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Mail Merge: How to send a personalized e-mail to many people at once

★★★★★

First of all, this post is dedicated to my aunt Gayla who runs a small business and has a lot of trouble with this feature. This post is not dedicated to those who might use this feature for spamming. :)

Mail merge is a feature of Outlook and Word that allows you to send a set of contacts a personalized e-mail as though they are the only person receiving the e-mail. With this feature, you can personalize the e-mail so that each of your recipients is the only person on the To: line and that the contents of the e-mail change based on information you have for each contact. Instead of starting the e-mail with "To whom it may concern," you can have Outlook and Word automatically fill in the e-mail with your recipient's name (e.g. "Dear Dan,"). Mail merge in Outlook is pretty hidden – most people don't even know that you can send a personalized e-mail to each contact in a set of contacts the way you can print a set of form letters in Word. As a matter of fact, Outlook's mail merge feature is built on Word's functionality, which might add to the confusion. With this post I hope to clarify how to use this feature to send an e-mail to a group of people in your contacts.

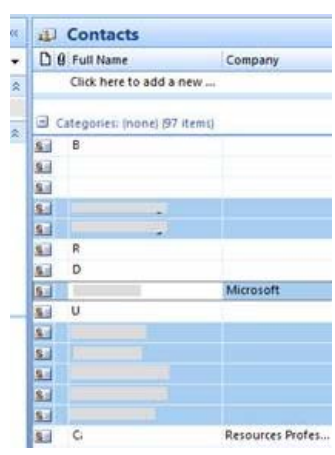
The basic steps to creating a mail merged e-mail from Outlook are:

1. Select your contacts in Outlook
2. Select to send an e-mail in the Mail Merge dialog and choose your subject
3. Compose your e-mail in Word – inserting fields where appropriate
4. Preview and Send

If you already have the e-mail you want to send written in Word, start at step 3 and see [this help article](#) for more specific steps. (There are also some great step-by-step training videos for this feature on [Office Online](#).)

Step 1: Select your contacts

In Outlook, navigate to Contacts (Ctrl-3) and select the set of contacts you want to send your e-mail to: (hold the Ctrl key down and click on multiple contacts):



Tip: Use [categories](#) for the set of people you want to e-mail and then arrange your contacts by category. To send "mail merge" e-mail to each of them, click on the category header.

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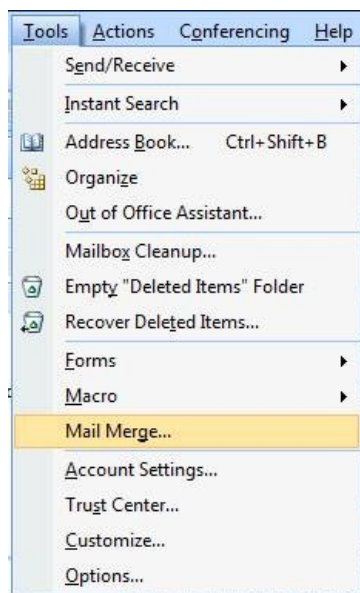


Note: The mail merge feature does not work with personal distribution lists. (I'm sorry!!)

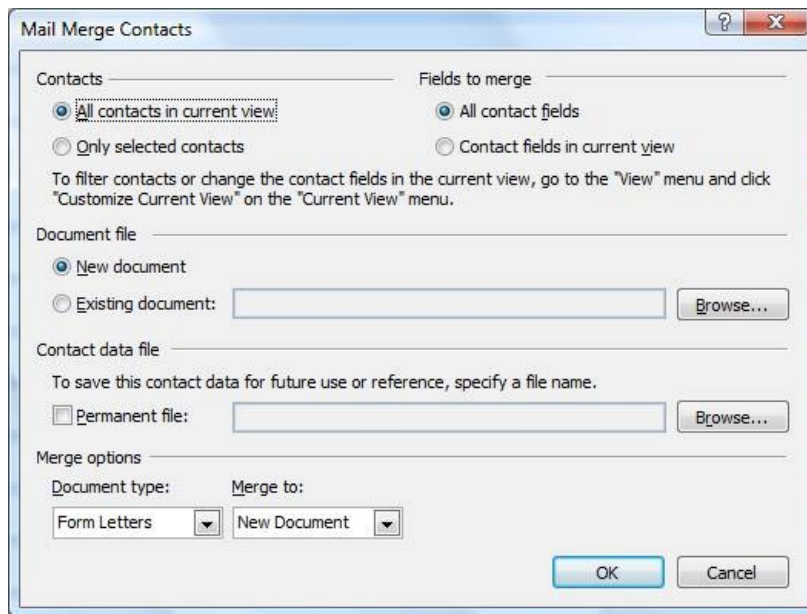
Note 2: You will only be able to send e-mails to contacts that have an e-mail in the e-mail field.

Step 2: Mail Merge Dialog in Outlook – Choose E-mail

Next, in the menu bar, click Tools, then Mail Merge



to get to this dialog:

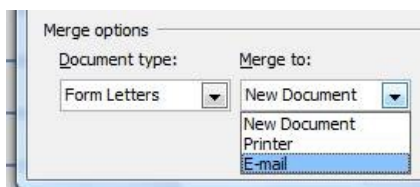


First, under "Contacts," select "Only selected contacts"

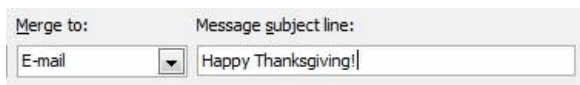


June 2007 (4)

Next, under "Merge options", under "Merge to:" select "E-mail"



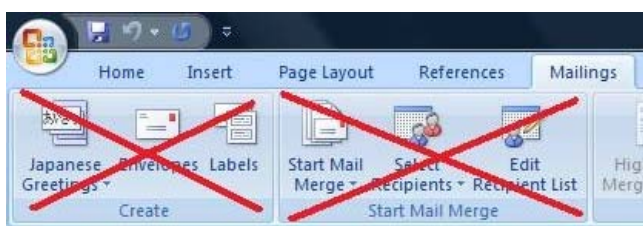
A subject line will appear – fill it in with your subject. Note: your subject will be the same for all of your recipients.



Click OK.

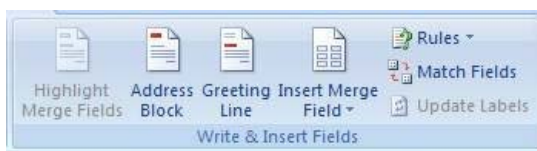
Step 3: Composing your e-mail... in Word

Word will be initialized and then appear. When starting a mail merge from within Word, the first step is to select the recipients, but you've already done that in Outlook, so the next step is to write the e-mail.



Ignore the Create and Start Mail Merge Groups in the Ribbon

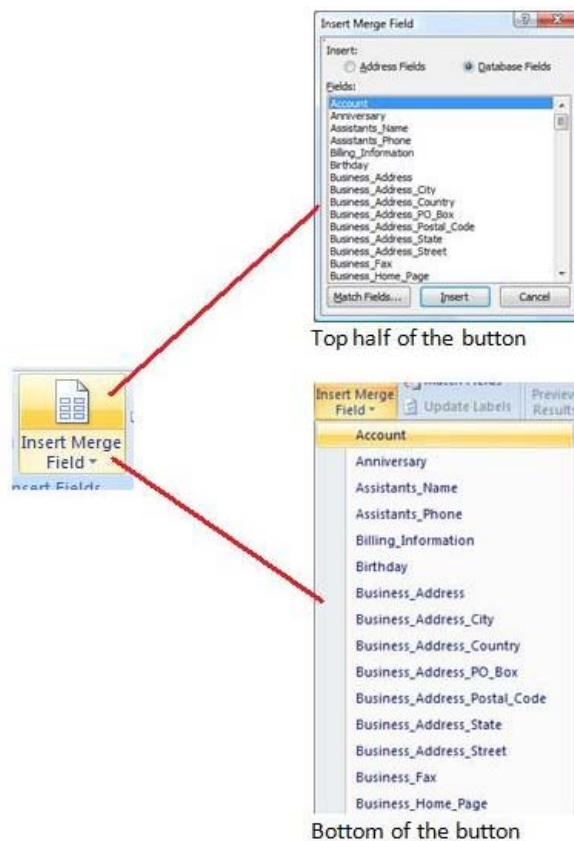
Treat the Word document as the body of your e-mail – because it is. Focus on the Write and Insert Fields group in the Ribbon:



To insert a greeting, click on "Greeting Line"



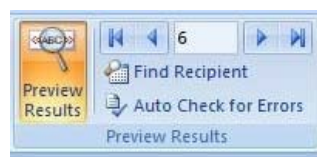
To insert a field, click on "Insert Merge Field" (on the top for a dialog, or on the bottom half of the button for a drop down list).



Note: There are a lot of contact fields to choose from.

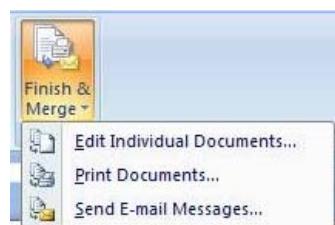
Step 4: Preview your e-mail

Once you have your e-mail the way you want it, you can preview what it will look like before you send it by clicking on "Preview Results" and then clicking on the left and right scroll buttons in the Preview Results group:

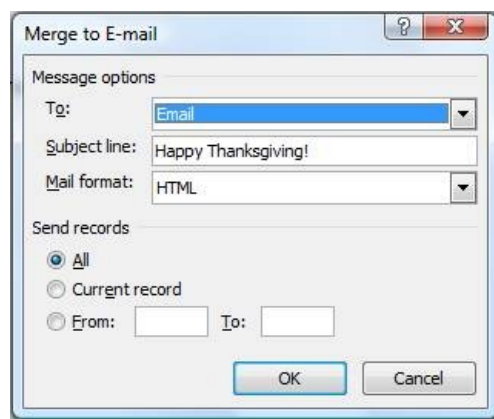


Step 5: Send it!

The last step is to send your e-mail. Just click "Finish&Merge" and "Send E-mail Messages..."



Which will bring up this dialog:



Click OK.

You can then watch as Word goes through each of your contacts and sends the mail.

And that's it!

For more information on this feature see [Office Online](#).

Enjoy!

Melissa MacBeth
Outlook PM

Posted: Tuesday, September 23, 2008 12:05 AM by [outblog](#)

Filed under: [outlook](#), [office online](#), [help](#), [contacts](#), [fields](#), [office](#), [personal distribution lists](#), [outlook 2007](#), [how-to](#), [tips&tricks](#), [mail merge](#)

Comments

Les. Ferguson said:

A first rate article on a feature that I had not used before.
This will come in very handy at Christmas. :-)
Thank You

September 23, 2008 1:55 AM

Russel said:

Just a note...in order to send merged documents in Outlook, you must have the same version of Word installed. You can't send a personalized email with mail merge if you are running Outlook 2007 and Word 2003 (per Microsoft's knowledge base).

September 23, 2008 11:23 AM

Jae said:

Thanks for the instructions on the Mail Merge. This was very helpful.
I have a question, but am not sure if it belongs here or not - but what if in the document you have a table - and you want the subject line to be in the first row of the table and the person to whom you are sending the email message to in the second row - and then in the third cell the personalized message?
And is this possible to do with a template?
-- Jae
jaep2r(at)gmail(dot)com

September 23, 2008 12:41 PM

[John-Wayne](#) said:

Great! Many thanks!
One of the best tips in this blog.

September 23, 2008 4:55 PM

[dcapuano](#) said:

Where can one go to find out troubleshooting tips? I have a issue with Outlook 2007 where it is in an endless send and receive loop. So far.....13244 tasks have completed..... OUCH.

September 23, 2008 8:25 PM

[Matthew](#) said:

This is cool. I've done this a few times because I didn't want to spring for one of the tools you can buy. Finally, I did buy one. I like "Send Personally" from MapiLabs. It allows you to work entirely inside Outlook and removes some of the complexity. Either way, email merge is a life saver.

September 23, 2008 11:49 PM

Hemant Sathe said:

How to do this on your enterprise address book? We often send mails to many of our colleagues and want to do the same. These names are not in our contacts but are taken for corporate address book.

September 24, 2008 12:51 AM

One Executive said:

I have Outlook 2007 and Word/ Excel etc 2003 installed on my laptop at work. When I tried I got a message that the version of Word should match that of outlook.

Is this a hard requirement or is there a way of working around it ?

At my company, we have Outlook 2007 for email but we are in process of transitioning to Office 2007 so most computers still have Word / Excel and Powerpoint from Office 2003.

September 24, 2008 9:50 AM

[Andrew Rare](#) said:

Why is Microsoft hiding these cool features deep down in the menus?

I used a paid software to do this kind of 'mass mailing'.

God damn you Microsoft ;)

September 24, 2008 11:57 AM

Chad said:

What a great feature! I wish I had known about this a long time ago, it sure would have saved me a bunch of time. I will be sure to use this going forward - THANKS!

September 30, 2008 1:56 PM

[Kanayama](#) said:

Thanks, but is there any way to handle attachments also?

October 1, 2008 12:51 PM

need help said:

Is it possible to add an attachment to your email when using mail merge in this way?

Thanks

October 2, 2008 1:01 PM

Milly Staples - MVP Outlook said:

Mail merges cannot send attachments at this time. Perhaps a future version of Outlook will but not at present.

There are third party software solutions that do work with attachments.

October 2, 2008 7:43 PM

Nadine said:

Is it possible to request a delivery notification and read receipt when sending emails this way?

October 3, 2008 8:45 AM

Nancy said:

I have MS Office 2007, when in Outlook and I click on Tools I do not have Mail Merge as a choice. What's the scoop on that?

I'm desperate to know. I am finding MS 2007 to be a HUGE burden for many daily functions. Compatibility issues with other co-workers, as well as people in general, clients, vendors, etc.

Please help.

October 7, 2008 5:09 PM

Milly Staples - MVP Outlook said:

When you attempt to use Mail Merge, are you in the Contacts Folder? That is where the mail merge feature lives.

October 10, 2008 4:02 PM

Joanne said:

This is great.

I am about to use it, but one thing I cannot find is how to select which email account to use for my emailing if I do not wish to use my default email address.

It uses the default account, which I can deal with by changing my default - but, it would be better to select it as I do the emailing.

October 10, 2008 4:48 PM

[KEVINCHICKENHEAD](#) said:

Greetings!

Is there anyway to add more options in the 'reminders' field of the MS Outlook for 2007.

I have 5 mins, 10 mins....4 days, 1 week, 2 weeks.

I know this can be done, I just can't find it.

I want to put, 1 month, 5 days, all other sorts of things.

Thanks!

October 10, 2008 7:33 PM

Milly Staples [MVP - Outlook] said:

Depending on where you are setting the reminder, you can use natural language to set your preferred reminder.

Such as 5d for 5 days, 3h for 3 hours, or christmas for a reminder on December 25. There is a lot of flexibility you can use when setting reminders. It all depends on where you are setting it from.

October 12, 2008 2:36 PM

Joi Williams said:

When completing a mail merge with Word/outlook 2003 the final document is missing the headers and footers. What can be done to correct this?

October 16, 2008 12:23 PM

[mmacbeth](#) said:

Joi,

I'm not sure I understand what you are trying to accomplish - Outlook's e-mail does not have headers or footers.

-Melissa

October 16, 2008 5:01 PM

Lyn bolt said:

I am an officer of a club with 900 members. I need to send out email every now and then to them to remind them about club business. I would rather not put all of these people in my contacts folder and I'm not sure this function will work for that many people. Does any have any experience in sending out a mass email like this?

TIA

October 17, 2008 11:09 AM

Mike said:

Hi

I used the mail merge in office 2007, both word and outlook are 2007,

Here is my problem;

I created and sent a message to my friends and my own emails in order to check the functionality of this feature.

It look great with no problem on word, however, when I receive the email it's like the correct message has been copied and pasted there twice.

I checked other recipients email and same thing there.

To clarify: recipients receive 1 email which contains the correct message repeated twice.

Is there any solution for that?

Am I doing something wrong? (which could probably be the case)

Regards,

Mike

October 27, 2008 11:58 PM

Dan said:

I have three accounts coming into Outlook - my work, a Gmail account, and another POP account which I use for group trips that I plan. Is it possible to select what account your sending from OTHER THAN going to Tools > Account Settings and changing which account you send from by default?

I'd like to keep my work email as my default email, but allow myself to send from my POP account.

October 29, 2008 1:44 PM

Ian Lowe said:

It works fine as you describe but is there a way to also include a file attachment into each e-mail?

November 1, 2008 11:35 AM

Caroline said:

I have 3 e-mail addresses that I send and receive from within Outlook. In the same vein as Dan, is it possible to select which e-mail address you send from? I have not been able to figure out how to do so yet.

November 4, 2008 2:46 PM

Ted said:

Can I personalise the Subject field in a mail merge?

Also can I add voting buttons to a mail merge?

The reason for this would be so that when I see the response email from someone, I will also see what was written specifically for them in their subject field. The data I would put in the subject field identifies a specific action that I was supposed to carry out for the recipient. Many recipients will have numerous actions associated with them and I need to be able to track each action individually. Therefore the mail merge will sbe required to send multiple mails to the same recipient with a different subject field entry for each mail (referencing the action). Now that's a confusing paragraph.

November 6, 2008 12:58 PM

jjenkins@cmcgp.com said:

Great feature and a very informative instructional outline. Two questions I have are these:

1. Can we use the enterprise or global address book for the merged contact source?
2. We have an admin assistant who sends out mass mailings for her boss, our CEO, and when we worked with this the mail merge worked great from his contact list but the admin's name was in the from field. Any way to "Send on Behalf" so the CEO's name appears in the email from field?

November 6, 2008 3:58 PM

JKVC@UIUC said:

You can personalize your emails and add attachments if you first take Outlook offline (under File menu). If you do that before you finish the mail merge, you can avoid having everything go out automatically. Instead it gets sent to the Out box, where you can fiddle with each email individually and add attachments. Then hit "send", and when you go back online (toggle the switch under file menu), everything will go out. Just be sure you do everything you want before going back online, because everything in the out box will go out automatically. Alternatively, you could move the files to Draft box, where they will sit until you are ready to deal with them.

November 11, 2008 12:00 PM

Samuel said:

Hello.
Thank you very much for your note, It was very useful and helpful.
Best regards
Samuel

November 18, 2008 5:21 AM

delimas said:

I have a new task that I need to perform and I am unable to locate the right Outlook plug-in software for this..... On the first of each month, I need to send a personalized b-day email to everyone in my contact list, who has a birthday that month. Do you know of anything out there that can automactially generate mail by Contact 'field' (DOB)? Thank you, Sharon

November 18, 2008 2:48 PM

5467 said:

Any one can help on the 2 ponits below
- How to specify which account i want to use to send this merge mail while i have mutiple account in my outlook, can i change to not use the default one?
- Can i have the vote button in the merge mail without editing the messages individually ?

November 20, 2008 2:20 AM

Chelsea said:

Thanks this was exactly what I needed! On the Microsoft website there are companies that advertise for you to buy add-on software that does this same thing.

November 20, 2008 12:15 PM

Segun said:

Handling Attachments
As earlier noted, Outlook does not appear to offer this functionality. However an add on to Outlook - Business Contact Manager - does and is much more efficient a tool for mail merges. It comes with Office 2007 Pro and may be available as a seperate download from Microsoft.

November 24, 2008 6:59 AM

pmtate said:

Useful blog.

We use BCM (OL2007), is there anyway to include the Title in the Greeting line, it doesn't seem to be an available field in the mailmerge or match fields option.

Paul

November 24, 2008 3:59 PM

Ellen Colangelo said:

With Outlook 2003, I was able to select my contacts for a mail merge to print envelopes or labels. I have not been able to accomplish this with Outlook 2007. I have to mail merge in Word and then select my outlook contacts. I am unable to use customized merge fields (they don't show up on the list) doing it this way- I could do it with Outlook 2003. Any suggestions?

December 2, 2008 12:20 AM

Stephanie said:

This is really excellent. One question - can you attach attachments to the email being merged?

December 2, 2008 11:16 AM

Suzanne said:

This is very helpful. I do have one other question. I frequently need to send a mass (welcome) email out to new chamber members that are not in my address book. And I really don't need to put them in that. Is there a way to enter addresses into the mail merge TO section that are NOT in your contacts? Thanks.

December 4, 2008 4:39 PM

Leslie Durschinger said:

This is great, but how do I manage all the bounced emails. I have them all in a mail folder and would like to compare them to the original contract list to see which bounced?

Thanks

Leslie

December 8, 2008 1:49 PM

Paradigit said:

Why isn't this article at the TOP of the list when you look for online help. It is perfect, all the HOW TO DO should be like this one, with pictures; the show me feature is the best THANKS. It worked with no problems.

December 10, 2008 11:45 PM

Cathy said:

The process works great; however, is there a way to specify which email account we prefer to use to send the message? Currently I have multiple accounts linked to Outlook and the main email is the one it keeps selecting. However, I need the messages to come from my other Outlook email account. Please help.

Thanks,

Cathy

December 17, 2008 8:30 PM

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