

How to run a mail merge or bulk email

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Bulk email lets you reach many people at once while still personalizing each message.

Steps

1. Build or select the list of contacts you want to reach (use search and filters, or an event participant list, campaign donor list, etc.).
2. Choose the email template you want to use.
3. Preview several records to confirm that merge fields (name, amount, event details, etc.) are filling correctly.
4. Send the emails, or schedule them if that option is available.

Best practices

- Always test with a small group or your own email address first.
- Keep records of what was sent and when.
- Respect unsubscribe preferences and your organization's communication policies.

Mail merges are commonly used for donation thank-yous, event reminders, newsletters, and targeted appeals.
