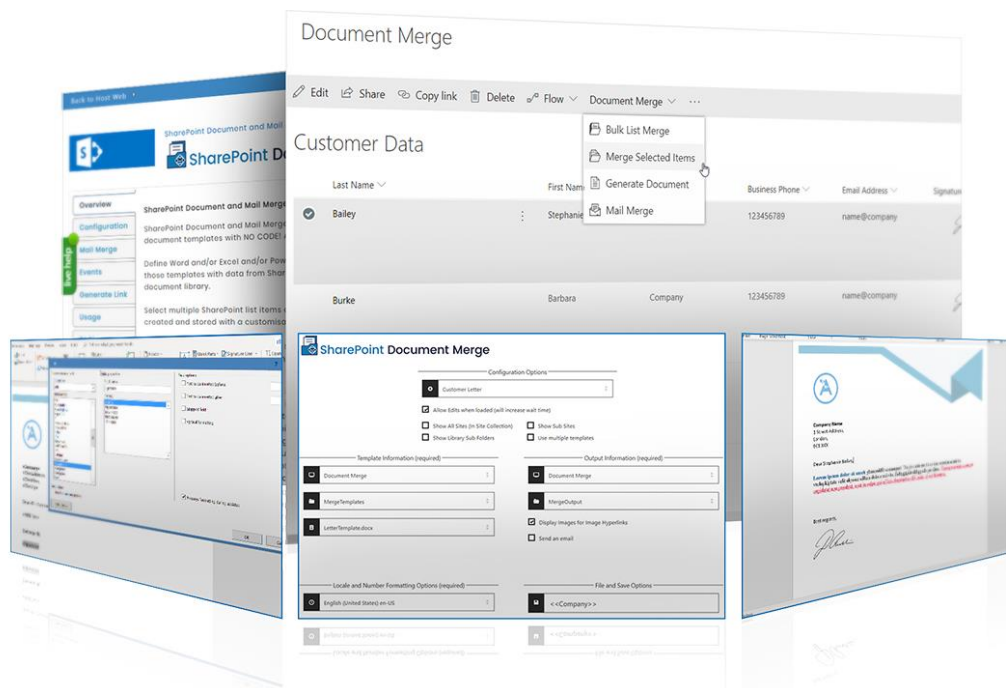


Installation and Configuration Manual



SharePoint Document Merge





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Version History

Change Record

Date	Author	Version	Change reference
2015, September	SharePoint Document Merge	1.0.0.0	Initial Release for SharePoint 2010.
2015, October	SharePoint Document Merge	1.0.0.1	Site Collection Misc. Bug Fixes.
2015, October	SharePoint Document Merge	1.0.0.2	Support for PowerPoint documents.
2015, November	SharePoint Document Merge	1.0.0.3	Support to display Images for Image Hyperlinks Images (Word).
2015, November	SharePoint Document Merge	1.0.0.4	Support to Merge multiple SharePoint list data into 1 Single Word Document (Choose to merge multiple Word documents to 1 single document).
2016, January	SharePoint Document Merge	1.0.0.5	Misc. bug fixes and Improvements. Merge multiple Word documents is now Versioning aware (Choose to merge latest published major version).
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.
2018, February	SharePoint Document Merge	3.0.0.1	Save As PDF only option Option to merge according to content types Show All site for site collection option Allow merge on external lists.
2018, April	SharePoint Document Merge	3.0.0.2	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 2010

Name	Version Approved	Compatibility	Date
SharePoint Document Merge	SharePoint Document Merge Version 5.0.0.0	SharePoint 2010 Foundation SharePoint 2010 Server.	2019, January
SharePoint Document Merge Workflow	SharePoint Document Merge Workflow	SharePoint 2010 Foundation SharePoint 2010 Server.	2016, Sept

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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 documents to a single document!

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 documents to merge to a single Word 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 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 2013 and 2010).

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 or 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.
- Automatically create accompanying PDF documents (SharePoint 2013 and 2010).
- Merge multiple SharePoint list data into 1 Single Word Document (Choose to merge multiple Word documents to 1 single document).
- Merge multiple Word documents into a Single Word document from within a Document Library.
- Mail Merge feature to merge and send mail.
- PDF/A save Option.
- Generate document by clicking a link.
- Excellent UK based support!

SharePoint Document Merge Installation (SharePoint 2010)

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

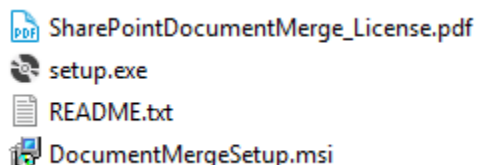
- The Single Site List License activates **SharePoint Document Merge** functionality to only one user specified SharePoint List.
- If the Single Site List License is already installed, then you will only be able to install a higher version License Type (e.g. Site/Site Collection).
- It will upgrade the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

Installing SharePoint Document Merge

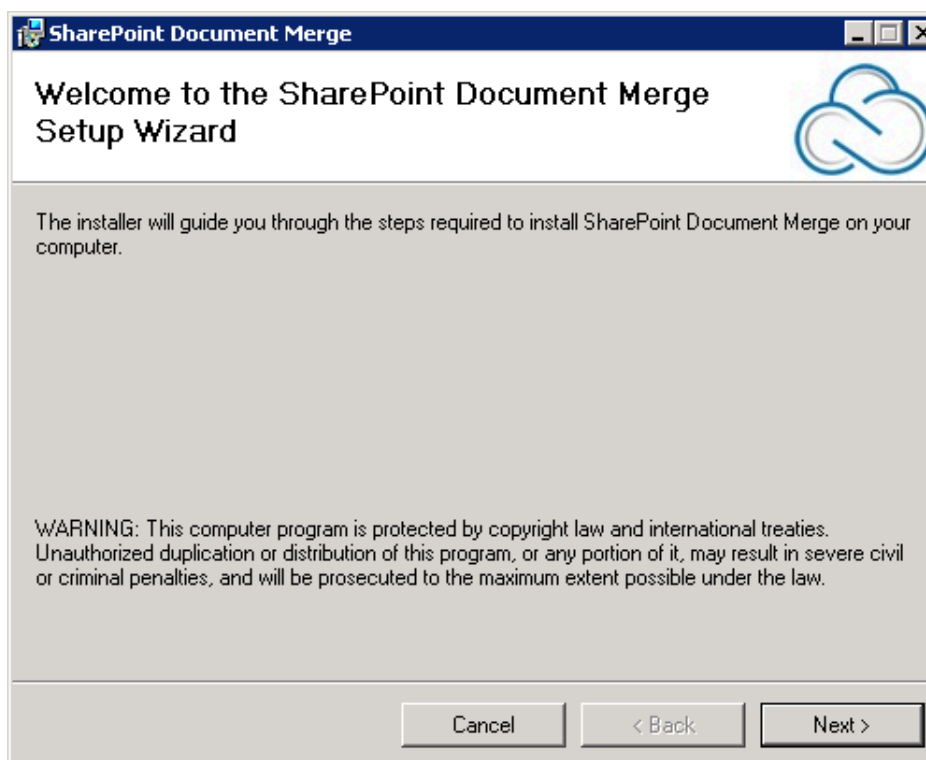
Installation of **SharePoint Document Merge** is a simple affair and can normally be completed by a SharePoint Administrator in a matter of just a few minutes. **SharePoint Document Merge** is provided as a very lightweight, deployable solution file (WSP) and accompanying Installer to make the installation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

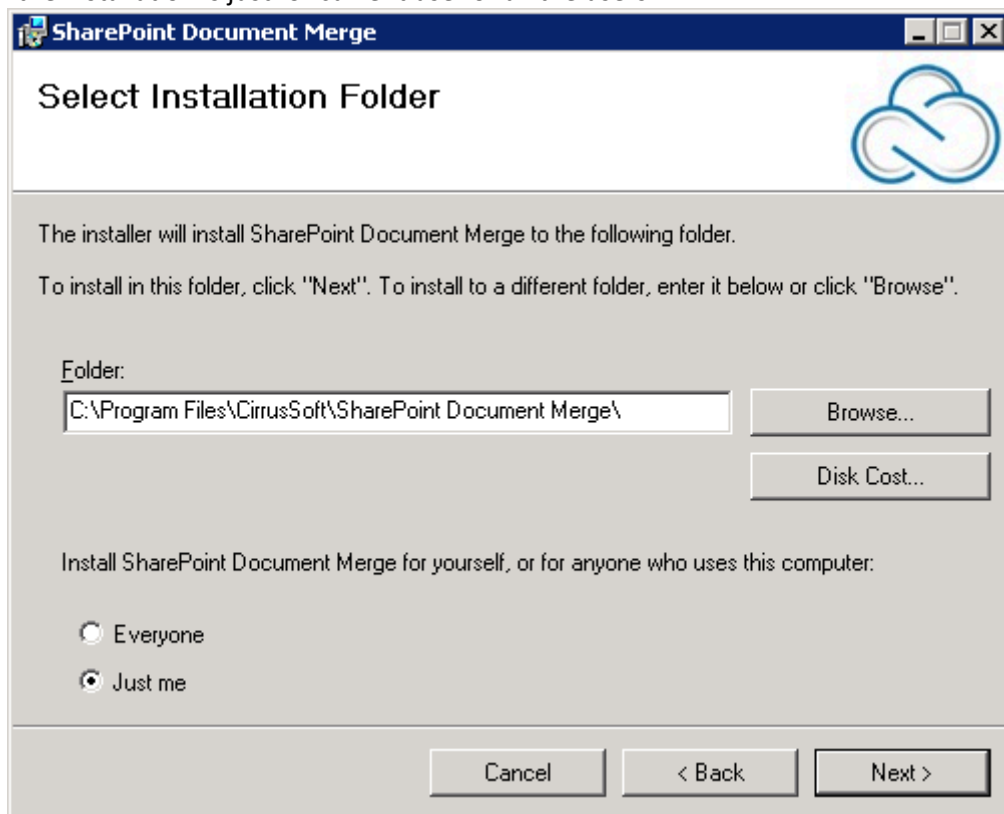


Run the “setup.exe”. This will initiate **SharePoint Document Merge** installation wizard.

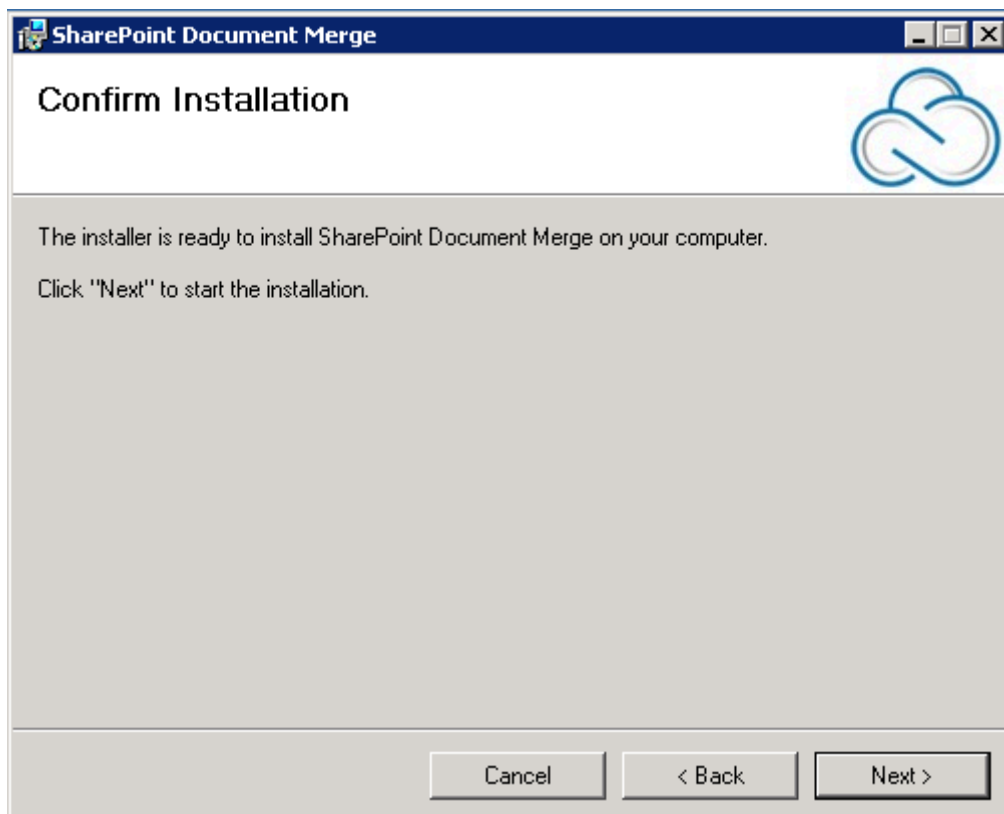


Click on the “Next” button.

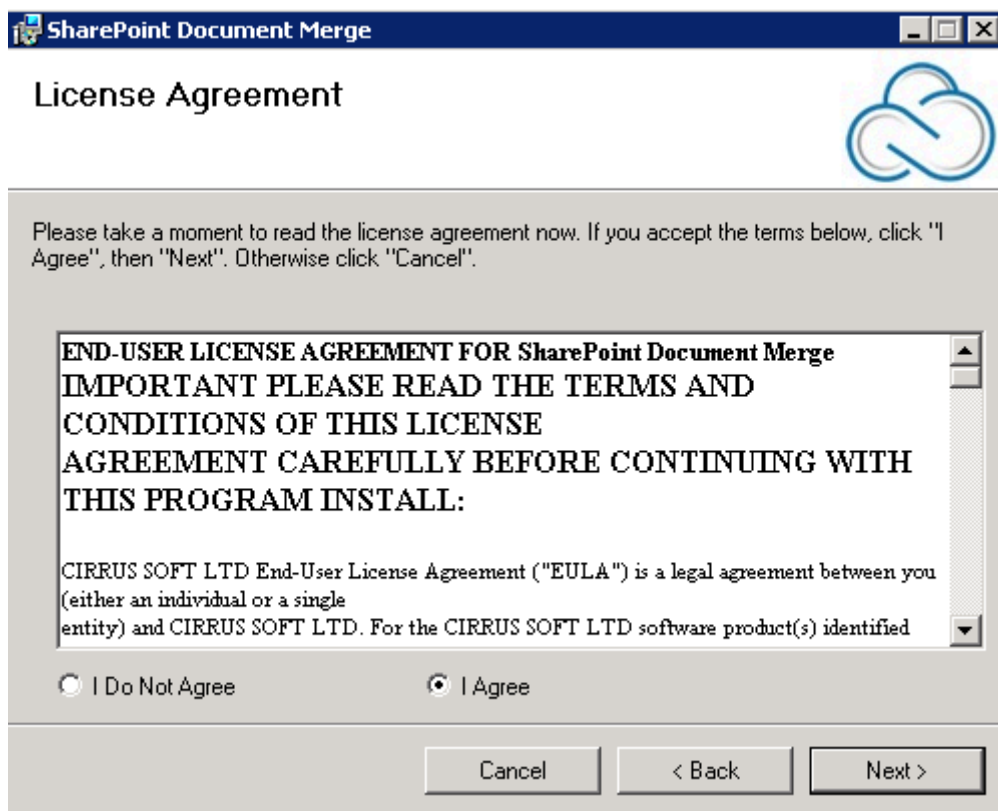
This will allow you to select path where you want to install **SharePoint Document Merge** and whether the installation is just for current user or all the users.



Make the desired selection and click on the “Next” button to proceed.

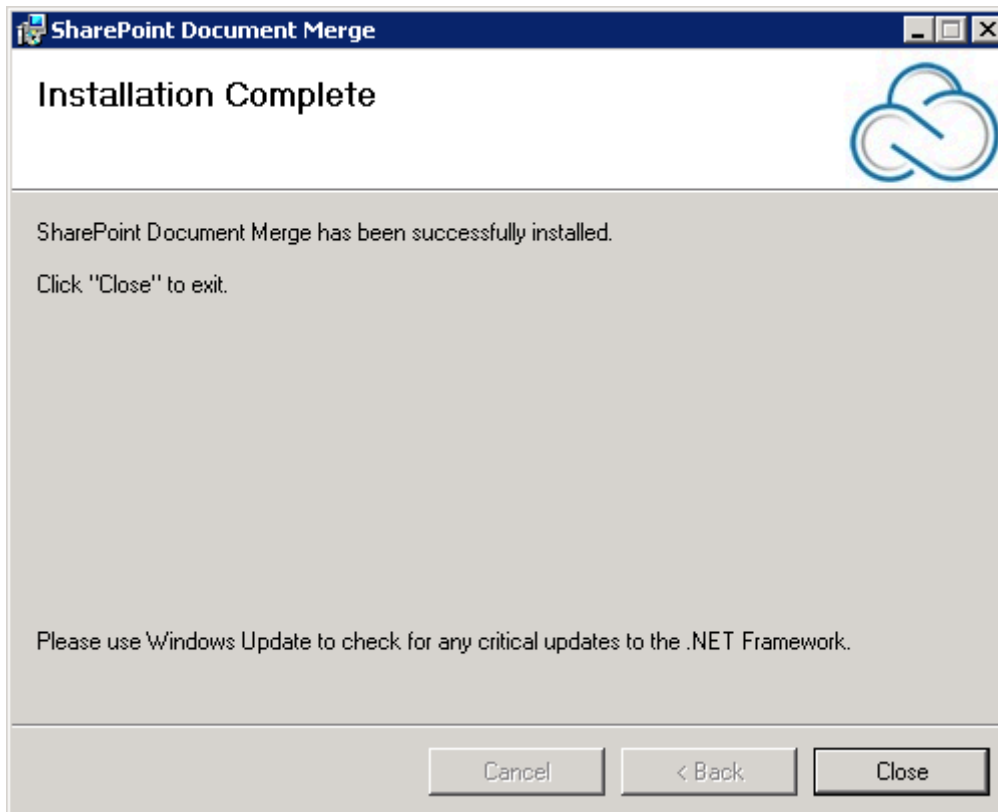


Click on “Next” to confirm Installation. Next you will see the Licence Agreement screen. Read this agreement and only if you agree- Check the “I agree” option and then click the “Next” button.



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

SharePoint 2010 Document and Mail Merge

License Key*

SiteUrl*

Username*

Password*

Domain*

Installation Mode* --Select--

* indicates the required fields

License

☐ Single Site List

☐ Single Site

☐ Site Collection

Version: 5.0.0.0

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:

SharePoint 2010 Document and Mail Merge

License Key* d194b144bc154d967de5c72803ff2356806563f846a8b978df93accec2d19862f2

SiteUrl* http://sp1dev2010:8001/

Username* hp

Password*

Domain* psspl

Installation Mode* Offline

* indicates the required fields

Connect

License

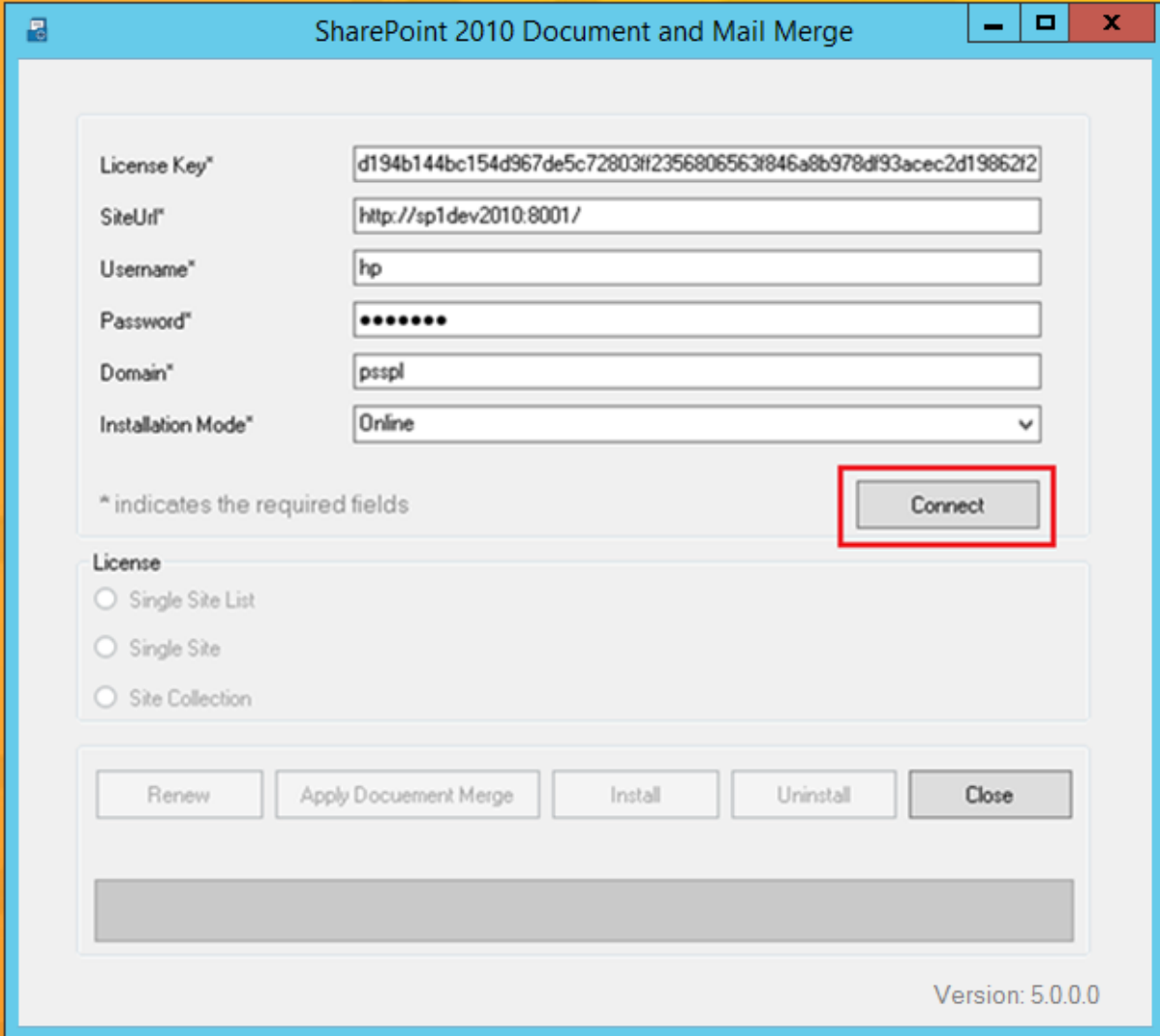
☐ Single Site List

☐ Single Site

☐ Site Collection

Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

Connect Online:

The screenshot shows a window titled "SharePoint 2010 Document and Mail Merge". Inside, there is a "Connect Online" section with several input fields and a "Connect" button highlighted with a red rectangle. Below this is a "License" section with three radio button options. At the bottom, there are five buttons: "Renew", "Apply Document Merge", "Install", "Uninstall", and "Close". A progress bar is visible below the buttons, and the version "Version: 5.0.0.0" is displayed in the bottom right corner.

License Key*	d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2
SiteUrl*	http://sp1dev2010:8001/
Username*	hp
Password*	*****
Domain*	psspl
Installation Mode*	Online

* indicates the required fields

Connect

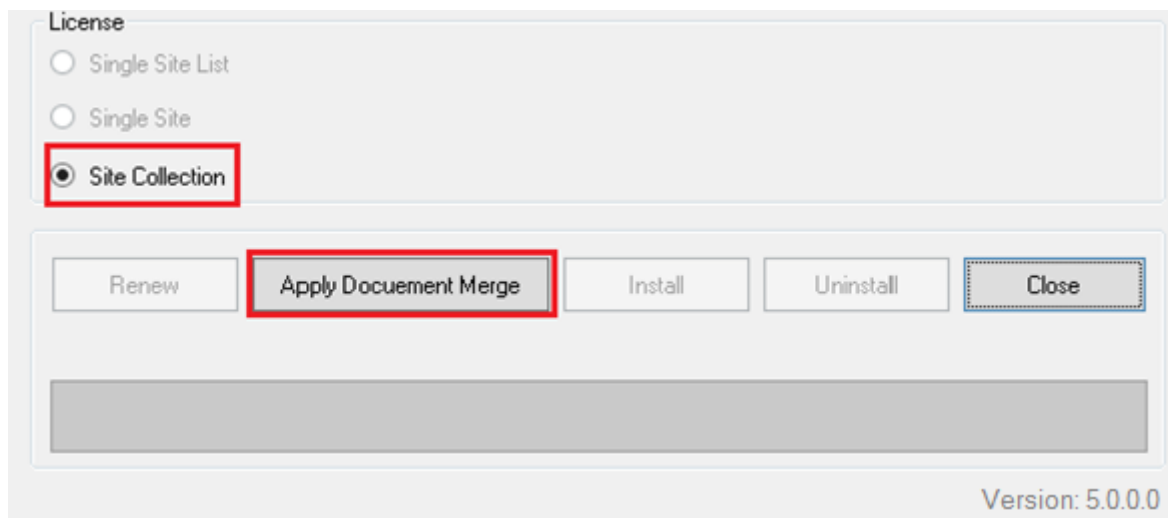
License

- ☐ Single Site List
- ☐ Single Site
- ☐ Site Collection

Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

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.



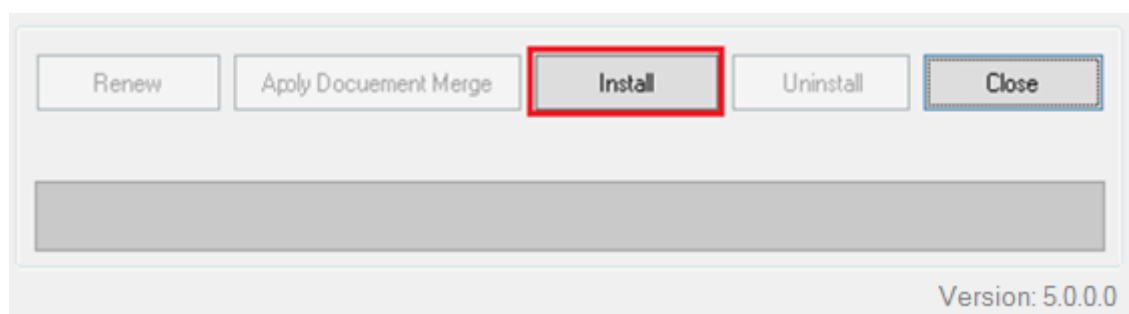
License

☐ Single Site List
☐ Single Site
☒ Site Collection

Renew **Apply Document Merge** Install Uninstall Close

Version: 5.0.0.0

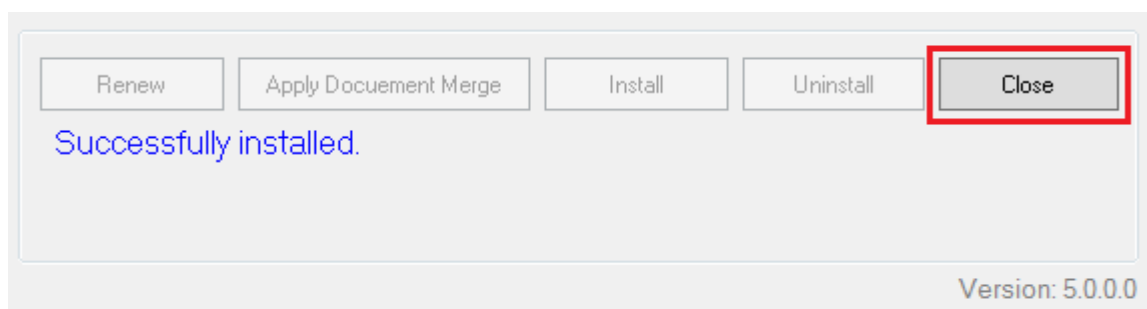
After successful activation “Install” button will be enabled click on “Install” button to install the License.



Renew Apply Document Merge **Install** Uninstall Close

Version: 5.0.0.0

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



Renew Apply Document Merge Install Uninstall **Close**

Successfully installed.

Version: 5.0.0.0

*** 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.

The screenshot shows a window titled "SharePoint 2010 Document and Mail Merge". It contains several input fields for configuration:

- License Key***: d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2
- SiteUrl***: http://sp1dev2010:8001/
- Username***: hp
- Password***: masked with dots
- Domain***: psspl
- Installation Mode***: Offline (selected from a dropdown menu)

A note states: "* indicates the required fields". A red rectangle highlights the **Connect** button.

Below the input fields is a **License** section with three radio button options:

- ☐ Single Site List
- ☐ Single Site
- ☐ Site Collection

At the bottom of the form are five buttons: **Renew**, **Apply Document Merge**, **Install**, **Uninstall**, and **Close**. A large gray rectangular area is located below these buttons.

Version: 5.0.0.0

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.

License

☐ Single Site List

☒ Single Site

☐ Site Collection

Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

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

Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

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

Renew Apply Document Merge Install Uninstall Close

Successfully installed.

Version: 5.0.0.0

*** 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.

The screenshot shows a window titled "SharePoint 2010 Document and Mail Merge". It contains several input fields for configuration:

- License Key***: d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2
- SiteUrl***: http://sp1dev2010:8001/
- Username***: hp
- Password***: masked with dots
- Domain***: psspl
- Installation Mode***: Offline (dropdown menu)

A note states: "* indicates the required fields". A red rectangle highlights the **Connect** button.

Below the input fields is a **License** section with three radio buttons:

- ☐ Single Site List
- ☐ Single Site
- ☐ Site Collection

At the bottom, there is a row of buttons: **Renew**, **Apply Document Merge**, **Install**, **Uninstall**, and **Close**. Below these buttons is a large gray rectangular area.

The version number **Version: 5.0.0.0** is displayed in the bottom right corner.

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 screenshot shows a window titled "SharePoint 2010 Document and Mail Merge". It contains several input fields for configuration:

- License Key***: d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2
- SiteUrl***: http://sp1dev2010:8001/
- Username***: hp
- Password***: (masked with dots)
- Domain***: psspl
- Installation Mode***: Offline (selected from a dropdown menu)

A note states: "* indicates the required fields". A red rectangle highlights the **Connect** button.

Below the input fields is a **License** section with three radio button options:

- ☐ Single Site List
- ☐ Single Site
- ☐ Site Collection

At the bottom, there is a row of buttons: **Renew**, **Apply Document Merge**, **Install**, **Uninstall**, and **Close**. Below these buttons is a large gray rectangular area, likely for a progress bar or log output.

Version: 5.0.0.0

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.

License

☐ Single Site List

☒ Single Site

☐ Site Collection

Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

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

Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

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

Renew Apply Document Merge Install Uninstall Close

Successfully installed.

Version: 5.0.0.0

*** 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 screenshot shows a window titled "SharePoint 2010 Document and Mail Merge". It contains several input fields for configuration:

- License Key***: d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2
- SiteUrl***: http://sp1dev2010:8001/
- Username***: hp
- Password***: masked with dots
- Domain***: psspl
- Installation Mode***: Offline (selected from a dropdown menu)

A note states: "* indicates the required fields". A red rectangle highlights the **Connect** button.

Below the input fields is a **License** section with three radio button options:

- ☐ Single Site List
- ☐ Single Site
- ☐ Site Collection

At the bottom, there is a row of buttons: **Renew**, **Apply Document Merge**, **Install**, **Uninstall**, and **Close**. Below these buttons is a large gray rectangular area, likely for progress or status information.

The version number **Version: 5.0.0.0** is displayed in the bottom right corner.

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.

License

☒ Single Site List

☐ Single Site

☐ Site Collection

Renew **Apply Document Merge** Install Uninstall Close

Version: 5.0.0.0

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

Renew Apply Document Merge **Install** Uninstall Close

Version: 5.0.0.0

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

Renew Apply Document Merge Install Uninstall **Close**

Successfully installed.

Version: 5.0.0.0

*** 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.

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.

The screenshot shows a Windows-style application window titled "SharePoint 2010 Document and Mail Merge". The window contains a form with the following fields:

- License Key***: A text box containing the value "d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2".
- SiteUrl***: A text box containing the value "http://sp1dev2010:8001/".
- Username***: A text box containing the value "hp".
- Password***: A text box containing seven dots, indicating a masked password.
- Domain***: A text box containing the value "pspl".
- Installation Mode***: A dropdown menu with "Offline" selected.

Below the fields, there is a note: "* indicates the required fields". To the right of this note is a button labeled "Connect", which is highlighted with a red rectangular box.

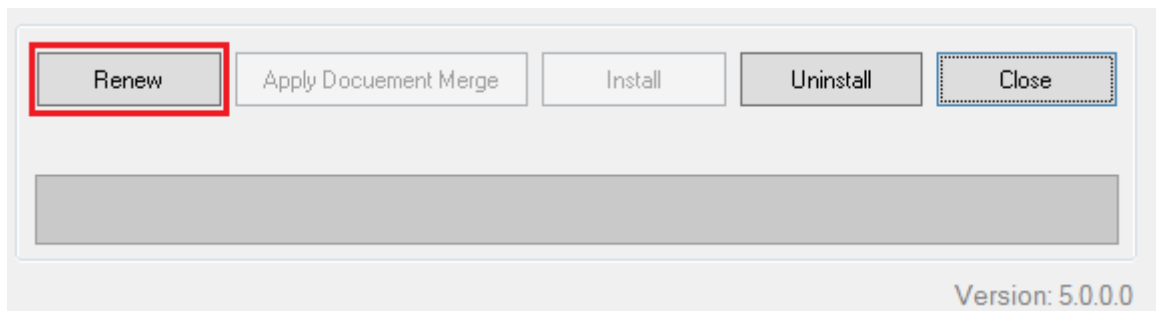
Below the "Connect" button, there is a section titled "License" with three radio button options:

- ☐ Single Site List
- ☐ Single Site
- ☐ Site Collection

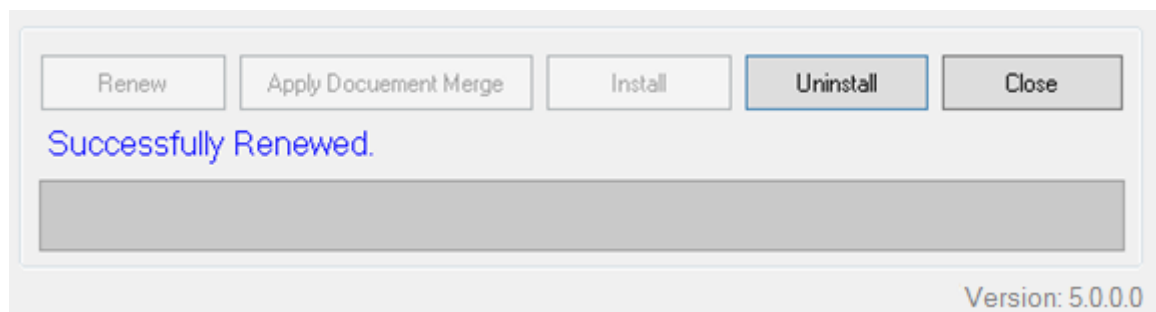
At the bottom of the form, there are five buttons: "Renew", "Apply Document Merge", "Install", "Uninstall", and "Close". Below these buttons is a large, empty rectangular box.

In the bottom right corner of the window, the text "Version: 5.0.0.0" is displayed.

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 2010)

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.

SharePoint 2010 Document and Mail Merge

License Key* d194b144bc154d967de5c72803ff2356806563f846a8b978df93acec2d19862f2

SiteUrl* http://sp1dev2010:8001/

Username* hp

Password*

Domain* psspl

Installation Mode* Offline

* indicates the required fields

Connect

License

☐ Single Site List

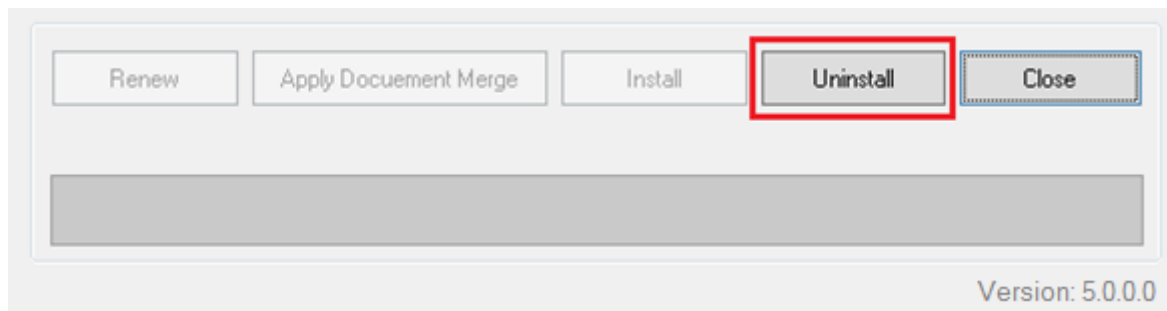
☐ Single Site

☐ Site Collection

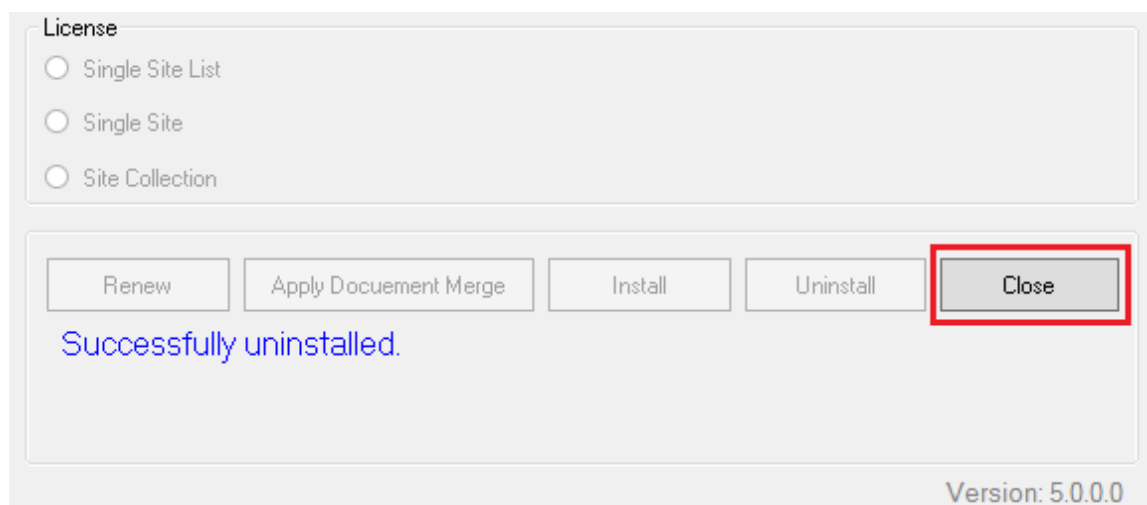
Renew Apply Document Merge Install Uninstall Close

Version: 5.0.0.0

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;

-  SharePointDocumentMerge_License.pdf
-  setup.exe
-  README.txt
-  DocumentMergeSetup.msi

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

Solution Management

Name

sharepoint_document_merge.wsp

How to Use SharePoint Document Merge?

Create your Word, Excel and 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:

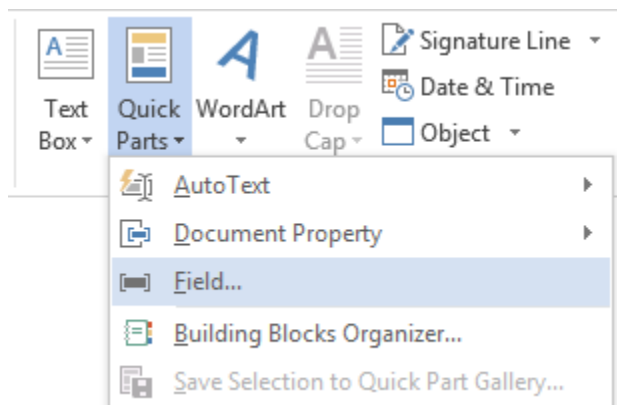
/_layouts/FldEdit.aspx?List=%7BD58F8F2A%2DEB69%2D4F6D%2D9296%2D2A36C6A58DA8%7D&FieldId=FirstName

“FirstName” is the **Internal Name** to be used as the Merge Field Name (Word) or Place holder (Excel, PowerPoint).

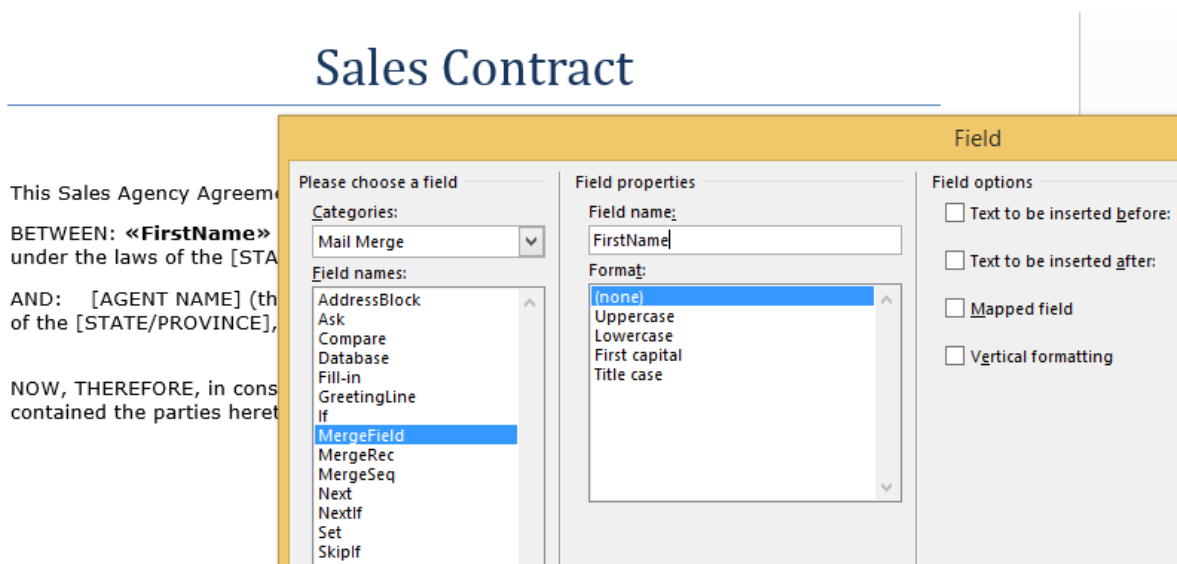
Create a Microsoft Word Template

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:
 - o 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	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).

INVOICE

Your Company Name

Your Company Slogan

Street Address
City, ST ZIP Code
Phone
Fax

DATE: September 9, 2015
INVOICE # 100
FOR: Project or Service Description
BILL TO: <<FirstName>>
Company Name
Street Address
City, ST ZIP Code
Phone

DESCRIPTION	AMOUNT
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- 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:
 - o For ascending order:

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

<<RangeEnd:ListName#LookupColumn# colNameToOrderBy:Asc>>

- For descending order:

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

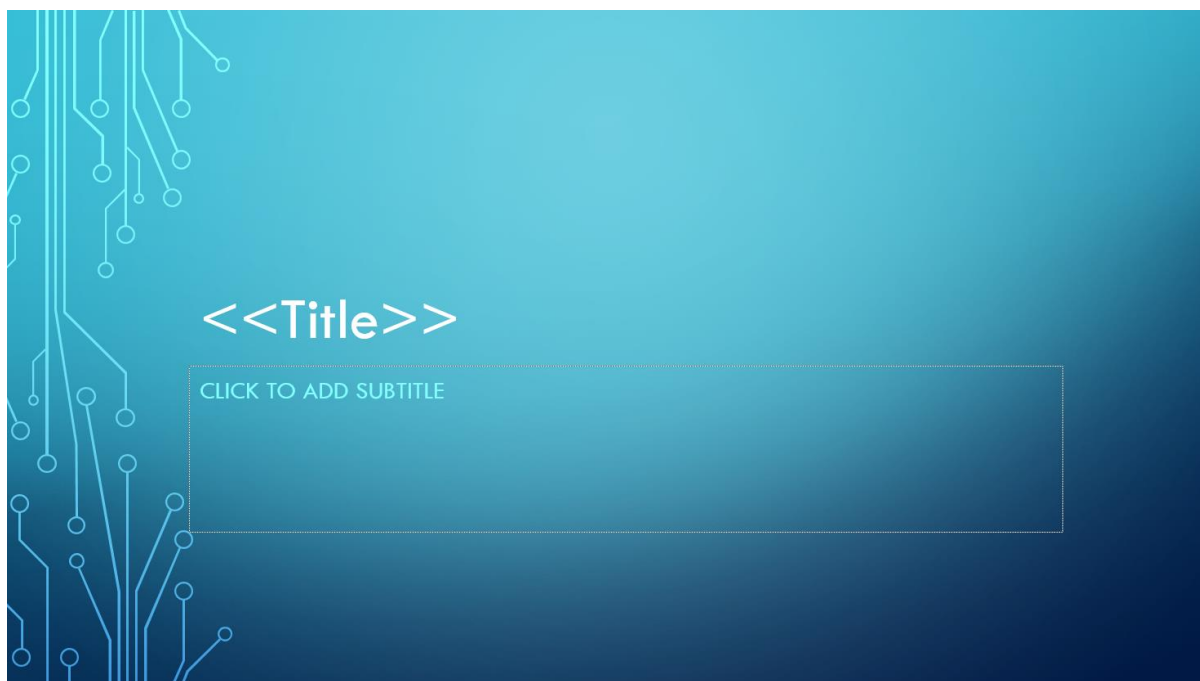
<<RangeEnd:ListName#LookupColumn# colNameToOrderBy:Dsc>>

Title	Date	Hours	Price	
<<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).

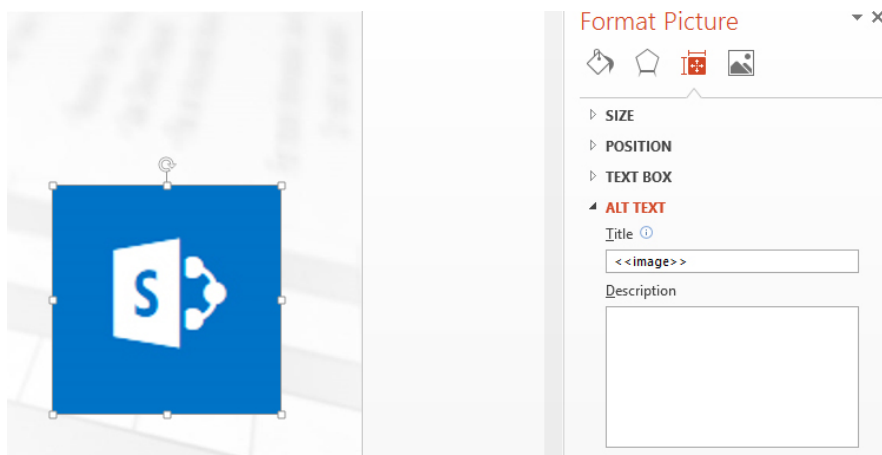


- Apply Place Holders (corresponding to the SharePoint List data) as required for the layout of the template and save the document as .pptx. This template is now ready to be used for **SharePoint Document Merge**.

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

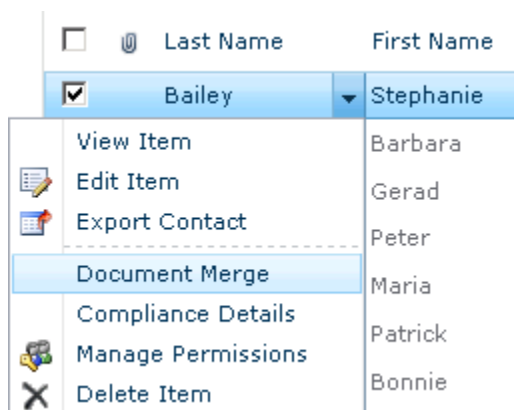
Once installed (with the appropriate License Type) **SharePoint Document Merge** options are made available on all List Items Context Menu and the Lists Ribbon Menu. Also, for Word Documents within Document Libraries.

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.

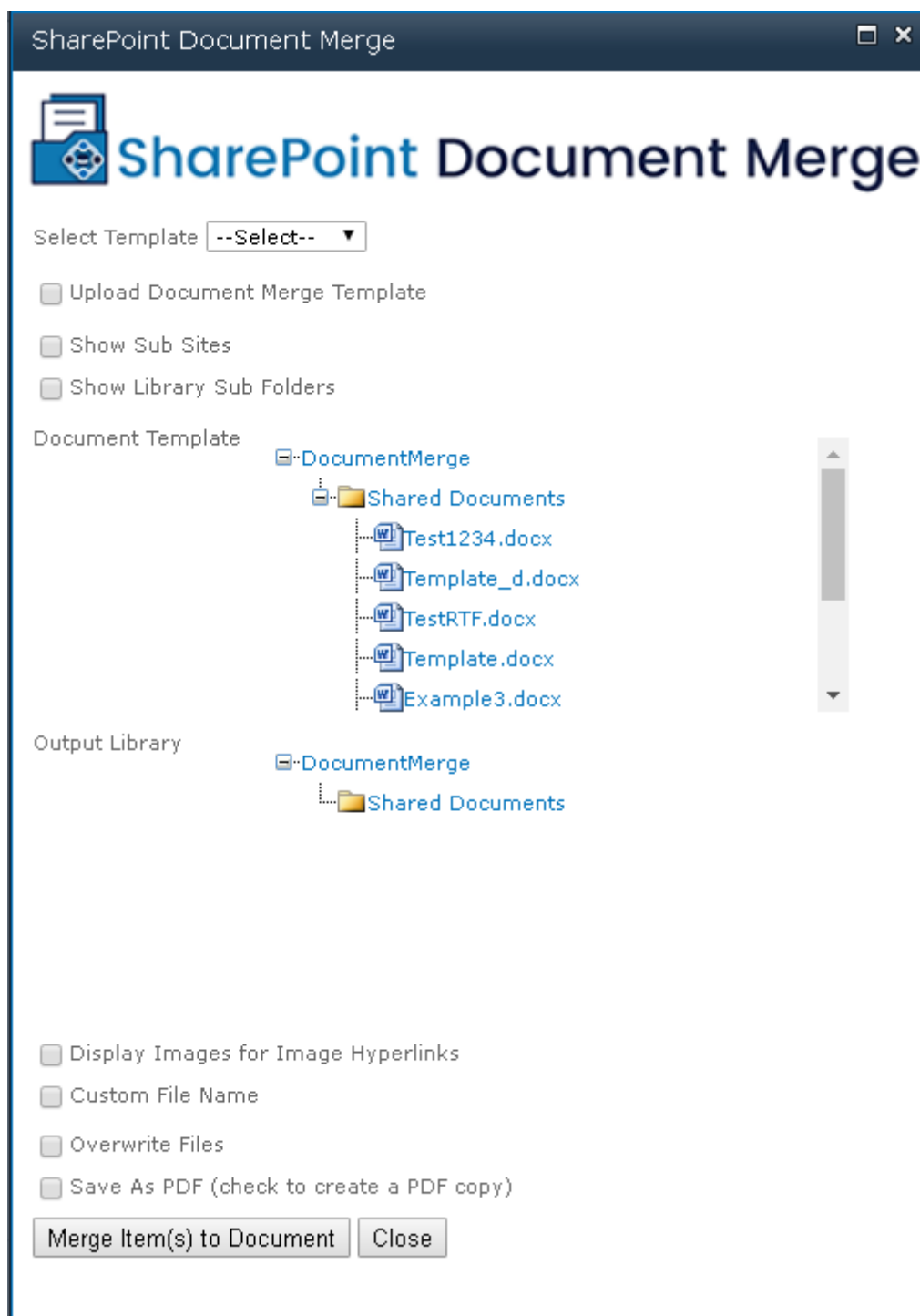
Select multiple SharePoint list items or Bulk Merge an entire List. A document for each list row (based on your selected template) will be automatically created and stored with a customisable file name to be easily identified.

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”.



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.

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

Upload Document Merge Template: Check to browse for the Word/Excel/PowerPoint 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>>.

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 specified SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

<input type="checkbox"/> Type	Name
	Invoice_20150909180440745 
	Invoice_Bailey_Stephanie 
	SalesContract_20150909180315980 
	SalesContract_20150909180315980 
	SalesContract_Bailey_Stephanie 
	SalesContract_Bailey_Stephanie 

INVOICE

Your Company Name

Your Company Slogan

Street Address
City, ST ZIP Code
Phone
Fax

DATE: September 9, 2015

INVOICE # 100

FOR: Project or Service Description

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

DESCRIPTION	AMOUNT
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Sales Contract

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

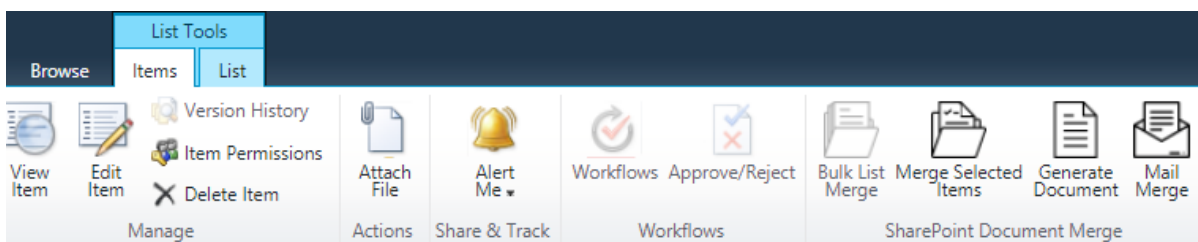
BETWEEN: Stephanie Bailey (the "Principal"), a corporation organized and existing under the laws of the [STATE/PROVINCE], with its head office located at:

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".

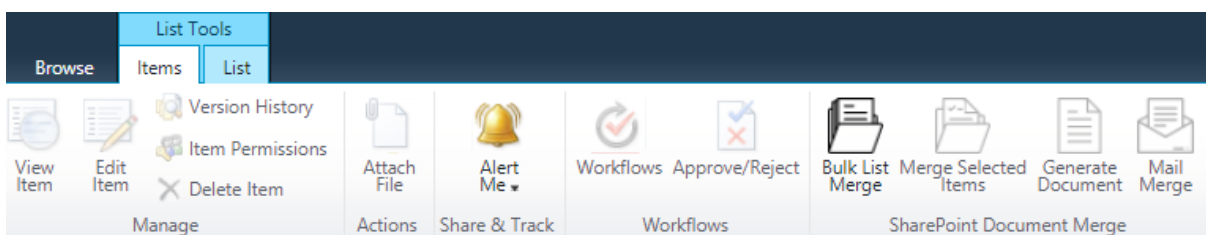


Once processing is complete the Documents (one for each List Item row) will be saved in the user specified SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

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.

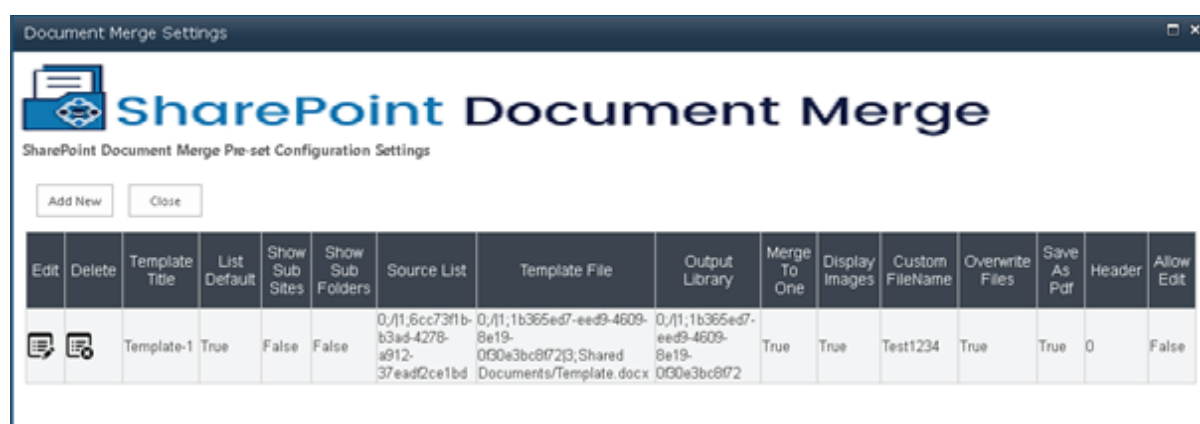
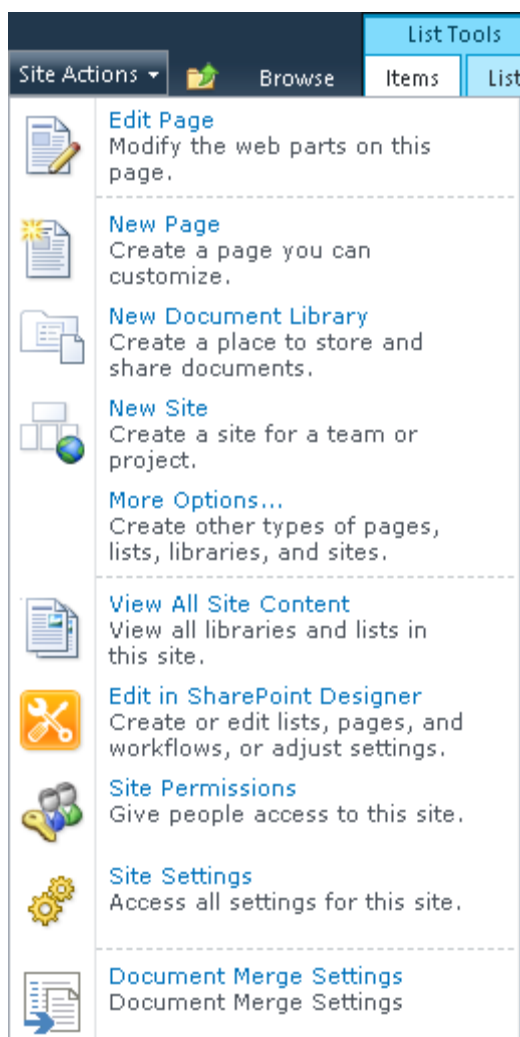
- Go to the required SharePoint List.
- Click on the “Bulk List Merge” Ribbon Menu button.
- The SharePoint Document Merge options window will appear. Choose as required and click “Merge Item(s) to Document”.



Once processing is complete the Documents (one for each List Item row) will be saved in the user specified 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.

Document Merge Settings

 **SharePoint Document Merge**

Template Name


☐ List Default


☐ Allow Edit


☐ Show Sub Sites


☐ Show Library Sub Folders


Source List


 DocumentMerge


 Announcements

 Calendar


 Invoices


 LessonsLearned_EE

 LessonsLearned_ESN


 LessonsLearned_Shared


Document Template

 DocumentMerge

 Shared Documents

Output Library

 DocumentMerge

 Shared Documents

☐ Merge to 1 Single Document

☐ Custom File Name

☐ Display Images for Image Hyperlinks

☐ Overwrite Files

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

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.

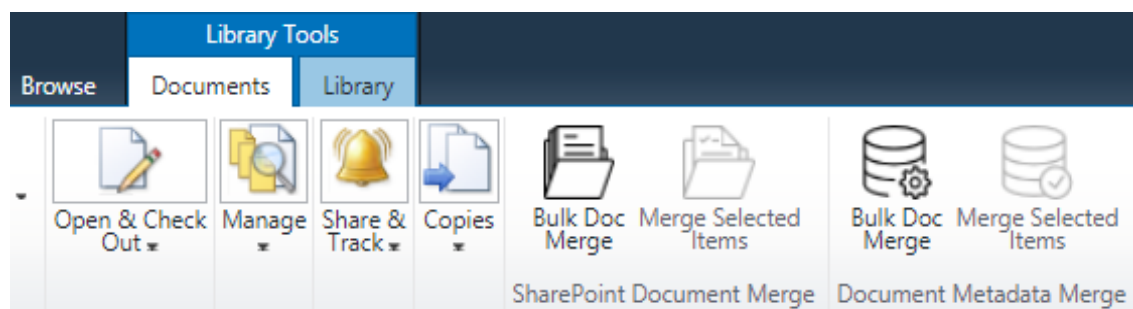
Source list : Select the SharePoint list, from within the site, for which the pre-set configuration settings will apply.

*All other options for setup are described above (pages 30 and 31).

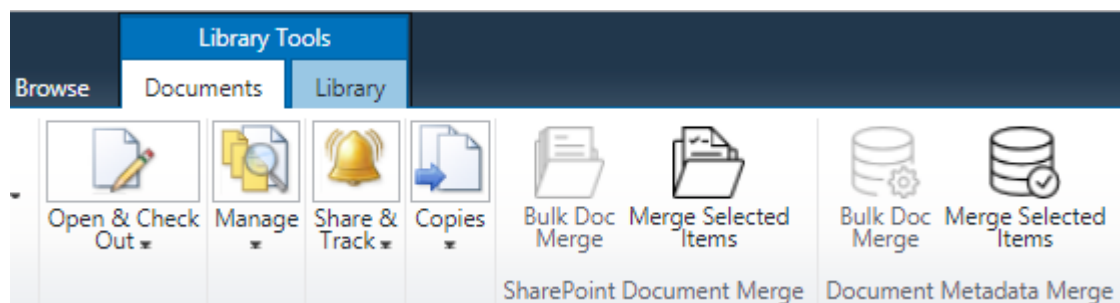
Merge Multiple Word Documents to a Single Word Document

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

SharePoint Document Merge

 **SharePoint Document Merge**

Documents will be merged in the order they are selected.

☐ Show Sub Sites ☐ Show All Sites

☐ Show Library Sub Folders

Select content type

OutPut Library

- DocumentMerge
 - OutPutDocs
 - Shared Documents
 - SharePoint_Templates

Custom File Name

Please enter a valid file name.

☒ Merge Word Files ☐ Merge PowerPoint Files

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

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


☐ Overwrite Files

Header

☒ Include latest published major version

Bulk Doc Merge

SharePoint Document Merge



SharePoint Document Merge

Documents will be merged in the order of their document id.


☐ Show Sub Sites
 ☐ Show All Sites


☐ Show Library Sub Folders


Select view for bulk merge All Documents ▼


Select content type All ▼

OutPut Library

 DocumentMerge

 OutPutDocs

 Shared Documents

 SharePoint_Templates

Custom File Name

Please enter a valid file name.

☒ Merge Word Files
 ☐ Merge PowerPoint Files

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

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

☐ Overwrite Files

Header Include Indiidual Document Headers ▼

☒ Include latest published major version

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 Library: 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 merging Word documents. This applies when versioning is turned on for a document library.

Document Merge Functionality on Metadata of Document Library.

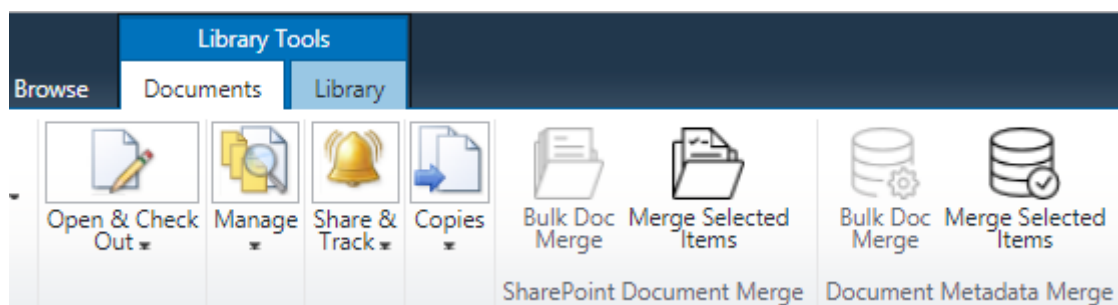
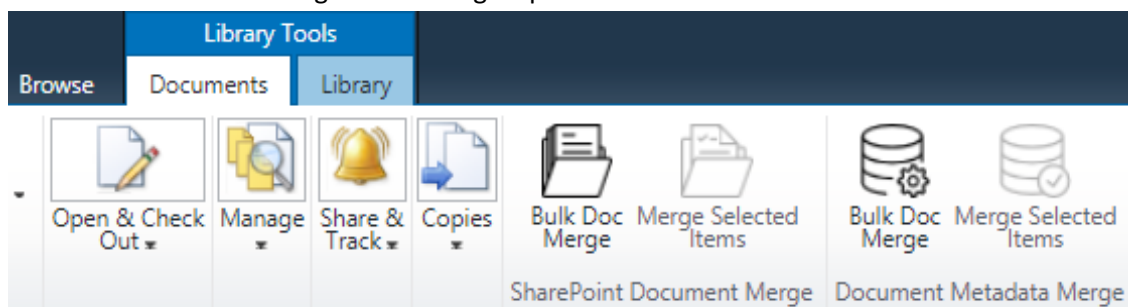
You can also merge metadata of documents of Document Library.

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.

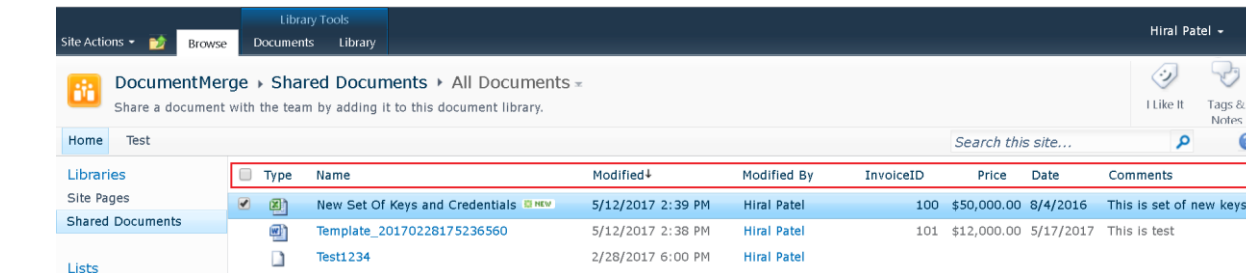
Define Word and/or Excel and/or PowerPoint templates and store them in Document Libraries, then easily merge those templates with metadata from SharePoint Libraries. Automatically generate and output the populated documents to a user specified SharePoint Document Library.

You can choose to “**Bulk Doc Merge**” or “**Merge Selected Items**”.

- Select particular 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.



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



- 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

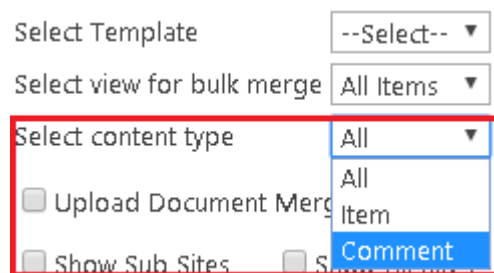
Comments: This is set of new keys

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.

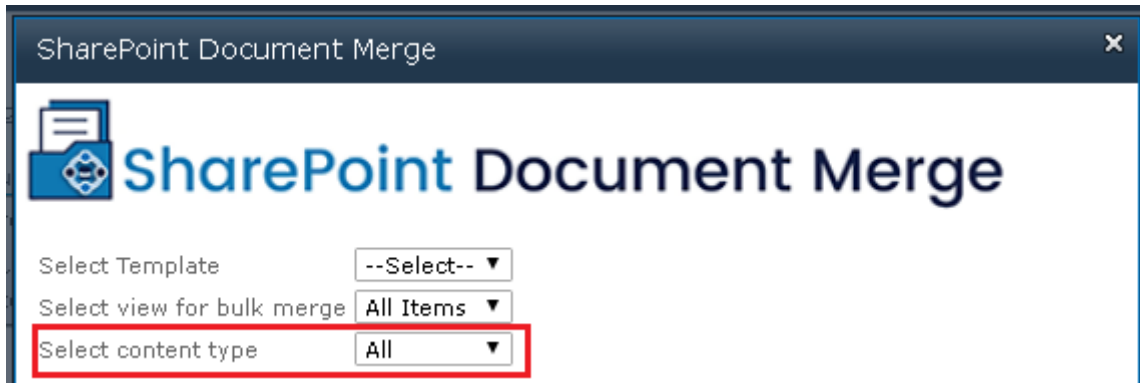
This option is available when you select bulk merge or selected merge (for more than 2 items).

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



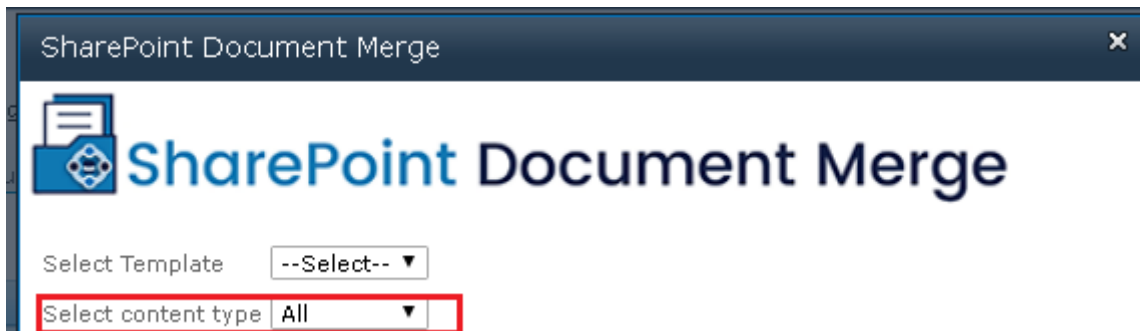
The screenshot shows a web interface for merging documents. It includes three dropdown menus: 'Select Template' with '--Select--', 'Select view for bulk merge' with 'All Items', and 'Select content type' with 'All'. Below these are two checkboxes: 'Upload Document Merge' and 'Show Sub Sites'. The 'Select content type' dropdown is open, showing a list with 'All', 'Item', and 'Comment' (highlighted in blue). A red rectangle highlights the 'Select content type' dropdown and the checkboxes below it.

Bulk Merge



The screenshot shows the 'SharePoint Document Merge' dialog box. The title bar reads 'SharePoint Document Merge' with a close button. Below the title bar is a header area with a folder icon and the text 'SharePoint Document Merge'. Underneath, there are three dropdown menus: 'Select Template' with '--Select--', 'Select view for bulk merge' with 'All Items', and 'Select content type' with 'All'. The 'Select content type' dropdown is highlighted with a red rectangular box.

Selected Merge

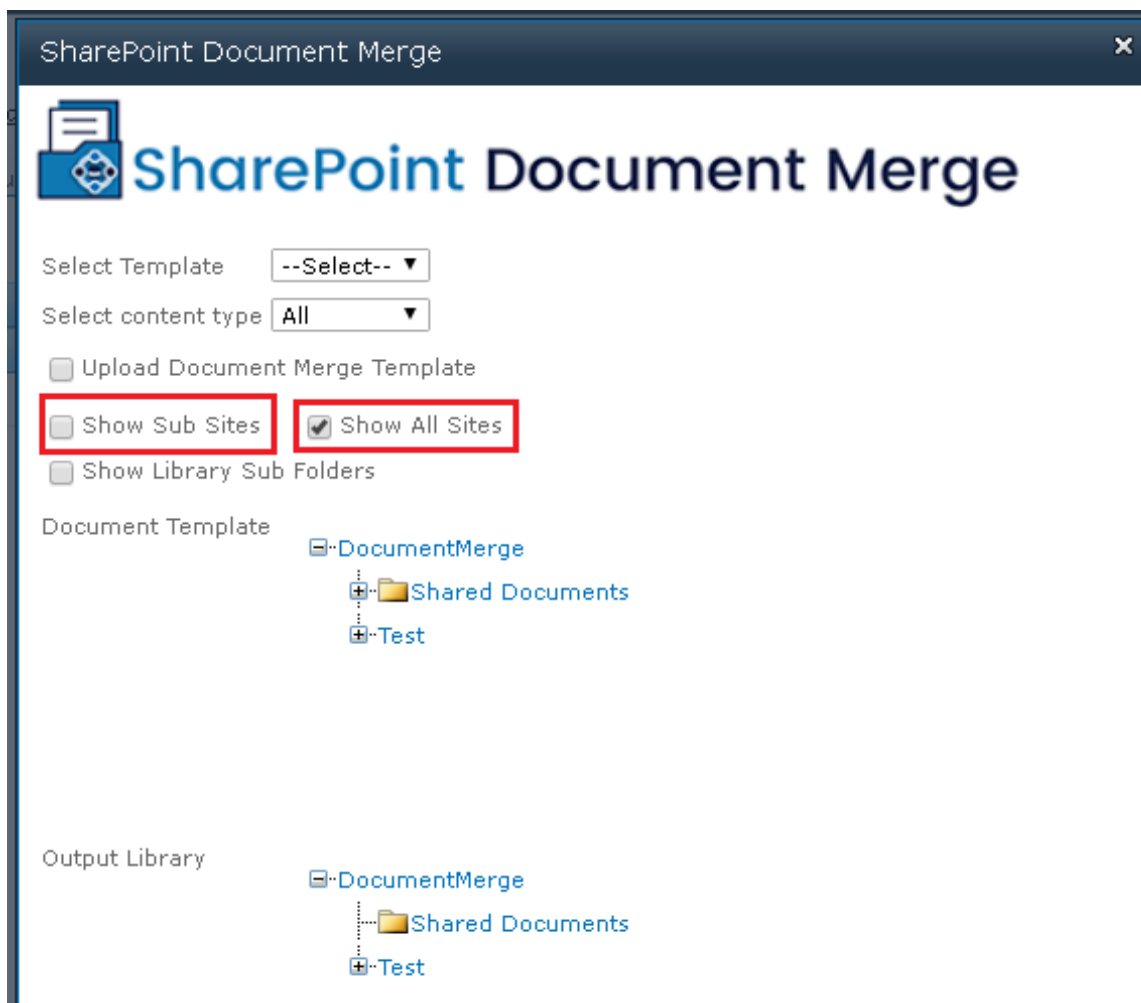


The screenshot shows the 'SharePoint Document Merge' dialog box. The title bar reads 'SharePoint Document Merge' with a close button. Below the title bar is a header area with a folder icon and the text 'SharePoint Document Merge'. Underneath, there are two dropdown menus: 'Select Template' with '--Select--' and 'Select content type' with 'All'. The 'Select content type' dropdown is highlighted with a red rectangular box.

Show All Sites or Sub Sites option

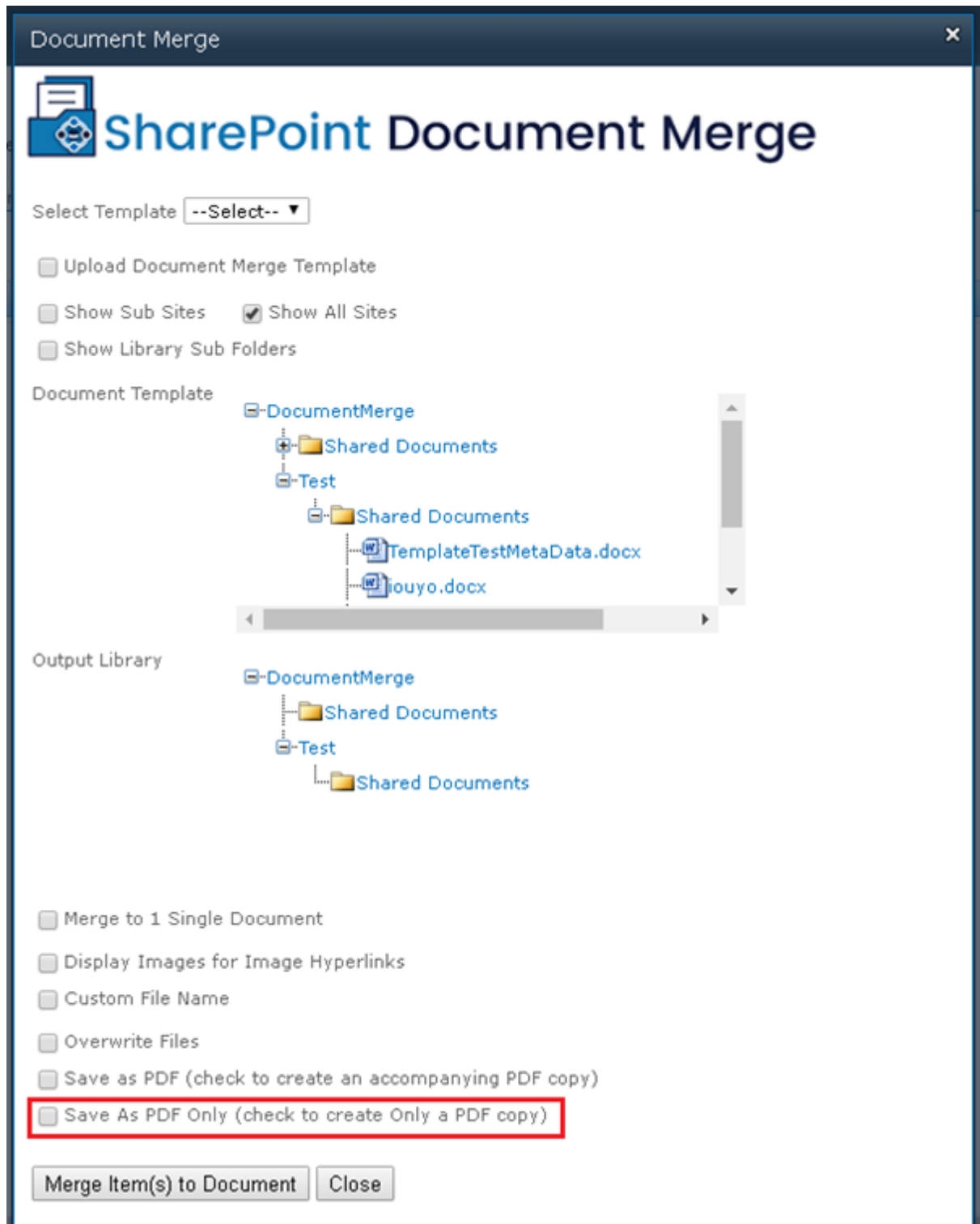
Show All Sites: This option will show all the sites available in the current site collection so you can select any of these sites to select template file or to store merged file to the output library regardless of where app is installed.

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.



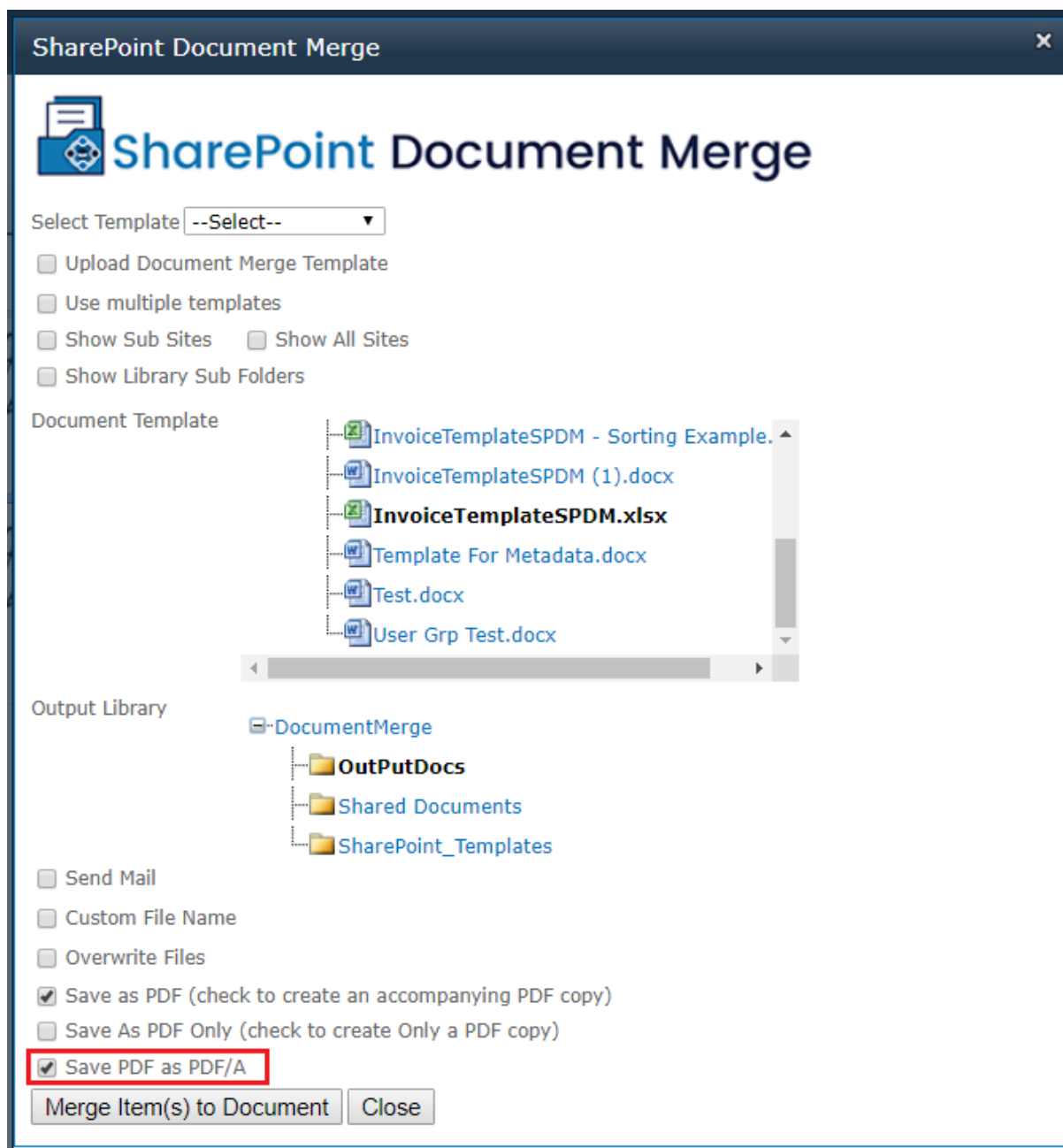
Save As PDF only functionality

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.



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/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.

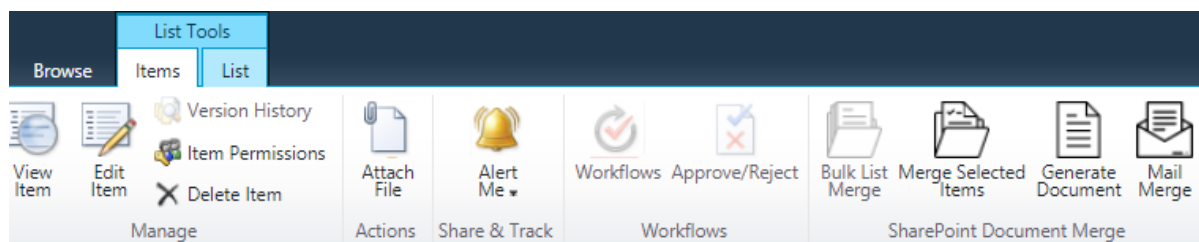
E.g.: Your URL will be like

[“http://SharePoint/Web1/_layouts/SharePointDocumentMerge/GenerateDocument.aspx?SPListItemId=1&SPListId={3b492a0c-585d-4216-a14b-95f343844022}&open=1”](http://SharePoint/Web1/_layouts/SharePointDocumentMerge/GenerateDocument.aspx?SPListItemId=1&SPListId={3b492a0c-585d-4216-a14b-95f343844022}&open=1)

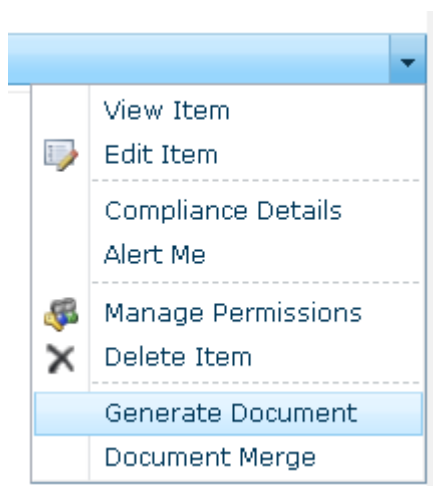
- Now whenever you place this link, on click, it will generate the merged document and open in a browser directly or download it according to your choice.

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.



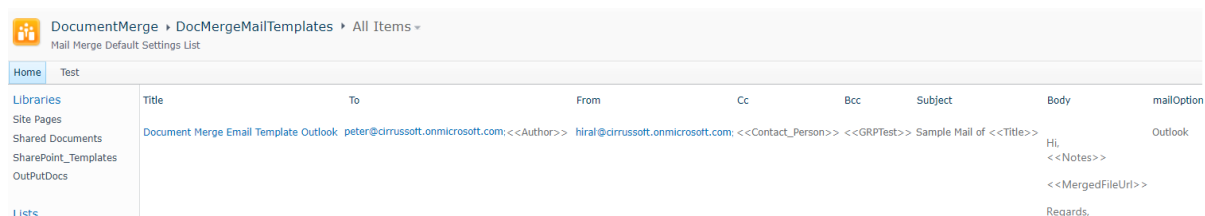
Send Mail Option

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.



Title *	Document Merge Email Template Outlook
To	peter@cirrussoft.onmicrosoft.com;<<Author>>
From	hiral@cirrussoft.onmicrosoft.com.com
Cc	<<Contact_Person>>
Bcc	<<GRPTest>>
Subject	Sample Mail of <<Title>>
Body	<p>Hi,</p> <p><<Notes>></p> <p><<MergedFileUrl>></p> <p><<MergedPDFFileUrl>></p> <p>Regards,</p> <p>Peter</p> <p><<Signature>></p> <p><<Created>></p>
mailOption *	Outlook ▼

- **Title:** Unique and required field to identify the email template.
- **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:

To peter@cirrussoft.onmicrosoft.com;<<Author>>

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

- **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:

Cc <<Contact_Person>>;sunil@cirrussoft.onmicrosoft.com

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

- **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:

Bcc

<<GroupTitle>>;lian@cirrussoft.onmicrosoft.com

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

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

From

hiral@cirrussoft.onmicrosoft.com

- **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.

Body

Hi,

<<Notes>>

<<MergedFileUrl>>

<<MergedPDFFileUrl>>

Regards,

Peter

<<Signature>>

<<Created>>

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

mailOption *

Outlook ▼

SharePoint

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.

The screenshot shows the 'SharePoint Document Merge' application window. It features a title bar with the application name and a close button. Below the title bar is a logo and the application name. The main interface includes a 'Select Template' dropdown menu, three checkboxes for 'Upload Document Merge Template', 'Show Sub Sites', and 'Show All Sites', and another checkbox for 'Show Library Sub Folders'. A 'Document Template' section displays a tree view of the file system, including folders like 'OutPutDocs', 'Shared Documents', and 'SharePoint_Templates', along with files like 'Test.docx' and 'InvoiceTemplateSPDM.xlsx'. An 'Output Library' section shows a similar tree view. At the bottom, there are checkboxes for 'Merge to 1 Single Document' and 'Send Mail'. The 'Send Mail' checkbox is checked, and a 'Mail Template' dropdown menu is open, showing options like 'Document Merge Email Template Outlook' and 'Document Merge Email Template SharePoint'. Other options include 'Display Images for', 'Custom File Name', 'Overwrite Files', 'Save as PDF (check to create an accompanying PDF copy)', and 'Save As PDF Only (check to create Only a PDF copy)'. At the very bottom are two buttons: 'Merge Item(s) to Document' and 'Close'.

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.

SharePoint Document Merge
✕



SharePoint Document Merge

The Document Merge processing is now complete. Please visit the selected Output Library ([OutPutDocs](#)) 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 sent via SharePoint to the following recipients as shown below.

To :	peter@cirrussoft.onmicrosoft.com
From :	hiral@cirrussoft.onmicrosoft.com.com
Cc :	
Bcc :	
Subject :	Sample Mail of Invoice1

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://sp1dev2010:8001/OutPutDocs/InvoiceTemplateSPDM\(1\)_20181022181824908.docx](http://sp1dev2010:8001/OutPutDocs/InvoiceTemplateSPDM(1)_20181022181824908.docx)

[http://sp1dev2010:8001/OutPutDocs/InvoiceTemplateSPDM\(1\)_20181022181824908.pdf](http://sp1dev2010:8001/OutPutDocs/InvoiceTemplateSPDM(1)_20181022181824908.pdf)

Regards,
Peter
<http://sp1dev2010:8001/Shared%20Documents/signature.jpg>
2/24/2017 1:00:54 PM

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 complete. Please visit the selected Output Library (**OutPutDocs**) 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.

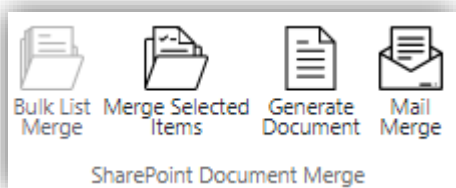
To :	peter@cirrussoft.onmicrosoft.com
From :	hiral@cirrussoft.onmicrosoft.com.com
Cc :	
Bcc :	
Subject :	Sample Mail of Invoice1
Body :	<p>Hi,</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam ante libero, efficitur at rhoncus sit amet, volutpat eu felis. Maecenas eu purus ornare, 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.</p> <p>http://sp1dev2010:8001/OutPutDocs/InvoiceTemplateSPDM(1)_20181022181824908.docx</p> <p>http://sp1dev2010:8001/OutPutDocs/InvoiceTemplateSPDM(1)_20181022181824908.pdf</p> <p>Regards, Peter http://sp1dev2010:8001/Shared%20Documents/signature.jpg 2/24/2017 1:00:54 PM</p>
Link :	Open in Outlook for Invoice1

Mail Merge Menu Option

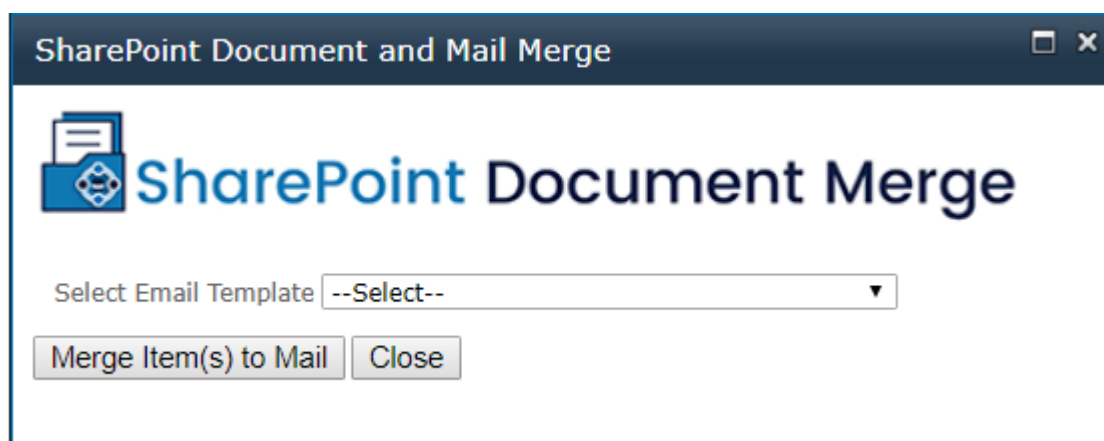
Now you can merge data item of the list to email templates.

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.

SharePoint Document and Mail Merge
□ ×



SharePoint Document Merge

The Mail Merge processing is now complete and your email(s) have been sent via SharePoint to the following recipients as shown below.

To :	peter@cirrussoft.onmicrosoft.com
From :	hiral@cirrussoft.onmicrosoft.com.com
Cc :	
Bcc :	
Subject :	Sample Mail of Invoice1

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.**

Regards,
Peter
<http://sp1dev2010:8001/Shared%20Documents/signature.jpg>
2/24/2017 1:00:54 PM

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 and Mail Merge
□ ×

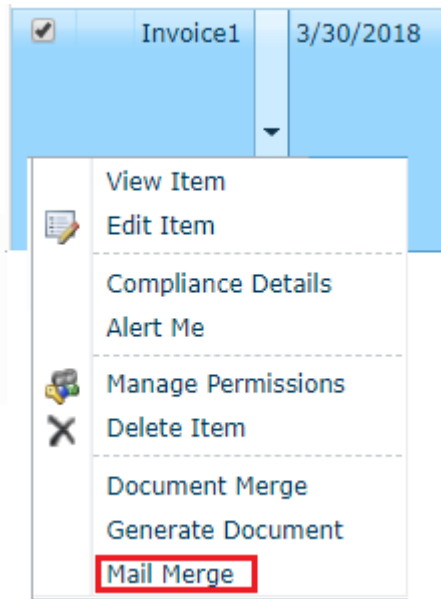


SharePoint Document Merge

The Mail Merge processing is now 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.

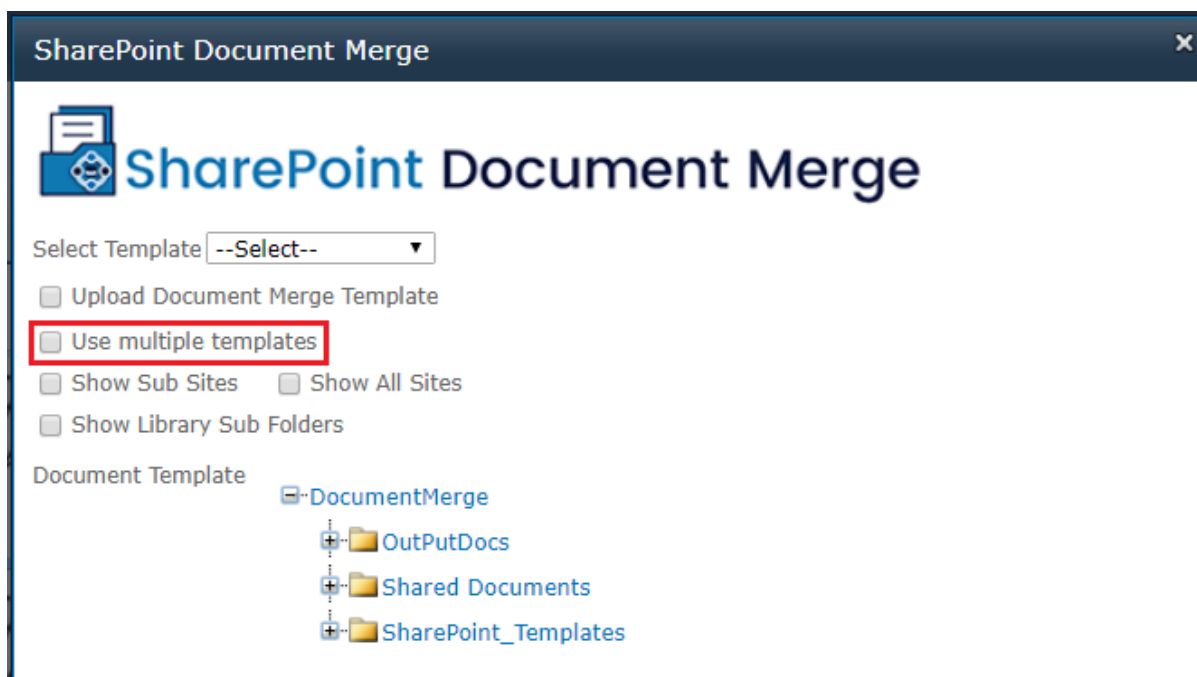
To :	peter@cirrussoft.onmicrosoft.com
From :	hiral@cirrussoft.onmicrosoft.com.com
Cc :	
Bcc :	
Subject :	Sample Mail of Invoice1
Body :	<p>Hi,</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Etiam ante libero, efficitur at rhoncus sit amet, volutpat eu felis. Maecenas eu purus ornare, 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.</p> <p>Regards, Peter http://sp1dev2010:8001/Shared%20Documents/signature.jpg 2/24/2017 1:00:54 PM</p>
Link :	Open in Outlook for Invoice1

Context menu also available for mail merge functionality.

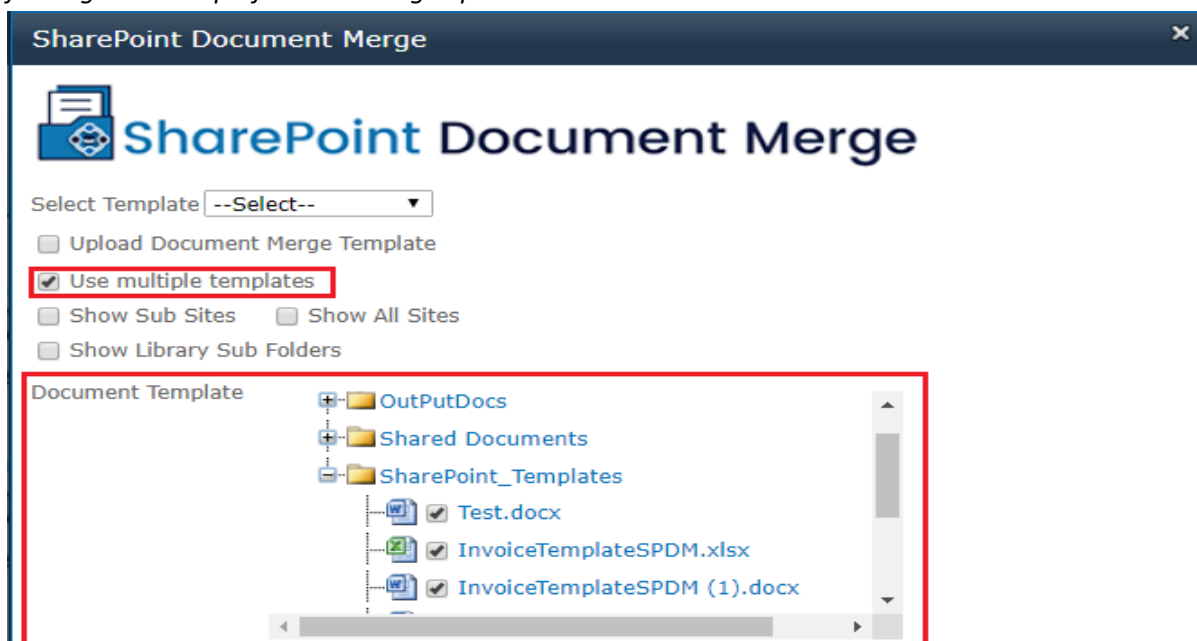


Selecting multiple templates in one go while doing document merge on single item

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

Install WSP

To install the solution first it need to be added by SharePoint 2010 Management Shell, for that

- Run the SharePoint Management Shell as administrator
- Write the following the command
 - Add-spsolution –literalpath “d:\path to the .wsp file including wsp file”
 - Eg. Add-spsolution –literalpath “d:\SDM.Workflow.CustomActivities.wsp”
 - Eg. Add-spsolution –literalpath “d:\SDM.Workflow.CustomActivities.wsp”

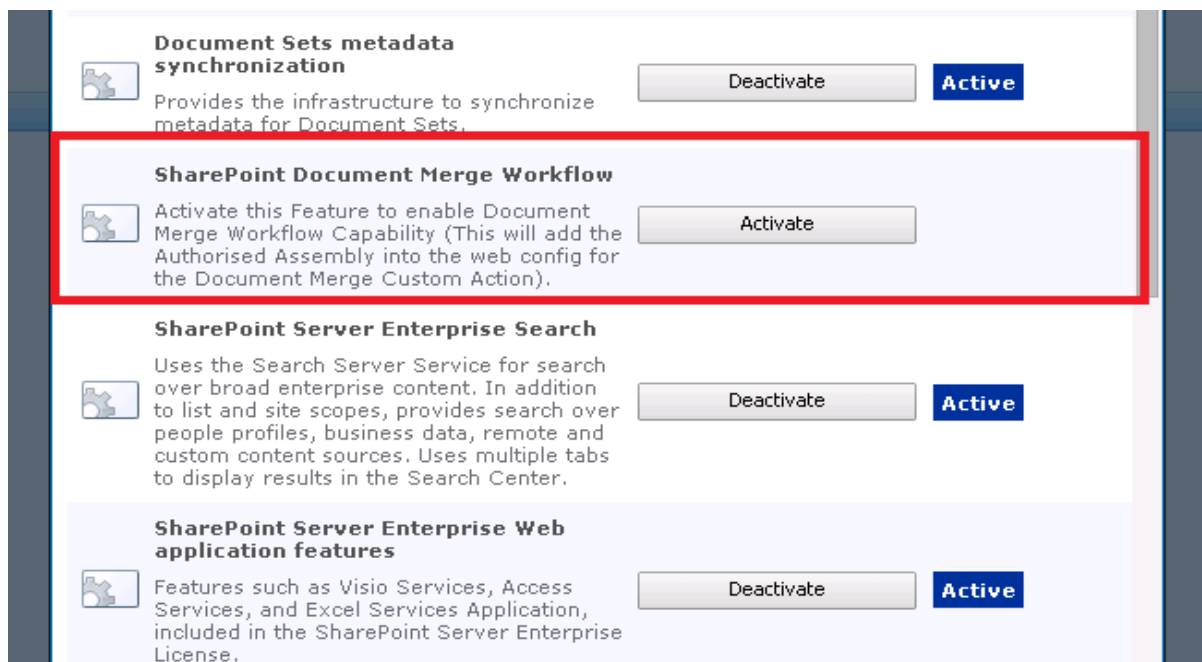
After that,

- Open central administrator site as administrator (SharePoint 2010 Central Administration > right click > run as administrator)
- Go to System settings > Manage Farm Solutions (under Farm Management)
- Select SDM.Workflow.CustomActivities.wsp> Deploy Solution > click on Ok

Activate Feature

Go to Central Admin then click on Application Management, then select the webapplication and click on Manage Features.

- Activate following feature on the web application, in which you want Document Merge Workflow functionality.

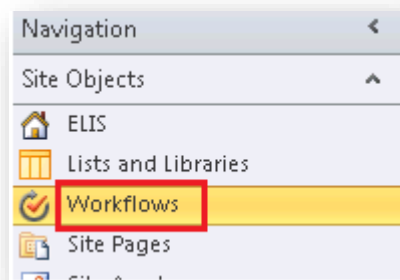


Create Workflow

- Create one SharePoint List. Create columns as per user requirements with below mentioned data types.

Column (click to edit)	Type
Title	Single line of text
Source	Single line of text
Destination	Single line of text
SaveAsPdf	Yes/No
OutPutFileName	Single line of text
OverWrite	Yes/No
DisplayImage	Yes/No
FirstName	Single line of text
LastName	Single line of text
Created By	Person or Group
Modified By	Person or Group

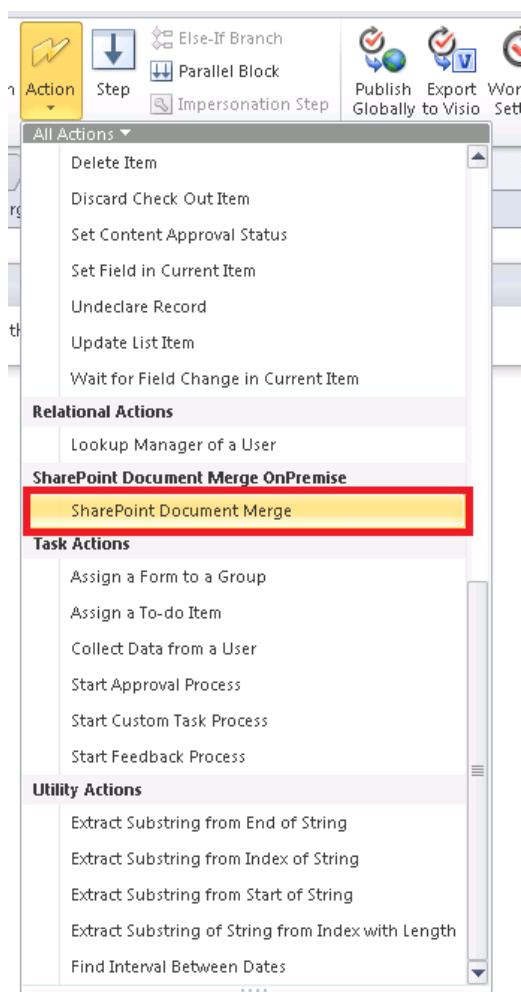
- Open SharePoint 2010 Designer.
- Select workflow from left panel



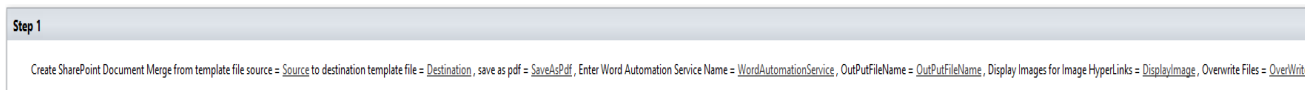
- User has to create reusable workflow and in that add workflow action



- User has to add workflow action from action menu

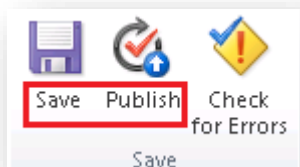


- Set fields same as below screen



- User will have use internal names of fields created in the list as mentioned above.
- **Source:**
 - User have to enter 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)
- **Word Automation Service**
 - In word automation service, user have to provide a simple text input of the name of Word Automation Service created in Central Admin
- **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)

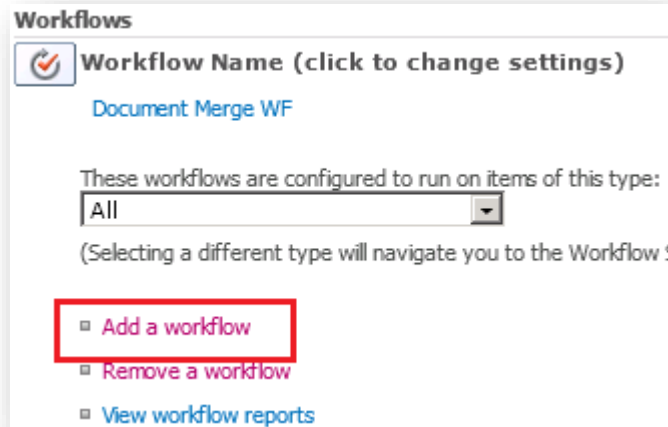
- **OutputFileName**
 - In OutPutFileName, user have to set the name of the field which will hold the value for Output file name. e.g. OutPutFileName (simple text input of name of the field)
- **Display Images for Image HyperLinks**
 - In this field user have to set whether he would like to display hyperlinks as images. Set the name of the list field which will hold the value for that. E.g DisplayImage (simple text input of name of the field)
- **Overwrite Files**
 - 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)
- 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

Select a workflow template:

- UATSIT Workflow 6
- DocumentMergeWF**
- UAT Workflow 3
- Producer Workflow 17

Description:

Type a unique name for this workflow:

Document Merge WF

Select a task list:

Tasks

Description:

Use the Tasks list to keep track of work that you or your team needs to complete.

Select a history list:

Workflow History

Description:

History list for workflow.

☒ Allow this workflow to be manually started by an authenticated user with Edit Item permissions.

☐ Require Manage Lists Permissions to start the workflow.

☐ Start this workflow to approve publishing a major version of an item.

☒ Start this workflow when a new item is created.

☒ Start this workflow when an item is changed.

OK Cancel

- User has to create to document library. One for Template file and second to save document
- Add new Item in list
- 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	SaveAsPdf	OutPutFileName	OverWrite	Display/Image	FirstName	LastName	DM Workflow
Title	Shared%20Documents/DM_Template.docx	Shared Documents	No	<<Title>>	Yes	No	Jon	Doe	Completed

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.

<https://cirrussoft.support>

<https://sharepointdocumentmerge.com>