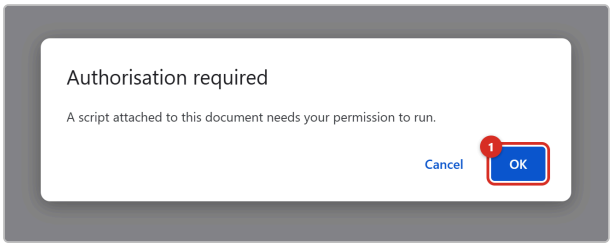
The very first time, Google asks you to allow Postline to work with your sheet and Gmail (the next 4 steps). After that, this opens the Postline sidebar straight away.



Step 5 Authorisation required

WHAT TO SELECT
Click **OK** 1.

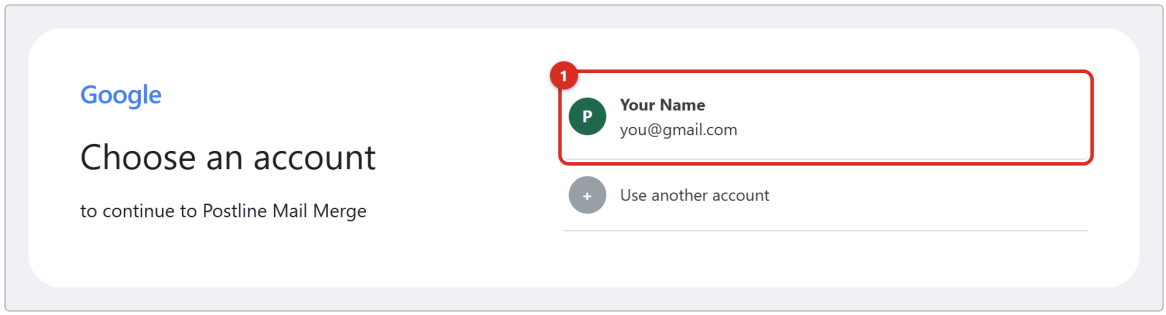
WHAT THIS DOES
Google opens a sign-in window to grant Postline its permissions. If nothing opens, your browser may have blocked the pop-up: allow pop-ups for docs.google.com and try again.



Step 6 Choose your account

WHAT TO SELECT
Click the account you want to send from 1. Pick the same account that owns the copy.

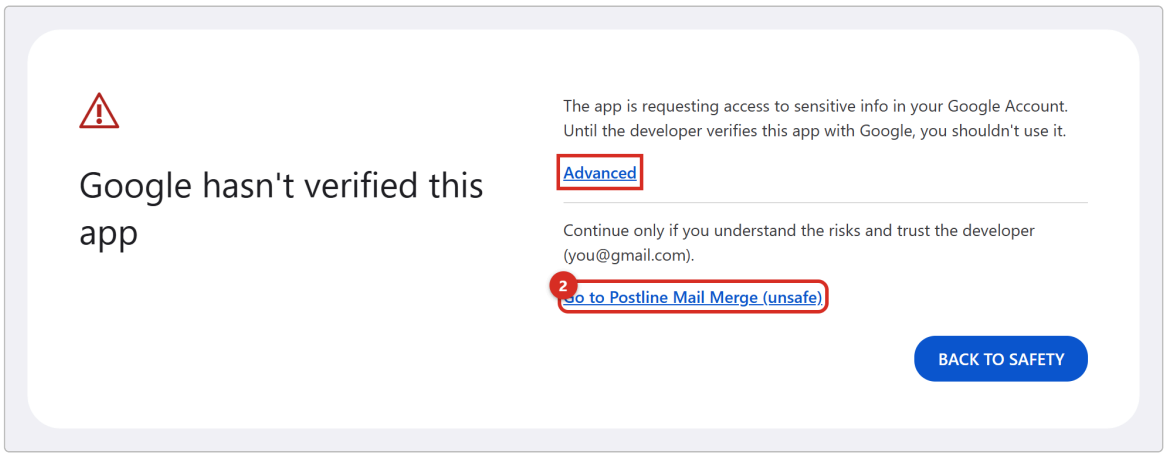
WHAT THIS DOES
The emails will be sent from this account's Gmail, and they will appear in its **Sent** folder.



Step 7 "Google hasn't verified this app"

WHAT TO SELECT
Click **Advanced** 1, then **Go to Postline Mail Merge (unsafe)** 2.

WHAT THIS DOES
This warning is normal for a script that lives inside your own copy of a sheet. Google shows it for every such script that has not been through Google's paid review. The script is in your copy, runs as you, and sends nothing anywhere except the emails you send yourself.



Step 8 Allow access

WHAT TO SELECT

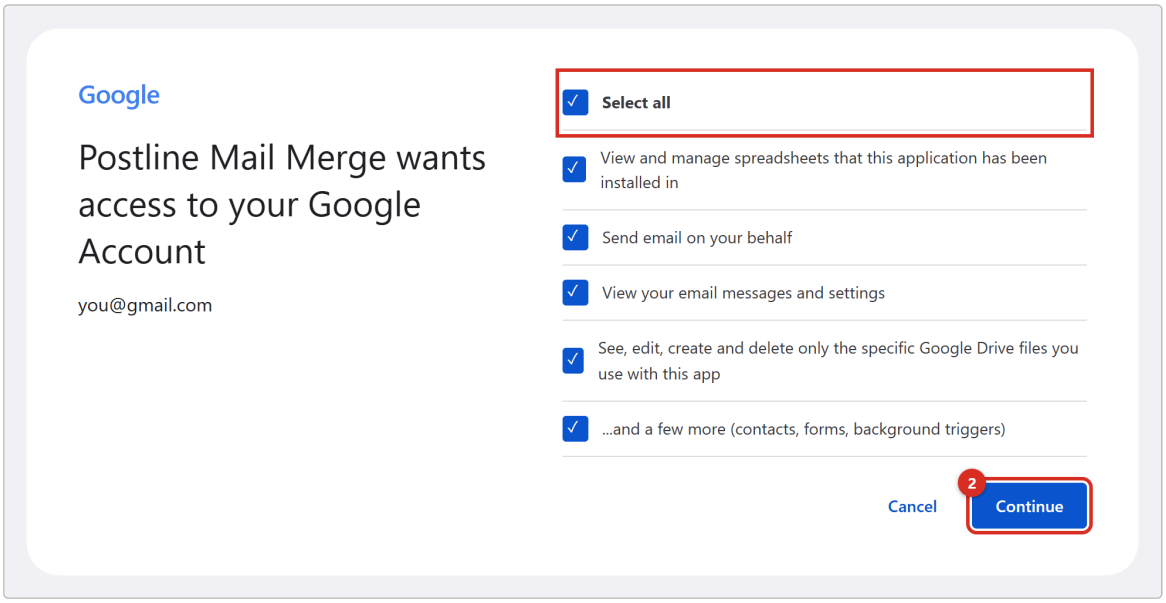
Tick **Select all** (1), then click **Continue** (2) at the bottom.

WHAT THIS DOES

Grants the permissions Postline needs:

- **Spreadsheets:** read your list and write each person's status back into the sheet.
- **Send email on your behalf:** send the emails from your Gmail.
- **View your email messages:** read your Gmail drafts (to use one as a template), your "send as" addresses, and replies and bounces (to mark them in the sheet).
- **Drive files:** attach only the files you pick yourself.

If you untick any of these, Postline cannot work and will ask again.

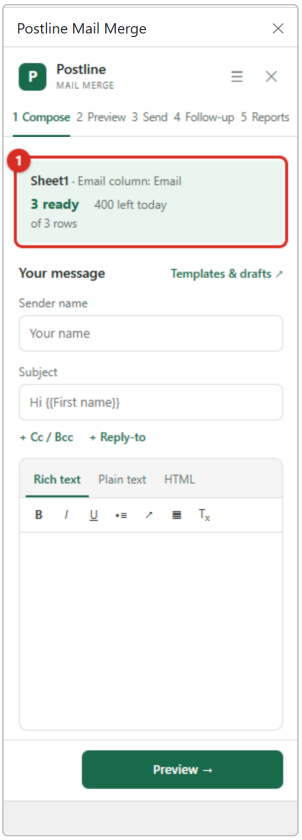


After allowing: if the sidebar does not open by itself, click **Postline Mail Merge** → **Start mail merge** once more. You will not see the permission screens again.

Part B: Your first mail merge (the workshop invite)

The Postline sidebar opens on the right of the sheet. Across its top are five numbered tabs, used left to right: **1 Compose**, **2 Preview**, **3 Send**, **4 Follow-up**, **5 Reports**. The ☰ button opens Tools and settings.

Step 9 Check the list summary



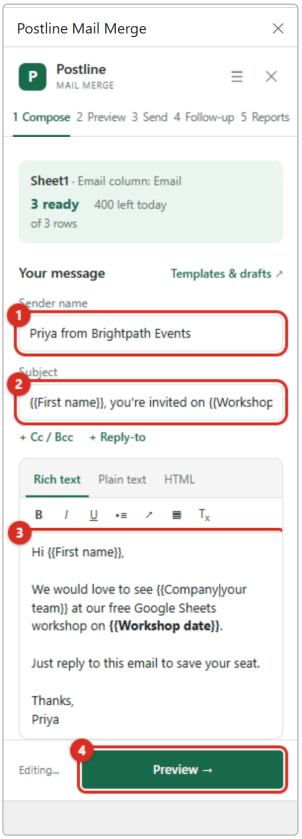
WHAT TO SELECT

Nothing to click. Look at the green box at the top 1.

WHAT THIS DOES

Postline has read your sheet. It shows the sheet's name, which column it uses for email addresses, how many rows are ready to send (*3 ready of 3 rows*) and how many emails your account can still send today. If the email column is wrong, rename that column to `Email` and reopen the sidebar.

Step 10 Write the email



WHAT TO SELECT

On **1 Compose**:

1. **Sender name** 1: the name people see, e.g. `Priya from Brightpath Events`.
2. **Subject** 2: `{{First name}}, you're invited on {{Workshop date}}`
3. **Message** 3: write your email. For the example:

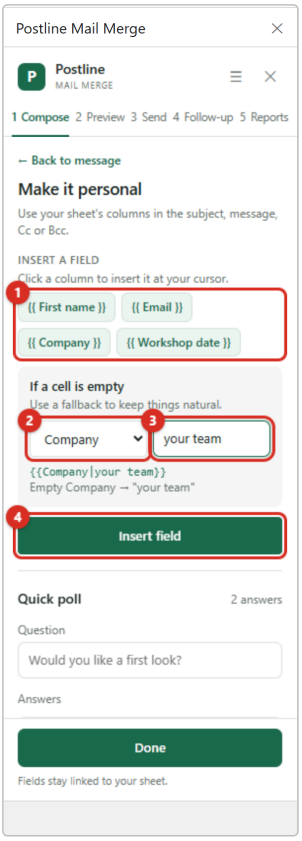
   Hi {{First name}},
   We would love to see {{Company|your team}} at our free Google Sheets workshop on **{{Workshop date}}**.
   Just reply to this email to save your seat.
   Thanks, Priya

The editor works like Gmail: bold, italic, lists and links are on the toolbar. Leave **Preview** 4 for the next steps.

WHAT THIS DOES

Anything in `{{double braces}}` is a placeholder. It must match a column name in row 1 exactly (spaces and capitals included). Everything else is sent as you typed it. Postline saves your draft automatically.

Step 11 Add placeholders and fallbacks (optional, but handy)



WHAT TO SELECT

Under the message box, click **{{ }} Personalize**. Then:

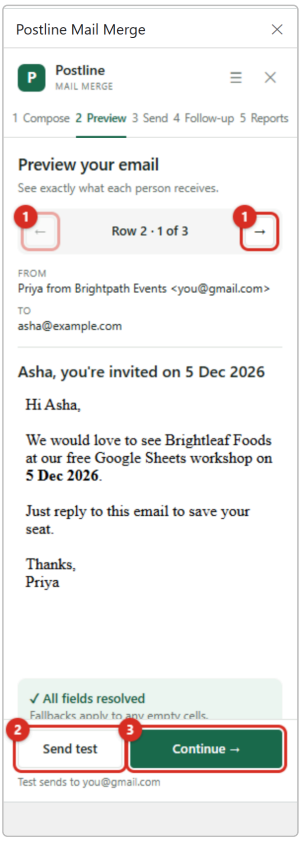
- Click a column chip (1) to insert that placeholder where your cursor was, so you never mistype a column name.
- For **If a cell is empty**: pick the column (2) (`Company`), type what to say instead (3) (`your team`), and click **Insert field** (4).

Click **Done** to go back to your message.

WHAT THIS DOES

A fallback is written as `{{Company|your team}}`: use the Company value, and if that cell is empty use "your team". So Asha's email says *Brightleaf Foods*, while Meera's (no company) says *your team* instead of a blank.

Step 12 Preview each person's email



WHAT TO SELECT

Click **Preview** (or the **2 Preview** tab). Use the arrows (1) to step through the rows.

WHAT THIS DOES

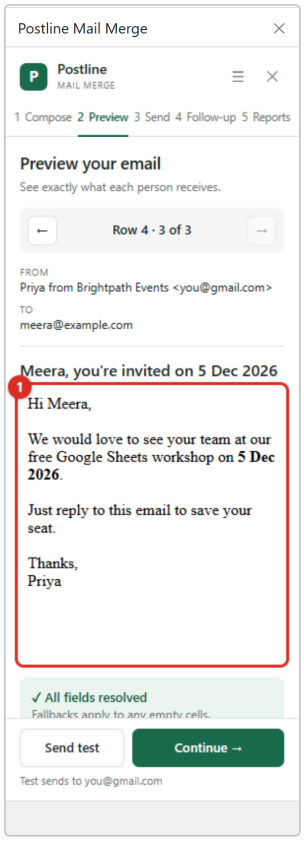
Shows exactly what each person will receive, with their own values filled in: here, row 2, Asha at Brightleaf Foods. Nothing is sent yet. A green **✓ All fields resolved** means every placeholder matched a column. If a placeholder is misspelled, Postline warns you here.

Step 13 Check the row with the empty cell

WHAT TO SELECT
Click the right arrow until you reach row 4 (Meera).

WHAT THIS DOES
Meera has no company, so the fallback is used: *"We would love to see your team…"* (1).

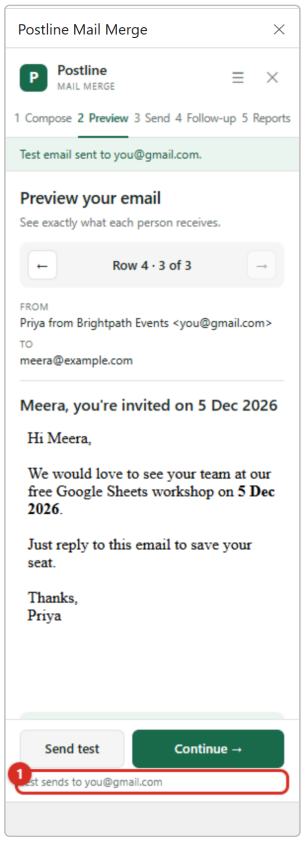
It is worth checking any row with empty cells before you send.



Step 14 Send yourself a test

WHAT TO SELECT
Click **Send test** (2 in the Step 13 picture). Then open your own Gmail inbox and look at the test email.

WHAT THIS DOES
Sends **one** email, filled in with the row on screen, to **your own address** only. Nobody on the list gets anything. The line (1) confirms where it went. Check the subject, the wording, the links and how it looks on your phone.



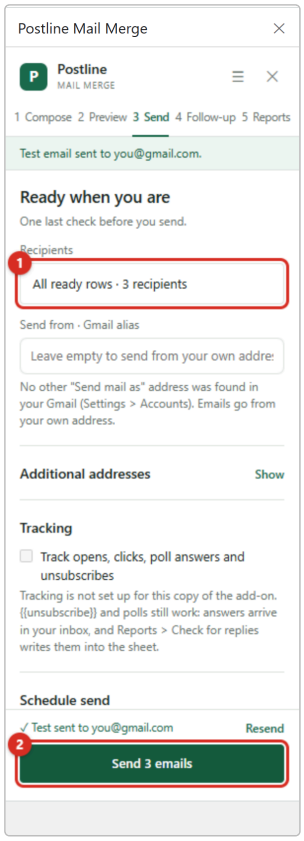
Step 15 Go to Send and check the recipients

WHAT TO SELECT

Click **Continue →** (or the **3 Send** tab). Check **Recipients** (1) says *All ready rows · 3 recipients*. Then click **Send 3 emails** (2).

WHAT THIS DOES

Shows who will receive the email and how many you can still send today. Rows that already have a status (sent before), unsubscribed people and invalid addresses are skipped automatically, so nobody gets the same email twice.



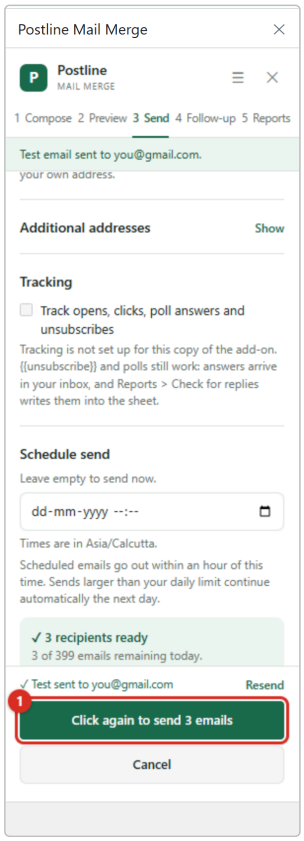
Step 16 Send: click again to confirm

WHAT TO SELECT

The button changes to **Click again to send 3 emails** (1). Click it once more. (Click **Cancel** if you changed your mind.)

WHAT THIS DOES

Sending needs two clicks so a mail merge never goes out by accident. On the second click Postline sends the emails from your Gmail, one per row. For a short list this takes a few seconds; leave the sidebar open until it says *Sent 3.*



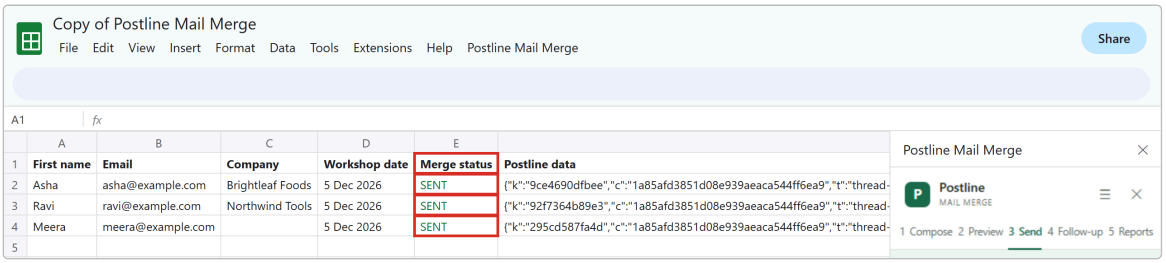
Step 17 See the result in your sheet

WHAT TO SELECT

Nothing to click. Look at the new columns in your sheet.

WHAT THIS DOES

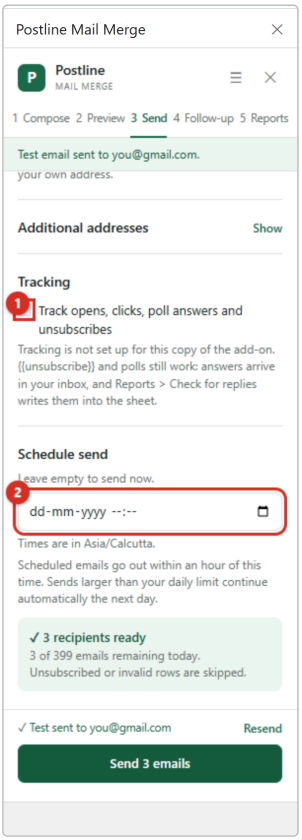
Postline adds a `Merge status` column 1 and writes `SENT` on each row that went out (or `ERROR: ...` with the reason if one failed). It also adds a `Postline data` column that it uses to find replies and follow-ups later: **leave it alone** and don't edit or delete it. The emails are in your Gmail **Sent** folder.



Done! That is a complete mail merge. The rest of this guide covers the optional extras and what to do when something goes wrong.

Part C: Useful extras

Step 18 Schedule the send, or turn on tracking



WHAT TO SELECT

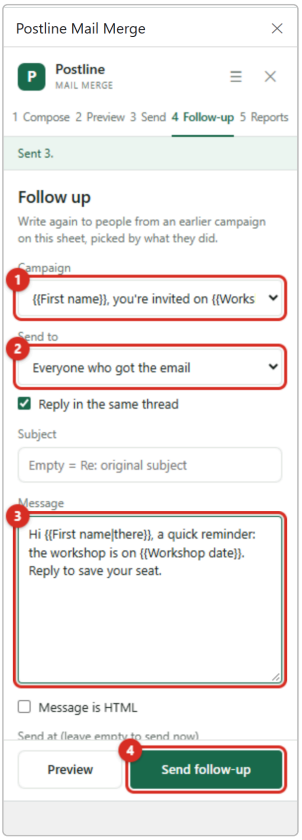
On **3 Send**, before clicking Send:

- **Track opens, clicks, poll answers and unsubscribes** 1: tick it to record who opened or clicked. (It needs a small tracking server; if your copy says "Tracking is not set up", it is not available and the box stays off.)
- **Schedule send** 2: pick a date and time. Leave it empty to send now.

WHAT THIS DOES

A scheduled send goes out **within an hour** of the time you pick, even if your computer is off and the sheet is closed. You can see and cancel scheduled sends on **5 Reports**.

Step 19 Send a follow-up



WHAT TO SELECT

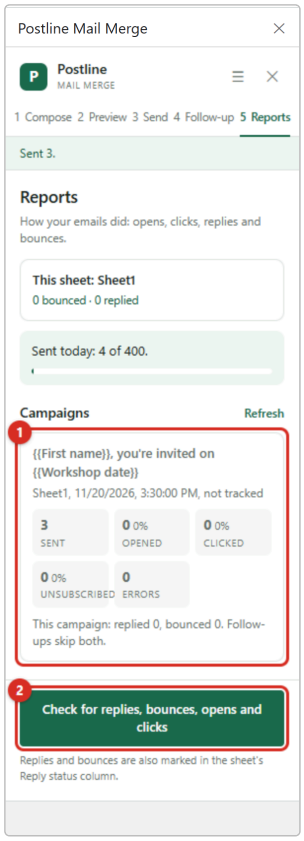
Open **4 Follow-up**:

1. **Campaign** 1: pick the email you sent earlier.
2. **Send to** 2: who gets the follow-up, e.g. **Everyone who got the email**, or only those who have not replied.
3. **Message** 3: write the follow-up. Placeholders work here too.
4. Click **Send follow-up** 4 (twice, like before). **Preview** shows it first.

WHAT THIS DOES

Sends a second email to the chosen people. With **Reply in the same thread** ticked, it lands under the first email in their inbox, like a normal reply. Its result goes into a `Follow-up 1 status` column.

Step 20 Check the reports and replies



WHAT TO SELECT

Open **5 Reports**. Each campaign (1) shows sent, opened, clicked, unsubscribed and error counts. Click **Check for replies, bounces, opens and clicks** (2) to update them now.

WHAT THIS DOES

Postline looks in your Gmail for replies and bounced emails and marks them in the sheet (Reply date and Reply status columns). It also does this by itself about once an hour. Use this to send follow-ups only to people who have not replied.

More things you can do

To…	Do this
Attach a file	Under the message on **1 Compose**, click **+ Attach from Drive** or **+ Upload file** (from your computer) (up to 24 MB in total). Every person gets the same files, unless you add an `Attachments` column naming a file per row.
Use a Gmail draft	Click **Templates & drafts**, then **Refresh** under Gmail drafts, and pick one: its subject, body and attachments come into the editor.
Save a message to reuse	**Templates & drafts** → save it by name; load it in any sheet later.
Add CC, BCC or a Reply-to	Click **+ Cc / Bcc** or **+ Reply-to** under the subject. Placeholders work there too.
Let people unsubscribe	Click **Unsubscribe** under the message to add `{{unsubscribe}}`. People who unsubscribe are skipped in every later mail merge.
Ask a quick question	Click **Poll** under the message; answers land in a `Poll answer` column.
Send to only some rows	Filter the sheet (**Data** → **Create a filter**). Rows hidden by a filter are skipped.
Send the same list again	On **3 Send**, click **Clear statuses**. It empties the status columns so those rows count as “ready” again. Your own columns are not touched.

Part D: Limits and troubleshooting

Daily limits

Gmail limits how many emails one account may send per day. Postline stays safely under it: by default **400 a day for a @gmail.com account** and **1,500 a day for a Workspace (work or school) account**. The green box on **1 Compose** shows how many are left today. If your list is bigger, Postline sends what it can today and **continues automatically the next day**; rows already sent are never sent twice. You can change the daily number in ☰ → Tools and settings.

If something goes wrong

What you see	What to do
No **Postline Mail Merge** menu	Wait 10 seconds and reload the page. Make sure you are in **your copy** (title starts with "Copy of"), not the original link.
Permission window does not open	Allow pop-ups for docs.google.com, then **Start mail merge** again.
"This app is blocked" (work or school account)	Your organisation does not allow unverified scripts. Ask your IT admin, or use a personal Gmail account.
0 ready or the wrong email column	Row 1 must have the headers, and one column must hold the addresses (name it `Email`). Remove empty rows above the list.
A placeholder shows as `{{...}}` or is blank	The name inside the braces must match the column header exactly. Use the **{{ }} Personalize** chips to insert it, and add a fallback for empty cells.
A row says `ERROR: ...`	The text after ERROR says why (often a mistyped address). Fix the row, clear that one status cell and send again: only that row goes out.
A row says `SKIPPED: ...`	It was left out on purpose, for example the person unsubscribed or the address is invalid.
Nothing is sent when you click Send	Sending needs a **second** click on **Click again to send N emails**.
I want to send to the same people again	**3 Send** → **Clear statuses**, then send.

> **Privacy in one line:** Postline runs inside your own copy of the sheet, under your Google account. Your list and your emails stay in your Google Drive and Gmail.