How to produce an E-mail distribution in Word using information in a Excel file
One of the little-discovered abilities in MS Word is the ability to send a group of e-mails to targeted recipients using information contained in a spreadsheet you might be maintaining for contacts. Many have used MS Word to generate mailing labels, and a similar process can be used to send e-mails to selected recipients.

WARNING: One has to use caution in designing mass e-mailings as the District has put strict controls on the number of e-mails that can be sent in one mailing. If the District’s servers detect a larger amount of e-mails (currently 200 or so e-mails) being sent out by you, they will block the e-mails, thinking that these e-mails must be “spam” (and rumor has it, will block subsequent e-mails coming from your e-mail account, believing that you are a “spammer”.)

The following will show you how to use Microsoft Word 2007 to generate customized e-mails from a list of names and addresses that are contained in a Microsoft Excel 2007 spreadsheet. Screen shots are provided as well as a brief explanation of what needs to be done at each part of the process.
You will be using MS Word 2007 as well as MS Excel 2007 to perform this mail merge. The first step is to start MS Word and to select “Start Mail Merge” on the menu bar.
To select a “e-mail merge”, pick what type of mail merge you want to perform. You will see the option to send e-mail messages a couple of options above “Labels” (that you may used in the past to generate mailing labels.)
Hello—

We wanted to let you know of a wonderful opportunity to learn how to send customized e-mails to targeted individuals using MS Word. For more information, or to receive training on this new technology, please contact the Center for the Advancement of Staff and Student Learning (CASSL) at extension 7385.

Once you tell MS Word that you want to send e-mails, you will be presented with a blank screen in which you can design how your e-mail will look. You will be able to do all of the things you are accustomed to doing in MS-Word (like inserting graphics, changing font type and size, etc.)
Hello –

We wanted to let you know of a wonderful opportunity to learn how to send customized e-mails to targeted individuals using MS Word. For more information, or to receive training on this new technology, please contact the Center for the Advancement of Staff and Student Learning (CASSL) at extension 7385.

Once you have designed your e-mail, you want to select an Excel file containing names and e-mail addresses in which to supply to MS Word for the targeted e-mail distribution. Make sure the tab labeled “Mailings” is highlighted and click on the “Select Recipients” option.
The next step is to select the file containing the mailing addresses.
To tell Word 07 that you want to use an external file (such as an Excel file).
Then select the MS Excel file that contains the names and E-mail addresses that you want to use for the e-mail distribution.
If the Excel file has multiple “worksheets” then select the appropriate sheet. Usually, the first sheet is the one you will use. Be sure to check the box on the lower left hand side of the window to assist you in identifying the proper fields to insert into the e-mail!
Now you can select which fields get placed on e-mail distribution to make the e-mail more “personalized”.
Select the “Insert Merge Field” option on the menu bar and the columns that have been labeled in your spreadsheet will appear.
Place your cursor where you want to insert the “merge field” (in this example I will use the first name field from my list to insert into the e-mail body. When The e-mail is generated, each e-mail will have the e-mail recipient’s first name inserted into the body of the e-mail.
After you have picked the location and which “merge field” to place in the body of the e-mail, you will see exactly where the “first name” will be inserted. To finish the insertion process, click on the “insert” button.
If you want to filter out certain people from your e-mail distribution, select “Edit recipient list” from the menu bar above and a screen will pop up where you can uncheck which e-mails will not be included in The e-mail distribution.
You will want to “preview” the results before sending out the e-mail. Select the “Preview Results” tab at the top of the screen and this is where you will see how the e-mail will look before you send it out. Note that the first name appears in the e-mail.
At this point, you will want to see how the mailing labels will actually look like. Select the “Preview Results” option from the menu bar to preview your labels.
When you tell Word to send out the e-mail, the program will automatically look for the column in the spreadsheet that contains the e-mail address. If your spreadsheet has multiple columns for e-mail addresses (i.e. work e-mail vs. home e-mail), you can select the appropriate column.
Hello Brad –

We wanted to let you know of a wonderful opportunity to learn how to send customized e-mails to targeted individuals using MS Word. For more information, or to receive training on this new technology, please contact the Center for the Advancement of Staff and Student Learning (CASSL) at extension 7385.

You will also have an opportunity to type in a “subject line” to let the e-mail recipient know what the e-mail is about. If you have graphics imbedded in the e-mail, make sure you have the “HTML” option selected in the e-mail format window. Once you are Ready, click on the OK button to send the e-mails.
After you select OK, Word will use your e-mail software (in this case Microsoft Outlook) and merge all of the e-mails you have selected in your spreadsheet to receive e-mails, insert the first name in the e-mail body and send them out.

It is important to be reminded that you should limit the number of e-mails being sent to under 200, or you might have your e-mails blocked and possibly incur the wrath of the District’s Informational Technology Department!
Here is the completed e-mail. As you can see, the “Subject line” has been completed as well as the first name has been inserted into the body of the e-mail. Since we sent the e-mail in “HTML” format, the graphics are properly displayed in the body of the e-mail.
Congratulations! You have generated a mass e-mail distribution using data in a spreadsheet that contains e-mail addresses.

If you keep the number of people receiving any given e-mail distribution down to less than 200, you should not be labeled a “spammer” by the District’s e-mail filtering process (nor hopefully be identified as such by your co-workers or recipients of your e-mails.)
For more information...

Here is a YouTube Video outlining the steps:

http://www.youtube.com/watch?v=9hs2bx3so_1