

Creating Live Links Using Mail Merge

When using mail merge, the only way to create a merged document with an active hyperlink is by using a “Hyperlink field.” This means you need pass the URL through the mail merge and nest the URL merge field into a Hyperlink field. This has to be the last step, and you must immediately merge to a new document. Then you can hide the merge field codes and update the fields to reach your final product.

1. Set up your merge document as desired.
 - a. From the *Mailings* tab, choose **Start Mail Merge** and select a type of merged document (letter, email, directory...)
 - b. Click **Select Recipients** and choose **Use Existing List**, then navigate to the Excel with the information you wish to include.
 - c. Insert the Merge Fields as desired by clicking **Insert Merge Field** and choosing the desired fields.

Note: To preview what the end result will look like, click **Preview Results**.

Once you have your document set up as desired, you will insert the Hyperlink field and nest the merge field containing the hyperlink into this field.

2. Press Ctrl+F9 to insert a pair of field brackets.
3. Type the field name, **Hyperlink**, followed by a **space**.
4. Click **Insert Merge Field** and choose the field containing the URL you wish to link. The resulting hyperlink and nested fields will look like one of the examples shown below.

Example: { Hyperlink { MERGEFIELD URL } } OR {Hyperlink http://www.uwec.edu }

5. You must immediately execute the merge to a new document:
 - a. From the *Mailings* tab, click **Finish & Merge**
 - b. Choose **Edit Individual Documents...**
 - c. With **All** selected, click **OK**.

Note: This process works only when merged to a new document, as you must be able to force the field updates.

6. In the resulting merge file, press Ctrl+A, then F9 to update all the fields.

Note: In the merge result file, you can push Alt+F9 to toggle the field codes on and off.

7. Now you should have a different hyperlink for each merged record, with the displayed text being the URL from the Merge Field.

The documentation for this process was adapted from documentation by Cindy Meister. This process and other documentation can be found on her website, [Inter-Solutions](#).