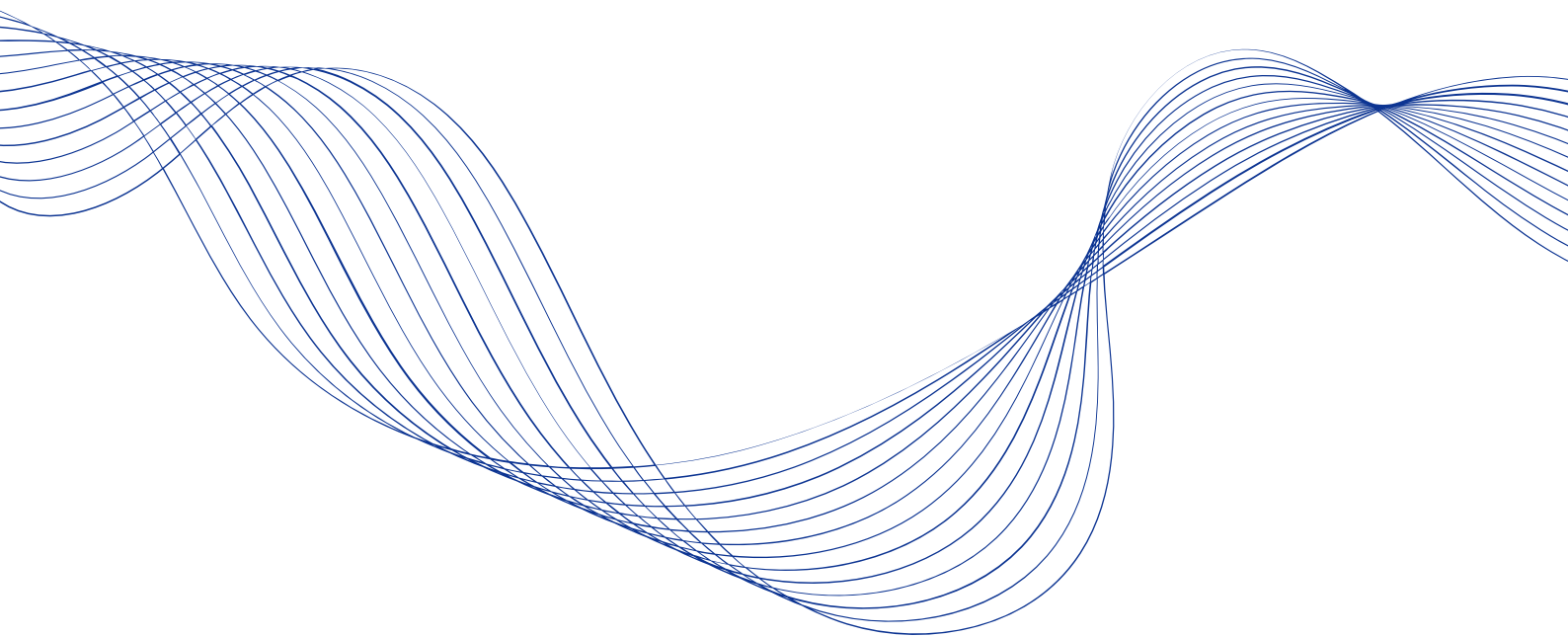


Annex 1 - FM Handbook

ACTA

Automated Certificates & Treasury Administration

A Step-by-Step Guide to the AutoCrat Workflow



The need for the digitalisation of Financial Management within the ELSA Network is no longer optional, it is essential and a clear priority. The administrative workload and repetitive tasks placed on Treasurers have been discussed many times across the Network. The position, while fundamental to the stability and credibility of the Association, is not always perceived as the most attractive one. Precisely for this reason, it is our responsibility to continuously improve its structure, tools and working methods.

By reducing unnecessary manual processes and simplifying routine financial administration, we make the role more sustainable, more strategic, and more aligned with modern governance standards. Streamlining financial administration through digital tools is therefore not merely an operational improvement, but a structural necessity for strengthening Financial Management across the Network.

For this reason, the A.C.T.A. Guide was developed as a practical solution to support the digitalisation of financial administration across the ELSA Network. Built on Google-based tools and designed to be widely accessible, user-friendly, and adaptable to different National and Local Group structures, it provides a structured framework that helps automate and simplify many of the repetitive treasury tasks, reducing manual workload.

The A.C.T.A. Guide was created and conceptualised by Emmanouil Myronakis, Treasurer of ELSA Komotini 2025–2026. The FM EIT and I are sincerely grateful for his work. so, a special thank you to Emmanouil , for creating and submitting this Annex to our FM Handbook for the benefit of the entire Network. His contribution demonstrates that every one of us can actively contribute by sharing good practices developed at the National and Local levels. This is precisely the strength of our Network: improving together by supporting one another, learning from each other's experiences, and transforming individual initiatives into collective progress for our shared goals



Tommaso Giordano
Treasurer

International Board of ELSA 2025/2026



Emmanouil Myronakis
Treasurer

Board of ELSA Komotini 2025/2026

Why adopt the ACTA?



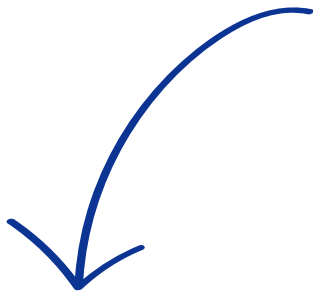
A.C.T.A. replaces manual data entry with automated cloud workflows.

By connecting Google Sheets with document templates,

Treasurers can generate thousands of personalized documents in minutes.

The Old Way

- ✗ **Manual Entry:** Typing names individually into Word files.
- ✗ **High Error Rate:** Risk of typos in names, dates, or amounts.
- ✗ **Slow Delivery:** Members wait days to receive receipts.
- ✗ **Hard to Archive:** Files scattered in local folders.



- ✓ **Auto-Generation:** 100+ receipts created in under 60seconds.
- ✓ **Zero Transcription Errors:** Data is pulled directly from the form.
- ✓ **Instant Emailing:** Attachments sent automatically via Gmail.
- ✓ **Cloud Storage:** Auto-saved copies in specific Drive folders.

The A.C.T.A. Way

How A.C.T.A. works

The Concept: 1 Row in Google Sheets + 1 Template = 1 Personalized PDF

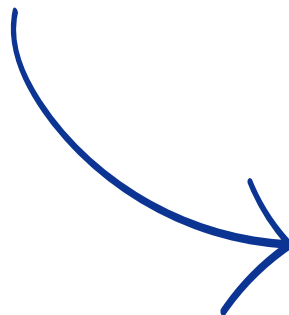
01. THE SOURCE (Google Sheets)

Data is entered into a Google Sheet like the example:

	A	B	C	D	E	F	G	H	I	J	K
	Date	Type	Number	Payer Name		Amount	E-payment	Cash	Balance	Reason	Email
January	03/01/2026	Receipt	W23	GABRIEL		€120.00	€120.00	€0.00	€0.00	ICM PARTICIPATION FEE	rodrigo@gmail.com
	06/01/2026	Receipt	H25	LUCIE		€120.00	€0.00	€120.00	€0.00	ICM PARTICIPATION FEE	lucie@gmail.com

02. THE DESIGN (Google Docs)

You have a pre-made Template with <<Tags>>.



ACTA Template - Google Docs

ment/d/tuCJHz8xadx7NFG25VAbkRkJKZxp1nEIPceCD2hqW0A/edit?tab=t.0

ools Extensions Help

Normal text Garam... 14 B I U A

2 1 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18

elsa
The European Law Students' Association
KOMOTINI

Payment Receipt

Full Name: <<Name>>
Amount: <<Amount>>
Reference Number: <<Number>>
Date of Issue: <<Date>>
Payment Reason: <<Reason>>

The Publisher
The Treasurer of ELSA Komotini
for the academic year 2025/2026

EMMANOYHA MYPONAKHES

03. THE ENGINE (AutoCrat)

AutoCrat merges the data from the Row into the Template. It converts the document into a single PDF instantly.

04. THE OUTPUT

1. Sends Email: The PDF is automatically emailed to the address in Column K.
2. Archives: A copy of the PDF is saved in your Google Drive for your records.

Smart Feature: You can set this to run automatically every time a new response comes in from a Google Form (Trigger on Form Submit).

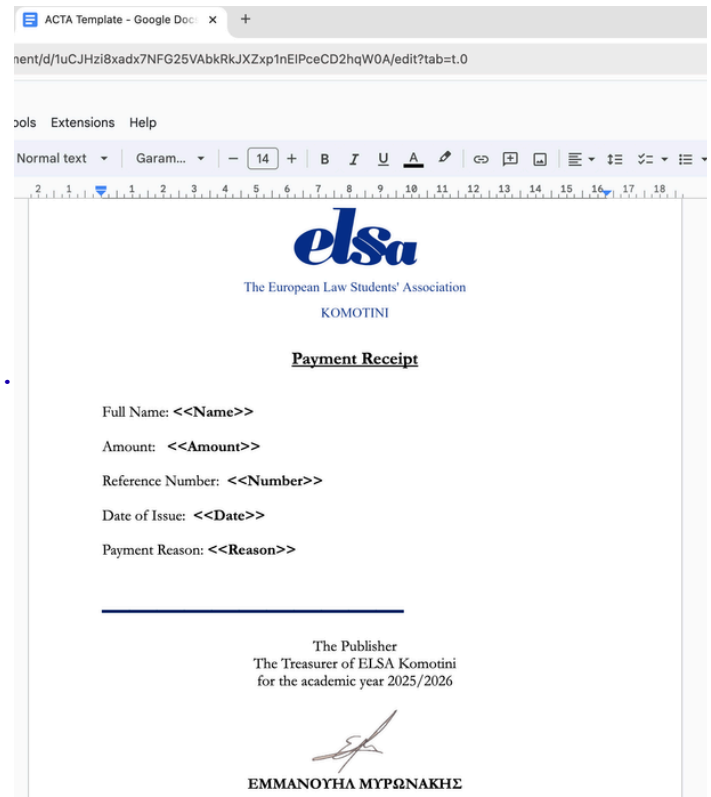
Set up the A.C.T.A.

Configuration Guide in 6 Steps

Prerequisite: Install the "AutoCrat" add-on from the Google Workspace Marketplace.

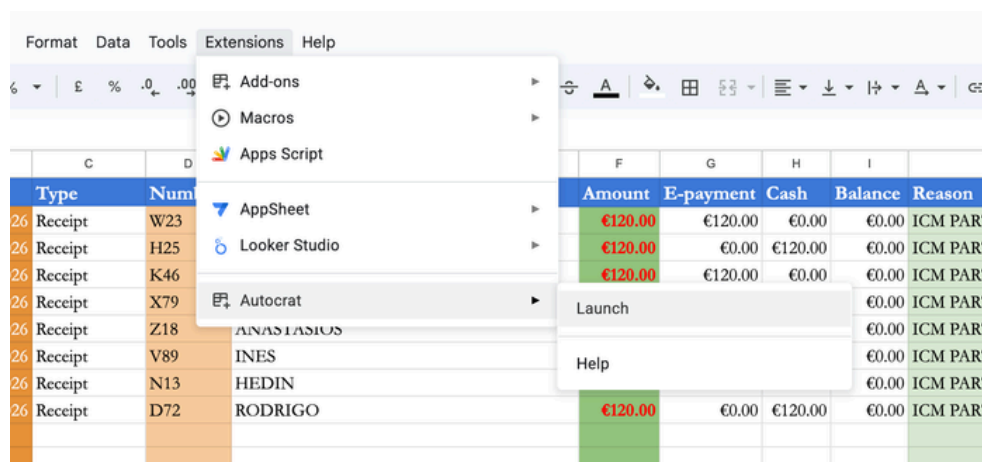
STEP 1: PREPARE THE TEMPLATE (Google Docs)

Create your own receipt or certificate in Google Docs on your Drive. Critical: Replace variable data (names, dates, amounts) with Merge Tags inside double chevrons. Example: instead of "Gabriel Johnson", type <<Full Name>>.



STEP 2: INITIALIZE & CHOOSE TEMPLATE

1. Launch: Go to Extensions > AutoCrat > Launch and click the red button "New Job".



Type	Num	Amount	E-payment	Cash	Balance	Reason
Receipt	W23	€120.00	€120.00	€0.00	€0.00	ICM PART
Receipt	H25	€120.00	€0.00	€120.00	€0.00	ICM PART
Receipt	K46	€120.00	€120.00	€0.00	€0.00	ICM PART
Receipt	X79				€0.00	ICM PART
Receipt	Z18				€0.00	ICM PART
Receipt	V89				€0.00	ICM PART
Receipt	N13				€0.00	ICM PART
Receipt	D72	€120.00	€0.00	€120.00	€0.00	ICM PART

2. Name Job & Select Template: Give your job a descriptive name (e.g., "Receipt Generation") and click Next. Then, click the "From Drive" button to locate and select your Google Doc template.

Set up the A.C.T.A.

STEP 3: MAP SOURCE DATA (Critical Step)

Link Data to Template: AutoCrat automatically detects tags like <<Amount>>.

AutoCrat

ACTA Receipts

3. Map source data to template

Merge tab	Header row	First data row
Sheet1	1	2

Standard	<< Name >>	maps to column	Payer Name
Standard	<< Amount >>	maps to column	Amount
Standard	<< Number >>	maps to column	Number

Help Guide

Cancel SAVE Back Next

- Ensure each Tag links to the correct Sheet Column (e.g., <<Name>> → Payer Name).
- Fix: If a tag appears Red, manually select the column from the dropdown.

STEP 4 : FILE NAMING & TYPE

Choose how the files will be saved. File Name: Use tags to create unique names (e.g. <<Payer Name>> Receipt). Type: Select PDF (Standard) so the document cannot be edited by the recipient.

AutoCrat

ACTA Receipts

4. File settings

File name

<<Payer Name>> Receipt

*Tell AutoCrat how to name each file it creates. You can use <<TAGS>> aligned to merge sheet column headers to merge in source data, only supported in multiple output mode.

Type

PDF

Output as

☒ Multiple output mode (classic mode) ☐ Single output mode

Help Guide

Cancel SAVE Back Next

Set up the A.C.T.A.

STEP 5: DESTINATION & ADVANCED OPTIONS

1. Destination Folder: Click the "Choose Folder" button to select a specific folder in your Drive (e.g., "Receipts Archive"). This is where the PDF copies will be saved.

2. Skip Advanced Settings: The next two screens ("Dynamic Folders" & "Conditions") are not required for this workflow. Simply press Next twice to skip them and proceed to the Email setup.

IMPORTANT TIP:
PERFORM A TEST Before running the job for all members, click the "Preview" (Eye icon) button in AutoCrat. This allows you to check one entry to ensure the tags are mapping correctly before sending mass emails.

STEP 6: SET EMAIL TRIGGERS

Enable "Share Doc? > YES".

Compose Email:

- To: <<Email>> (Select the column with emails).
- Write the Subject.
- Body: Write your standard email text here. The PDF will be attached automatically.

The image displays two screenshots of the AutoCrat application interface. The left screenshot shows the '8. Share docs & send emails' configuration step. It includes options for 'Share doc?' (set to 'Yes'), 'Share doc as' (set to 'PDF'), and 'Allow collaborators to re-share' (set to 'Yes'). The 'Send from generic no-reply address' is also set to 'Yes'. A text box at the bottom allows for a custom email address, with a note: 'To: You can use <<TAGS>> for merging in source data or type manually.' The right screenshot shows the email composition screen. It features a 'To' field with '<<Email>>', a 'Cc' field, a 'Bcc' field, and a 'Reply To' field. The subject is 'Receipt for ICM'. The body text is a template: 'Dear <<Payer Name>>, I hope this message finds you well. Please find attached the proof of payment for the participation fee for the upcoming ICM. Should you require any further information or clarification, please do not hesitate to contact me. Kind regards,'. Both screenshots have 'Cancel', 'SAVE', 'Back', and 'Next' buttons at the bottom. A blue curved arrow points from the 'Next' button in the left screenshot to the right screenshot.

Press Save and you are ready to run A.C.T.A.!

Download the Starter Kit

Start Using A.C.T.A. Today

Don't start from scratch. I have prepared a complete 'Plug-and-Play' Kit for you to copy and use immediately.

The Kit Includes:

- ✓ Master Database: A pre-formatted Google Sheet ready for your data.
- ✓ Master Templates: Professional Receipt design with tags.
- ✓ Setup Guide: A digital copy of this manual.

PRIVACY & SECURITY NOTE

The system operates 100% within your own Google Drive. Your data never leaves your account and is accessible only by you, ensuring full privacy and GDPR compliance under your control.

SCAN TO DOWNLOAD THE KIT



The European Law Students' Association

