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How to Use Google Mail Merge

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How to Use Google Mail Merge:

We are retiring our usage of **Mail Meteor** and thus swapping to **Google Mail Merge**. This is an article that will help show how to use it.

Google Mail Merge allows you to send personalized emails to multiple recipients by using data stored in a spreadsheet.

For example, if you have a list of names and email addresses in a spreadsheet, **Mail Merge** can use that information to automatically generate and send customized emails to each person.

- Ensure that you have the spreadsheet containing the list of email recipients.
- Open your **SOU Gmail account**, or click this link to access it directly.



- Click the **Compose** button (usually located at the top left).
- The right side of the **To** field there should icons for **Cc**, **Bcc**, and a people icon with a plus sign called the *Use mail merge* icon.
- Click the Use mail merge icon to open a dropdown menu.
- Check the Mail Merge box, then select Add from a spreadsheet.

| New Message | 1 - 2 |
|-------------|-------------------------|
| То | Cc Bcc |
| Subject | ഷ• Mail Merge |
| | E Add fro 2 spreadsheet |

- A window titled **Link a spreadsheet for recipient info** will appear, with tabs at the top to help you locate your file.
- Locate your spreadsheet using those tabs.

Example

For example, If your spreadsheet is saved in **Google Drive**, look under the **My Drive** tab.

| Recent | My Drive | Shared drives | Shared with me | Starred | Computers | | | |
|--------------|-------------------|---------------|----------------|---------|-----------|--|--|--------|
| Recent | | | | | | | | = |
| Last week | | | | | | | | |
| | | | | | | | | |
| ti ti | est | | | | | | | |
| Earlier this | s month | | | | | | | |
| | | | | | | | | |
| | fease indicate yo | NF 11. | | | | | | |
| Earlier this | s year | | | | | | | |
| | | | | | | | | |
| × 1s | selected | | | | | | | Insert |

- Select it and then click **Insert**.
- Next, match the fields: link the **EMAIL** field to the email column in your spreadsheet, and the **FIRST NAME** field to the appropriate column.

Note

LAST NAME is an optional field but FIRST NAME is a required field.

Finish linking spreadsheet

Select the columns from (🖶 test) that have recipient info

| EMAIL* | |
|--------------------------------------|----------------------|
| @email | • |
| FIRST NAME* | LAST NAME |
| @name • | Select a column 👻 |
| Use first name by itself if you only | have one name column |
| PREVIEW (2 RECIPIENTS) | |
| In Order concentrations adve- | |
| to the Association also | |
| See all 🔀 | |
| | Back to draft Finish |

- Click **Finish** when done.
- Click **Continue** to begin the process of sending the email.

Note

You can start drafting your email either at the beginning or midway through the **Mail Merge** process. Just be sure to have the email fully written before clicking **Continue**.

| Draft saved | _ v ^z | × |
|--|------------------|---------|
| To 🚺 test X | De | 1+ à |
| Subject | | |
| This is a test message | | |
| <u>Unsubscribe</u> | | |
| You're using mail merge Personalize your message with merge tags like @firstname. Each recipient will get a separate copy of this email with a unique unsubscribe link. Learn more So C Sans Serif T B I U A * E E E | Ē | • |
| Continue 🛆 🛛 🖙 😳 🛆 🖬 🔓 🎢 🛱 🗄 | 1 | Ū |

Note

You may get a popup titled **Help fight junk mail** which provides information about email best practices. It includes a Got it button and an option to prevent the popup from appearing again.

- The final step(s) are found on the **Ready to send** popup window.
- Clicking **Cancel** will stop the whole process.
- Clicking **Send preview** delivers a copy of your email to your inbox so you can review formatting and content before sending.
- Clicking **Send all** will send the final version of your email to all recipients listed in your spreadsheet.