

How to create Mail Merge Campaigns

The Mail Merge subscription plan lets you create and send personalized emails to multiple recipients at once. For this, you need to prepare an email message and a mailing list and create a mail merge campaign. For the email message, you have three options: a simple template, a mail merge template, and your own html text.

Messages for the campaign are customized with merge fields—specific parts of the emails that are set up as variables with the help of a macro.

Here is the [detailed mail merge campaigns manual](#)

? What is mailing list?

This is an Excel table with email addresses of the recipients and all the info needed to personalize the emails. Important notes about the mailing list:

- XLSM and XLSX formats are supported.
- The Excel book must be located in OneDrive.
- The table must be [formatted as an Excel table](#).
- The first column of the table must contain email addresses and it's header must be 'email'.

Here is an example of a mailing list:

	A	B	C
1	email	name	discount
2	johnson.btravel@outlook.com	Jessica Johnson	10%
3	morgendorffer.btravel@outlook.com	Daria Morgendorffer	15%
4	irina.btravel@outlook.com	Irina Davis	20%
5	john.smith@ablebits.com	John Smith	15%

? What are merge fields?

These are parts of the template that should be variable in email messages to make them personalized. The data for merge fields is taken from the mailing list.

The fields are inserted with the help of the ~%MergeField[] macro. In the square brackets, type the name of the mailing list column from which the value should be retrieved.

For example:

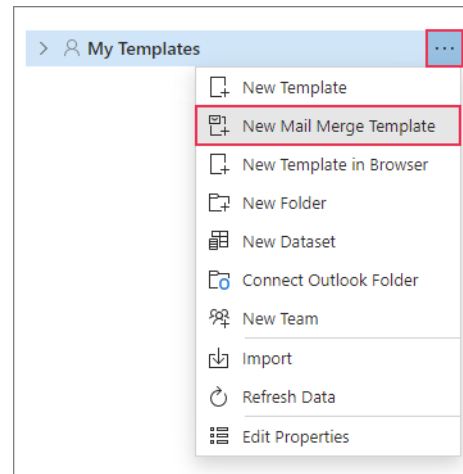
```

Hello ~%MergeField[name],
Only in August, you can get the Text Toolkit
upgrade at your personal ~%MergeField[discount]
discount.
    
```

Create mail merge template

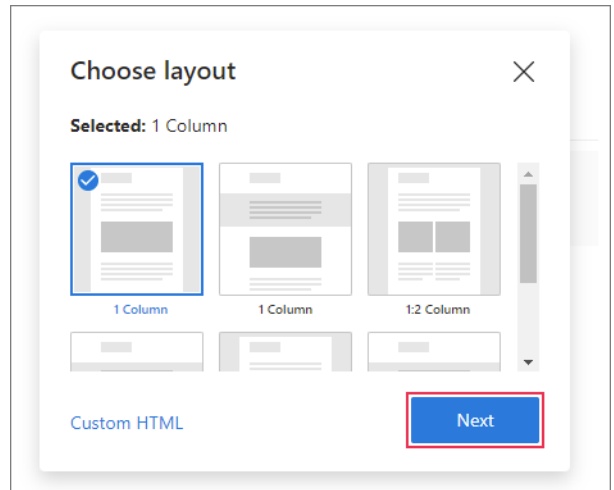
Step 1

Right-click a folder and select **New Mail Merge Template**:



Step 2

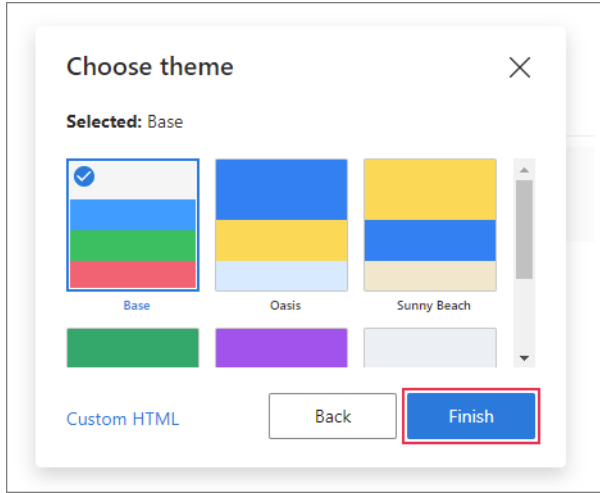
In your default browser, a new tab with the Shared Email Templates web application will open. Select a layout and click **Next**:





Step 3

Select the color theme and click **Finish**:



Step 4

Edit the mail merge template, [here is the guide](#).

Add merge fields

Into the places where custom information from the mailing list should appear, enter the `~%MergeField[]` macro with column headers of the mailing list in square brackets.

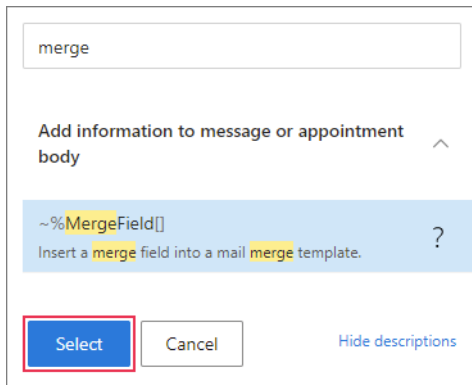
Step 1

Put the cursor where the text should be pasted and click the **Insert Macro** icon on the toolbar:



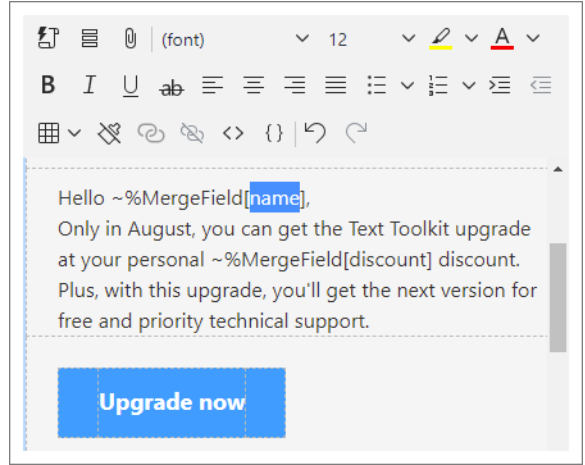
Step 2

Start typing "Merge" in the Search box, click on the suggested `~%MergeField[]` macro and hit **Select**:



Step 3

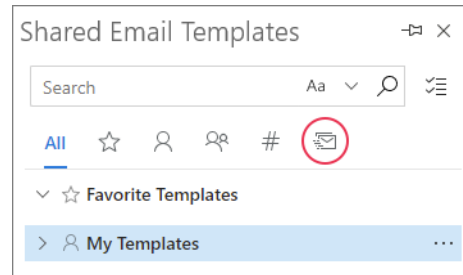
The macro will be pasted. Into the square brackets, enter the header name of the column from which you need the data to retrieve:



Create mail merge campaign

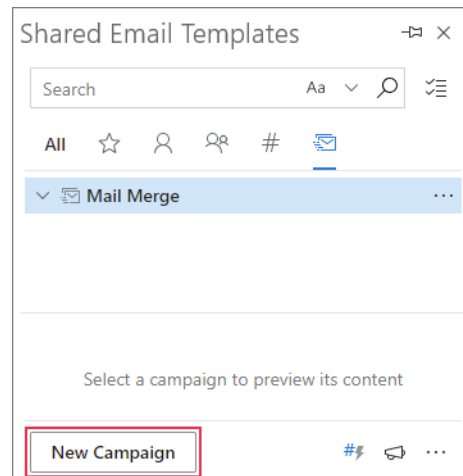
Step 1

Click the **Mail Merge** icon:



Step 2

Click **New Campaign**:





Step 3

Fill in the fields and select files:

The screenshot shows the 'Shared Email Templates' dialog box with the following fields and callouts:

- 1: Campaign name field containing 'Text Toolkit upgrade discount'
- 2: Subject field containing 'Get Text Toolkit at discount - Limited time offer!'
- 3: Reply to (optional) field containing 'support@ablebits.com'
- 4: Mailing List section showing 'Imported 4 rows from My Files/Sales/Text Toolkit discounts.xlsx!DiscountsList'
- 5: Message Body section showing 'My Templates > Text Toolkit upgrade discount'
- 6: Schedule section with 'Date' selected, showing '01/08/21' and '14:41'
- 7: 'Immediately' radio button selected
- 8: 'Save copies to Sent Items' checkbox checked
- 9: 'Send' button

1. Enter a name for your campaign.
2. Enter text that will be the Subject of the email message that your recipients will receive.
3. If needed, enter the email address for the reply messages.
4. Import the mailing list.
5. Here you define the message body of the letters. You can either select a template or paste your html-based message.
6. You can set a date and time for the campaign to schedule it.
7. Or select **Immediately** to start mailing right after clicking the **Send** button.
8. Check the box to save all the sent items in your Sent Outlook folder.
9. Click **Send** to start the campaign.

Note. As soon as you click the **Start** or **Schedule** button, you'll be asked to pick the account from which the mailing should be performed and confirm [accepting the needed permissions](#).



Import mailing list

Step 1

Click **Import from a file**:

The screenshot shows the 'Mailing List' section of the dialog box. The 'Import from a file...' option is highlighted with a red box.

Step 2

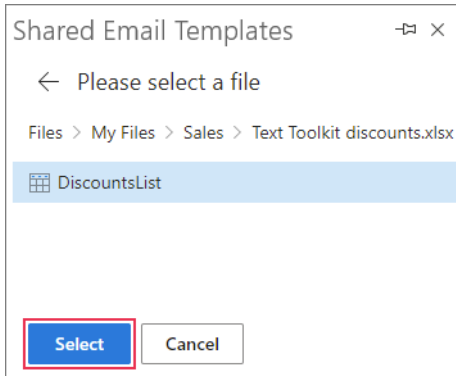
In your OneDrive, select an Excel book and click **Open**. Also, you can **Upload** a file from your local storage to OneDrive and then attach it:

The screenshot shows a 'Please select a file' dialog box in OneDrive. The file 'Text Toolkit discounts.xlsx' is selected and highlighted in blue. The 'Open' button is visible at the bottom.



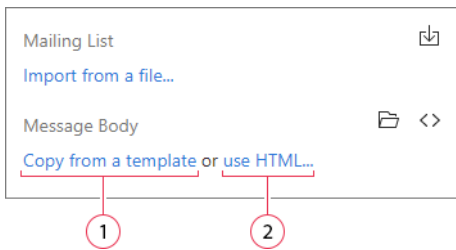
Step 3

Choose the table:



Define message body

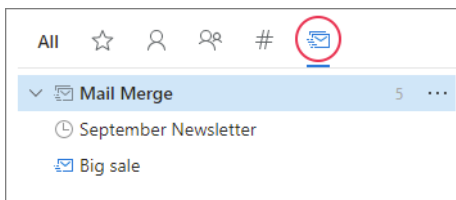
For the message body, pick:



1. To use a template in the message body, click **Copy from a template** and select the template.
2. Pick **Use HTML** to paste your own template designed in HTML.

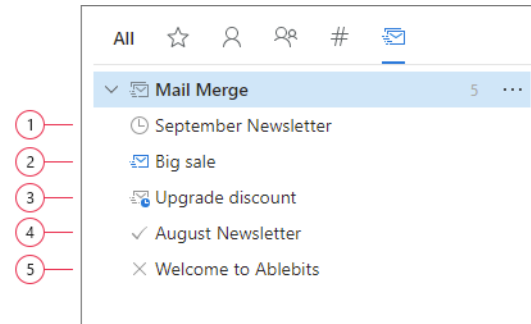
Find all mail merge campaigns

All the created campaigns are collected on the Mail Merge pane:



Mail merge campaigns statuses

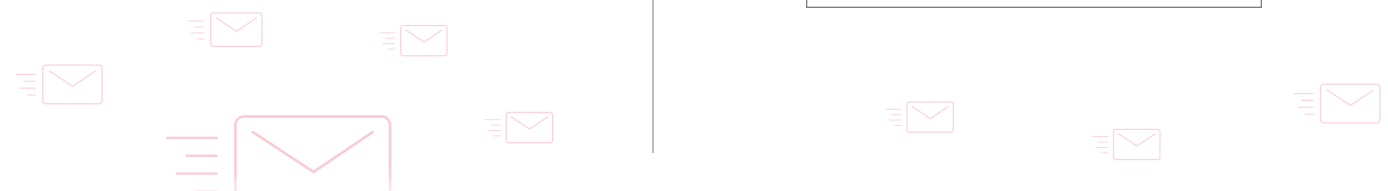
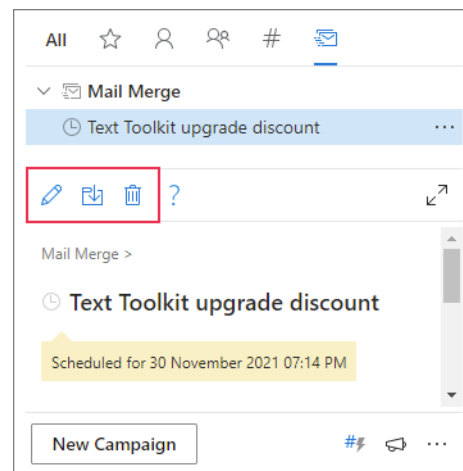
Campaigns in different statuses are marked with different icons:



1. **Scheduled** campaign will start on the indicated date and time. Can be edited, moved, or deleted.
2. **Sending** campaign is being sent at the moment. Can be canceled but of course if some messages are already sent, they can't be unsent.
3. **Pending** campaign will start mailing as soon as the Sending one is finished.
4. **Finished** campaign can be moved or deleted.
5. **Cancelled** campaign can be activated anew. To do this, click on the **Edit** icon on the toolbar, make changes if necessary and click the **Schedule** or **Send** button.

Edit or remove Scheduled campaign

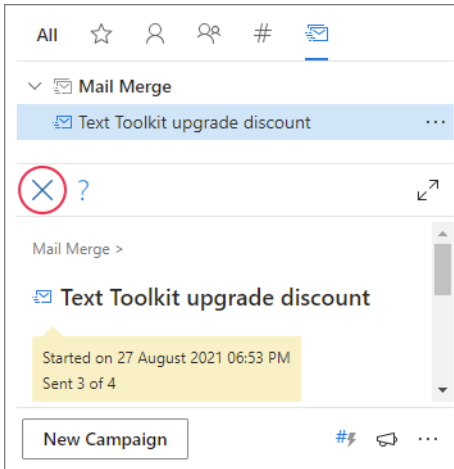
To edit, move, or delete the campaign, select it and click the corresponding icon:





Cancel Sending or Pending campaign

To cancel the campaign that is being sent or is pending, select it and click **Cancel**:



Find more information

- How to create merge mail campaigns in Outlook
<https://www.ablebits.com/docs/outlook-shared-templates-mail-merge>
- Before you start: Key definitions and notes
<https://www.ablebits.com/docs/outlook-shared-templates-mail-merge/#before-start>
- How to edit mail merge templates
<https://www.ablebits.com/docs/outlook-shared-templates-edit-mail-merge-templates>
- Not supported macros in mail merge campaign templates:
<https://www.ablebits.com/docs/outlook-shared-templates-mail-merge/#not-supported-macros>
- Mail merge campaigns: Required permissions
<https://www.ablebits.com/docs/outlook-shared-templates-mail-merge/#required-permissions>

? Need more details?

- Shared Email Templates for Outlook documentation: [ablebits.com/docs/#shared-email-templates-outlook](https://www.ablebits.com/docs/#shared-email-templates-outlook)
- More Shared Email Templates features and benefits: [ablebits.com/outlook-shared-email-templates](https://www.ablebits.com/outlook-shared-email-templates)
- Shared Email Templates tips and tricks: [ablebits.com/office-addins-blog/tag/shared-email-templates](https://www.ablebits.com/office-addins-blog/tag/shared-email-templates)
- All Shared Email Templates cheat sheets: [ablebits.com/docs/outlook-shared-templates-cheat-sheets](https://www.ablebits.com/docs/outlook-shared-templates-cheat-sheets)