Installation and Configuration Manual

SharePoint Document Merge

SharePoint
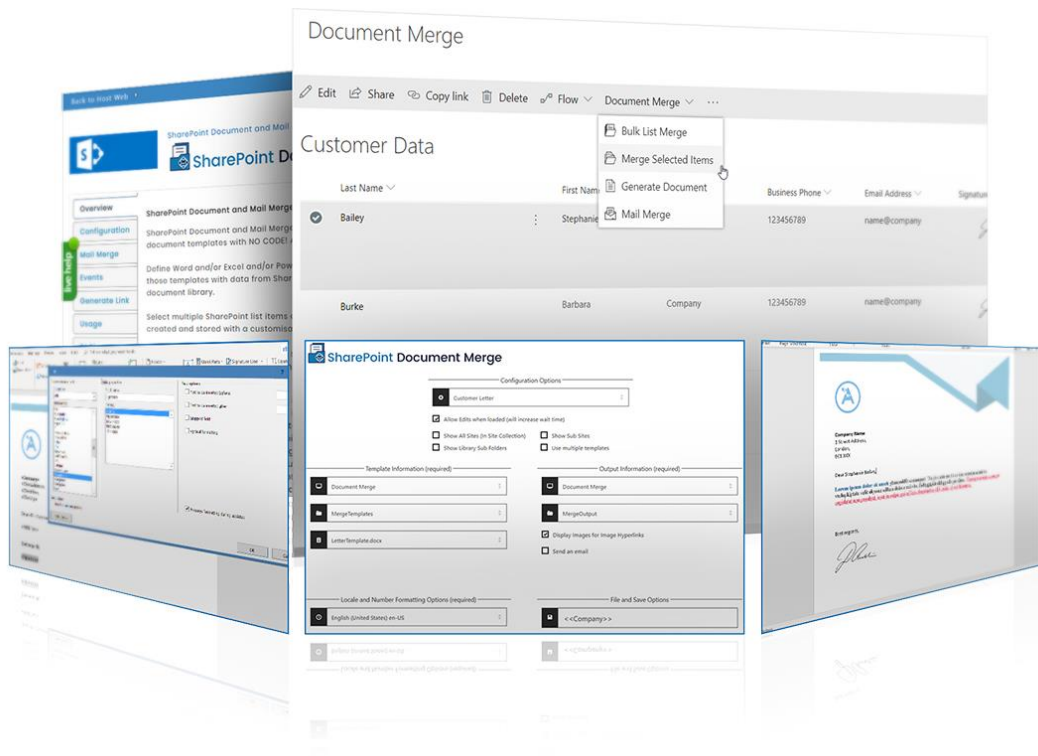
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Version History

Change Record

Date	Author	Version	Change reference
2015, February	SharePoint Document Merge	1.0.0.0	Initial Release for SharePoint 2013.
2017, January	SharePoint Document Merge	2.0.0.0	Metadata merge for SharePoint Library added and provision to create pre-set Document Merge Configuration Template added
2017, May	SharePoint Document Merge	3.0.0.0	Misc. bug fixes and performance enhancements. New improved installer and Licensing authentication.
2017, September	SharePoint Document Merge	3.0.0.1	Misc. Performance Improvements.
2017, December	SharePoint Document Merge	3.0.0.2	Misc. Performance Improvements. Show All sites for site collections options.
2018, March	SharePoint Document Merge	3.0.0.3	Save As PDF only option. Option to merge according to content types. Allow merge on external lists.
2018, April	SharePoint Document Merge	3.0.0.4	Create a link to generate a document from the pre-set Configuration Template. Generate Document menu option.
2018, April	SharePoint Document Merge	3.0.0.5	Document Merge icon and logo changed.
2018, October	SharePoint Document and Mail Merge	4.0.0.0	Added Mail Merge feature to merge and send mail. Updated Icons. Performance enhancements. Custom Header Option added.
2019, January	SharePoint Document and Mail Merge	5.0.0.0	Selecting multiple templates in one go while doing document merge on single item. Save as PDF\A option added.

Current Version for SharePoint 2013

Name	Version Approved	Compatibility	Date
SharePoint Document Merge	SharePoint Document Merge Version 5.0.0.0	SharePoint 2013 Foundation | SharePoint 2013 Server.	2019, January
SharePoint Document Merge Workflow	SharePoint Document Merge Workflow	SharePoint 2013 Foundation | SharePoint 2013 Server.	2016, Oct
SharePoint Document Merge Web Service	SharePoint Document Merge Web Service	SharePoint 2013 Foundation | SharePoint 2013 Server.	2019, January

Table of Contents

Introduction

SharePoint Document Merge is the simple, fast and clean way to merge SharePoint list data into predefined Word, Excel and PowerPoint document templates with NO CODE! Also, merge multiple Word or PowerPoint documents to a single document from within any SharePoint document library!

Define Word and/or Excel and/or PowerPoint templates, store them in document libraries or access them from a drive location, then easily merge those templates with data from SharePoint lists. Automatically generate and output the populated documents to a user specified SharePoint document library.

Select multiple SharePoint list items or Bulk Merge an entire list. A document for each list row (based on your selected template) will be automatically created and stored with a customisable file name to be easily identified.

Select multiple Word or PowerPoint documents to merge to a single Word or PowerPoint document from within a document library. The selected documents will be automatically appended in the order selected.

How does SharePoint Document Merge Work?

After you have installed **SharePoint Document Merge**, the **Document Merge** Option will now be available for list items and Word / PowerPoint documents within document libraries.

Create your Word, Excel or PowerPoint document template/s with the layout as required. Use the List Column Internal Name as Merge Field Name (Word) or Place holder (Excel, PowerPoint) where you want the list data to appear in the document template.

With SharePoint Document Merge you can now automatically create documents from any list for any predefined document template directly from the Ribbon Menu (SharePoint Document Merge) or list items Context Menu.

Create a selection of merged Documents by selecting multiple list items and clicking on the "**Merge Selected Items**" option from the Ribbon Menu or utilise the "**Bulk List Merge**" to automatically generate a document for the entire list.

Customise the file name and specify the SharePoint document library to store the automatically generated merged documents, you can even automatically create an accompanying PDF document.

SharePoint Document Merge Uses:

Do you collect customer records, financial data, order information, or any other important business data in SharePoint lists? With SharePoint Document Merge you can swiftly merge this data into Word and Excel document templates with absolutely no coding!

Generate contracts, personalised letters to prospects, marketing materials, personalised policies, quotes, invoices, financial reports, project status reports, Presentations and get your SharePoint list data in Word, Excel and PowerPoint where you can really work with your data.

SharePoint Document Merge Benefits and Features

- Merge any SharePoint list data into Word, Excel and PowerPoint Templates with NO CODING!
- Fast, save data entry time and increase productivity.
- Very easy to install. Very easy to use, no training required.
- Tightly integrated into SharePoint. Easy access via Ribbon Menu and Items Context Menu.
- Simple Template Creation using Merge Field (Word) or Placeholders (Excel, PowerPoint).
- Display Images for Image Hyperlinks (Word).
- Specify output SharePoint document library and customise document file names.
- One click automatic creation of multiple Merged Documents.
- Merge multiple SharePoint list data into 1 Single Word Document (Choose to merge multiple Word documents to 1 single document).
- Merge multiple SharePoint list data into 1 Single PowerPoint Document (Choose to merge multiple PowerPoint documents to 1 single document).
- Merge multiple Word documents into a Single Word document from within a Document Library.
- Merge multiple PowerPoint documents into a Single PowerPoint document from within a Document Library.
- Rich text support for Word.
- Export to pdf function for Word and Excel.
- Support for Inserting Images in PowerPoint.
- Repeated rows for Word & Excel from related list's items (with lookup field).
- Options to target file names and to overwrite Documents.
- Generate document by clicking a link.
- Mail Merge feature to merge and send mail.
- PDF\A save Option.
- Excellent UK based support!

SharePoint Document Merge Installation (SharePoint 2013)

Types of License

SharePoint Document Merge is made available from the **SharePoint Document Merge** web site (https://sharepointdocumentmerge.com) from where you can decide to choose the most appropriate License Type. Once you have selected the required License Type and created an account you will be able to log in and download the installer and a License Key. Below is the list of **SharePoint Document Merge** License Types;

Trial

- There are 2 types of trial licences.
  - Trial List
  - Trial Site
- The **Trial List** can only be applied to one List per farm.
- The **Trial Site** can only be applied to one Site per farm.
- The Trial will expire after 15 days.
- You cannot install a Trial License, if any other License Type is already installed on that SharePoint Site/Site Collection.

Site Collection

- The Site Collection License activates **SharePoint Document Merge** functionality to all of the Lists within a specified SharePoint Site Collection (e.g. site including its sub sites).
- If the Site Collection License is installed, then you will not be allowed to install any other License Type on that Site Collection.
- It will upgrade a lower License Type if already applied on the given SharePoint Site (e.g. Trial License, Single Site License and Single Site List License).

Single Site

- The Single Site License activates **SharePoint Document Merge** functionality to all lists within the Site to which it is applied.
- If a Single Site license is already installed, then you will only be able to install a higher version License Type (e.g. Site Collection).
- It will upgrade a lower License Type (e.g. Trial Version, Single Site List Version) if already applied on the given SharePoint Site.

Single Site List

- The Single Site List License activates **SharePoint Document Merge** functionality to only one user specified SharePoint List.
- If the Single Site List License is already installed, then you will only be able to install a higher version License Type (e.g. Site/Site Collection).
- It will upgrade the lower License Type (e.g. Trial) if already applied on the given SharePoint Site List.
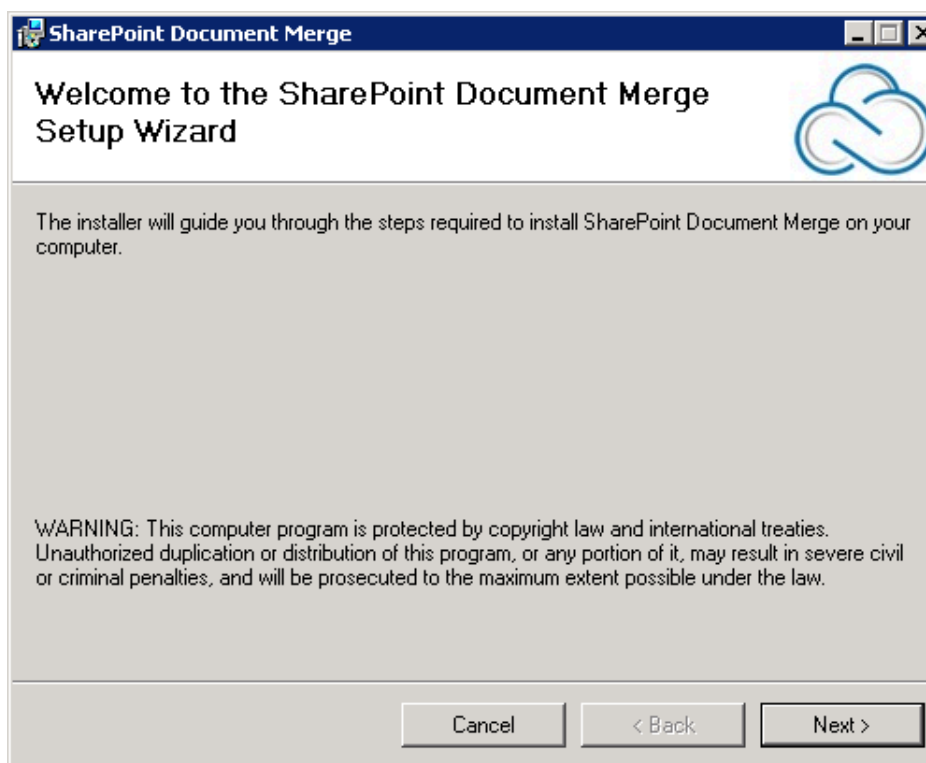
Installing SharePoint Document Merge

Installation of **SharePoint Document Merge** is a simple affair and can normally be completed by a SharePoint Administrator in a matter of just a few minutes. **SharePoint Document Merge** is provided as a very lightweight, deployable solution file (WSP) and accompanying Installer to make the installation process as simple as possible.

Once you have downloaded the zip package and the correct License Key from the **SharePoint Document Merge** web site (https://sharepointdocumentmerge.com) installation can begin. Copy and unzip the package onto the SharePoint WFE or Application Server (This is your choice- once a solution is deployed, the timer job will propagate the changes to all other servers).

The unzipped package contains the following files;

📄 SharePointDocumentMerge_License.pdf
🖳 setup.exe
📄 README.txt
🛢 DocumentMergeSetup.msi
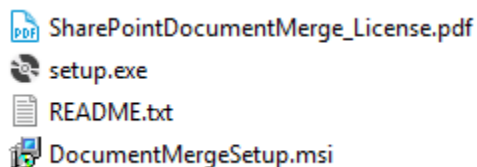
Run the "setup.exe". This will initiate **SharePoint Document Merge** installation wizard.

Click on the "Next" button.
This will allow you to select path where you want to install **SharePoint Document Merge** and whether the installation is just for current user or all the users.
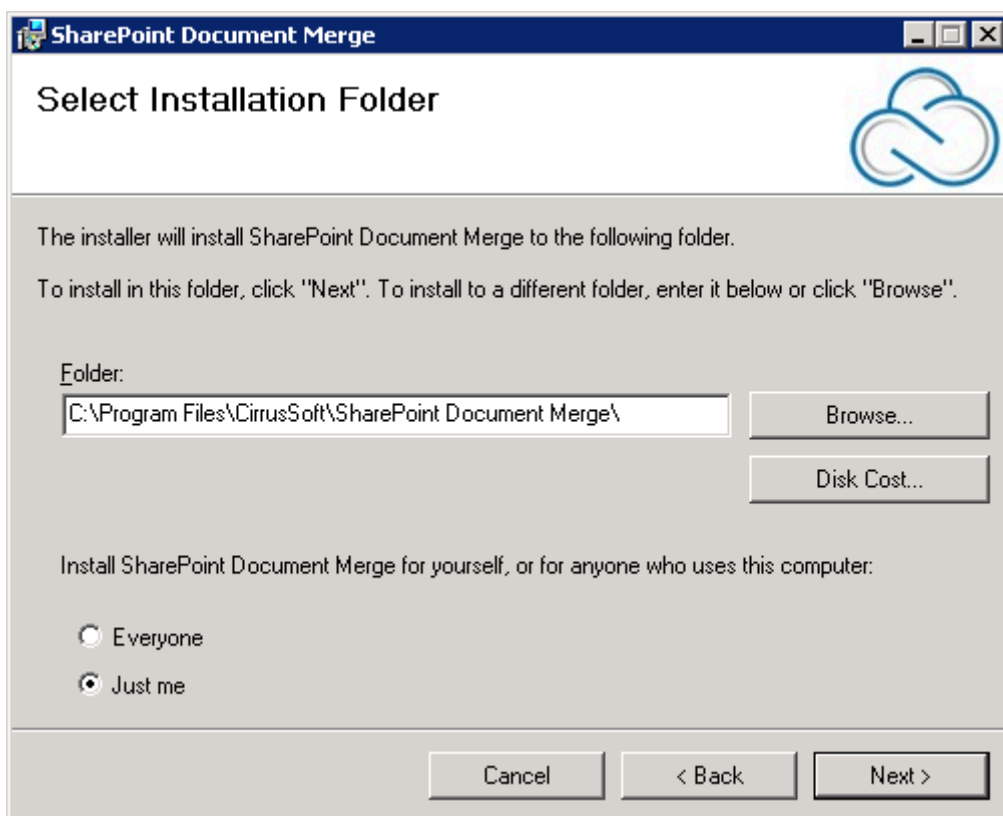
Make the desired selection and click on the "Next" button to proceed.
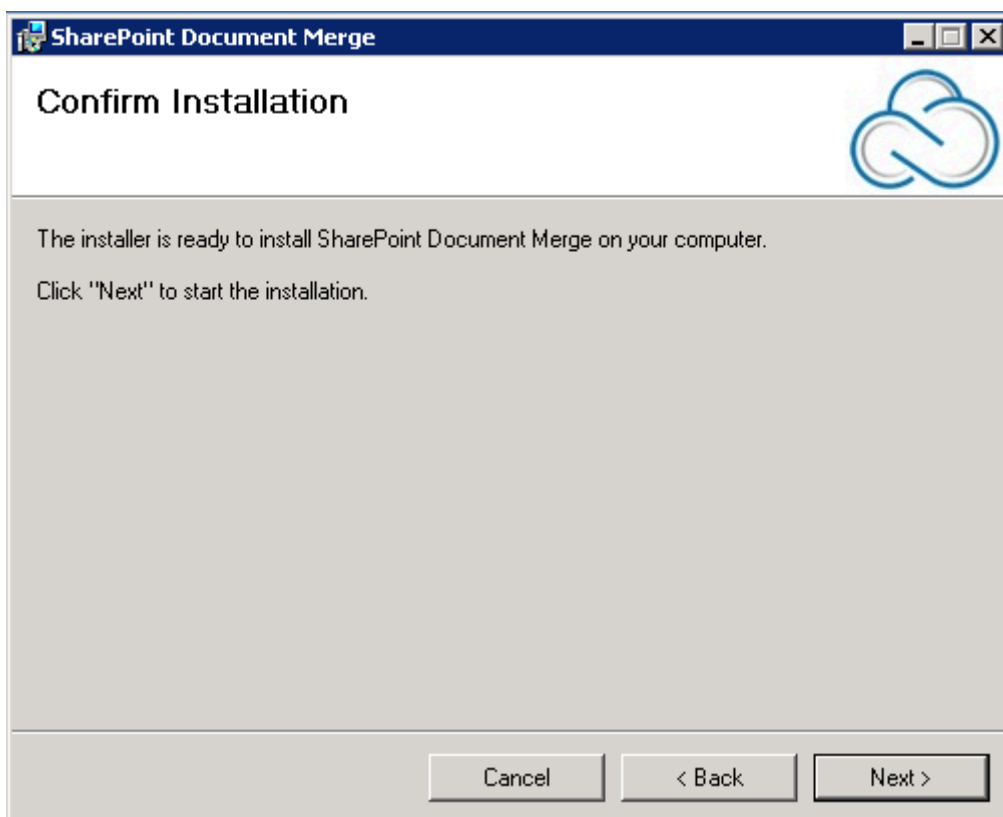
Click on "Next" to confirm Installation. Next you will see the Licence Agreement screen. Read this agreement and only if you agree- Check the "I agree" option and then click the "Next" button.
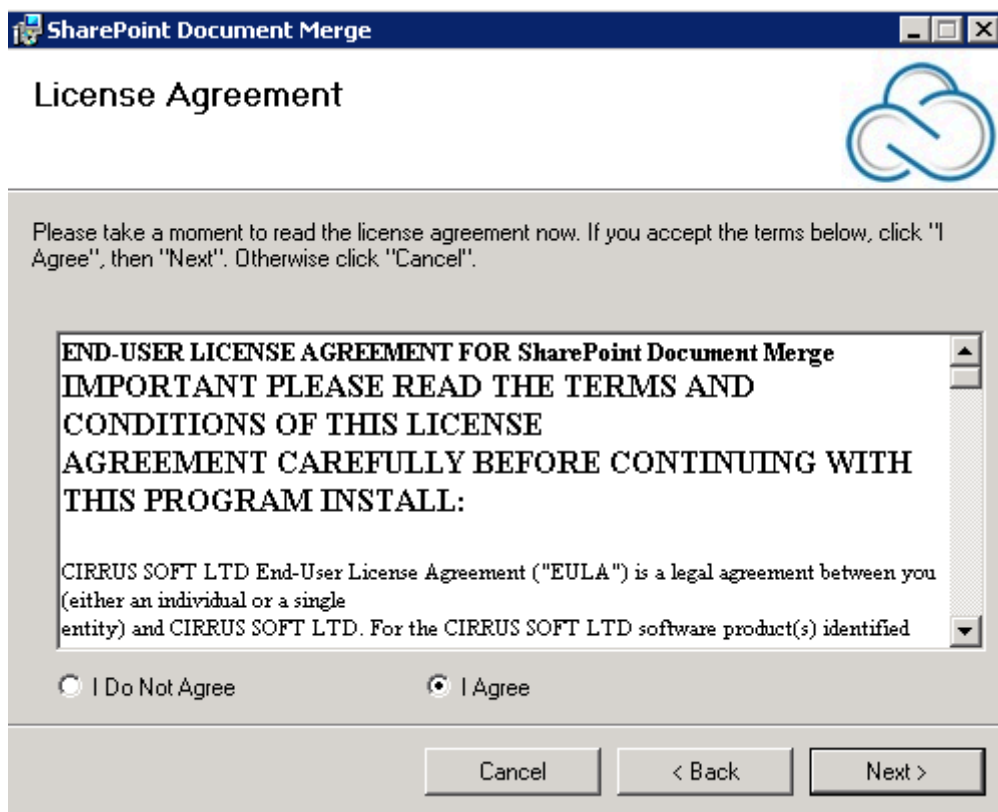
After you click "Next" the installation process will begin, once installation is complete you will get the following screen stating that the **SharePoint Document Merge** has been successfully installed. Click on "Close".
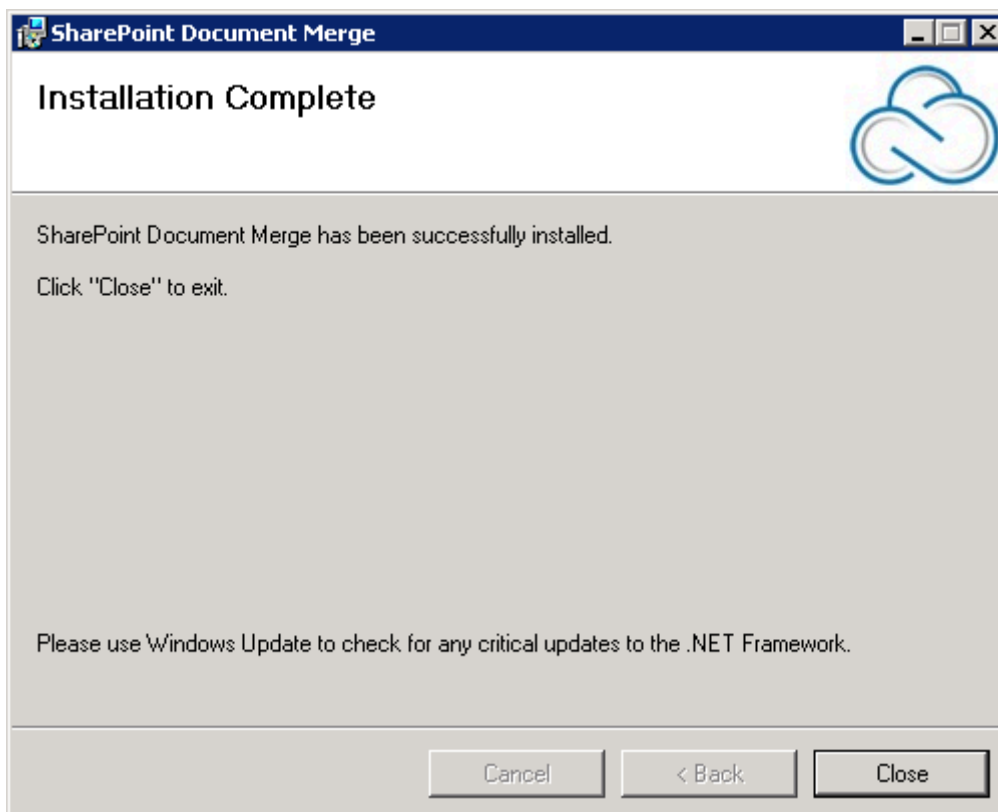
The Installation process will create the **SharePoint Document Merge** shortcut icon on your desktop as shown in below;

Double click on the icon and you will be presented with the **SharePoint Document Merge** Deployment Form to complete set-up.

IMPORTANT

During the installation of **SharePoint Document Merge** the SharePoint Server must have temporary Internet access to connect to our License Manager Server (this is only required once at the point of installation). Please see the 'README.txt' file for the IP address to allow access. If your policy does not permit any external access from your SharePoint Servers, please contact us and we can provide you with an offline installer.

SharePoint Document Merge Deployment Form

Activating and Installing SharePoint Document Merge
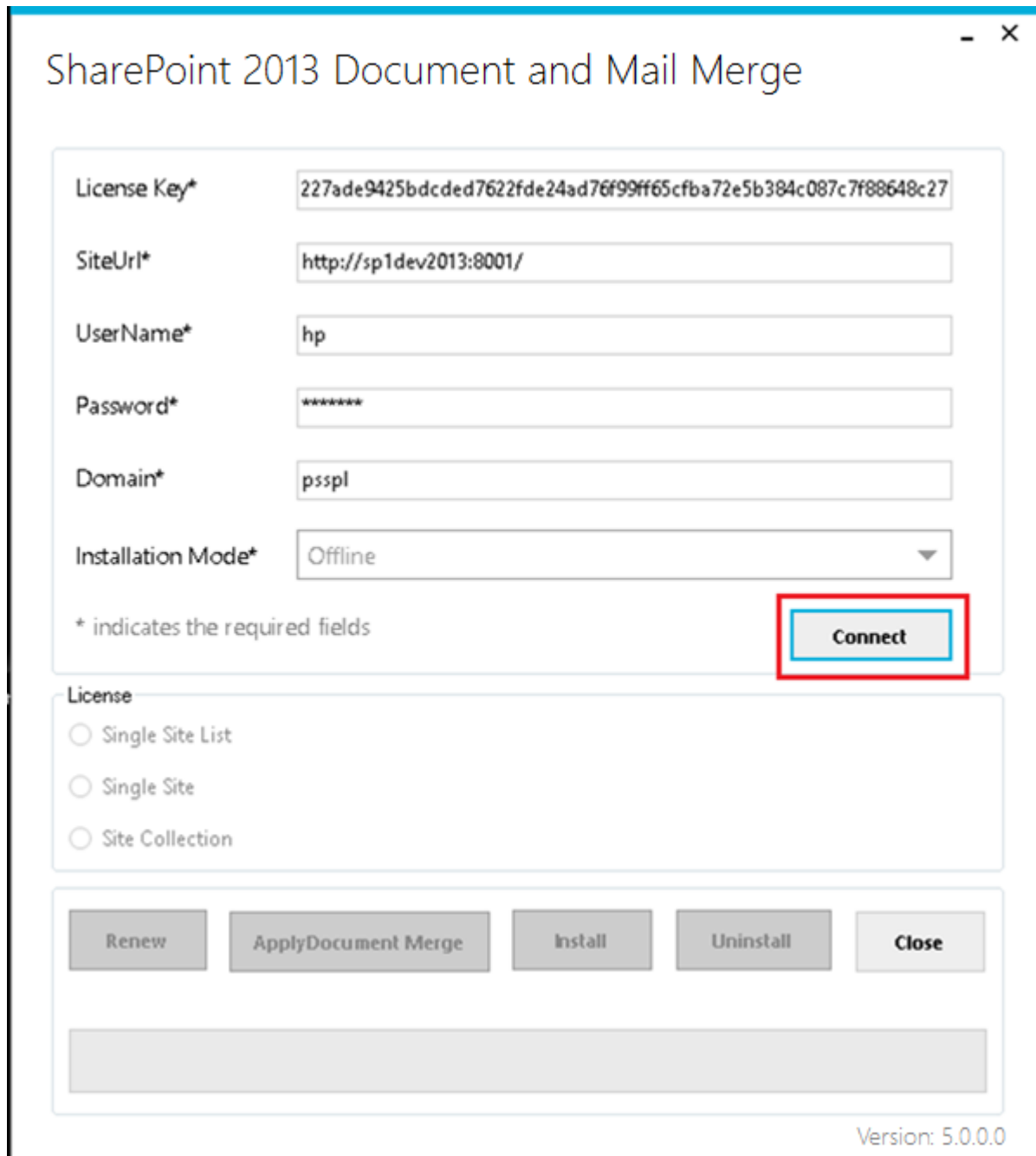
There are four conditions that may occur while installing any of the **SharePoint Document Merge** License Types;

1) The **SharePoint Document Merge** License is "Not Activated and Not Installed". This indicates that the Ribbon and Context Menu is not created and the .wsp files are not deployed and not activated.

2) The **SharePoint Document Merge** License is "Activated but Not Installed". This indicates that the Ribbon and Context Menu are created on a specific list or all lists within a Site/Site Collection but the .wsp files are not deployed and not activated. This situation will occur if the user closes the **SharePoint Document Merge Deployment Form** installer without completing the installation.

3) The **SharePoint Document Merge** License Type is of a "Higher License Type" and a License is already installed and activated.

4) The **SharePoint Document Merge** License Type is of a "Lower License Type" and a License is already installed and activated.

Site Collection License

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type.

Connect Offline:

Connect Online:

If the License condition is "Not Activated and Not Installed" then it will enable "Apply SharePoint Document Merge" button, click on "Apply SharePoint Merge Document" to activate the License.

After successful activation "Install" button will be enabled click on "Install" button to install the License.

After successful installation click on "Close" to close the form. **SharePoint Document Merge** is now installed to the specified SharePoint Site Collection!

* Installation conditions for a Site Collection License:

If the License condition is "Activated but Not Installed" then it will enable "Install" button only, click on the Install button to install the license.

If the License condition is of a "Higher License Type" then for Site Collection License you will receive a message that you are unable to upgrade- as this is the highest License Type.

If the License condition is of a "Lower License Type" (Trial, Single Site, Single Site List) prior to the Site Collection License Type being applied you will receive a prompt to confirm the Upgrade.

Single Site License

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type.

If the License condition is "Not Activated and Not Installed" then it will enable "Apply SharePoint Document Merge" button, click on "Apply SharePoint Merge Document" to activate the License.

After successful activation "Install" button will be enabled click on "Install" button to install the License.

After successful installation click on "Close" to close the form. **SharePoint Document Merge** is now installed to the specified SharePoint Site!

* Installation conditions for a Single Site License:

If the License condition is "Activated but Not Installed" then it will enable "Install" button only, click on the Install button to install the license.

If the License condition is of a "Higher License Type" for Single Site License Only Site Collection License will prompt to Upgrade- as this is the higher License Type. If Trial, Single Site List License Type are already installed within the specified SharePoint Site you will receive a message that you are unable to upgrade.

If the License condition is of a "Lower License Type" (Trial, Single Site List) prior to the Single Site License Type being applied within the specified SharePoint Site you will receive a prompt to confirm the Upgrade.

Single Site List License

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type.

If the License condition is "Not Activated and Not Installed" then it will enable "Apply SharePoint Document Merge" button, click on "Apply SharePoint Merge Document" to activate the License.

After successful activation "Install" button will be enabled click on "Install" button to install the License.

After successful installation click on "Close" to close the form. **SharePoint Document Merge** is now installed to the specified SharePoint Site Single List!

Installation conditions for a Single Site List License:

If the License condition is "Activated but Not Installed" then it will enable "Install" button only, click on the Install button to install the license.

If the License condition is of a "Lower License Type" (Trial) prior to the Single Site List License Type being applied within the specified SharePoint Site, you will receive a prompt to confirm the Upgrade.

Trial (Single Site)

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type.

The Trial License can only be applied to one site per Farm. The Trial will expire after 15 days.

If the License condition is "Not Activated and Not Installed" then it will enable "Apply SharePoint Document Merge" button, click on "Apply SharePoint Merge Document" to activate the License.

After successful activation "Install" button will be enabled click on "Install" button to install the License.

After successful installation click on "Close" to close the form. **SharePoint Document Merge** is now installed to the specified SharePoint Site Single List!

* Installation conditions for a Trial (Single Site List License):

If the License condition is "Activated but Not Installed" then it will enable "Install" button only, click on the Install button to install the license.

Trial (Single Site List)

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type.

The Trial License can only be applied to one list per Farm. The Trial will expire after 15 days.

If the License condition is "Not Activated and Not Installed" then it will enable "Apply SharePoint Document Merge" button, click on "Apply SharePoint Merge Document" to activate the License.

After successful activation "Install" button will be enabled click on "Install" button to install the License.

After successful installation click on "Close" to close the form. **SharePoint Document Merge** is now installed to the specified SharePoint Site Single List!

* Installation conditions for a Trial (Single Site License):

If the License condition is "Activated but Not Installed" then it will enable "Install" button only, click on the Install button to install the license.

Renewing a SharePoint Document Merge License

To Renew your **SharePoint Document Merge** License Type visit your secure members area (https://sharepointdocumentmerge.com) and obtain your License Key. Contact us for offline activation.

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type, in this case Renewal.
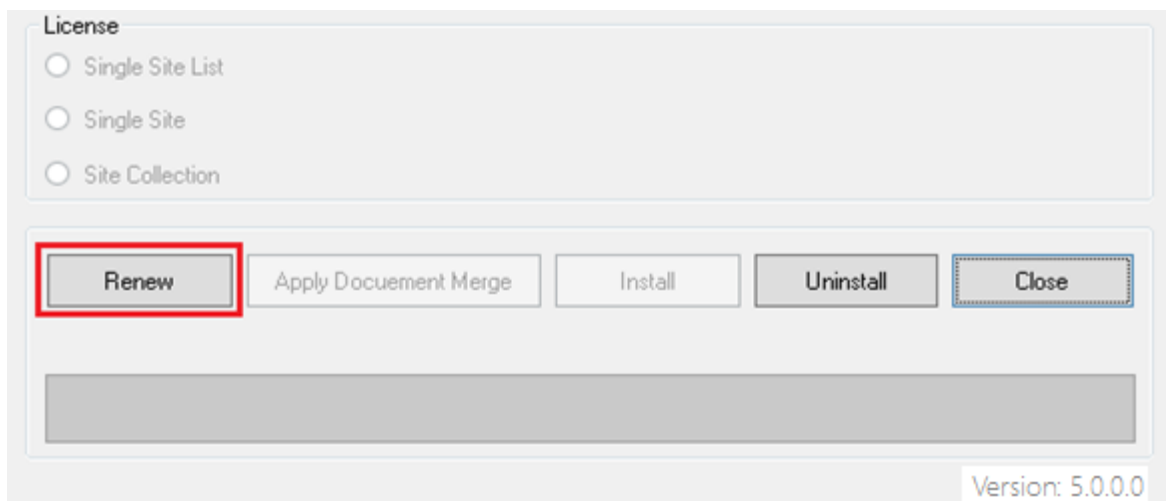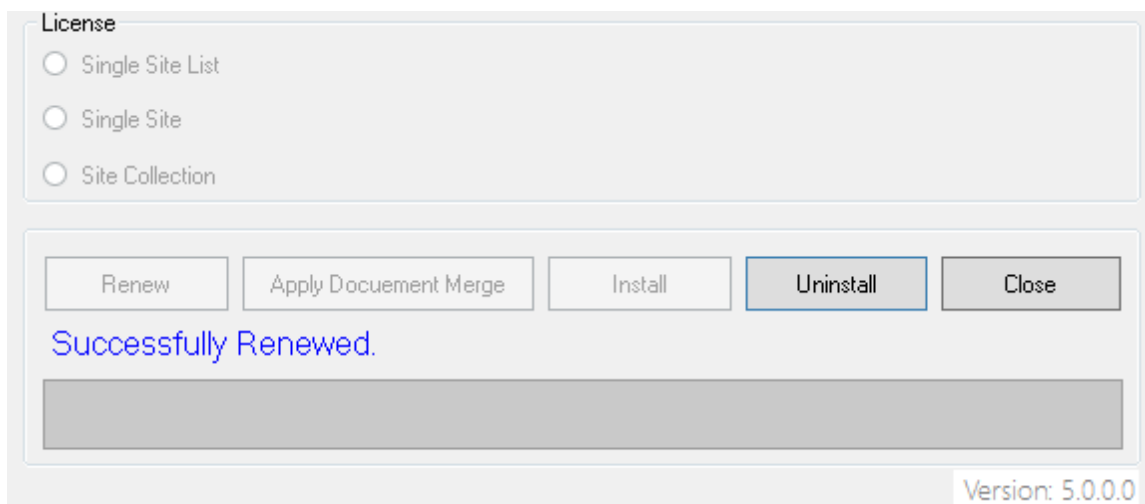
Click "Renew". **SharePoint Document Merge** functionality is enabled.

After successful renewal click on "Close" to close the form. **SharePoint Document Merge** functionality is enabled.

SharePoint Document Merge Uninstallation (SharePoint 2013)

The Uninstallation process will remove **SharePoint Document Merge** form your SharePoint environment. Open the **SharePoint Document Merge Deployment Form**.

Complete the **SharePoint Document Merge Deployment Form** with the required values and then click on the "Connect" button. This will determine the License Type.

After you click on the "Connect" button and the License is activated and installed the "Uninstall" button will be enabled.
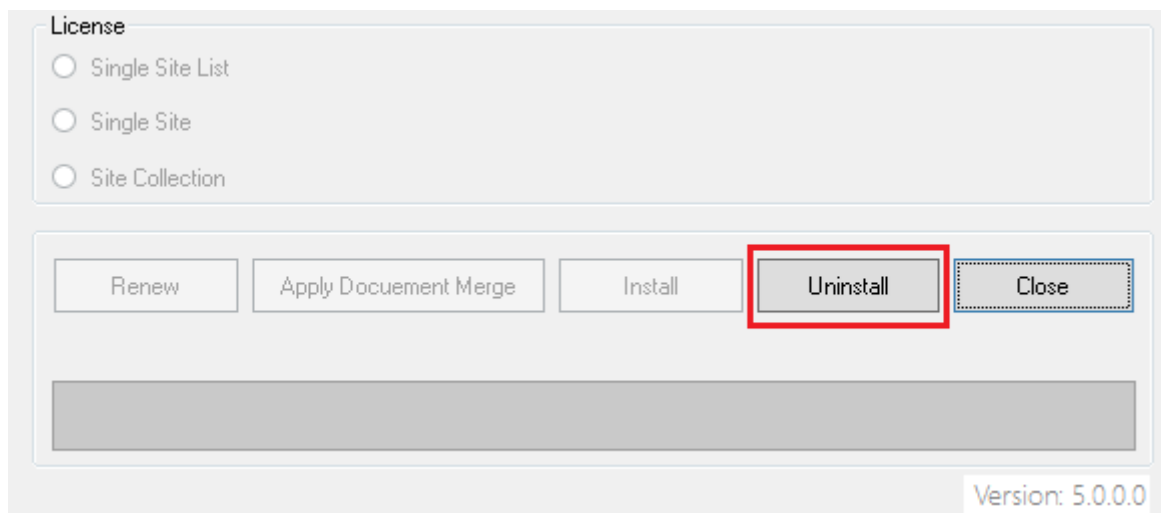
Click "Uninstall".
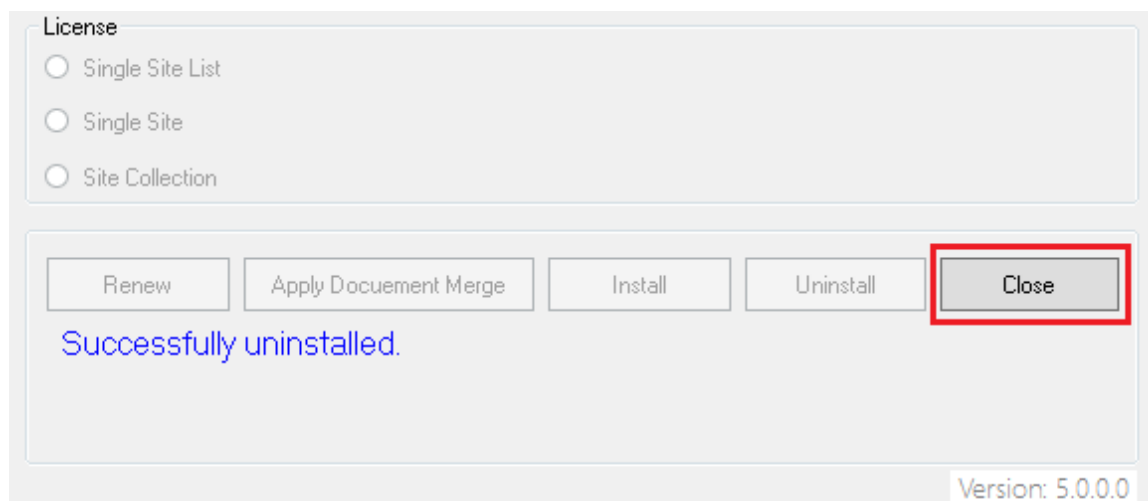
After successful uninstallation click on "Close" to close the form. **SharePoint Document Merge** is now uninstalled.

Locate the unzipped package containing the following files;

Re-run the "setup.exe". This will initiate the **SharePoint Document Merge** installation wizard. Following the on screen prompts to remove the windows installer.

To remove the 'sharePoint_document_merge.wsp' from you SharePoint Environment visit Central Administration >>Solution Management and remove.

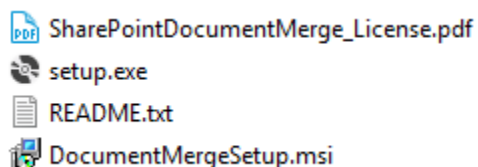# Solution Management

Name

sharepoint_document_merge.wsp

How to Use SharePoint Document Merge?

Create your Word, Excel and/or PowerPoint document template/s with the layout as required. Use the List Column **Internal Name** as Merge Field Name (Word) or Place holder (Excel, PowerPoint) where you want the list data to appear in the document template.

Find the List Column Internal Name

When you create a Column on a List, both its Display Name and **Internal Name** are set to the same value. However, the **Internal Name** contains converted values for some characters, most notably a space ' ' is converted to '_x0020_'. So if the Display Name is 'Product Description', then the **Internal Name** will be 'Product_x0020_Description'. If you change the Display Name, the **Internal Name** stays the same!

A simple way to find the **Internal Name** is to go to List Settings, and then click on the column name in which you are interested. On the Edit Column page, the URL will end in something like:

/_layouts/15/FldEdit.aspx?List=%7BD58F8F2A%2DEB69%2D4F6D%2D9296%2D2A36C6A58DA8%7D **&Field=FirstName**

"FirstName" is the **Internal Name** to be used as the Merge Field Name (Word) or Place holder (Excel, PowerPoint).
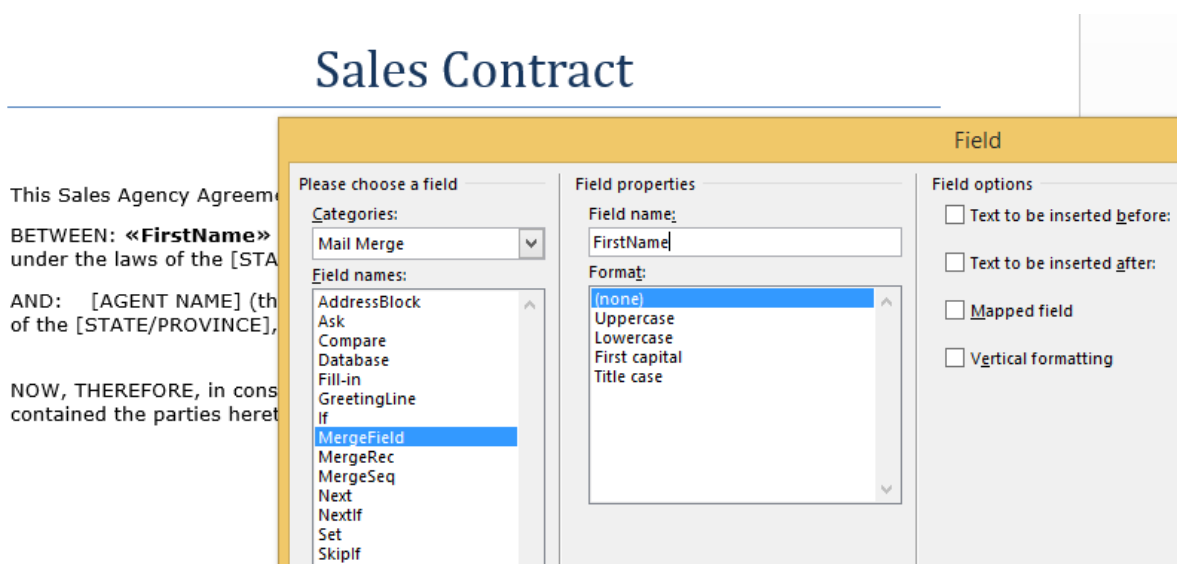
Create a Microsoft Word Template

Open or create any Microsoft Word document with your required layout and use the Merge Field (with Internal SharePoint List Column Name) where you want the list data to appear.

- Go to Insert -> Quick Parts - > Field…
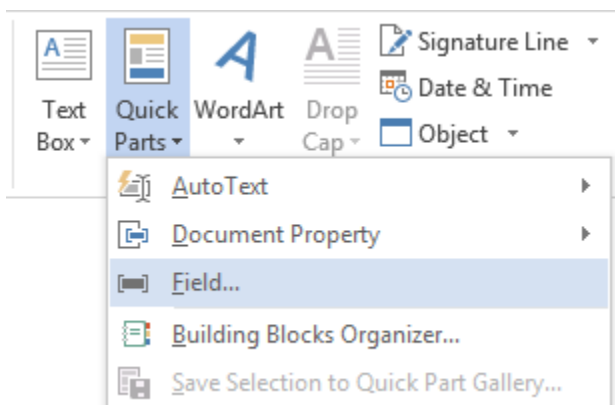
- Select Merge Field and give the Field Name as the SharePoint Internal List Column Name.

- Click Ok. Apply Merge Fields (corresponding to the SharePoint List data) as required for the layout of the template and save the document as .docx. This template is now ready to be used for **SharePoint Document Merge**.

Merge Rich Text Content to Microsoft Word

To insert Rich Text Content, you need to prepend the Merge Field SharePoint Internal List Column Name with the "**Rtf:**" keyword.

Example – If the Internal List Column Name is "**richtext**" in the Merge Field you will enter "**Rtf:richtext**" so in your Word document template it will appear like **«Rtf:richtext»**.

Merge repeated rows for Word from related List's items (with Lookup field)

You can Merge related SharePoint List items with the Lookup field and achieve repeated rows within your Word document;

- Create 2 SharePoint Lists using the Lookup field to relate the List items.
- In this example we have 2 Lists – **WorkedHours** and **Invoices**;
  We have created a Lookup column named *Invoices* in the **WorkedHours** List that gets the related items information from the List named **Invoices**.
- Use the "**RangeStart:"** and "**RangeEnd:"** keywords followed by the List Name and Lookup column in the Merge Field to specify the range of repeated related items. The repeated items are placed in between.
- The construct to enter into the Merge Field is **(Keyword):(ListName)#(Lookup field column name)**. **RangeStart:ListName#LookupFieldName | RangeEnd:ListName#LookupFieldName**.

- Example: **RangeStart:*WorkedHours*#*Invoices* and RangeEnd:*WorkedHours*#*Invoices***.
  Create a table in the Word template and specify with the Merge Filed where the repeated information is placed as below;

Title	Date	Hours	Price	Total
«RangeStart:WorkedHours#Invoices»«Title»	«Date»	«Work_Hours»	«Unit_Price»	«Total»«RangeEnd:WorkedHours#Invoices»

You can also merge related list's items (with lookup field) along with the **sorting feature**:

- You just need to specify one more parameter, column name to which you want to order by followed by order in which you want to sort **Asc** or **Dsc** for sorting as shown below:
  - For ascending order:

    <<RangeStart:ListName#LookupColumn**#colNameToOrderBy:Asc**>> and
    <<RangeEnd:ListName#LookupColumn**# colNameToOrderBy:Asc**>>

  - For descending order:

    <<RangeStart:ListName#LookupColumn**#colNameToOrderBy:Dsc**>> and
    <<RangeEnd:ListName#LookupColumn**# colNameToOrderBy:Dsc**>>

Title	Date	Hours	Price	Total
«RangeStart:WorkedHours#Invoices#Date:Dsc»«Title»	«Date»	«Work_Hours»	«Unit_Price»	«Total»«RangeEnd:WorkedHours#Invoices#Date:Dsc»

Create a Microsoft Excel Template

Open or create any Microsoft Excel document with your required layout and use the Place Holder << and >> (with Internal SharePoint List Column Name) where you want the list data to appear.

- Go to particular Cell and put a Place Holder as blow e.g. **<<FirstName>>** (Excel does not support Merge Field).

SharePoint Document Merge

INVOICE

Your Company Name
Your Company Slogan

DATE:	September 9, 2015
INVOICE #	100
FOR:	Project or Service Description

Street Address
City, ST ZIP Code
Phone
Fax

BILL TO:	<<FirstName>>
Company Name
Street Address
City, ST ZIP Code
Phone

DESCRIPTION	AMOUNT

- Apply Place Holders (corresponding to the SharePoint List data) as required for the layout of the template and save the document as .xlsx. This template is now ready to be used for **SharePoint Document Merge**.

Merge repeated rows for Excel from related List's items (with Lookup field)

You can Merge related SharePoint List items with the Lookup field and achieve repeated rows within your Excel document;

- Create 2 SharePoint Lists using the Lookup field to relate the List items.
- In this example we have 2 Lists – **WorkedHours** and **Invoices**;
  We have created a Lookup column named *Invoices* in the **WorkedHours** List that gets the related items information from the List named **Invoices**.
- Use the "**<<RangeStart:>>**" and "**<<RangeEnd:>>**" keywords followed by the List Name and Lookup column in the Place Holder to specify the range of repeated related items. The repeated items are placed in between.
- The construct to enter in Place Holders is **<<(Keyword):(ListName)#(Lookup field column name)>>**. **<<RangeStart:ListName#LookupFieldName>> | <<RangeEnd:ListName#LookupFieldName>>**.

- Example: **<<RangeStart:*WorkedHours#Invoices*>> <<RangeEnd:*WorkedHours#Invoices*>>**. Specify the Place Holders in the Excel template where the repeated information is placed as below;

Title	Date	Hours	Price	
<<RangeStart:WorkedHours#Invoices>><<Title>>	<<Date>>	<<Work_Hours>>	<<Unit_Price>>	<<Total>><<RangeEnd:WorkedHours#Invoices>>

You can also merge related list's items (with lookup field) along with the **sorting feature**:

- You just need to specify one more parameter, column name to which you want to order by followed by order in which you want to sort **Asc** or **Dsc** for sorting as shown below:
  - For ascending order:

<<RangeStart:ListName#LookupColumn**#colNameToOrderBy:Asc**>> and
<<RangeEnd:ListName#LookupColumn**# colNameToOrderBy:Asc**>>

- o For descending order:

<<RangeStart:ListName#LookupColumn**#colNameToOrderBy:Dsc**>> and
<<RangeEnd:ListName#LookupColumn**# colNameToOrderBy:Dsc**>>

Title	Date	Hours	Price	
<<rangeStart:WorkedHours#Invoices#Unit_Price:Dsc>><<Title>>	<<Date>>	<<Work_Hours>>	<<Unit_Price>>	<<Total>><<rangeEnd:WorkedHours#Invoices#Unit_Price:Dsc>>

Create a Microsoft PowerPoint Template

Open or create any Microsoft PowerPoint document with your required layout and use the Place Holder << and >> (with Internal SharePoint List Column Name) where you want the list data to appear.

- Go to particular Cell and put a Place Holder as blow e.g. **<<Title>>** (PowerPoint does not support Merge Field).
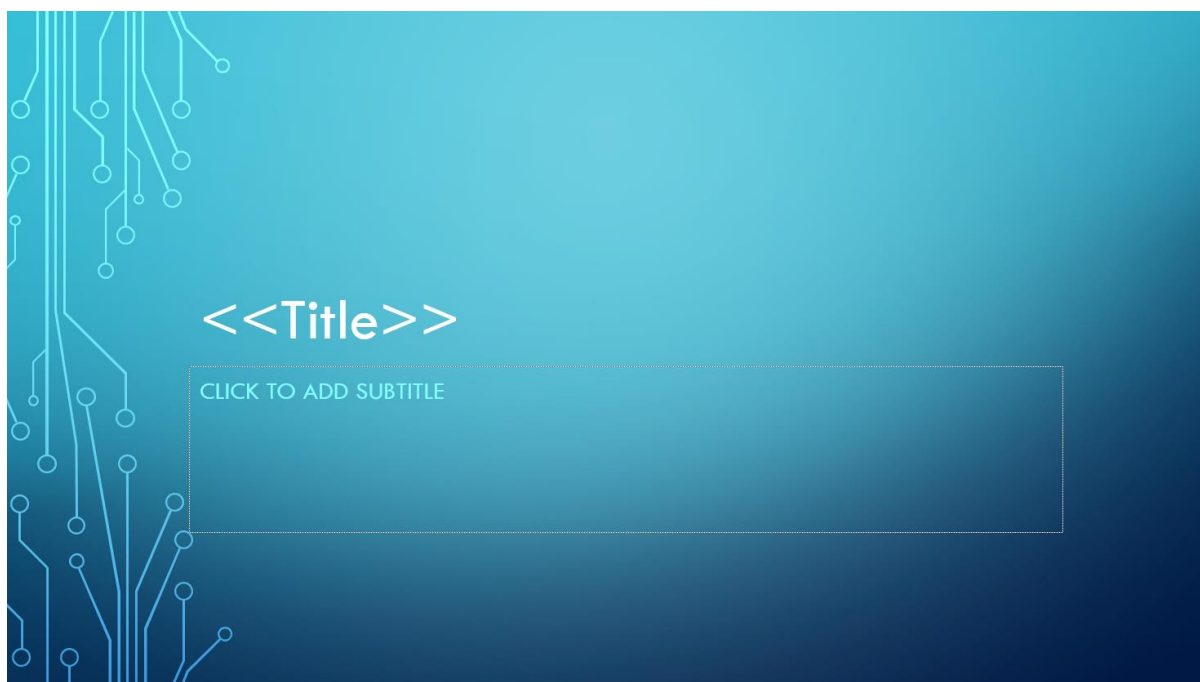
- Apply Place Holders (corresponding to the SharePoint List data) as required for the layout of the template and save the document as .pptx. This template is now ready to be used for **SharePoint Document Merge**.

Merge Images into PowerPoint

To Merge Images into PowerPoint from a SharePoint List;

1. Insert a dummy Image in the PowerPoint slide with the correct size as the Image you want to Merge from the SharePoint List.
2. Right click on the Image and select Format Picture.
3. Under "Size and Properties", set "Alt Text" to the Internal SharePoint List Column Name for the Image to be merged. E.g. here we have set Alt Text to <<image>>.
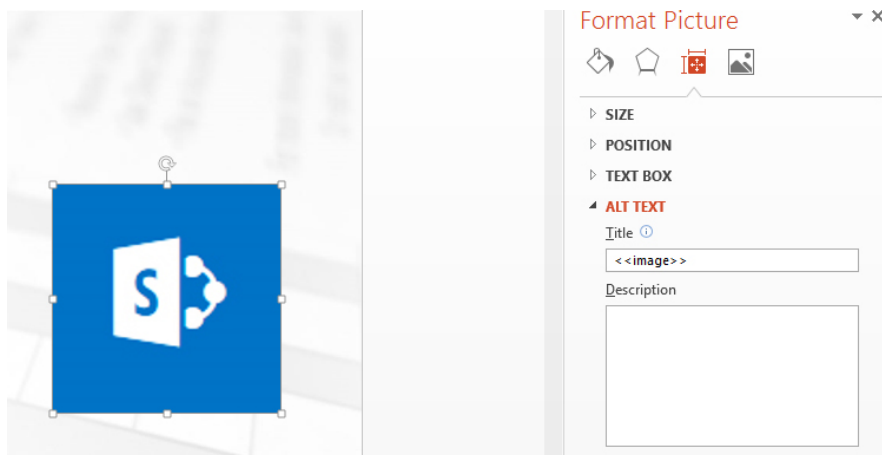
Using SharePoint Document Merge within SharePoint

Once installed (with the appropriate License Type) **SharePoint Document Merge** options are made available on all List Items Context Menu and the Lists Ribbon Menu. Also, for Word Documents within Document Libraries.

Define Word and/or Excel and/or PowerPoint templates, store them in Document Libraries or access them from a drive location, then easily merge those templates with data from SharePoint Lists. Automatically generate and output the populated documents to a user specified SharePoint Document Library.

Select multiple SharePoint list items or Bulk Merge an entire List. A document for each list row (based on your selected template) will be automatically created and stored with a customisable file name to be easily identified.

Merge a List Item to a Document Template

- Go to the required SharePoint List.
- Click on the Context Menu of the Item you want to Document Merge.
- Click Document Merge.

-   The SharePoint Document Merge options window will appear. Choose as required and click "Merge Item(s) to Document".

SharePoint Document Merge

SharePoint Document Merge

Select Template --Select--   ▼

☐ Upload Document Merge Template

☐ Show Sub Sites   ☐ Show All Sites
☐ Show Library Sub Folders

Document Template
    ⊟ Document Merge
        ⊞ 📁 Shared Documents
        ⊞ 📁 SPDM_Templates

Output Library
    ⊟ Document Merge
        📁 Shared Documents
        📁 SPDM_Templates

☐ Merge to 1 Single Document

☐ Display Images for Image Hyperlinks

☐ Custom File Name

☐ Overwrite Files

☐ Save as PDF (check to create an accompanying PDF copy)

☐ Save As PDF Only (check to create Only a PDF copy)

[Merge Item(s) to Document]   [Close]

Select Template: *Select a pre-set Configuration Template. Pre-sets are managed via site Action menu "Document Merge Settings".*

Show Sub Sites: *Check this option to Show Sub Sites.*

SharePoint Document Merge

Show Library Sub Folders: *Check this option to Show Document Library Sub Folders.*

Upload Document Merge Template: *Check to browse for the Word/Excel Document Template (if not held within a SharePoint Document Library).*

Document Template: *Select the Word/Excel/PowerPoint Document Template from a SharePoint Document Library.*

Output Libray: *Select the SharePoint Document Library where you want to save the Merged Word/Excel/PowerPoint Document.*

Merge to 1 Single Document: *Check this option to create a Single Word Document containing multiple Word documents merged to 1 from the Template and List items selected. (Only applies when a Word document Template is selected).*

Display Images for Image Hyperlinks: *Check this option if you to display images instead of the hyperlink. The image must be located in a SharePoint document library and the user must have permission to access (.png, .jpg, .jpeg, .bmp, .ico, .gif are supported formats).*

Custom File Name: *By default the Merged Word/Excel/PowerPoint Document is saved with a file name of the following construct 'TemplateName_BinaryTimeStamp'. Check this option to create a custom file name. File name can contain multiple field Internal Names enclosed in '<<' and '>>'.E.g. <<FirstName>><<LastName>>.*

Overwrite Files: *Check this option to overwrite an existing file with the same name.*

Save As PDF (check to create a PDF Copy): *Check this option if you also want to create a pdf for the same Merge Word/Excel/PowerPoint Document. PDF generation will take more time to process.*
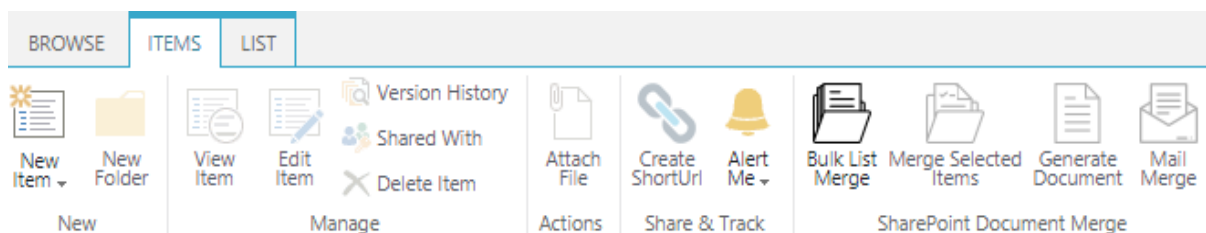
Once processing is complete the Documents will be saved in the user specifed SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

SharePoint Document Merge

✓ 🗋 Name

    📗 InvoiceTemplate_20150909151937211 ✳

    📗 InvoiceTemplate_Bailey_Stephanie ✳

    📘 SalesContract_20150909152050633 ✳

    📘 SalesContract_Bailey_Stephanie ✳

INVOICE

Your Company Name
Your Company Slogan

DATE: September 9, 2015

INVOICE # 100

FOR: Project or Service Description

Street Address
City, ST ZIP Code
Phone
Fax

BILL TO: **Stephanie**
Company Name
Street Address
City, ST ZIP Code
Phone

DESCRIPTION	AMOUNT

Sales Contract

This Sales Agency Agreement ("Agreement") is made and effective this [DATE],

BETWEEN: Stephanie Bailey (the "Principal"), a corporation organized and existing under the laws of the [STATE/PROVINCE], with its head office located at:

AND: [AGENT NAME] (the "Agent"), a corporation organized and existing under the laws of the [STATE/PROVINCE], with its head office located at:

Merge Multiple List Items to a Document Template (create multiple documents)

You can create a selection of Merged Documents by selecting multiple List Items and clicking the "Merge Selected Items" Ribbon Menu button.

- Go to the required SharePoint List.
- Select the required List Items and click on the "Merge Selected Items" Ribbon Menu button.
- The SharePoint Document Merge options window will appear. Choose as required and click "Merge Item(s) to Document".
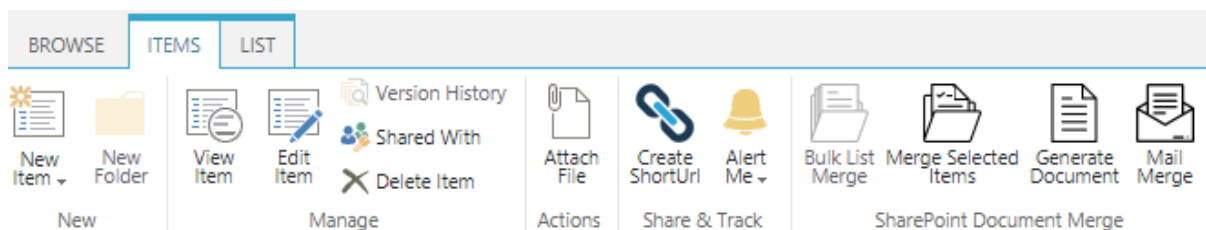
Once processing is complete the Documents (one for each List Item row) will be saved in the user specifed SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

Bulk Merge All List Items to a Document Template (create multiple documents)

You can automatically generate a Document for ALL List Items by clicking the "Bulk List Merge" Ribbon Menu button.

- Go to the required SharePoint List.
- Click on the "Bulk List Merge" Ribbon Menu button.
- The SharePoint Document Merge options window will appear. Choose as required and click "Merge Item(s) to Document".

Once processing is complete the Documents (one for each List Item row) will be saved in the user specifed SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

Create a pre-set Document Merge Configuration Template for a List

You can predefine the SharePoint Document Merge options for a List via the site action menus and clicking the 'Document Merge Settings' button.
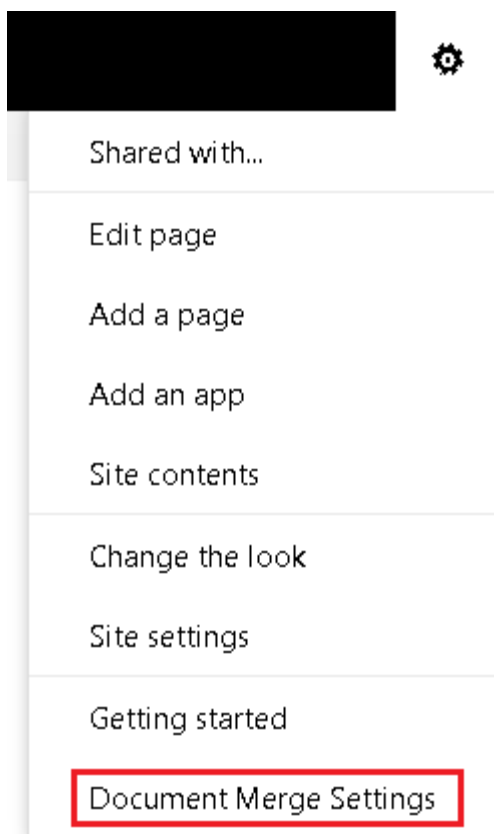
You can Save and Edit unlimited SharePoint Document Merge Pre-set Configuration Settings for your SharePoint Lists.

SharePoint Document Merge

Template Settings and Configuration Options

Enter Unique Template Name: *Enter a name to identify the pre-set Configuration Template.*

Set as list default: *Check this option to make this the default pre-set configuration settings for the selected list. These settings will load when Document Merge is selected for the specified list.*

Allow Edit: *Check this option to allow edits to the pre-set configuration from within the specified list. This will increase load time. When unchecked you will not be able to edit the pre-set configuration from within the specified list.*

Source list : *Select the SharePoint list, from within the site, for which the pre-set configuiartion settings will apply.*

*All other options for setup are described above (*pages 31 and 32*).

Merge Multiple Word Documents to a Single Word Document

Once installed **SharePoint Document Merge** options are made available within Document Libraries on the Files Context and Ribbon Menu. This allows you to merge multiple Word documents to a single word document.

You can choose to "**Bulk Doc Merge**" or "**Merge Selected Items**".
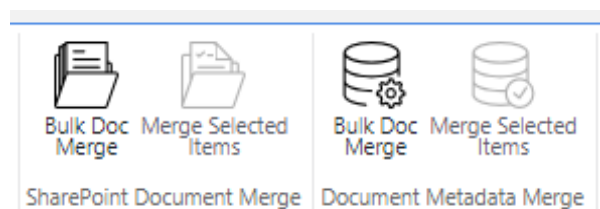
Bulk Doc Merge will merge all Word Documents within a document library. The order the Word documents are appended into a single Word document will be determined by the Document ID set when each document has been uploaded.
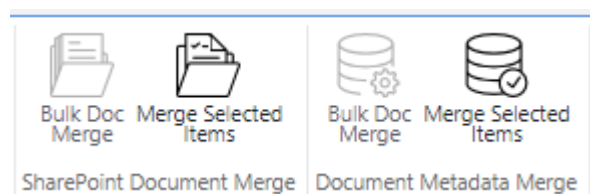
Merge Selected Items will merge the selected Word Documents within a document library. The order the Word documents are appended into a single Word document will be determined by the order they are selected.

- The SharePoint Document Merge options window will appear. Choose as required and click "Merge Item(s) to Document".

Merge Selected Items

Bulk Doc Merge

Show Sub Sites: *Check this option to Show Sub Sites.*

Show Library Sub Folders: *Check this option to Show Document Library Sub Folders.*

Selcet View for Bulk Merge: Select a view to Bulk Merge.

Output Libray: Select the SharePoint Document Library where you want to save the Merged Word Document.

Custom File Name: Choose a custom file name for the Merged Word Document.

Save As PDF (check to create a PDF Copy): Check this option if you also want to create a pdf for the Word Document. PDF generation will take more time to process.

Header: Choose the header information to include into Word documents.

Include latest published major version: Check this option to include the latest published version of the Word document when mergeing Word documents. This applies when versioning is turned on for a document library.

Document Merge Functionality on Metadata of Document Library.

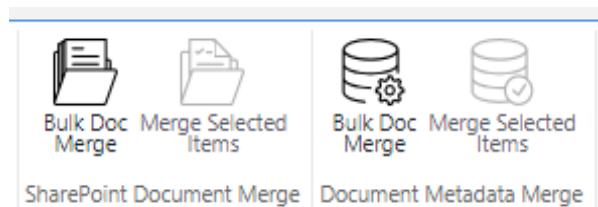You can also merge metadata of documents of Document Library.

Once installed **SharePoint Document Merge Metadata** options are made available within Document Libraries on the Files Ribbon Menu. This allows you to merge metadata of documents to a specified template.

Define Word and/or Excel and/or PowerPoint templates and store them in Document Libraries, then easily merge those templates with metadata from SharePoint Libraries. Automatically generate and output the populated documents to a user specified SharePoint Document Library.
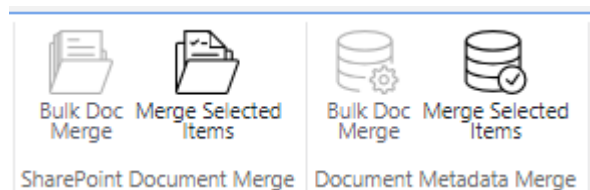
You can choose to "**Bulk Doc Merge**" or "**Merge Selected Items**".

- Select library for document merge metadata functionality as shown below, click on Bulk Doc Merge/Merge Selected Items based on your requirement from ribbon menu inside SharePoint Document Merge Metadata group.

Bulk Merge:

Selected Merge:

- It will open SharePoint Document Merge Dialog box shown as below.

- It will merge meta data of selected documents from the library.

Test Library

✓	Title		Name	Modified	InvoiceID	Price	Date	Comments
	XL File		JulySummery ✳	··· About an hour ago	100	$50,000.00	04/08/2016	Summery of month of july
	Sample Image		Sample ✳	··· About an hour ago	101	$10,000.00	02/01/2017	This is a test image file
	Template		SharePoint123 ✳	··· About an hour ago	102	$12,000.00	19/01/2017	Sample File
	PDF File		SharePoint123 ✳	··· 50 minutes ago	103	$59,000.00	20/01/2017	PDF File
			Template_ ✳	··· 4 minutes ago				

Drag files here to upload

- Structure of template file.

Title: «Title»

Invoice Id: «InvoiceID»

Price: «Price»

Date: «Date»

Comments: «Comments»

- And it will give you Output file like given below for the above sample library and template.

Title: XL File

Invoice Id: 100

Price: $50,000.00

Date: 8/4/2016

Comments: Summery of month of july

Save As PDF only functionality

Now you can also generate only pdf copy of merged document by selecting "Save As PDF Only" option instead 2 files.

Save PDF file in PDF\A format:

Now you can save your PDF file into the PDF\A format. This option will appear only if you select the "save as pdf" or "save as pdf only" option.

Merge functionality according to content type selection

You can also merge items or files according to selection of content types available on your list\library items.

This option is available when you select bulk merge or selected merge (for more than 2 items).

It will merge only those items which contains selected content types.

Bulk Merge

Selected Merge

Show All Sites or Sub Sites option

Show All Sites: This option will show all the sites available in the current site collection so you can select any of these sites to select template file or to store merged file to the output library regardless of where app is installed.

Show Sub Sites: This option will show all the Sub sites available in the current site so you can select any of these sites to select template file or to store merged file to the output library regardless of where app is installed.
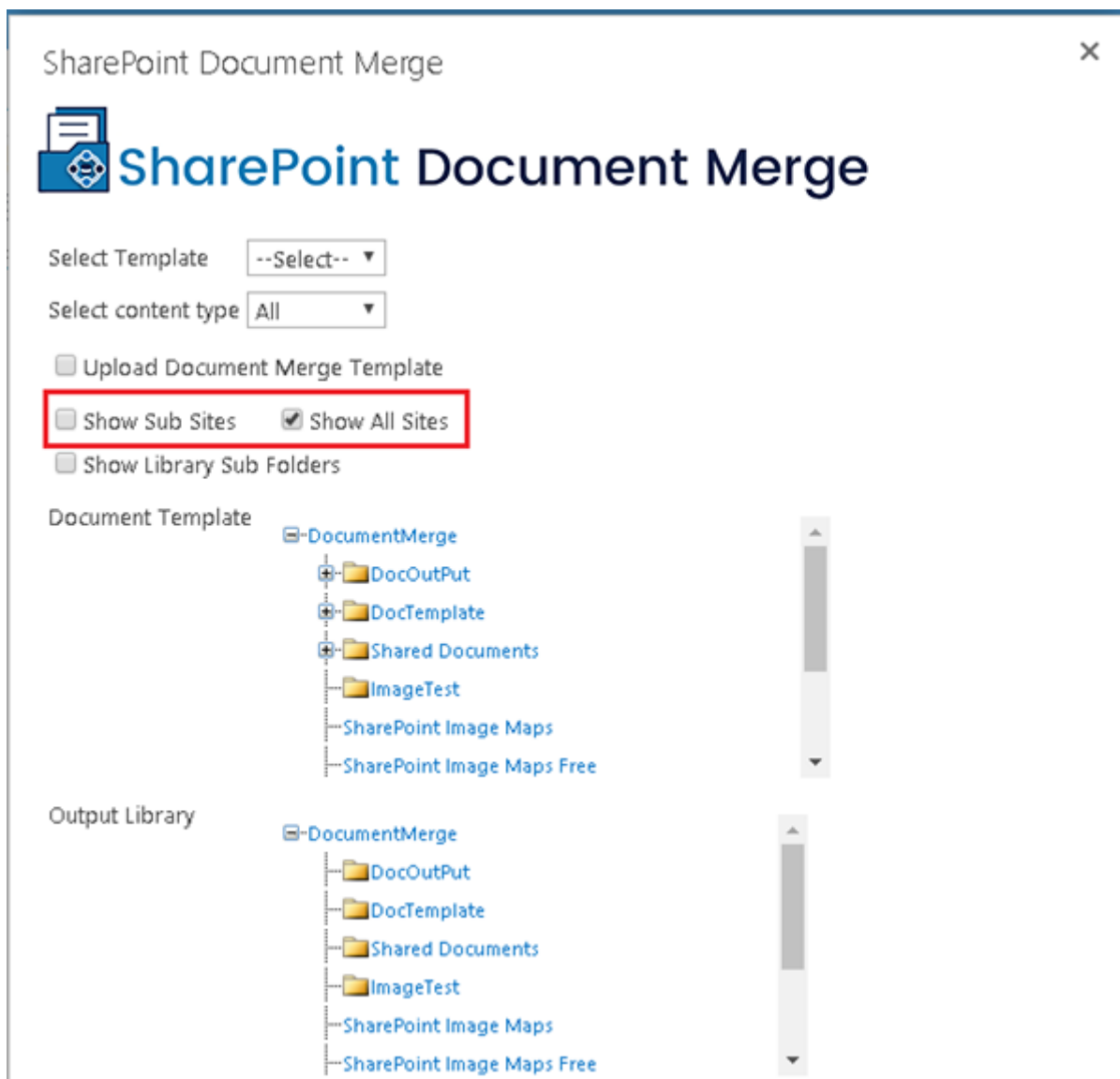
Create a Link to Automatically Generate a Document

You can create a link for document merge to automatically generate a merged document for a specified item of a specific SharePoint list.

Following are the steps:

- First setup a pre-configured template from 'Document Merge Settings' as specified above in manual (Create a pre-set Document Merge Configuration Template for a List – page 35). Ensure that you make the template as the list's default.
- Now you can create a link to automatically generate a document based on the list default Pre-Configured template.
- To do so, specify the following parameters and create your link as below:
  "/_layouts/15/SharePointDocumentMerge/GenerateDocument.aspx?SPListItemId=**{ItemId}**&SPListId=**{ListGuid}**&open=**{open}**"

  {ItemId}: Replace this with the item id of the list item for which you want to perform the Document Merge.

  {ListGuid}: Replace this with list's Guid on which you want to perform merge.

  {open}: you can specify whether you want to open the generated document directly in browser or you want to download it. If you set value of **{open}** to "1", document will be opened in browser directly and for download option set the value of **{open}** to "2".

- Then place this URL after your web URL on which the source list exists.

  E.g.: Your URL will be like
  "**http://SharePoint/Web1/_layouts/15/SharePointDocumentMerge/GenerateDocument.aspx?SPListItemId=1&SPListId={3b492a0c-585d-4216-a14b-95f343844022}&open=1**"

- Now whenever you place this link, on click, it will generate the merged document and open in a browser directly or download it according to your choice.

Generate Document Menu Option

- If you have setup a Pre-Configured Template from 'Document Merge Settings' as specified above and that template is set as the list default template, then you can generate a document by selecting a list item and clicking on the 'Generate Document' from Menu. This will automatically generate the merged document and open it in the browser.
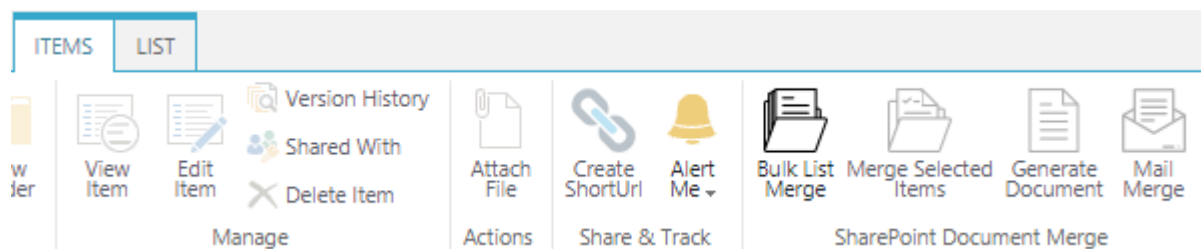
- You can also select from context menu.
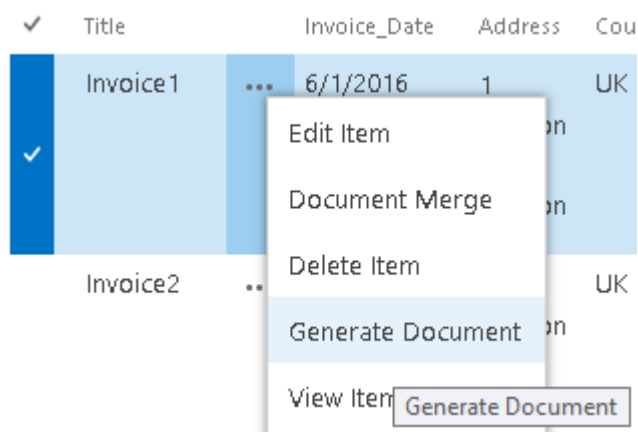
Send Mail Option

Now you can send merged document's link via email. This will help you to specify the email template. You can merge the selected data to the email template along with the data merge and merged document's link will be sent via email after merge processing.

First you must specify email template's data to the list.

Once you install the solution a list named "DocMergeMailTemplates" will be created.

- Go to the list "DocMergeMailTemplates" available in the site contents.
- Here we can specify the email template.

o **Title**: Unique and required field to identify the email template.
o **To**: Recipients to send mail, you can specify multiple values along with the placeholders. Multiple values should be separated by semi colon (;) without any extra spacing as shown below:

You can specify the column names as a placeholder which contains SharePoint users or groups.

o **Cc**: Recipients to put in Cc, you can specify multiple values along with the placeholders. Multiple values should be separated by semi colon (;) without any extra spacing as shown below:

You can specify the column names as a placeholder which contains SharePoint users or groups.

SharePoint Document Merge

○ **Bcc**: Recipients to put in Bcc, you can specify multiple values along with the placeholders. Multiple values should be separated by semi colon (;) without any extra spacing as shown below:

You can specify the column names as a placeholder which contains SharePoint users or groups.

○ **From:** Recipient address who will send an email.

○ **Subject**: Subject of the mail, you can include the placeholders too.
○ **Body**: Body of the mail, you can include the placeholders too. If you want to include the link of the current merged document, you must specify the placeholder "<<MergedFileUrl>>" wherever you want to insert the link in the body of mail and "<<MergedPDFFileUrl>>" is for PDF file link.

○ **Mail Options**: there are two options to send mail.
  ○ SharePoint (Note: SharePoint can't send mail to the user outside the current tenant)
  ○ Outlook

Once template is created you can use this template to send mail while performing document merge.

When you select items to merge, document merge screen will have the option to send mail. Once you checked the option, dropdown will appear from where you can select email templates which you have specified in pre - config settings.

This will also merge the selected list items data to the email template and replace the placeholders with the actual data.

Once the merge processing is complete and if you have selected "SharePoint" as a mail option then mail will send directly to the specified recipients as shown below.

If "Outlook" is selected as an option, then link to outlook will be generated with the email contents.

You can see the contents for each email to copy and paste into Outlook (to preserve any rich text formatting). You can open the email directly in Outlook by clicking the "Open in Outlook link".

SharePoint Document Merge

SharePoint Document Merge

The Document Merge processing is now compete.Please visit the selected Output Library (Shared Documents) to view your Document(s). You may close this window and visit the selected Output Library later at your convenience.

The Mail Merge processing is also complete and your email(s) have been generated. You can see the contents for each email below to copy and paste into Outlook (to preserve any rich text formatting). You can also open the email directly in Outlook by clicking the Open in Outlook link.

To :	peter@cirrussoft.onmicrosoft.com
From :	hiral@cirrussoft.onmicrosoft.com
Cc :	
Bcc :	
Subject :	Sample Mail of Invoice 1
Body :	Hi, **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam ante libero, efficitur at rhoncus sit amet,** volutpat eu felis. Maecenas eu purus ornare, tincidunt arcu sit amet, fermentum nibh. Fusce id libero enim. Sed pulvinar purus id nisl pellentesque, ac tempor nulla tincidunt. Pellentesque scelerisque lacus velit, **imperdiet pharetra risus pharetra et. Maecenas eu ultricies massa. Proin laoreet porttitor auctor. Duis lobortis faucibus massa sed consequat. Duis maximus lacus elit, non tristique purus suscipit sit amet. Ut at sem erat.** http://sp1dev2013:8001/Shared Documents/InvoiceTemplateSPDM_20181022104711179.docx http://sp1dev2013:8001/Shared Documents/InvoiceTemplateSPDM_20181022104711179.pdf Regards, Peter http://sp1dev2013:8001/Shared%20Documents/signature1.png 10/2/2018 12:45:44 PM
Link :	Open in Outlook for Invoice 1

Mail Merge Menu Option

Now you can merge data item of the list to email templates.

To achieve this first you need to create the email template as specified above (Page 33 to Page 36).

Go to the list whose data you want to merge with and send an email. Select items to merge and click on ribbon menu named "Mail Merge" under Document Merge title
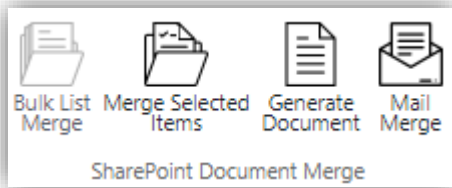
Now Mail Merge screen will appear as shown below.
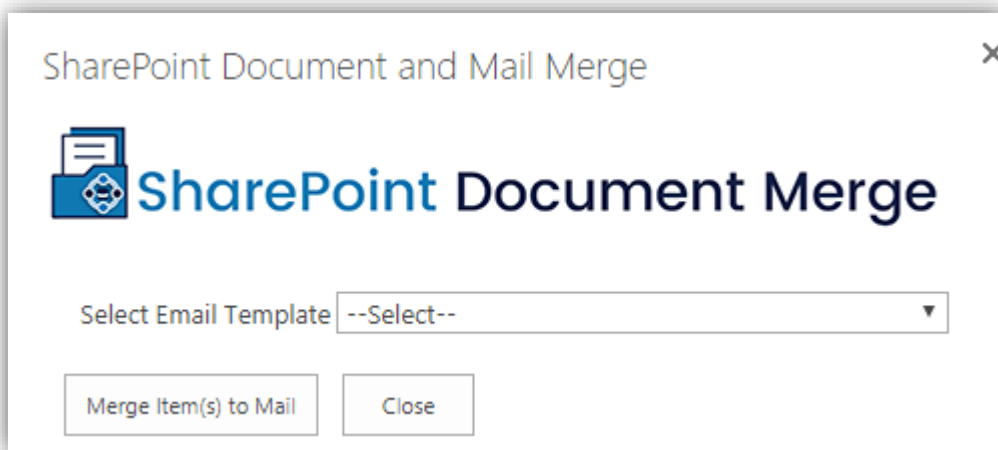
Dropdown will show the available pre-configured email templates.

This will merge the selected data to the email template and send an email to the specified recipients from email template.

If Mail Option is SharePoint, then this will send mails via SharePoint and display the contents on screen.

If "Outlook" is selected as an option, then link to outlook will be generated with the email contents. You can see the contents for each email to copy and paste into Outlook (to preserve any rich text formatting). You can open the email directly in Outlook by clicking the "Open in Outlook link".

Context menu also available for mail merge functionality.

SharePoint Document Merge
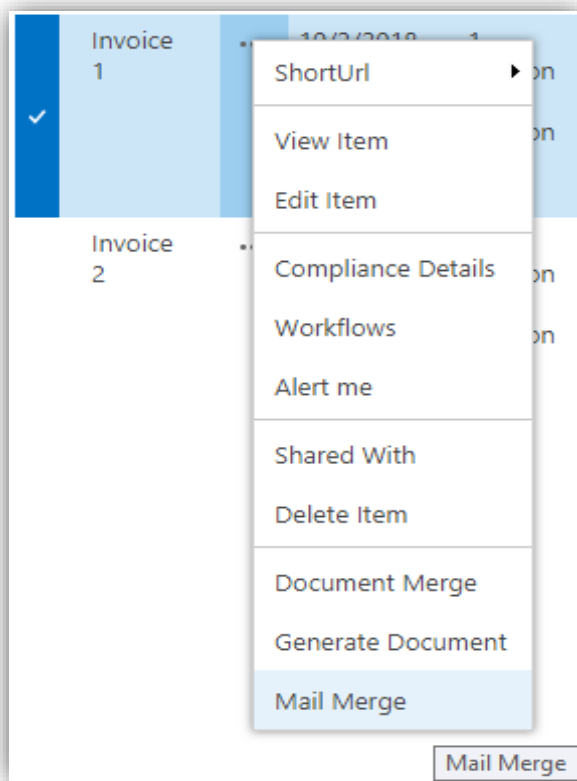
Selecting multiple templates in one go while doing document merge on single item

This option will enable only if User have selected single item to merge from the SharePoint List as show below:

Use multiple templates: If it is checked, then this option will allow users to select multiple templates for single item to perform the merge operation.

You can also select all files from the selected SharePoint Document Library by selecting "Select All" option.

This will merge data of a single item of a list to the multiple templates of different types (Word and/or PowerPoint and/or Excel) from the same document library and store the generated documents to the specified output library.

SharePoint Document Merge Workflow

Deployment Steps

- Workflow Manager box
  - Copy activity assembly (SDM16.OnPrem.Workflow.CustomActivity.dll) to following locations:
    - %ProgramFiles%\Workflow Manager\1.0\Workflow\Artifacts
    - %ProgramFiles%\Workflow Manager\1.0\Workflow\WFWebRoot\bin
  - Add your activity class to the white-list
    - Copy AllowedType.xml file to above two locations if not already present there. Else Copy portion between <AllowedTypes></AllowedTypes> from the given file and paste it under <AllowedTypes></AllowedTypes> portion in the files available at above two locations.
  - Restart "Workflow Manager backend" service by
    - net stop WorkflowServiceBackend and net start WorkflowServiceBackend commands
- SharePoint box
  - Copy DocumentFormat.OpenXml.dll assembly to SharePoint box and GAC it
    - C:\Windows\system32>gacutil.exe -i "Path"
  - Copy GemBox.Document.dll assembly to SharePoint box and GAC it
    - C:\Windows\system32>gacutil.exe -i "Path"
  - Copy GemBox.Spreadsheet.dll assembly to SharePoint box and GAC it
    - C:\Windows\system32>gacutil.exe -i "Path"
  - Copy activity assembly (SDM16.OnPrem.Workflow.CustomActivity.dll) to SharePoint box and GAC it Source
    - C:\Windows\system32>gacutil.exe -i "Path"
  - Add a new .actions4 file (DocumentMergeCodeActivity.actions4) to %CommonProgramFiles%\Microsoft Shared\Web Server Extensions\15\TEMPLATE\1033\Workflow (need top-level node)
  - Reset IIS
- Client
  - Clean up SPD cache (%LocalAppdata%\Microsoft\WebsiteCache)
  - User can also run given batch file to clean cache (clearCashe.bat)
- After that you will get workflow action in SharePoint Designer.

Create Workflow

- Create one SharePoint List. Create columns as per requirements.

SharePoint Document Merge

Columns

A column stores information about each item in the list. The following columns are currently available in this list:

Column (click to edit)	Type
Title	Single line of text
Source	Single line of text
Destination	Single line of text
OutputFileName	Single line of text
DisplayImage	Yes/No
OverWrite	Yes/No
FirstName	Single line of text
LastName	Single line of text
SaveAsPDF	Yes/No
Document Merge WF	Hyperlink or Picture
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- Open SharePoint 2013 Designer.
- Select workflow from left panel
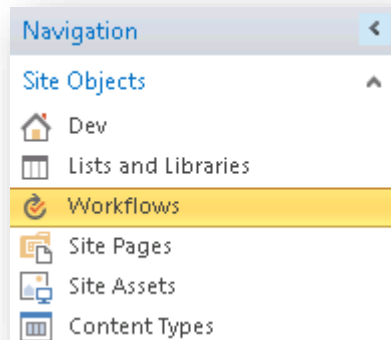
- User has to create reusable workflow and in that add workflow action

- User has to add workflow action from action menu
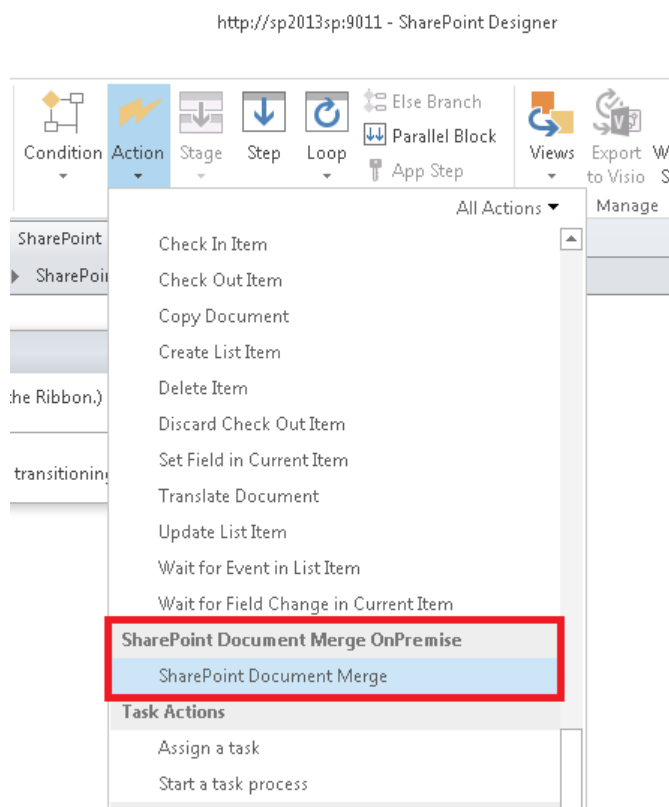
- Set fields same as below screen, user has to enter column names in respective fields
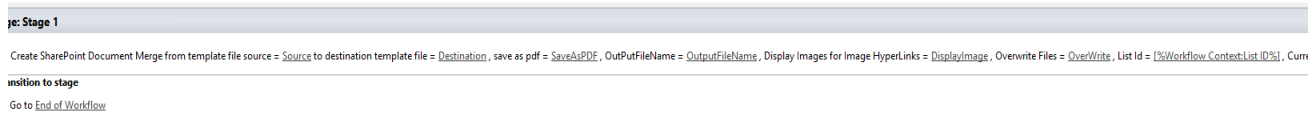
- *Source:*
  - User have to add name of the field which will contain Source Template Path in the list. E.g. Source (simple text input of name of the field)
- *Destination Template file*
  - In Destination, user have to add name of the field which will hold Destination Library Name. E.g. Destination (simple text input of name of the field)
- *Save as pdf*
  - In Save as pdf, user have to set name of the field which will hold the value whether user wants to Save As PDF or not. E.g. SaveAsPDF (simple text input of name of the field)
- *OutputFileName*
  - In OutPutFileName, user has to set name of the field which will hold the value for Output file name. e.g. OutPutFileName (simple text input of name of the field)
- *Display Images for Image HyperLinks*
  - In this field user has to set whether he would like to display hyperlinks as images. E.g. DisplayImage (simple text input of name of the field)
- *Overwrite File*

SharePoint Document Merge

- In this field user has to set name of the field which will hold the value whether user wants to overwrite files or not (simple text input of name of the field)
- *__List Id__*
    - In List Id, user have to set Current List Id. This can be done as displayed below.

nt Document Merge from template file source = Source to destination template file = Destination , save as pdf = SaveAsPDF, OutPutFileName = OutputFileName , Display Images for Image HyperLinks = DisplayImage , Overwrite Files = OverWrite , List Id =

- Click on the blank space after List Id and then click on fx. Then Select Following values in the Dialog box. And click on Ok
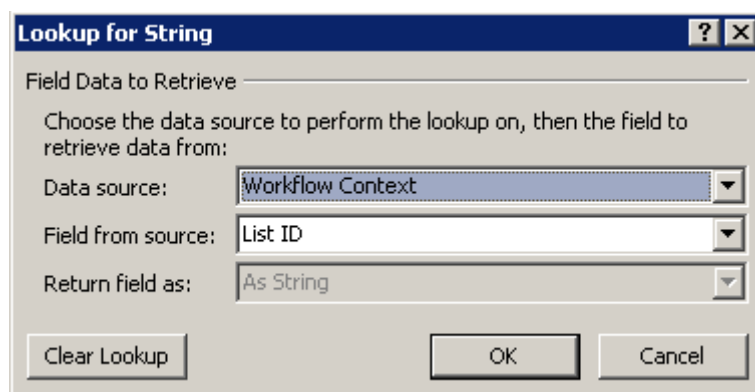
- *__Current Item Id__*
    - For Current Item Id select following values from the dialog box.
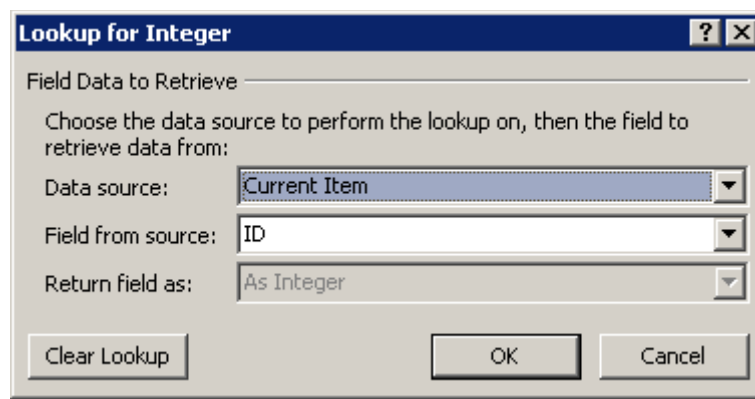
- *__Site URL__*
    - For Site URL select following values from the dialog box
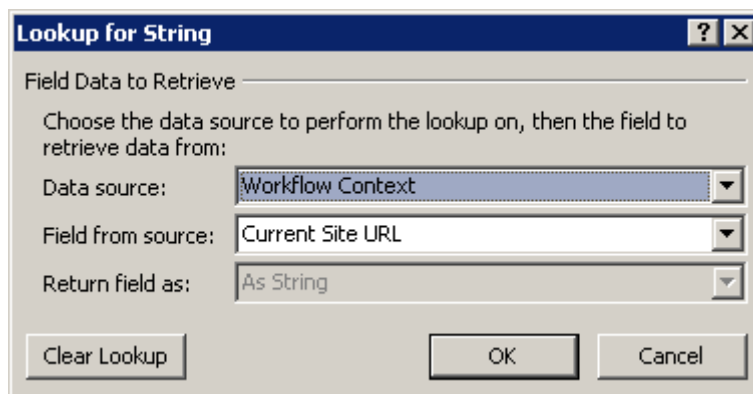
- Then, click on save button from ribbon and click on Publish button from ribbon.
- After publish user will have Workflow on site.

- Go to Created SharePoint List
- Open SharePoint workflow setting of list from ribbon
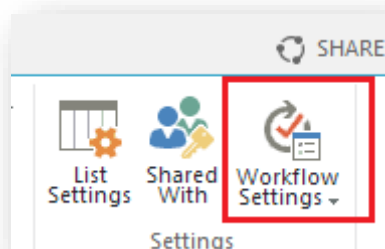
- Add workflow on list with in workflow setting. Please refer below screen shot
- Click on "Add a Workflow" link button
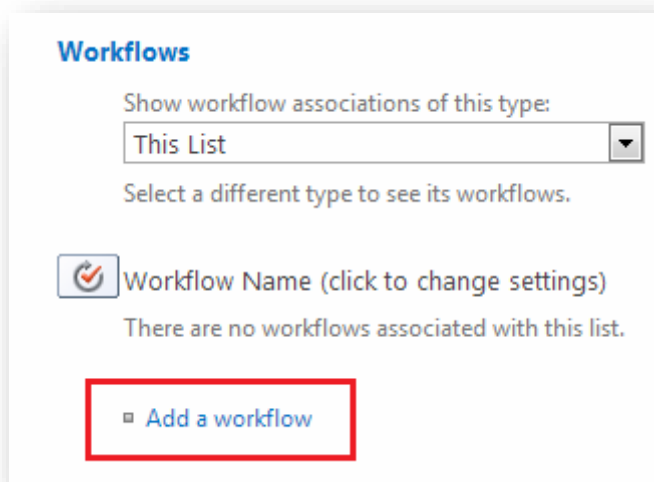
- Select publish workflow form list box and enter workflow name and checked checkbox options.
- Click on OK button.
- Please refer below screen shot

- User has to create to document library. One for Template file and second to save document
- Add new Item in list with values as below
- All other values are self-explanatory except OutPutFileName
  - You can leave OutPutFileName blank or enter field name of the column which you want as the output file name. If you leave it as blank, then the output file name will be like "filename_timestamp" if you enter something like "<<Title>>" then output file name will be like "filename_Test Title1"

✓	Title		Source	Destination	OutputFileName	DisplayImage	OverWrite	FirstName	LastName	SaveAsPDF	Document Merge WF
	Title1 ✻	⋯	Shared Documents\DM_Template.docx	TestLib	Test<<Title>>	Yes	No	Jon	Doe	No	Stage 1

Document Merge Web Service

Installation Instructions

- Add and Install the solution
    - Add-SPSolution –LiteralPath "path to wsp"
    - install-spsolution -Identity SDM15.OnPrem.SDMService.wsp –GACDeployment

Service Url:

Merge List Item to document:

<SiteURL>/_vti_bin/SDMService/DocumentMerge.svc/MergeDocuments

Merge multiple documents to one document:

<SiteURL>/_vti_bin/SDMService/DocumentMerge.svc/MergeDocumentsOfLib

Operations:

Merge List Item to document:

Note: As this is a synchronous service there is no need of GetStatus to poll result.

Following is the sample input xml

```
<?xml version="1.0"?>
<DocumentMergeParams xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
        <DisplayImageforHyperlinks>true</DisplayImageforHyperlinks>
        <ItemId>2</ItemId>
        <ListID>F95BBCF4-04F9-4F1D-A052-B59316B37442</ListID>
        <OutputFilename />
        <OverWriteFiles>true</OverWriteFiles>
        <SaveAsPDF>true</SaveAsPDF>
        <SaveAsPDFOnly>false</SaveAsPDFOnly>
        <SaveAsPDFA>true</SaveAsPDFA>
        <SourceUrl>http://sp2013sp:9011/Shared
    Documents/2016docFile.docx</SourceUrl>
        <TargetUrl>http://sp2013sp:9011/Shared Documents</TargetUrl>
        <SendMail>True</SendMail>
        <MailTemplate>Invoice mail</MailTemplate>
</DocumentMergeParams>
```

Elements explanation:

1. SourceUrl – It's a required field. Full Url to Document Merge Template.
2. TargetUrl – It's a required field. Full Url till Document Library name
3. Item Id – It's a required field. Id of Item whose data will be merged
4. ListID – It's a required field. GUID of the list containing the item to merge data
5. DisplayImageforHyperlinks – In case of word template if you set this field as true then the image hyperlinks will be rendered as images in output. The images should belong to sharepoint library only.
6. OutputFilename – It's an optional field. Here you can specify the name as a placeholder. If you don't specify then the files will be generated with timestamp

7. OverWriteFiles- It's an optional field. Here you can specify whether you want to allow overwriting of files or not. Default is false.

8. SaveAsPDF- It's an optional field. Here you can specify whether you want to save as pdf or not. Default is false

9. SaveAsPDFOnly- It's an optional field. Here you can specify whether you want only PDF copy of merged document or not. Default is false.

10. SaveAsPDFA- It's an optional field. Here you can specify whether you want your pdf file in PDFA format or not. Default is false.

11. SendMail- it's an optional field. Here you can specify whether you want to mail merge or not. Default is false.

12. MailTemplate- Tittle of the mail merge template. If you have set the Email template, you can specify that and perform mail merge.

13. Template Name- it's an optional field. Here you can specify title of pre-config settings template. If you are specifying the template name you just need to pass the item id and template name it will read other information from settings list and perform merge.

Example of how to call service from your application:

```
[DataContract(Namespace = "")]
 public class DocumentMergeParams
{
    [DataMember]
    public bool DisplayImageforHyperlinks { get; set; }
    [DataMember]
    public int ItemId { get; set; }
    [DataMember]
    public string ListID { get; set; }
    [DataMember]
    public string MailTemplate { get; set; }
    [DataMember]
    public string OutputFilename { get; set; }
    [DataMember]
    public bool OverWriteFiles { get; set; }
    [DataMember]
    public bool SaveAsPDF { get; set; }
    [DataMember]
    public bool SaveAsPDFA { get; set; }
    [DataMember]
    public bool SaveAsPDFOnly { get; set; }
    [DataMember]
    public bool SendMail { get; set; }
    [DataMember]
    public string SourceUrl { get; set; }
    [DataMember]
    public string TargetUrl { get; set; }
    [DataMember]
    public string TemplateName { get; set; }
    public DocumentMergeParams()
    { }
  }

HttpWebRequest request =
(HttpWebRequest)HttpWebRequest.Create("YOURWEBAPPLLICATIONURL
/CONTEXTSITE/WEB/_vti_bin/SDMService/DocumentMerge.svc/MergeDocuments");
            request.ContentType = "application/xml; charset=utf-8";
            request.Credentials = new NetworkCredential("username",
"password");
```

```
                DocumentMergeParams docMerge = new DocumentMergeParams (SourceUrl,
    TargetUrl, SaveAsPDF, SaveAsPDFOnly, SaveAsPDFA, DisplayImageforHyperlinks,
    OutputFilename, OverWriteFiels, ItemId, ListID, SendMail, MailTemplate);


                    var serializer = new
        XmlSerializer(typeof(DocumentMergeParams));

                    request.Method = "POST";
                    MemoryStream stream = new MemoryStream();

                    serializer.Serialize(stream, docMerge);
                    stream.Position = 0;
                    StreamReader reader = new StreamReader(stream);
                    byte[] byteData =
        UTF8Encoding.UTF8.GetBytes(reader.ReadToEnd());

                    request.ContentLength = byteData.Length;


                    using (Stream dataStream = request.GetRequestStream())
                    {
                        dataStream.Write(byteData, 0, byteData.Length);
                        dataStream.Close();
                    }

                    var httpResponse = (HttpWebResponse)request.GetResponse();
                    using (var responseStream =
        httpResponse.GetResponseStream())
                    {
                        serializer = new
        XmlSerializer(typeof(DocumentMergeResponse));
                        var response =
        (DocumentMergeResponse)serializer.Deserialize(responseStream);
                        if (response != null)
                        {
                            lblResponseMessage.Text = response.ResponseMessage;
                        }
                    }
```

Merge multiple documents to one document:

Note: As this is a synchronous service there is no need of GetStatus to poll result.

Following is the sample input xml

```
<?xml version="1.0"?>
<DocumentMergeParamsForLib xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <FileType>.pptx</FileType>
  <Header>3.2#This is test header<Header>
  <ItemIds>4124,4125,4142,4143,4144,4145</ItemIds>
  <OutputFilename>TestMergePPTX</OutputFilename>
  <OverWriteFiles>true</OverWriteFiles>
  <SaveAsPDF>false</SaveAsPDF>
  <SaveAsPDFOnly>true</SaveAsPDFOnly>
  <SourceLibID>2D7CC269-59A1-497A-86DE-DDEC2F40382F</SourceLibID>
  <TargetUrl>http://sp1dev2013:8001/Shared Documents</TargetUrl>
```

SharePoint Document Merge

```
</DocumentMergeParamsForLib>
```

Elements explanation:

1. FileType – It's a required field. Specifies Files Type for which merge will performed. Value can be ".docx" or ".pptx".
2. Header-it's a required field. Specifies headers of the merged document. Following options are available for header, you can specify one of following the options:

   0: is for "Include Individual headers".

   1: is for "Include 1st document header for all".

   2: is for "Remove Headers"

   3#CustomHeaderText: this is to add custom headers to the merged document. you can also   specify the position of the custom headers.

   > 3.1 is for Left
   >
   > 3.2 is for Center
   >
   > 3.3 is for right

   For eg "**3.2#Test header**" will add text "**Test header**" as a header of the merged document and alignment of the header will be center.

3. ItemIds – It's a required field. Ids of documents which will be merged. Comma separated values for eg "1,2,3,4". If value is set to Zero or empty then this perform bulk merge.
4. OutputFilename – It's required field. Here you need to specify the name of the output file.
5. OverWriteFiles- It's an optional field. Here you can specify whether you want to allow overwriting of files or not. Default is false.
6. SaveAsPDF- It's an optional field. Here you can specify whether you want to save as pdf or not. Default is false
7. SaveAsPDFOnly- It's an optional field. Here you can specify whether you want only PDF copy of merged document or not. Default is false.
8. SaveAsPDFA- It's an optional field. Here you can specify whether you want your pdf file in PDFA format or not. Default is false.
9. SourceLibID- It's a required field. GUID of the library containing the documents to merge to one document.
10. TargetUrl – It's a required field. Full Url till Document Library name.

Example of how to call service from your application:

```
[DataContract(Namespace = "")]
    public class DocumentMergeParamsForLib
    {
        [DataMember]
        public string FileType { get; set; }
        [DataMember]
        public string Header { get; set; }
        [DataMember]
        public string ItemIds { get; set; }
        [DataMember]
        public string OutputFilename { get; set; }
        [DataMember]
```

```csharp
            public bool OverWriteFiles { get; set; }
            [DataMember]
            public bool SaveAsPDF { get; set; }
        [DataMember]
            public bool SaveAsPDFA { get; set; }
            [DataMember]
            public bool SaveAsPDFOnly { get; set; }
            [DataMember]
            public string SourceLibID { get; set; }
            [DataMember]
            public string TargetUrl { get; set; }
            public DocumentMergeParamsForLib()
                    { }
        }


    HttpWebRequest request =
    (HttpWebRequest)HttpWebRequest.Create("YOURWEBAPPLLICATIONURL
    /CONTEXTSITE/WEB/_vti_bin/SDMService/DocumentMerge.svc/MergeDocumentsOfL
    ib");
     request.ContentType = "application/xml; charset=utf-8";
     request.Credentials = new NetworkCredential("username", "password");
     DocumentMergeParamsForLib docMerge = new DocumentMergeParamsForLib
    (FileType, Header, ItemIds, OutputFilename, OverWriteFiles, SaveAsPDF,
    SaveAsPDFA,SaveAsPDFOnly, SourceLibID, TargetUrl);


            var serializer = new
    XmlSerializer(typeof(DocumentMergeParamsForLib));
            request.Method = "POST";
            MemoryStream stream = new MemoryStream();
            serializer.Serialize(stream, docMerge);
            stream.Position = 0;
            StreamReader reader = new StreamReader(stream);
            byte[] byteData = UTF8Encoding.UTF8.GetBytes(reader.ReadToEnd());

            request.ContentLength = byteData.Length;


            using (Stream dataStream = request.GetRequestStream())
            {
                dataStream.Write(byteData, 0, byteData.Length);
                dataStream.Close();
            }

            var httpResponse = (HttpWebResponse)request.GetResponse();
            using (var responseStream = httpResponse.GetResponseStream())
            {
                serializer = new XmlSerializer(typeof(DocumentMergeResponse));
                var response =
    (DocumentMergeResponse)serializer.Deserialize(responseStream);
                if (response != null)
                {
                    lblResponseMessage.Text = response.ResponseMessage;
                }
            }


        }
```

SharePoint Document Merge Support

Thank you for choosing **SharePoint Document Merge.**
If you require any further assistance, please visit our online Support Centre or Contact Us.

http://cirrussoft.support
https://sharepointdocumentmerge.com