

Mailing with Power Automate

Flexible mailing using power automate. Send emails with or without attachment using an excel list.
Works on all platforms without email client.

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ExcelExcelMailing

Suchen (WAHL+M)

DateiStartEinfügenZeichnenSeitenlayoutFormelnDatenÜberprüfenAnsicht

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= A2 & "_" & B2

	A	B	C	D	E	F	G
1	Firstname	Lastname	Email	Subject	Attachment	Field 1	Field 2
2	Laura	Schmidt	laura.schmidt@example.com	Any text or formula	Laura_Schmidt		27.11.2023
3	Felix	Wagner	felix.wagner@example.com	Any text or formula	Felix_Wagner		28.11.2023
4	Anna	Müller	anna.muller@example.com	Any text or formula	Anna_Müller		27.10.2023
5	David	Becker	david.becker@example.com	Any text or formula	David_Becker		20.10.2023
6	Sarah	Keller	sarah.keller@example.com	Any text or formula	Sarah_Keller		27.12.2023
7							

INTRODUCTION

Send emails using excel list. Emails can be fully configured individually. Works with or without attachments, even with individual attachments and individual emails.

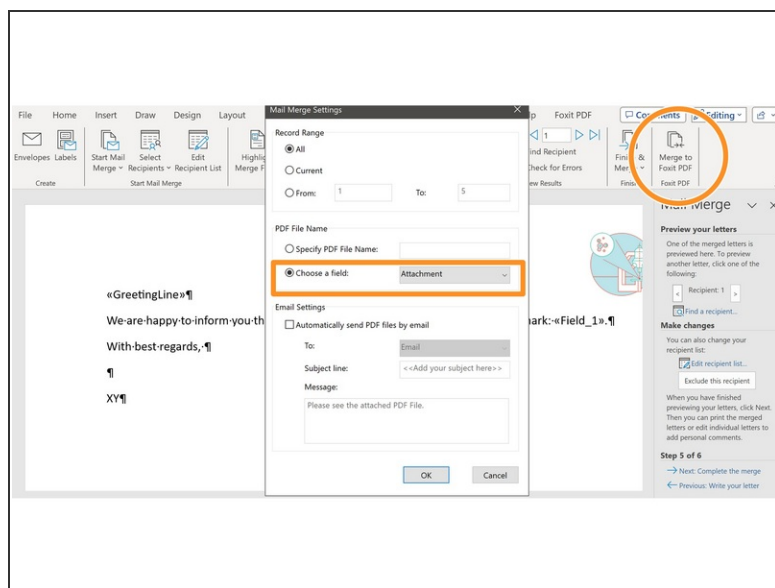
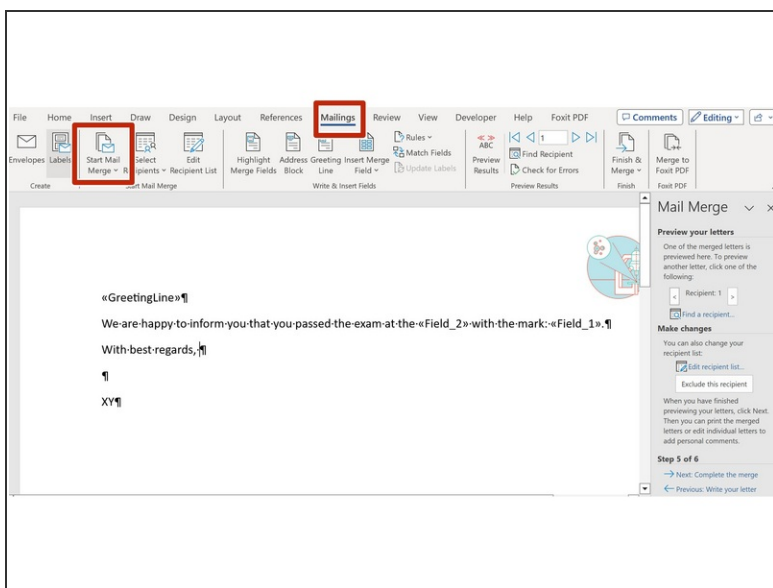
Step 1 — Excel file


Firstname	Lastname	Email	Subject	Attachment	Field 1	Field 2
Laura	Schmidt	laura.schmidt@example.com	Any text or formula	Laura_Schmidt	27.11.2023	
Felix	Wagner	felix.wagner@example.com	Any text or formula	Felix_Wagner	28.11.2023	
Anna	Müller	anna.muller@example.com	Any text or formula	Anna_Müller	27.10.2023	
David	Becker	david.becker@example.com	Any text or formula	David_Becker	20.10.2023	
Sarah	Keller	sarah.keller@example.com	Any text or formula	Sarah_Keller	27.12.2023	

Firstname	Lastname	Email	Subject	Attachment	Field 1	Field 2
Laura	Schmidt	laura.schmidt@example.com	Any text or formula	Flyer	6	27.11.2023
Felix	Wagner	felix.wagner@example.com	Any text or formula	Flyer	5	28.11.2023
Anna	Müller	anna.muller@example.com	Any text or formula	Flyer	4	27.10.2023
David	Becker	david.becker@example.com	Any text or formula	Flyer	4	20.10.2023
Sarah	Keller	sarah.keller@example.com	Any text or formula	Flyer	2	27.12.2023


- Excel file with: Firstname Lastname Email
- Attachment: name of attachment without extension.
 - ❗ Only needed if an attachment is used for the mailing
 - ❗ For **individual** attachment, use **individual** names, otherwise just use the one single name for the attachment
 - 📌 Example to compute individual Attachment names: = A2 & "_" & B2
- Additional fields are optional. Numbers, dates best formatted as text!


Step 2 — Individual Attachments - Word, Excel and Foxit



 Skip if no individual attachments needed.

- For individual Attachments, use Mail Merge in Word.

 Use the wizard if new to the Mail Merge.

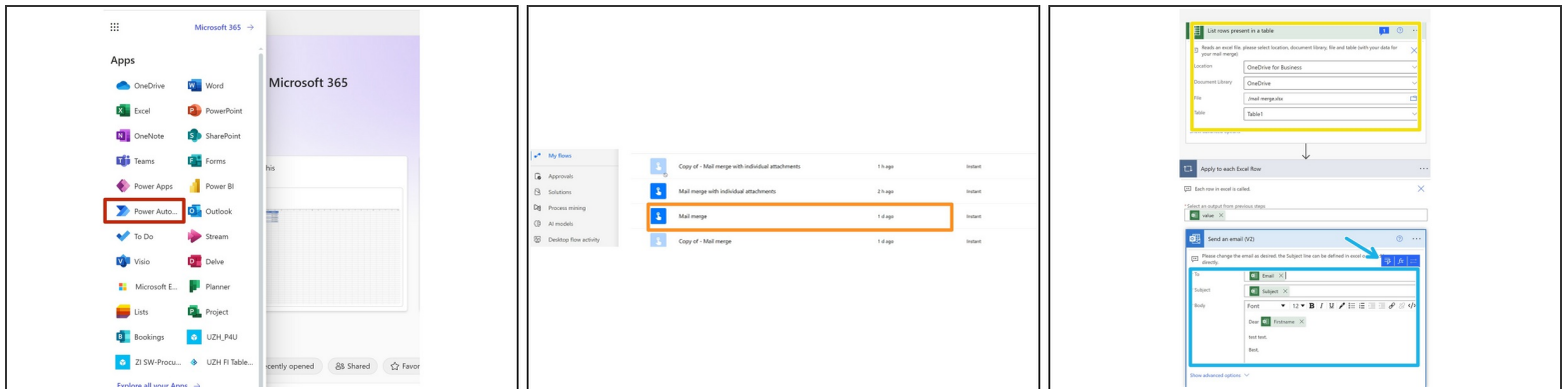
 Use the previous excel as a source.

- Merge to Foxit PDF

 PDF File Name: choose the Attachment field from your excel.

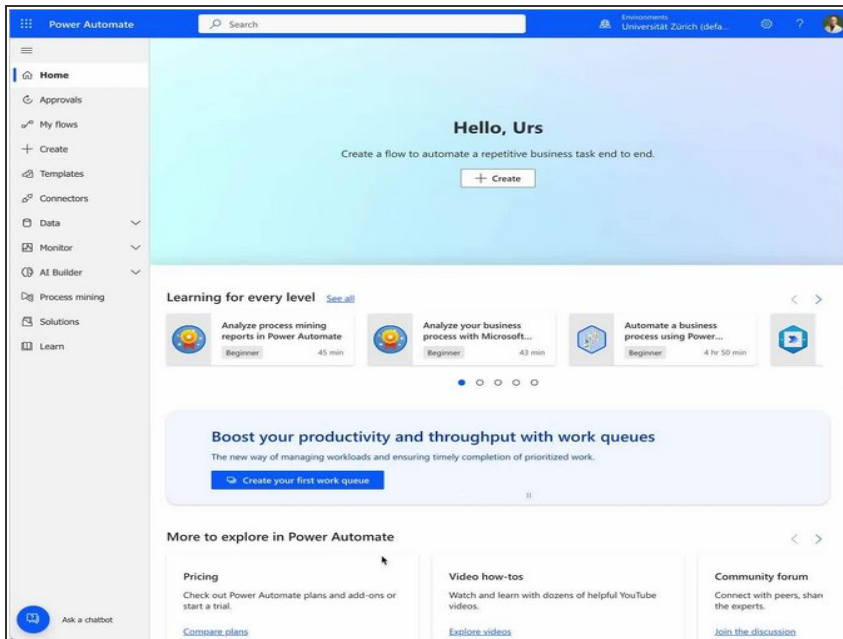
- Save all PDFs in a directory on **onedrive**.

Step 3 — Send email without attachments



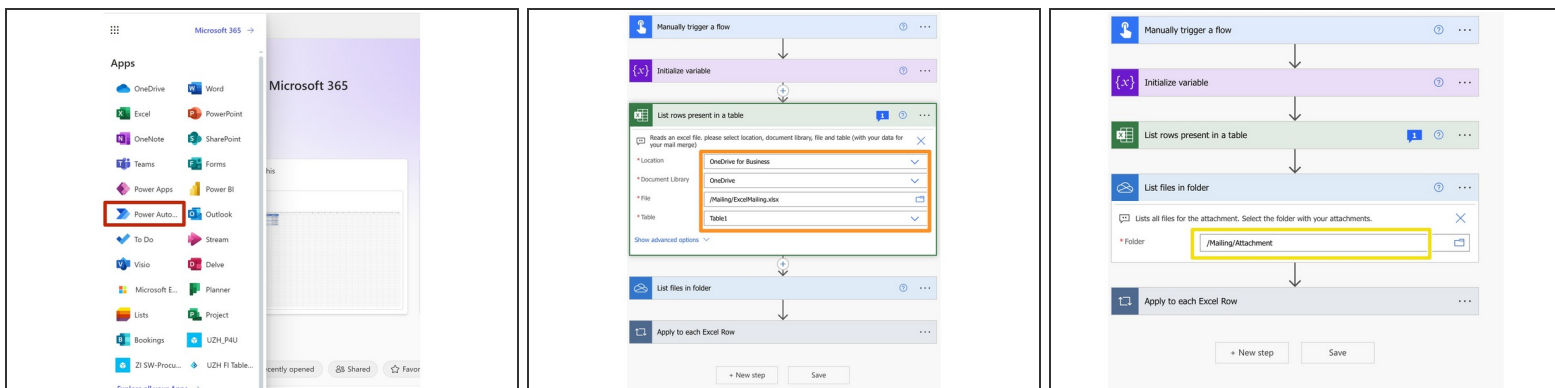
- open Microsoft 365 in your web browser
- Select Power Automate
- **Edit Mail merge**
 - ❗ You may need to connect your onedrive and email the first time you use a flow.
- Select: Location, Library, Excel and Excel Table
- Write your email
 - *Dynamic fields* (from the excel loaded in the step before) can be selected to add email addresses into the *To* field, or using dynamic content in your email.
- Save and run your modified flow. Emails to **all** entries in the excel will be sent.

Step 4 — Send email with attachment(s)



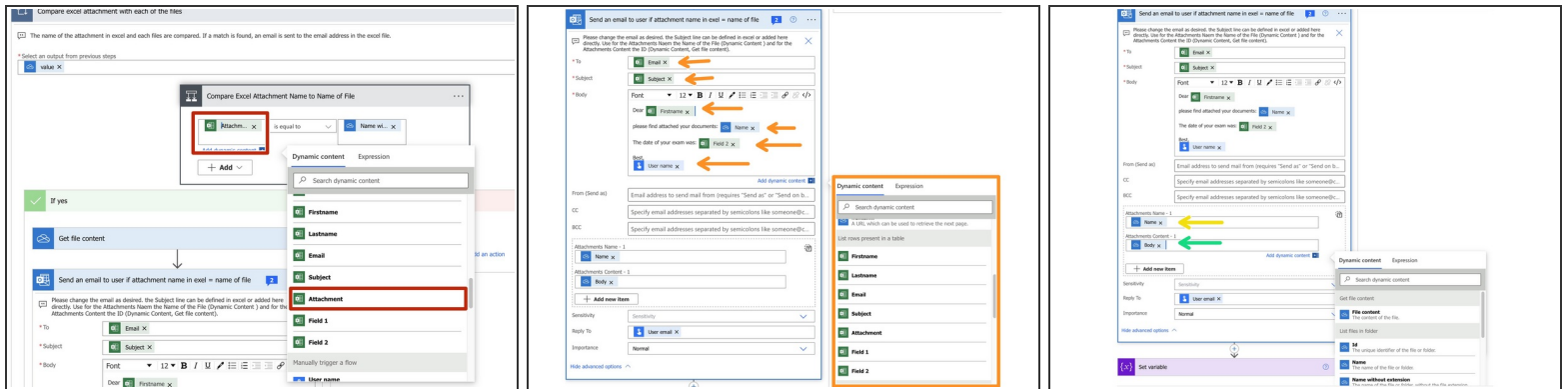
- open Microsoft 365 in your web browser. Select Power Automate.
 - Edit *Mail merge with individual attachments*
 - Modify **List rows present in a table**
 - Modify **List files in folder**
 - Modify **send an email to user if attachment name in excel = name of file**
 - Check if **Compare excel Attachment Name to Name of File** if you changed the header **Attachment** in your excel file.
- ① use the next steps for a detailed walk through instead of the video.

Step 5 — Send email without attachment(s)



- open Microsoft 365 in your web browser and edit *Mail merge with individual attachments* in your flows.
- ① New line. You may need to connect your onedrive and email the first time you use a flow.
- Select: **Location, Library, Excel and Excel Table**
- Modify **List files in folder**

Step 6 — Send email without attachment(s)



- Check that the header for the attachment in the excel file matches this comparison.
❗ All headers of the excel list are listed in the dynamic content.
- Compose your email. Fields from your excel list are found using the *Dynamic Content*.
- Attachment name: *Dynamic content* from the *List file in folder*.
- Attachment document: *Dynamic content* from the *Get file content*.

⚠ Save your flow and run it. Best practice: test it first with know email addresses.