

DOCUMENT MERGE

for SharePoint



INSTALLATION AND CONFIGURATION MANUAL



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Version History Change Record

Date	Author	Version	Change reference
2015, September	SharePoint Document and Mail Merge	1.0.0.1	Initial Release for SharePoint Online.
2015, October	SharePoint Document and Mail Merge	1.0.0.2	Support for PowerPoint documents.
2015, November	SharePoint Document and Mail Merge	1.0.0.3	Support to display Images for Image Hyperlinks Images (Word).
2015, November	SharePoint Document and Mail 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 and Mail Merge	1.0.0.5	Misc. bug fixes and Improvements.
2016, March	SharePoint Document and Mail Merge	2.0.0.0	<p>Rich text support for Word.</p> <p>Export to pdf function for Word and Excel.</p> <p>Image sizing for Word (same size as in SharePoint Library).</p> <p>Support for Inserting Images in PowerPoint.</p> <p>Repeated rows for Word & Excel with related list's items (with lookup field).</p> <p>More options to target file names.</p> <p>Option to overwrite file.</p> <p>Support to Merge multiple SharePoint list data into 1 Single PowerPoint Document (Choose to</p>

			merge multiple PowerPoint documents to 1 single document).
2016, April	SharePoint Document and Mail Merge	2.0.0.1	Increased size of Document Merge modal window to see all options without scroll (screen resolution dependent).
2016, December	SharePoint Document and Mail Merge	3.0.0.0	User Interface update. Pre-set Configuration Settings. Selection of locale and number decimal places. Misc. bug fixes and performance enhancements.
2017, February	SharePoint Document and Mail Merge	3.0.0.1	Misc. bug fixes and performance enhancements.
2017, May	SharePoint Document and Mail Merge	3.0.0.2	Remote Event Receiver Automated Workflows. Trigger Document Merge events on item added and item updated. Performance enhancements.
2017, June	SharePoint Document and Mail Merge	3.0.0.2	Save As PDF only option Option to merge according to content types Show All site for site collection option
2018, January	SharePoint Document and Mail Merge	3.0.0.3	Selecting multiple templates in one go while doing document merge on single item Update Event Receiver to use Pre-set Document Merge Configuration Templates
2018, April	SharePoint Document and Mail Merge	3.0.0.4	Create a link to generate a document from the pre-set Configuration Template. Generate Document menu option. Sorting feature added for repeated rows.

2018, April	SharePoint Document and Mail Merge	3.0.0.5	App icons and images changed
2018, June	SharePoint Document and Mail Merge	4.0.0.0	Token update and fix for AppSource. Misc. bug fixes and performance enhancements.
2019, January	SharePoint Document and Mail Merge	5.0.0.0	Added Mail Merge feature to merge and send mail. Updated Icons. Performance enhancements. Save PDF file as PDF\A Option.
2019, June	SharePoint Document and Mail Merge	5.0.0.1	Export to document feature added. Added support for "Include Text" fields having merge fields in between the URL of another word file. Fix for custom file name with special characters. RTFWF tag for rich text formatting.
2019, November	SharePoint Document and Mail Merge	6.0.0.0	Related rows merge operations and export to document feature for PowerPoint Presentation added.

Current Version for SharePoint Online

Name	Version Approved	Compatibility	Date
SharePoint Document and Mail Merge	SharePoint Document and Mail Merge Version 6.0.0.0	SharePoint Online / Office 365.	2019, November

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Introduction

SharePoint Document and Mail 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.

Mail Merge your SharePoint list data for automatic sending of email with the contents of your SharePoint list data. You can even generate a document and then send this via email to a predefined email template with the contents of the email populated for a SharePoint list.

How does SharePoint Document and Mail Merge Work?

After you have installed **SharePoint Document and Mail 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 and Mail Merge you can now automatically create documents from any list for any predefined document template directly from the Ribbon Menu (SharePoint Document and Mail 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.

Select the email option to send the merged document

SharePoint Document and Mail Merge Uses:

Do you collect customer records, financial data, order information, or any other important business data in SharePoint lists? With SharePoint Document and Mail 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 and Mail 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 clicks 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 and PowerPoint Presentation from related list's items (with lookup field).
- ☒ Options to target file names and to overwrite Documents.
- ☒ Pre-set Configuration Settings.
- ☒ Mail Merge options.
- ☒ Send Mail after Document Merge processing with link of merged document/s.
- ☒ 2 options to send mail (via Outlook and SharePoint).
- ☒ Remote Event Receiver to merge and send mail.

 Excellent UK based support!

SharePoint Document and Mail Merge Installation (SharePoint Online App)

Types of License

SharePoint Document and Mail Merge is made available from the Office Store (<https://store.office.com/WA104379659.aspx>).

Below is the list of **SharePoint Document and Mail Merge** License Types;

Trial

- The Trial License can only be used for up to 5 Users. It will only allow you to merge the first 5 rows for Merge Selected Items. You cannot Bulk Merge with the Trial. The Trial will expire after 15 days.

User License

- A User License activates **SharePoint Document and Mail Merge** functionality to all Lists within a SharePoint Site for the Users who have a License assigned.

Site License

- A Site License activates **SharePoint Document and Mail Merge** functionality to all Users and on all Lists within the SharePoint Site to which it is applied.

Installing SharePoint Document and Mail Merge

To add an app from the SharePoint Store

1. Verify that the user account that is performing this procedure is a member of the site Owners group.
2. On the home page, under Get started with your site, click Add lists, libraries, and other apps.
3. If the Get started with your site control does not appear on the home page, click the Settings icon, and click View Site Contents, and then on the Site Contents page, click Add an App.
4. Click SharePoint Store.
5. Browse the SharePoint Store for “**SharePoint Document and Mail Merge**”.
6. Click the **SharePoint Document and Mail Merge** App.
7. Click Details, and then click Trial / Buy It.
8. Follow the steps to log in and purchase the App, if required.
9. In the Grant Permission to an App dialog box, if you trust the App, click Allow Access.
10. The **SharePoint Document and Mail Merge** App is now added and appears in the Apps section of your Site Contents list.

How to Use SharePoint Document and Mail Merge?

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.

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={E67400DD-5986-4E99-B8A5-13BA9CD2559E}&Field=FirstName

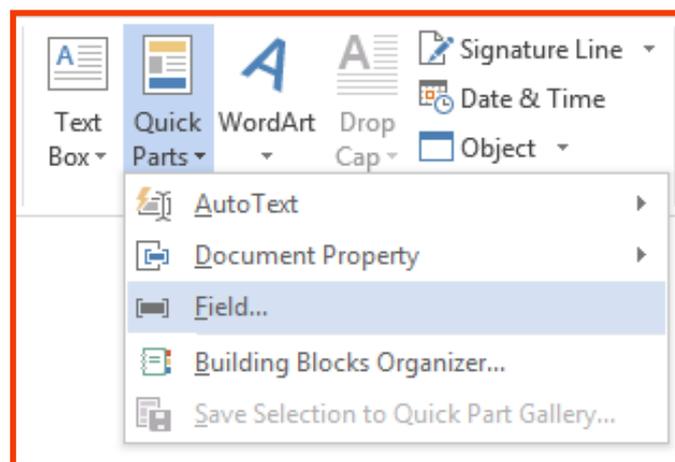
"FirstName" is the **Internal Name** to be used as the Merge Field Name (Word) or Place holder (Excel).

Also see – <http://sharepointlists.com/getinternalcolumnnames.html>

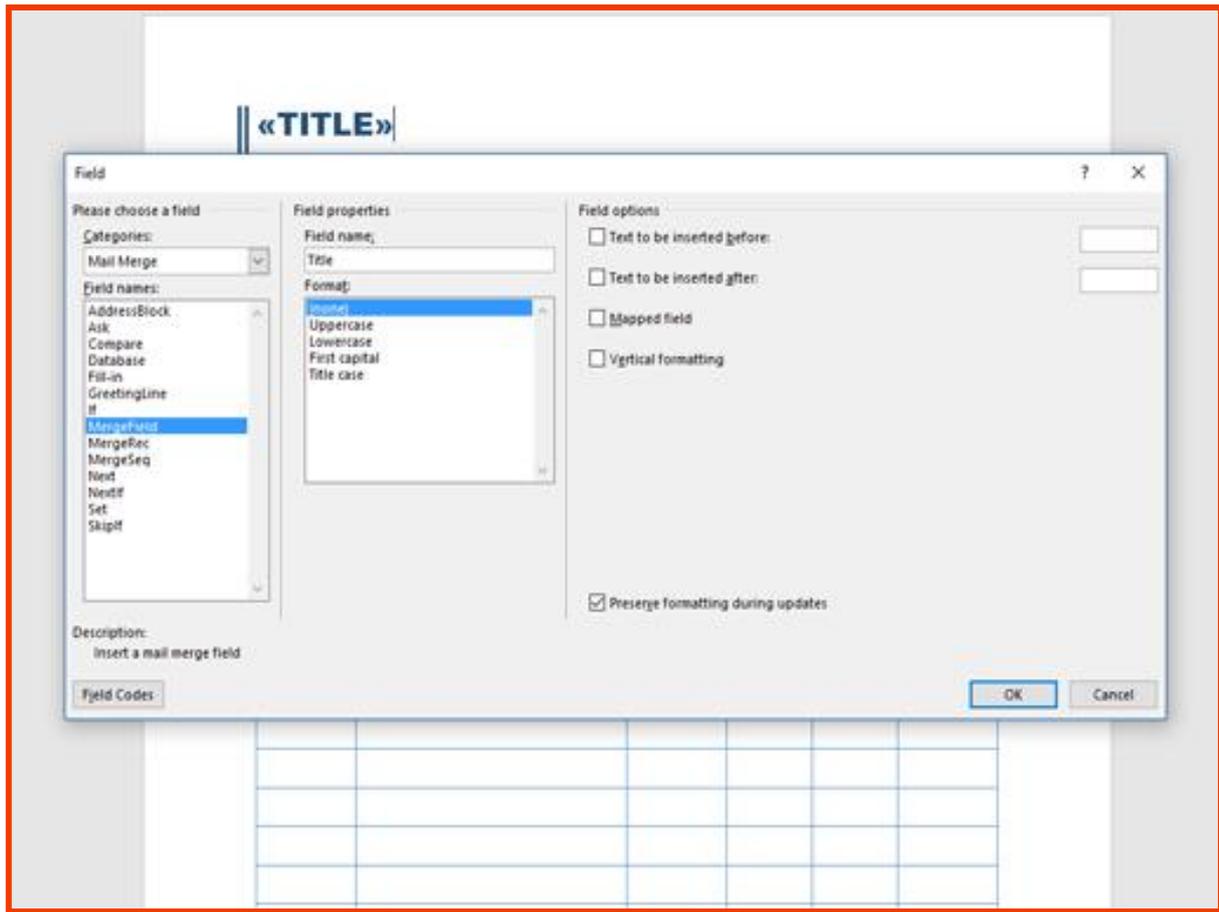
Create a Microsoft Word Template

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 and Mail 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).

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
-------------	--------

- 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 and Mail 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>>

- For descending order:

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

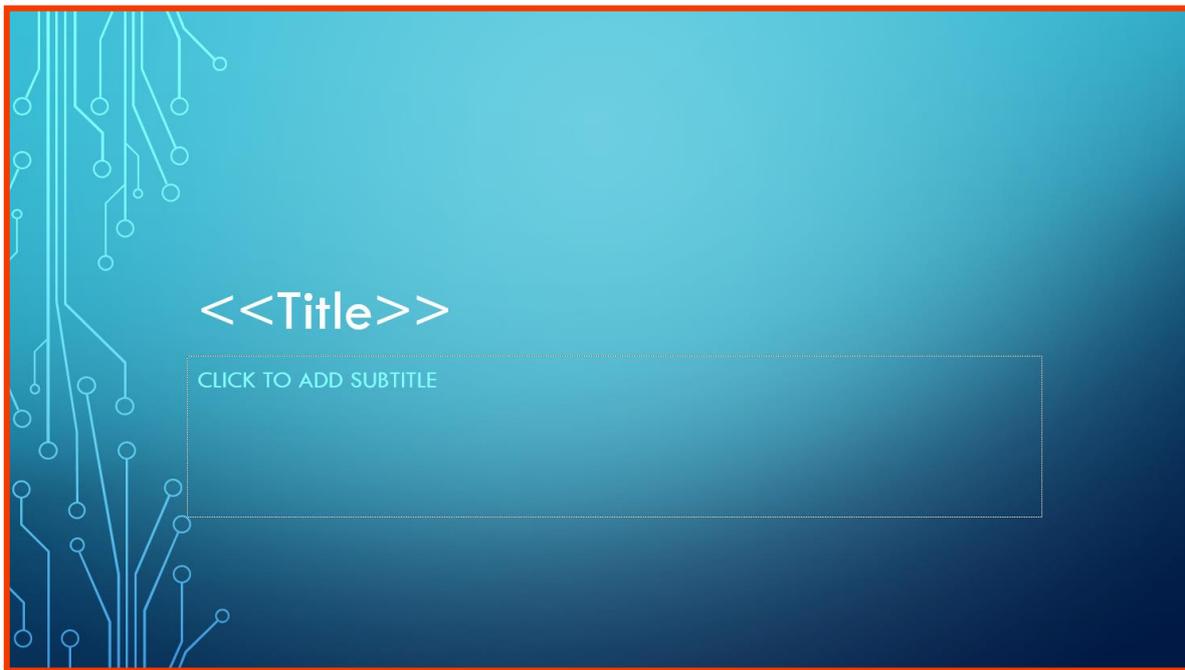
<<RangeEnd:ListName#LookupColumn# colNameToOrderBy:Dsc>>

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).

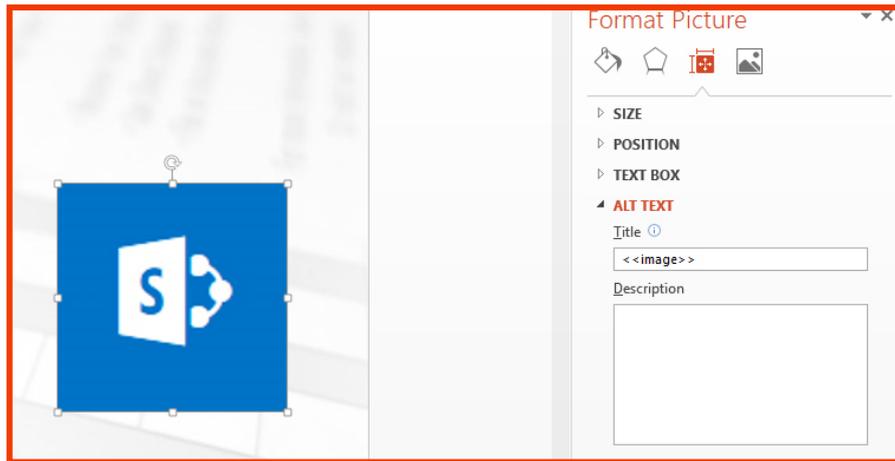


- Apply Place Holders (corresponding to the SharePoint List data) as required for the layout of the template and save the document as .pptx. This template is now ready to be used for **SharePoint Document and Mail Merge**.

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>>.



Merge repeated rows for PowerPoint 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 PowerPoint file;

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

Note: you need to preserv etxra space below table to provide space for content to be merged into that table as shapes in PowerPoint have fixed position which doesn't change depending on content flow. Adding content to table cell (like in the user scenario) will only change the height of current table row to accommodate new content but will NOT modify position of any other shape on the slide.

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**>>

Using SharePoint Document and Mail Merge within SharePoint

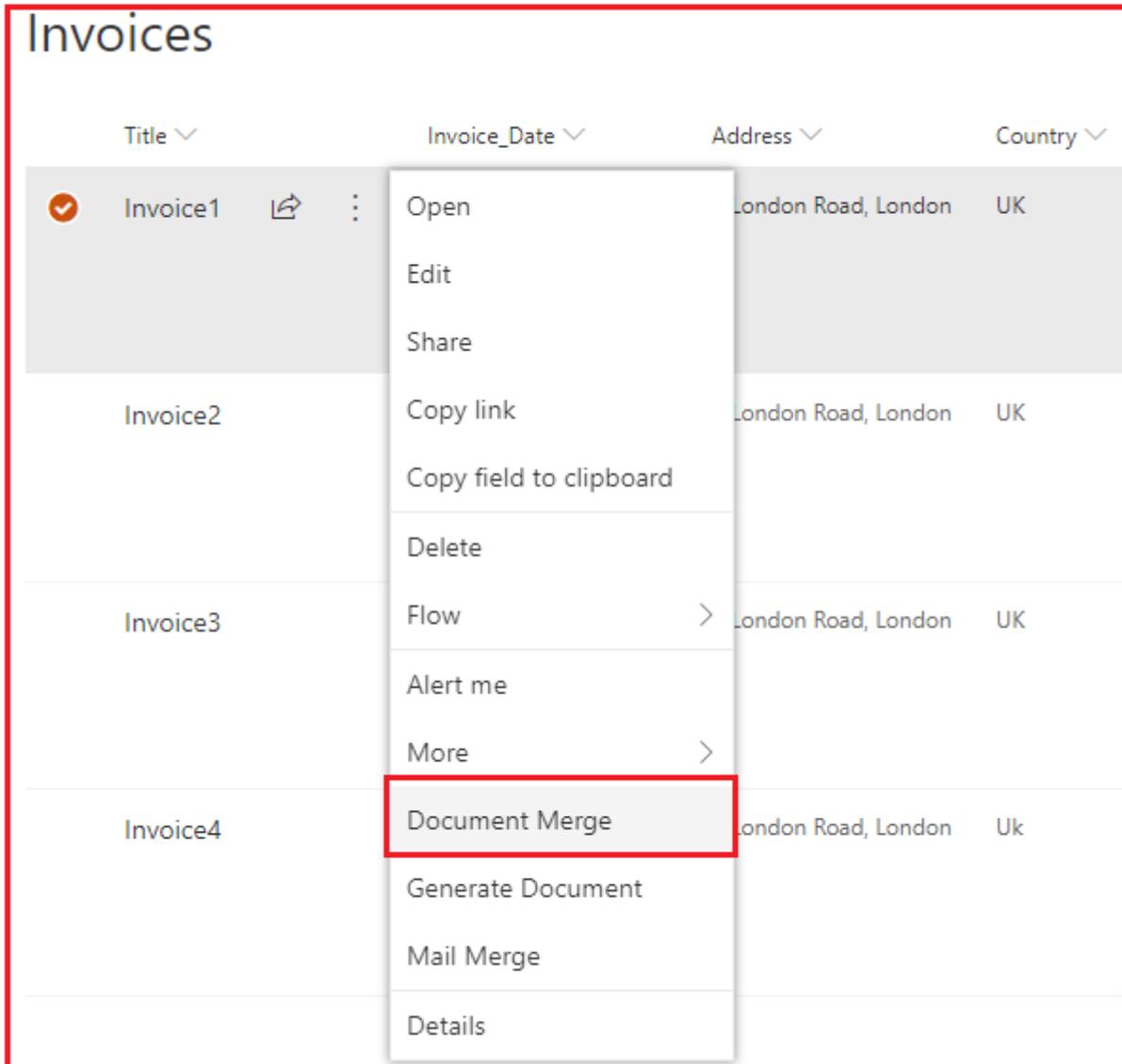
Once installed **SharePoint Document and Mail Merge** options are made available on all List Items Context Menu and the Lists Ribbon Menu. Also, for Word Documents within Document Libraries.

Define Word and/or Excel and/or PowerPoint templates and store them in Document Libraries, 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 and Mail Merge window will appear. Choose the options as required and click the "Merge Item(s) to Document" button.

DOCUMENT MERGE

for SharePoint

Configuration Options

Show All Sites (In Site Collection)

Show Library Sub Folders

Show Sub Sites

Use multiple templates

Template Information (required)

Output Information (required)

Display Images for Image Hyperlinks
 Send an email

Locale and Number Formatting Options (required)

File and Save Options

Overwrite Files
 Save as PDF Save as PDF only

Configuration Options

Select Preconfigured Template: Select a pre-set Configuration Template. Pre-sets are managed via the Document Merge App landing page.

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

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

Template Information (required)

Select Site for Document Template Library: Select the SharePoint Site for the Document Library that the Word/Excel Document Template is stored in. Sub Sites will display if the Configuration Option is checked.

Select Document Template Library: Select the SharePoint Document Library that the Word/Excel Document Template is stored in. Document Library Sub Folders will display if the Configuration Option is checked.

Select Document Template File: Select the Word/Excel/PowerPoint Document Template file from the specified SharePoint Document Library.

Locale and Number Formatting Options (required)

Select Locale: Select the Locale for Date and Time formatting.

Select Number of decimal Places: Select the number of decimal places for number values.

Output Information (required)

Select Site for Output Library: Select the SharePoint Site where you want to save the Merged Word/Excel/PowerPoint Document. Sub Sites will display if the Configuration Option is checked.

Select Output Library: Select the SharePoint Document Library where you want to save the Merged Word/Excel/PowerPoint Document. Document Library Sub Folders will display if the Configuration Option is checked.

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).

Send Mail: Check this option if you want to send mail along with the merged document link.

To get more detailed description of this feature go to ["Send Mail" section](#).

File and Save Options

Custom File Name: Enter a Custom File Name as required. By default the Merged Word/Excel/PowerPoint Document is saved with a file name of the following construct 'TemplateName_BinaryTimeStamp'. File name can contain multiple field Internal Names enclosed in '<<' and '>>'.E.g. <<FirstName>><<LastName>>. To remove '_' seperator use '<<<' and '>>>' and if you want just field's value as a filename then you can use '<<<<' and '>>>>'.

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

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.

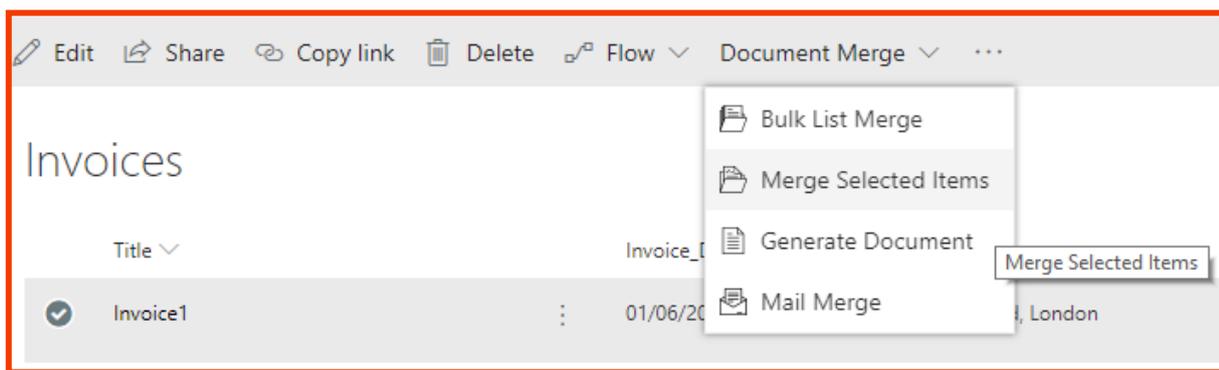
Save As PDF (check to create a PDF Copy): Check this option if you also want to create a pdf for the same Merge Word/Excel Document. PDF generation will take more time to process.

Once processing is complete the Documents will be saved in the user specified SharePoint Site / Sub Site / Document Library / Document Library Sub folder with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

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 and Mail Merge options window will appear. Choose as required and click “Merge Item(s) to Document”.
- For Word (.docx) you may choose to merge multiple Word documents to 1 single document (ideal for printing!).

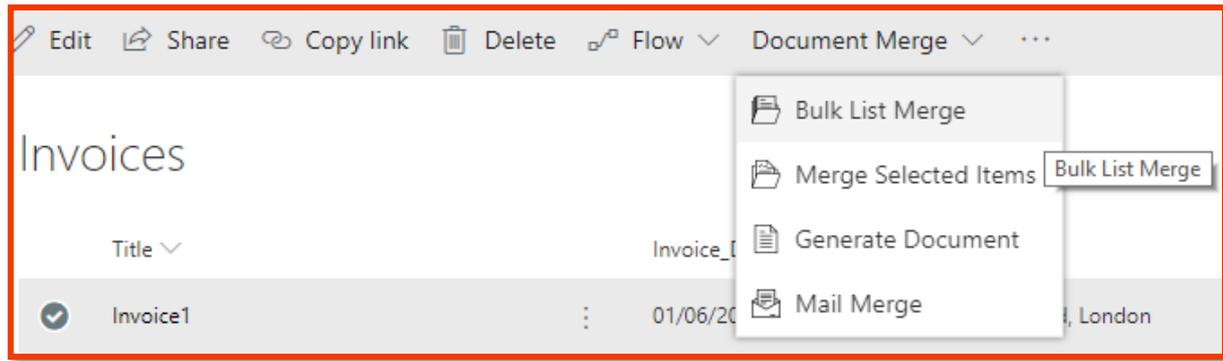


Once processing is complete the Documents (one for each List Item row or for .docx 1 Single Document if selected) will be saved in the user specified SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

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.

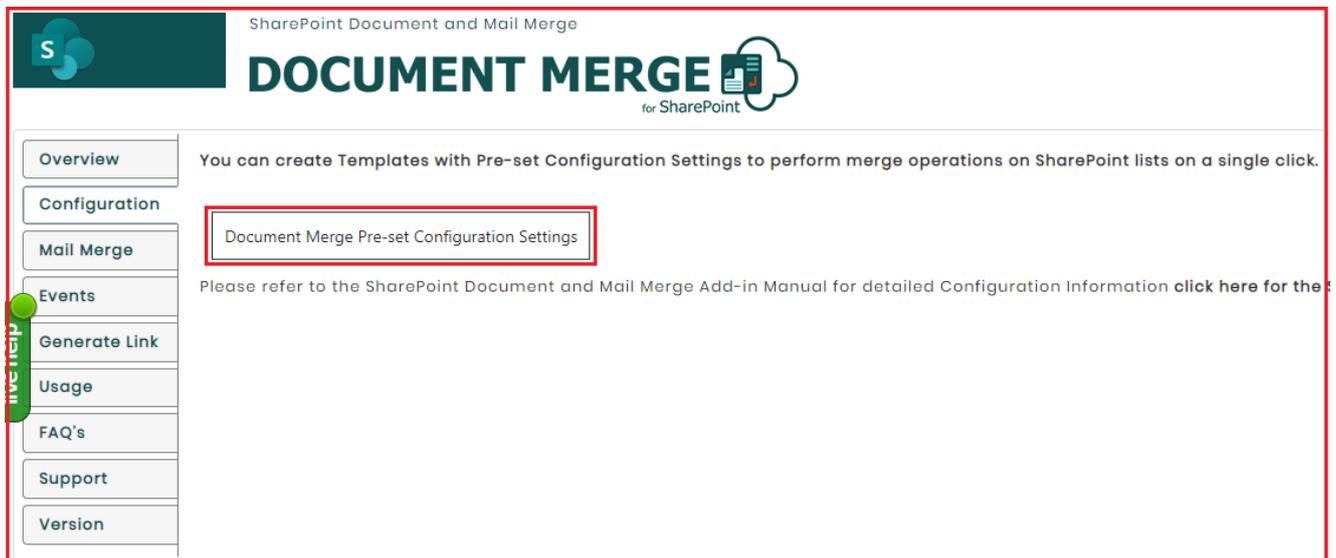
- Go to the required SharePoint List.
- Click on the “Bulk List Merge” Ribbon Menu button.
- The SharePoint Document and Mail Merge window will appear. Choose as required and click “Merge Item(s) to Document”.
- For Word (.docx) and PowerPoint (.pptx) you may choose to merge multiple Word or PowerPoint documents to 1 single document (ideal for printing!).



Once processing is complete the Documents (one for each List Item row or for .docx/.pptx 1 Single Document if selected) 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 and Mail Merge options for a List via the Document Merge App landing page and clicking the 'SharePoint Document and Mail Merge Pre-set Configuration Settings' button.



DOCUMENT MERGE 
for SharePoint

SharePoint Document Merge Pre-set Configuration Settings

[Add New](#) [Go Back](#)

Edit	Delete	Template Title	Source List Site	Source List	Default Template Site	Template Library	Template File	Site For Output Library	Output Library
		Customer Data Template - Selected Merge	/SDMApp	/SDMApp/Lists/CustomerData	/SDMApp	/SDMApp/Shared Documents	Document Merge Template.docx	/SDMApp	/SDMApp/Shared Documents
		Customer Data Template - Merge to one	/SDMApp	/SDMApp/Lists/CustomerData	/SDMApp	/SDMApp/Shared Documents	Document Merge Template.docx	/SDMApp	/SDMApp/Shared Documents
		Invoice Template - docx	/SDMApp	/SDMApp/Lists/Invoices	/SDMApp	/SDMApp/SPDM_Templates	InvoiceTemplateSPDM.docx	/SDMApp	/SDMApp/Shared Documents
		Invoice Template - xlsx	/SDMApp	/SDMApp/Lists/Invoices	/SDMApp	/SDMApp/SPDM_Templates	InvoiceTemplateSPDM.xlsx	/SDMApp	/SDMApp/Shared Documents
		Test123	/SDMApp	/SDMApp/Lists/Invoices	/SDMApp	/SDMApp/SPDM_Templates	Invoice TemplateSPDM.docx	/Clients/CLLL/CLLLP1/SubSite1	/Clients/CLLL/CLLLP1/SubSite1/Shared Documents

You can Save and Edit unlimited SharePoint Document and Mail Merge Pre-set Configuration Settings for your SharePoint Lists.

DOCUMENT MERGE 
for SharePoint

Configuration Options

No Preconfigured Template

Show All Sites (In Site Collection) Show Sub Sites
 Show Library Sub Folders Use multiple templates

Template Information (required)

Output Information (required)

Display Images for Image Hyperlinks
 Send an email

Locale and Number Formatting Options (required)

File and Save Options

Overwrite Files
 Save as PDF Save as PDF only

[Merge Item\(s\) to Document](#) [Back to Site](#)

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 Edits when loaded (will increase wait time): 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.

Select Site for which this template settings apply: Select the SharePoint Site for the source list for which the pre-set configuration settings will apply.

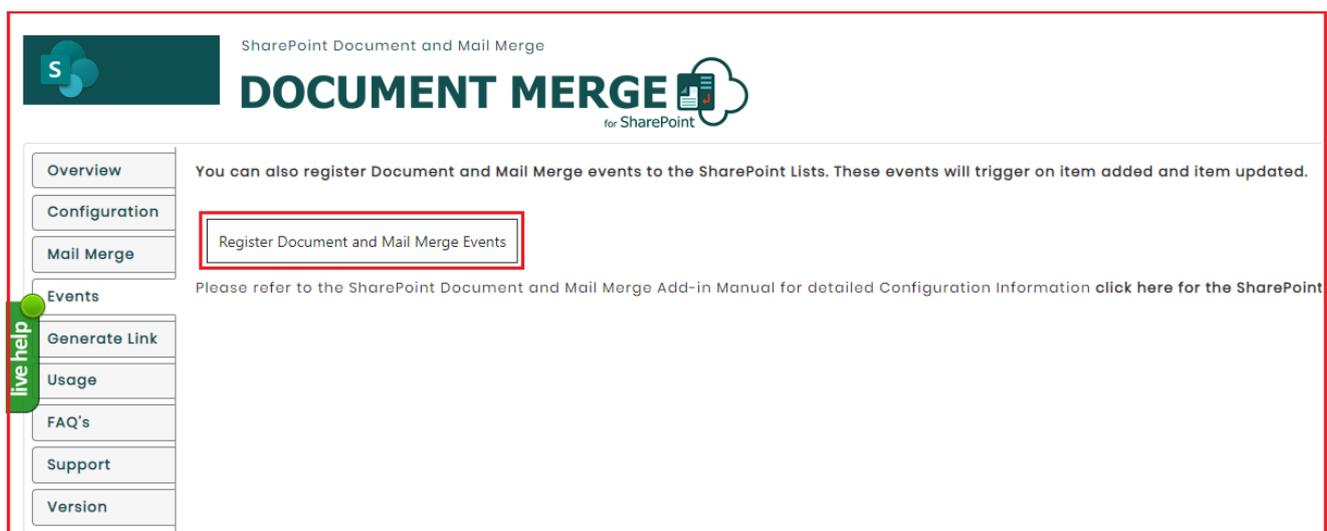
Select the source list for which this template settings apply: Select the SharePoint list, from within the site, for which the pre-set configuration settings will apply.

*All other options for setup are described above (pages 18 and 20).

Trigger Document Merge events on item added and item updated (Remote Event Receiver Automated Workflows) (Old Versions < 3.0.0.3):

Following are the steps to use document merge app Remote Event Receiver:

Step 1: Click on document merge app landing page:



Step 2: Then click on “Register Document Merge Events” button.

- Here you can register the doc merge event to the specific list on which you want to perform document merge events.
- It will trigger on item added and item updated as per your selection on the list.

Register Document Merge event to lists

Source List

Event Type

- When item is added
- When item is updated

List Title	Event Type	Remove
Demo	ItemAdded	
Demo	ItemUpdated	

- It will add following additional columns to your list which are required to perform doc merge functionality.

Column (click to edit)	Type
Title	Single line of text
Source	Single line of text
Destination	Single line of text
Display Image	Yes/No
Output File Name	Single line of text
OverWrite	Yes/No
Save As Pdf	Yes/No
Save As Pdfa	Yes/No
Save As Pdf Only	Yes/No
Send Mail	Yes/No
Mail Template	Lookup
Merge Options	Choice
Created	Date and Time
Modified	Date and Time
Created By	Person or Group
Modified By	Person or Group

S

- Then you must provide information for these columns whenever you add an item to the list to perform doc merge event:
 - Source: Source of template file (e.g. Shared Documents/Test.docx)
 - Destination: Destination library where you want to store the merged document.
 - Save As Pdf: Yes/No
 - Save As Pdfa: Yes/No
 - Output file name: Name of the merged file(e.g. <<Title>>)

- Display Image: Yes/No
- Overwrite: Yes/No
- Send Mail: Yes/No
- Mail Template: Select preconfigured templates to [send an email](#).
- Merge Option: Its choice field with 3 options.
 - Document Merge: Select this to perform Document merge for current item you need fill other required information.
 - Mail Merge: Select this to perform Mail merge for current item you need select email template to send mail from current item.
 - Both: This will perform Document Merge and Mail Merge both.



The screenshot shows a dropdown menu titled "Merge Options". The current selection is "Document Merge", indicated by a downward arrow on the right. The dropdown list contains three options: "Document Merge" (highlighted in grey), "Mail Merge", and "Both".

Office 365 | SharePoint

Search

Home

Notebook

Documents

Pages

Site contents

Edit

Edit all

Demo > Test

Title *

Test

Source

Shared Documents/TitleTest.docx

Destination

Shared Documents

Save As Pdf

Yes

Save As Pdfa

Yes

Output File Name

ReRTest

Display Image

Yes

OverWrite

Yes

Send Mail

Yes

Mail Template

[Email Temnplate For Invoice List](#)

Attachments

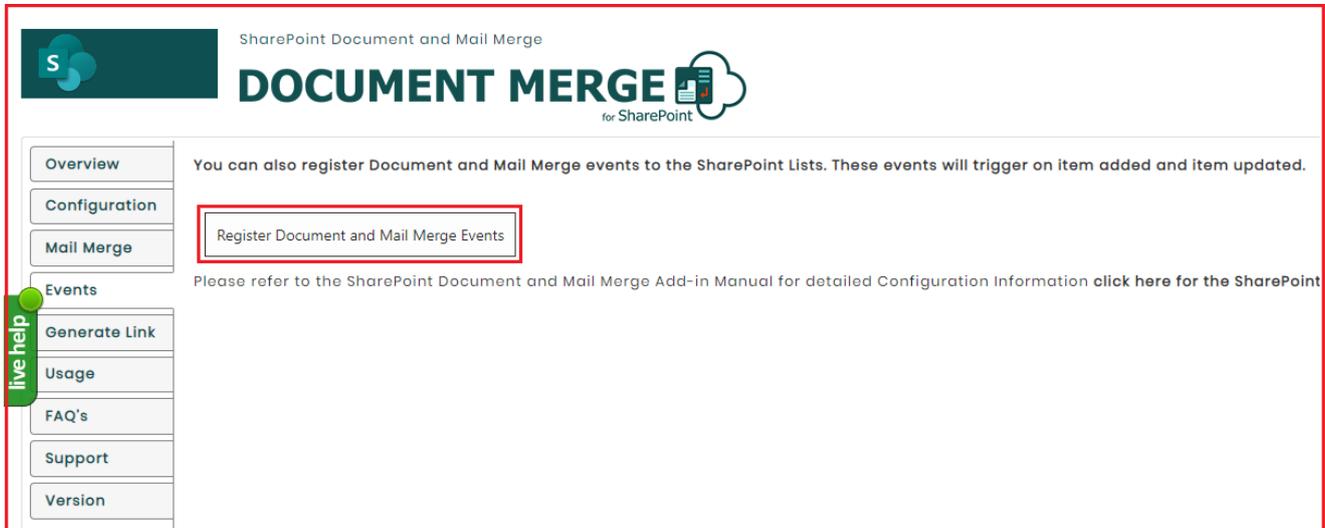
Add or remove attachments

Step 3: Whenever you will add/update an item to the list it will generate merged document to the destination library.

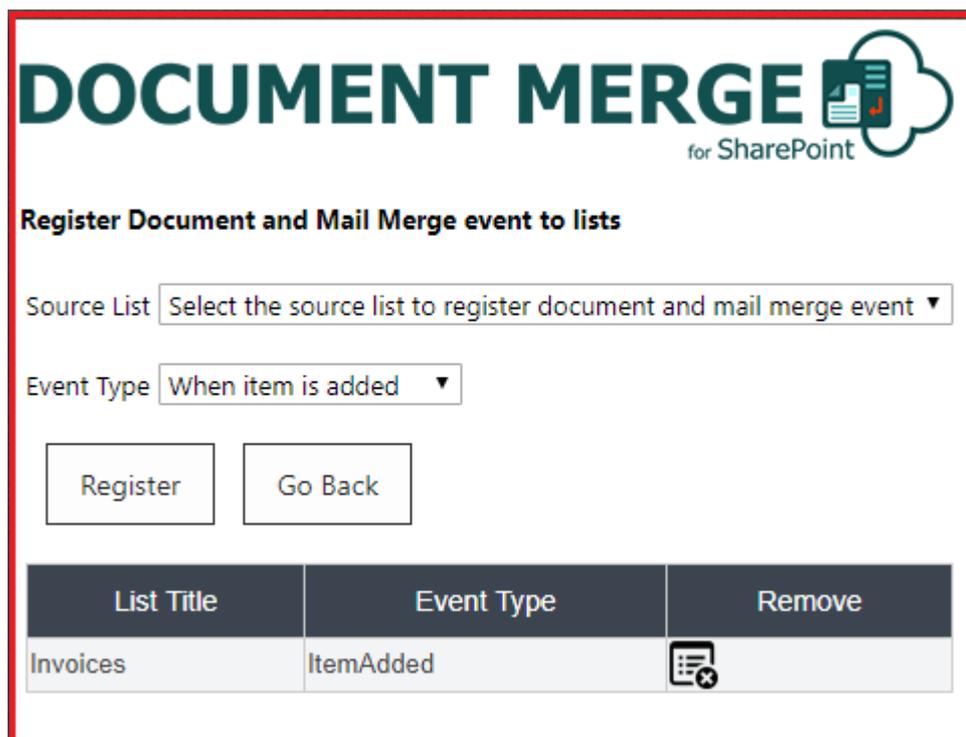
Trigger Document Merge events on item added and item updated (Remote Event Receiver Automated Workflows) :

Following are the steps to use document merge app Remote Event Receiver:

Step 1: Click on document merge app landing page:



Step 2: Then click on “Register Document Merge Events” button.



- Here you can register the doc merge event to the specific list on which you want to perform document merge events.
- It will trigger on item added and item updated as per your selection on the list.

Register Document Merge event to lists

Source List

Event Type

- When item is added
- When item is updated

List Title	Event Type	Remove
Demo	ItemAdded	
Demo	ItemUpdated	

- It will add one additional column to your list “TemplateName” which will be the lookup of “SharePoint Document and Mail Merge Pre-set Configuration Settings”.

Title	Single line of text
Invoice_Date	Date and Time
Address	Multiple lines of text
Country	Single line of text
Contact_Person	Person or Group
Notes	Multiple lines of text
Signature	Hyperlink or Picture
TemplateName	Lookup
Modified	Date and Time
Created	Date and Time
Created By	Person or Group
Modified By	Person or Group

- Then you are required to select correct template title which you have created, from the dropdown, whenever you add an item to the list to perform doc merge event:

Invoices

Title	Invoice_Date	Address	Country
Invoice1	6/1/2016	1 London Road, London	UK
Invoice2	7/1/2016	1 London Road, London	UK
Invoice3	8/1/2016	1 London Road, London	UK
Invoice4	9/1/2016	1 London Road, London	Uk
Invoice5	4/17/2018	1 London Road, London	Uk
<input checked="" type="checkbox"/> Invoice1	1/12/2018	London	Uk

Country

Uk

Contact_Person

Enter a name or email address

Notes

This is the test to show the events, how this will merge selected template on item added automatically

Signature

https://cirrussoft.sharepoint.com/sites/PDFWizard/Shared%...

Enter display text

TemplateName

(None)

(None)

Document Template Demo

Test Template Document Template Demo

TestTemp1

Document Merge
1 selected

VIEW

Version History | Alert Me | Workflows

Edit Item | Shared With | Delete Item | Manage | Actions

Title	Test Template
Source List Site	/sites/PDFWizard
Source List	/sites/PDFWizard/Lists/Invoices
Default Template Site	/sites/PDFWizard
Default Template Library	/sites/PDFWizard/SPDM_Templates
Document Template File	InvoiceTemplatesPDM.docx
Site for Output Library	/sites/PDFWizard
Output Library	/sites/PDFWizard/Shared Documents
Locale	en-US
List Default	No
Merge To One	No

Notes

Signature

TemplateName

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.

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.

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.

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.

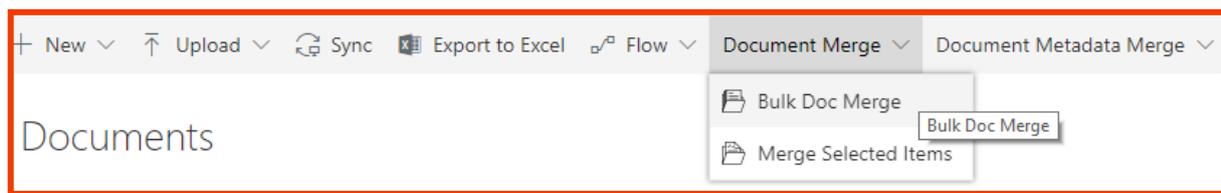
This is the test to show the events, how this will merge the data to the selected template on item added automatically

Step 3: Whenever you will add/update an item to the list it will generate merged document to the destination library.

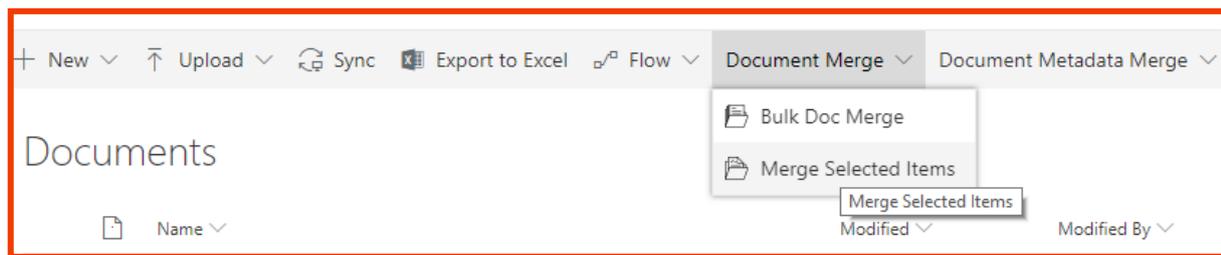
Merge Multiple Word or PowerPoint Documents to a Single Word or PowerPoint Document

Once installed **SharePoint Document and Mail 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 or multiple PowerPoint documents to a single PowerPoint document.

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



Bulk Doc Merge will merge all Word or PowerPoint Documents within a document library. The order the Word or PowerPoint documents are appended into a single Word or PowerPoint document will be determined by the Document ID set when each document has been uploaded.



Merge Selected Items will merge the selected Word or PowerPoint Documents within a document library. The order the Word or PowerPoint documents are appended into a single Word or PowerPoint document will be determined by the order they are selected.

- The SharePoint Document and Mail Merge window will appear. Choose as required and click “Merge Item(s) to Document”.

Merge Selected Items



(Documents will be merged in the order they are selected)

Sub Site and Library Subfolder Options

Show All Sites (In Site Collection)
 Show Library Sub Folders

Show Sub Sites

Output / Save Information (required)

File Options

Overwrite Files

Save as PDF
 Save as PDF only

Bulk Doc Merge



(Documents will be merged in the order of their document ID)

List View and Content type Options

Sub Site and Library Subfolder Options

Show All Sites (In Site Collection)
 Show Library Sub Folders

Show Sub Sites

Output / Save Information (required)

File Options

Overwrite Files

Save as PDF
 Save as PDF only

List View Options

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

Sub Site and Library Subfolder Options

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

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

Output / Save Information (required)

Select Site for Output Library: Select the SharePoint Site where you want to save the Merged Word / PowerPoint Document. Sub Sites will display if the Option is checked.

Select Output Library: Select the SharePoint Document Library where you want to save the Merged Word / PowerPoint Document. Document Library Sub Folders will display if the Option is checked.

Custom File Name: Specify a Custom File Name for the Merged Word/ PowerPoint Document.

File Options

File Type to Merge: Choose the File Type- Word or PowerPoint.

Header: Choose the header information to include into Word documents.
*Previously merged documents will not merge with headers. 2 Merged Word documents will cause corrupt output file if the header information is included. If no header information is required then you can merge previously merged Word documents.

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 Merged Word / PowerPoint Document. PDF generation will take more time to process.

Document Merge Functionality on Metadata of Document Library

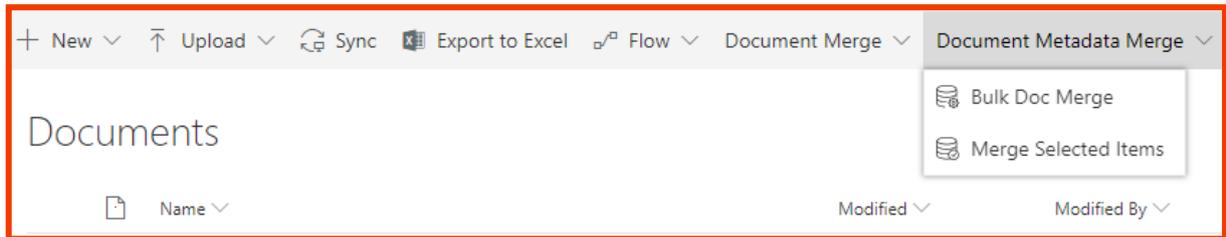
You can also merge metadata of documents of Document Library.

Once installed **SharePoint Document and Mail 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 and Mail Merge MetaData group.



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



Configuration Options

Show All Sites (In Site Collection) Show Sub Sites
 Show Library Sub Folders

List Content type Options


All

Template Information (required)

Output Information (required)

Display Images for Image Hyperlinks

Locale and Number Formatting Options (required)

File and Save Options

Overwrite Files Save as PDF Save as PDF only

- Select Template Library drop down, Word or Excel Template from Document Template drop down, and then select Output Library name from Output Library drop down and click on Merge Item(s) to Document button to perform document merge functionality.
- It will merge meta data of selected documents from the library.

test lib

Title	Name	Modified	Modified By	InvoiceID	Price	Date
CIRRUSOFT_INVOICE_GBP	CIRRUSOFT_INVOICE_GBP_201...	About a minute ago	Deepa	C1001	£10,000.00	06/12/2017

- Structure of template file.

```
Title: «Title»  
Invoice Id: «InvoiceID»  
Price: «Price»  
Date: «Date»
```

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

```
Title: CIRRUSOFT_INVOICE_GBP  
Invoice Id: C1001  
Price: £10,000.00  
Date: 6/12/2017
```

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.

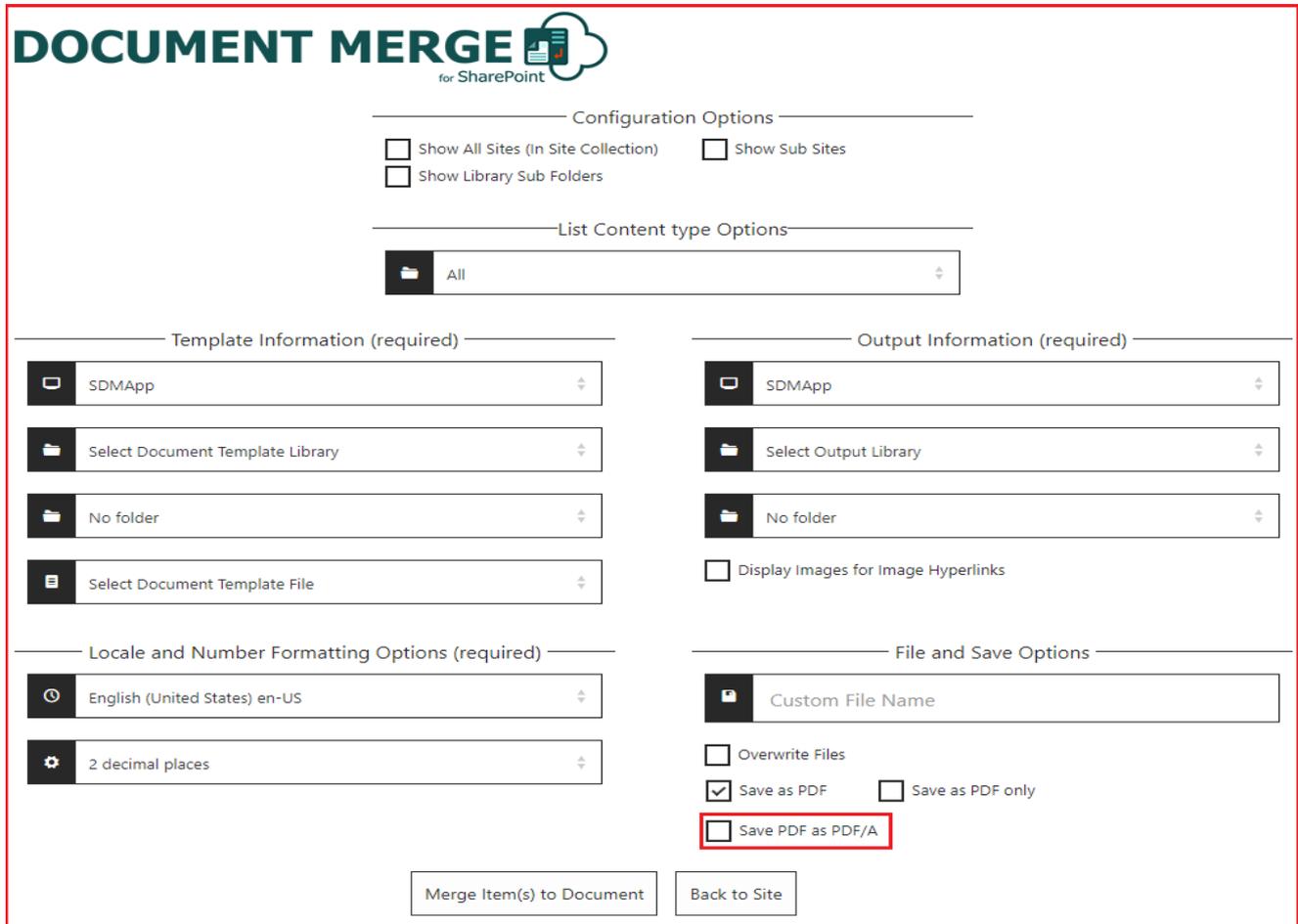
The screenshot displays the 'DOCUMENT MERGE for SharePoint' configuration interface. It is organized into several sections:

- Configuration Options:** Includes three checkboxes: 'Show All Sites (In Site Collection)', 'Show Sub Sites', and 'Show Library Sub Folders', all of which are currently unchecked.
- List Content type Options:** A dropdown menu is set to 'All'.
- Template Information (required):** Four dropdown menus are configured: 'SDMApp', 'Select Document Template Library', 'No folder', and 'Select Document Template File'.
- Output Information (required):** Three dropdown menus are configured: 'SDMApp', 'Select Output Library', and 'No folder'. There is also an unchecked checkbox for 'Display Images for Image Hyperlinks'.
- Locale and Number Formatting Options (required):** Two dropdown menus are set to 'English (United States) en-US' and '2 decimal places'.
- File and Save Options:** A dropdown menu is set to 'Custom File Name'. There are three checkboxes: 'Overwrite Files' (unchecked), 'Save as PDF' (unchecked), and 'Save as PDF only' (checked and highlighted with a red box).

At the bottom of the interface, there are two buttons: 'Merge Item(s) to Document' and 'Back to Site'.

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.



DOCUMENT MERGE for SharePoint

Configuration Options

- Show All Sites (In Site Collection)
- Show Sub Sites
- Show Library Sub Folders

List Content type Options

All

Template Information (required)

- SDMApp
- Select Document Template Library
- No folder
- Select Document Template File

Output Information (required)

- SDMApp
- Select Output Library
- No folder
- Display Images for Image Hyperlinks

Locale and Number Formatting Options (required)

- English (United States) en-US
- 2 decimal places

File and Save Options

- Custom File Name
- Overwrite Files
- Save as PDF
- Save as PDF only
- Save PDF as PDF/A

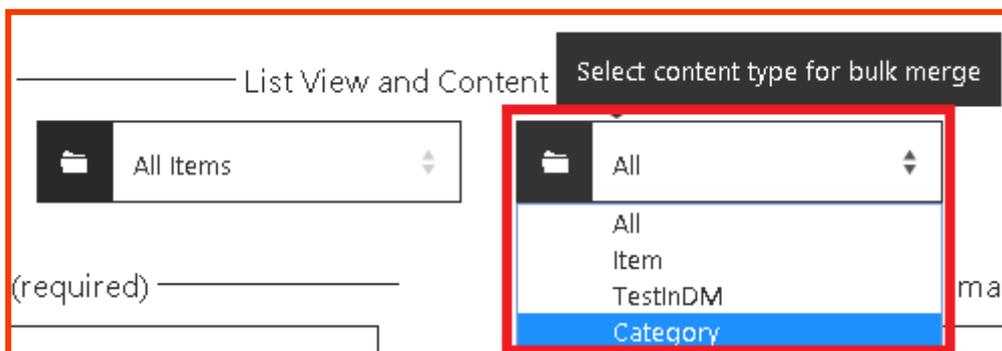
Merge Item(s) to Document Back to Site

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.



List View and Content

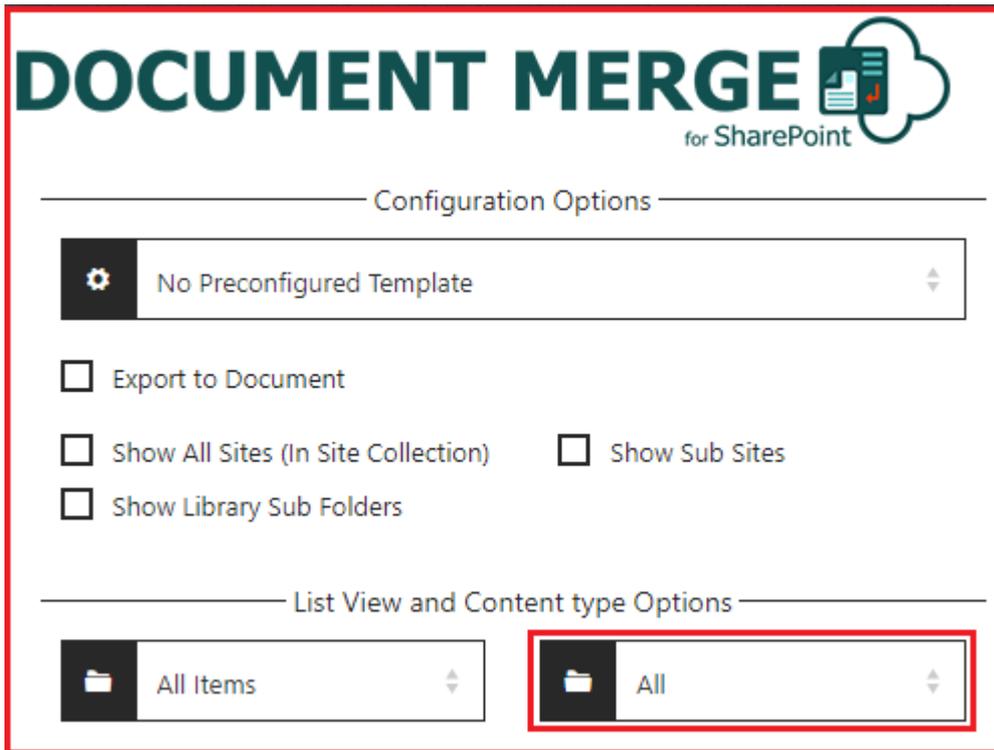
All Items

(required)

Select content type for bulk merge

- All
- All Item
- TestInDM
- Category

Bulk Merge



DOCUMENT MERGE 
for SharePoint

Configuration Options

No Preconfigured Template

Export to Document

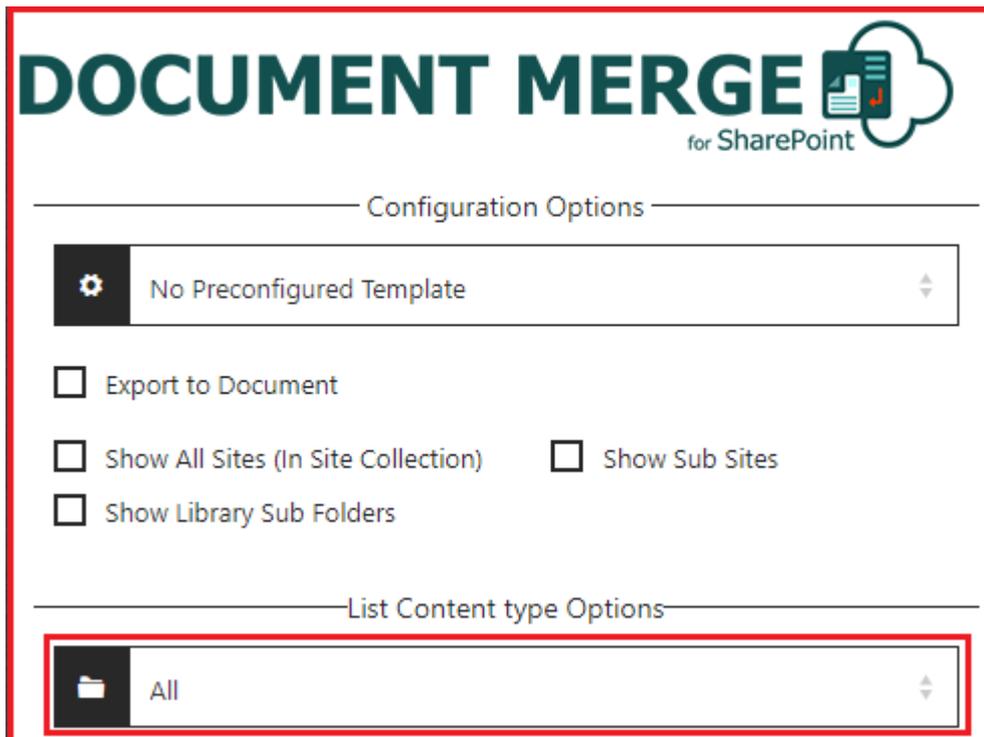
Show All Sites (In Site Collection) Show Sub Sites

Show Library Sub Folders

List View and Content type Options

All Items All

Selected Merge



DOCUMENT MERGE 
for SharePoint

Configuration Options

No Preconfigured Template

Export to Document

Show All Sites (In Site Collection) Show Sub Sites

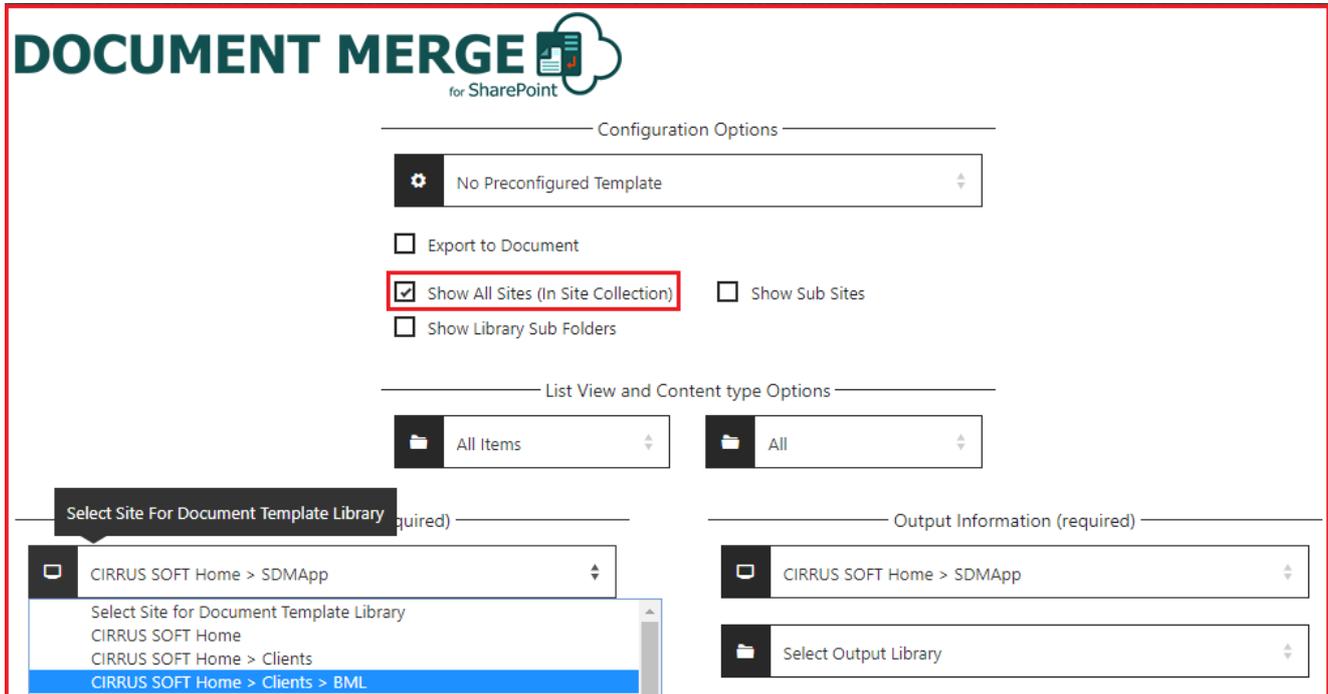
Show Library Sub Folders

List Content type Options

All

Show All Sites option

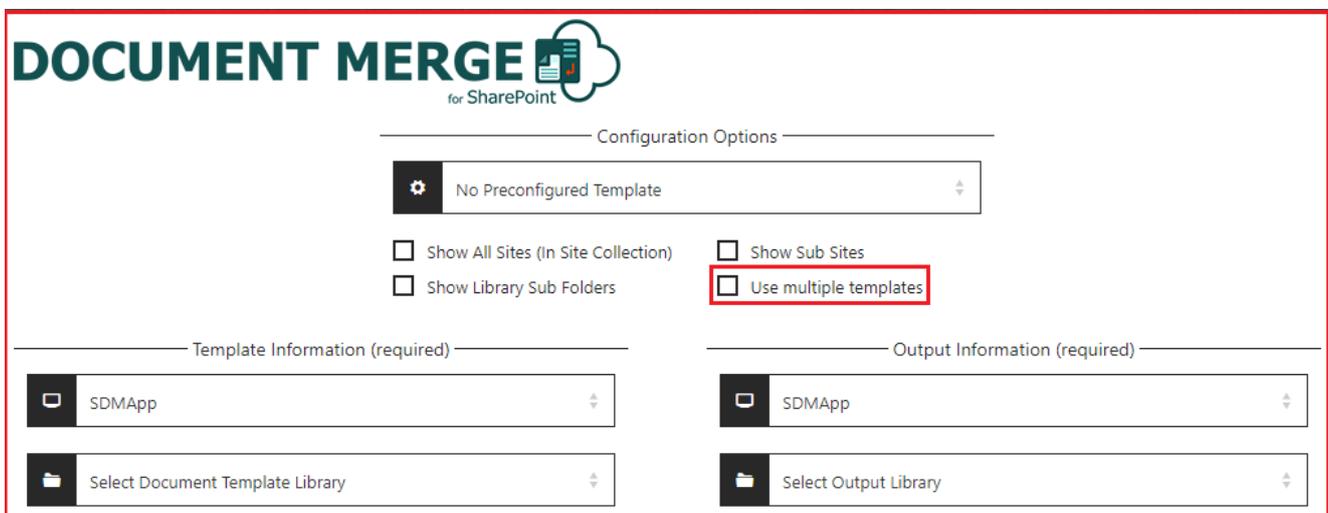
This option will show all the sites available in the current site collection so you can select any of these sites to select template file or to store merged file to the output library regardless of where app is installed.



The screenshot shows the 'DOCUMENT MERGE for SharePoint' configuration interface. Under 'Configuration Options', the 'Show All Sites (In Site Collection)' checkbox is checked and highlighted with a red box. Other options include 'No Preconfigured Template', 'Export to Document', 'Show Sub Sites', and 'Show Library Sub Folders'. Under 'List View and Content type Options', 'All Items' and 'All' are selected. The 'Select Site For Document Template Library (required)' dropdown is open, showing a list of sites including 'CIRRUS SOFT Home > Clients > BML'. The 'Output Information (required)' section shows 'CIRRUS SOFT Home > SDMAApp' selected for the output library.

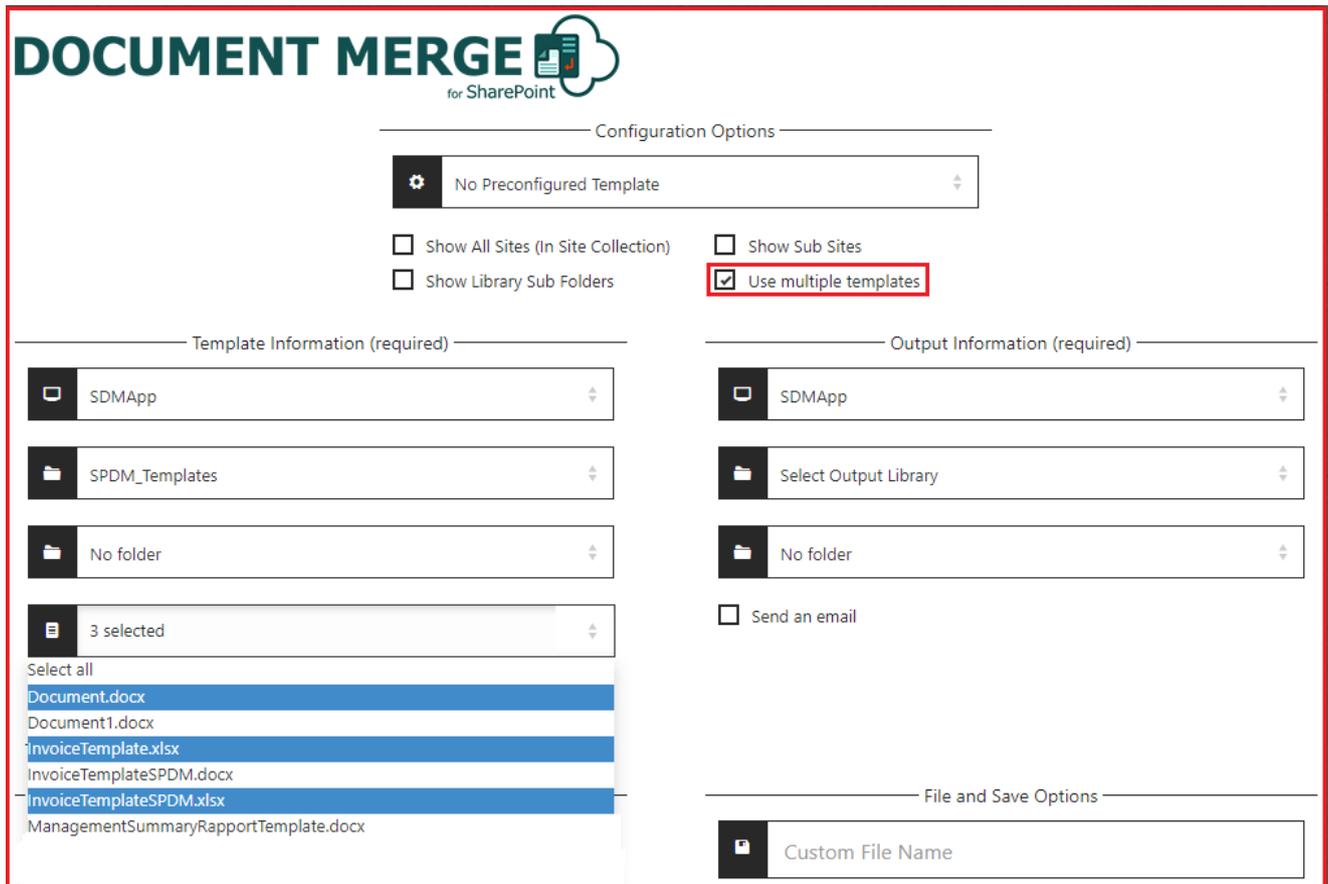
Selecting multiple templates in one go while doing document merge on single item.

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



The screenshot shows the 'DOCUMENT MERGE for SharePoint' configuration interface. Under 'Configuration Options', the 'Use multiple templates' checkbox is checked and highlighted with a red box. Other options include 'No Preconfigured Template', 'Show All Sites (In Site Collection)', 'Show Sub Sites', and 'Show Library Sub Folders'. The 'Template Information (required)' section shows 'SDMAApp' selected for the document template library and 'Select Document Template Library' for the output library. The 'Output Information (required)' section shows 'SDMAApp' selected for the output library and 'Select Output Library' for the output library.

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.



DOCUMENT MERGE 
for SharePoint

Configuration Options

No Preconfigured Template

Show All Sites (In Site Collection) Show Sub Sites

Show Library Sub Folders Use multiple templates

Template Information (required)

SDMApp

SPDM_Templates

No folder

3 selected

Select all

- Document.docx
- Document1.docx
- InvoiceTemplate.xlsx
- InvoiceTemplateSPDM.docx
- InvoiceTemplateSPDM.xlsx
- ManagementSummaryRapportTemplate.docx

Output Information (required)

SDMApp

Select Output Library

No folder

Send an email

File and Save Options

Custom File Name

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.

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.

To achieve this, go to the app landing page and select Generate Link tab:

The screenshot shows the 'Generate Link' tab in the SharePoint Document and Mail Merge app. The page content includes:

- Overview:** You can create a link for document merge to automatically generate a merged document for a specified item of a specific SharePoint list.
- To do so, replace the following parameters with actual value to create your link as shown below:**
- URL Template:**
`https://docmergecirrussoft.azurewebsites.net/Pages/GenerateDocument.aspx?SPHostUrl=https%3A%2F%2Fcirrussoft%2Esharepoint%2Ecom%2FSDMApp%2FSPLanguage=en%2DUS&SPClientTag=0&SPProductNumber=16%2E0%2E0%2E0%2D2e2a6969b5863d2%2Esharepoint%2Ecom%2FSDMApp%2FSharePointDocumentMerge&SPListItemId={ItemId}&SPListId={ListGuid}&open={open}`
- Parameters:**
 - {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".
- 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.**
- Please refer to the SharePoint Document and Mail Merge Add-in Manual for detailed Configuration Information [click here for the SharePoint](#)**

This will generate the link with placeholders for you, where you need to replace the following parameters:

{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".

E.g.: Your URL will be like

"https://docmergeapp.azurewebsites.net/Pages/GenerateDocument.aspx?SPHostUrl=https%3A%2F%2Fbaryadev1%2Esharepoint%2Ecom%2Fsites%2FNsite%2FSPLanguage=en%2DUS&SPClientTag=0&SPProductNumber=16%2E0%2E7528%2E1204&SPAppWebUrl=https%3A%2F%2Fbaryadev1%2D3a4505b3cbea31%2Esharepoint%2Ecom%2Fsites%2FNsite%2FSharePointDocumentMerge&SPListItemId=1&SPListId={104D2533-89CA-491E-BA5C-B85C41B28192}&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.

How to get specific number of decimal places for specified number fields:

- You can also specify number of decimal places you want in merged output document for specific number field.
- For this you just need to add one parameter along with your merge field in the template as show below:

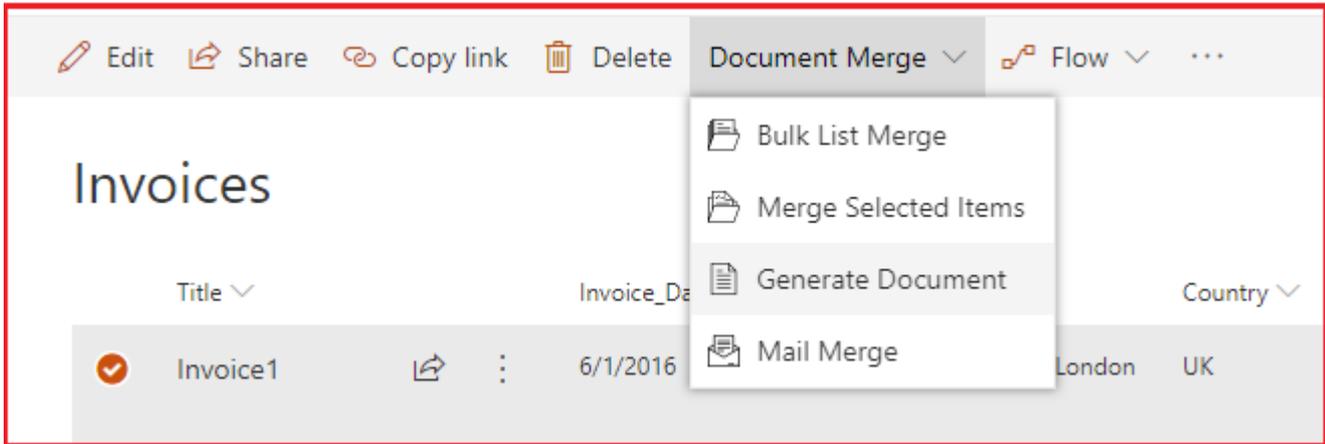
<<NumberField#numofdecimalplaces>>

For eg: <<Total#1>>

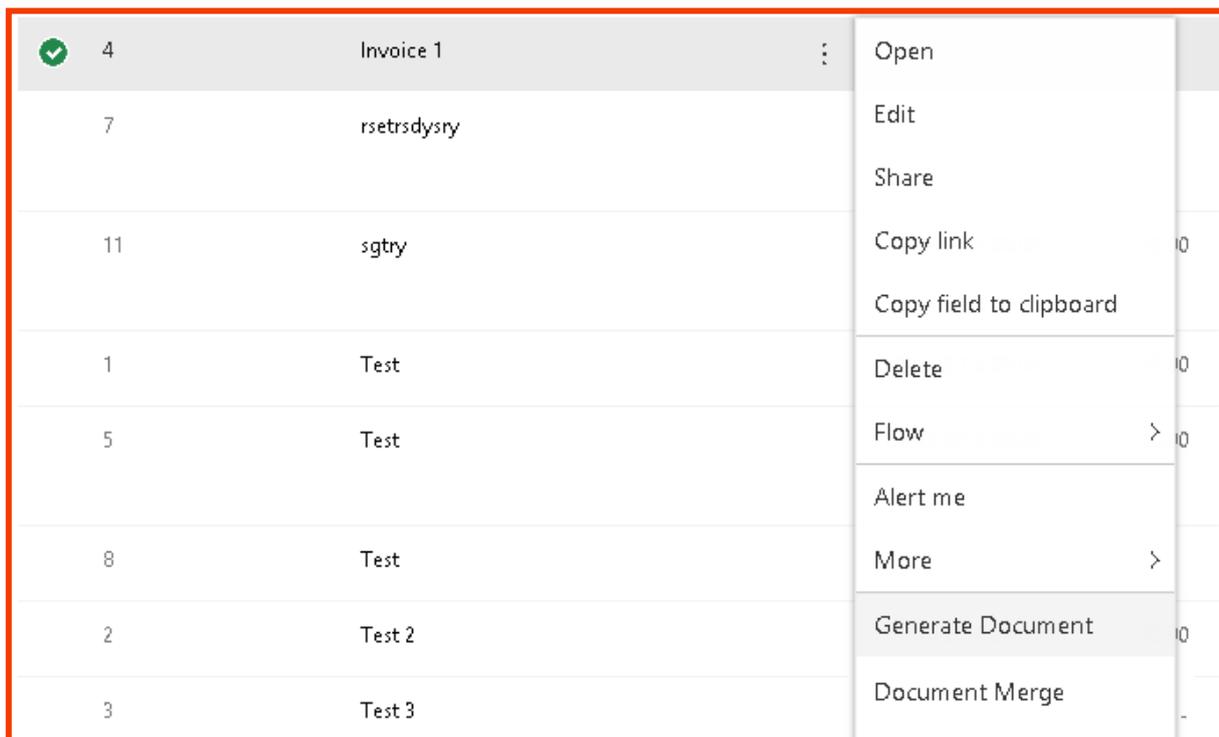
- Here **NumberField**: is the internal name of the column.
- **NumOfdecimalplaces**: Number of decimal places can be between 0 to 5.

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.

- Go to app landing page.

- Click on “Mail Merge Pre-Set Configuration Settings”
- This will redirect to the email template list (DocMergeMailTemplates).
- Here we can specify the email template.

Title	To	From	Cc	Bcc	Subject	Body	Mail Options
Test Email Template :	hiral@cirrussoft.onmicrosoft.com ;<<Author>>; <<Group>>	peter@cirrussoft.onmicrosoft.com;	sunil@cirrussoft.onmicrosoft.com	liam@cirrussoft.onmicrosoft.com	Sample Mail of <<Title>>	Hi, Please find the merged document here:	SharePoint

Test Email Template

Title *
Test Email Template

To
hiral@cirrussoft.onmicrosoft.com; <<Auther>>; <<Group>>

From
peter@cirrussoft.onmicrosoft.com;

Cc
sunil@cirrussoft.onmicrosoft.com

Bcc
liam@cirrussoft.onmicrosoft.com

Subject
Sample Mail of <<Title>>

Body 
Hi,

Please find the merged document here:
<<MergedFileUrl>>
<<MergedPDFFileUrl>>
See more

Mail Options

SharePoint 

SharePoint

Outlook SharePoint

Add attachments

Save **Cancel**

- **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

hiral@cirrussoft.onmicrosoft.com;<<Auther>>;<<Group>>

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

peter@cirrussoft.onmicrosoft.com;sunil@cirrussoft.onmicrosoft.com ;<<Auther>>

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

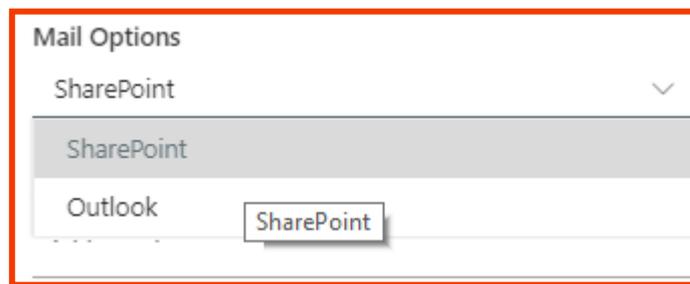
liam@cirrussoft.onmicrosoft.com

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

- **From:** Case where mail sends through SharePoint and if you want to display any user name of your tenant in “From” address then you can specify the valid email address of the user whose name you want to show.
- **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 have to specify the placeholder “<<MergedFileUrl>>” wherever you want to insert the link in the body of mail and “<<MergedPDFFileUrl>>” is for PDF file link.

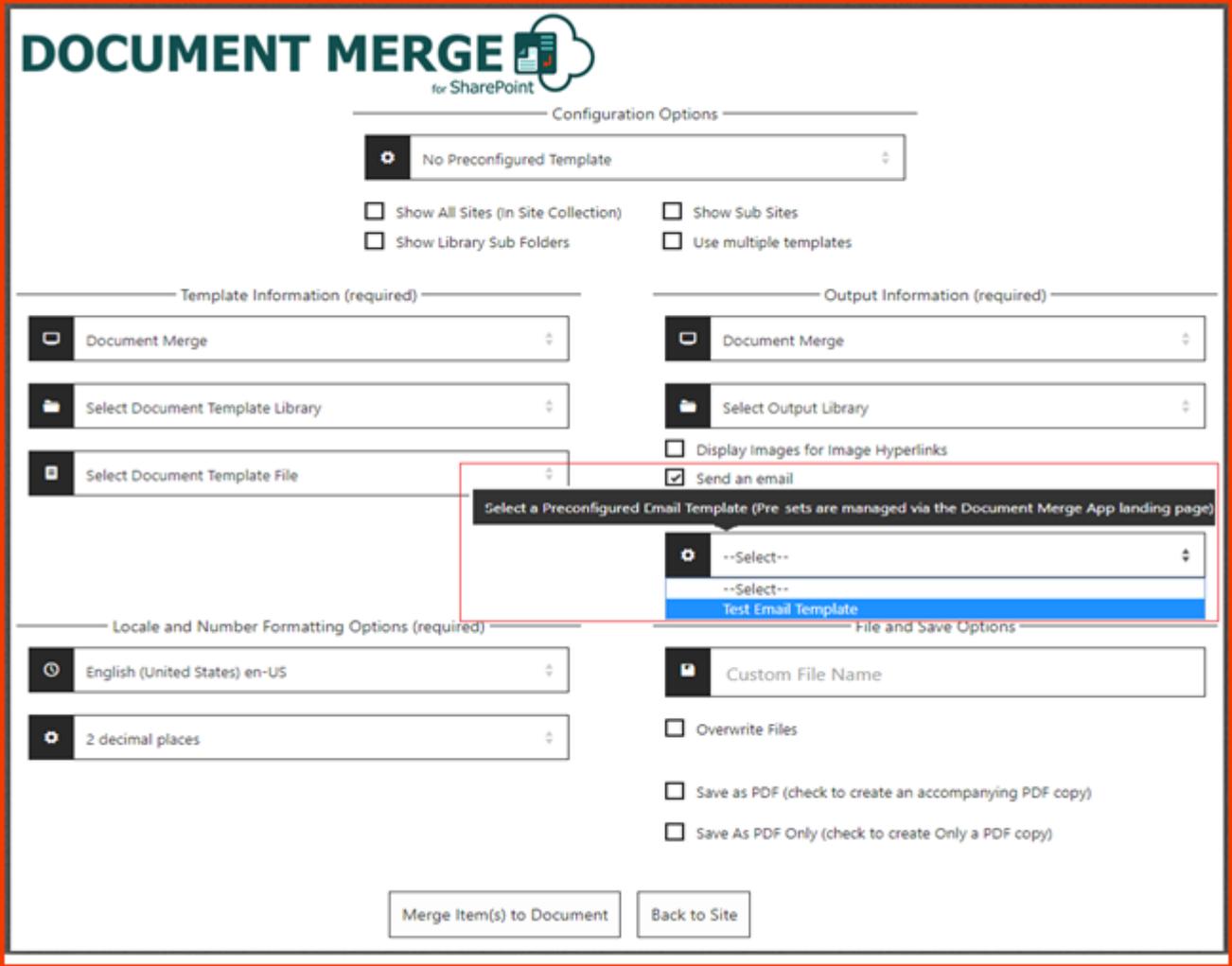


- **Mail Options:** there are two options to send mail.
 - SharePoint (Note: SharePoint can't send mail to the user outside the current tenant)
 - Outlook



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.



DOCUMENT MERGE for SharePoint

Configuration Options

No Preconfigured Template

Show All Sites (in Site Collection) Show Sub Sites

Show Library Sub Folders Use multiple templates

Template Information (required)

Document Merge

Select Document Template Library

Select Document Template File

Output Information (required)

Document Merge

Select Output Library

Display Images for image Hyperlinks

Send an email

Select a Preconfigured Email Template (Pre sets are managed via the Document Merge App landing page)

--Select--

--Select--

Test Email Template

Locale and Number Formatting Options (required)

English (United States) en-US

2 decimal places

File and Save Options

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 Back to Site

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.

DOCUMENT MERGE

for SharePoint

The Document Merge processing is now complete. 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 sent via SharePoint to the following recipients as shown below.

Title :	Invoice1
To :	hiral@cirrussoft.onmicrosoft.com;peter@cirrussoft.onmicrosoft.com
From :	peter@cirrussoft.onmicrosoft.com;
Cc :	peter@cirrussoft.onmicrosoft.com
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.

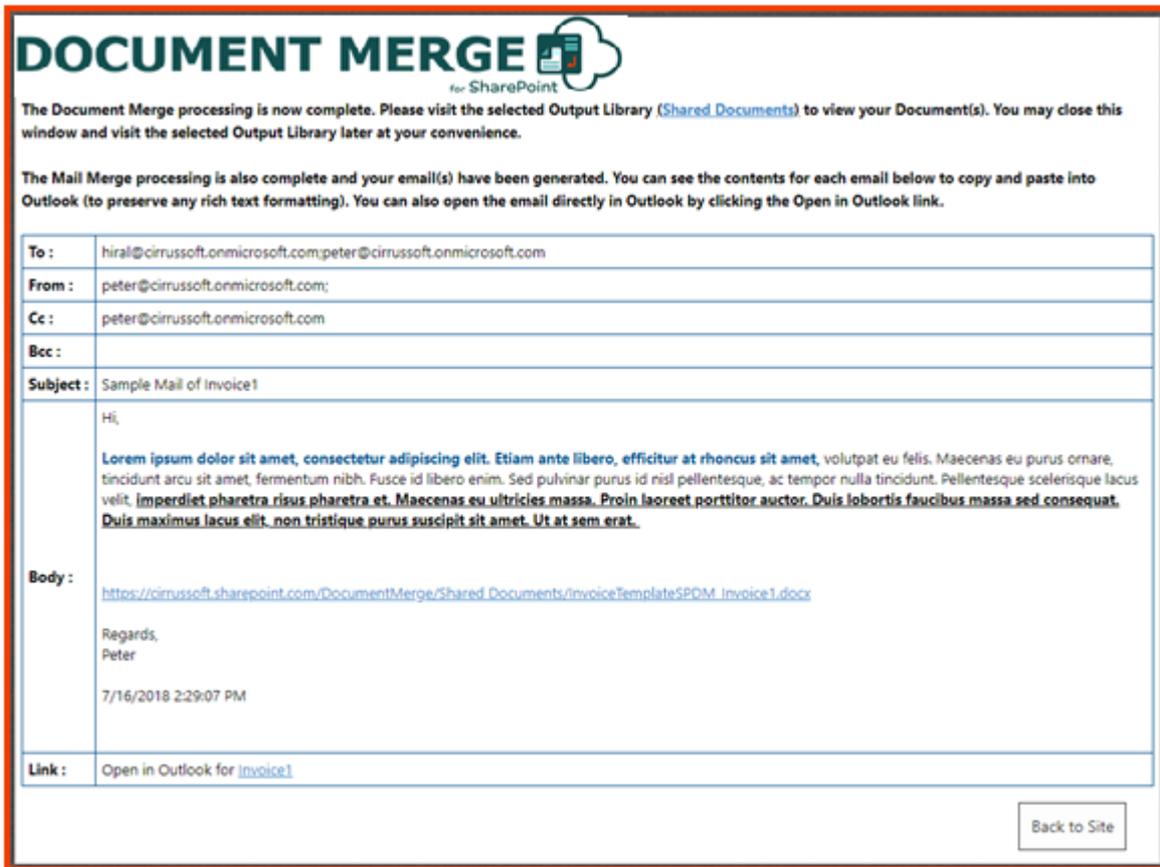
https://cirrussoft.sharepoint.com/DocumentMerge/Shared Documents/invoiceTemplateSPDM_Invoice1.docx

Regards,
Peter

7/16/2018 2:29:07 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”.



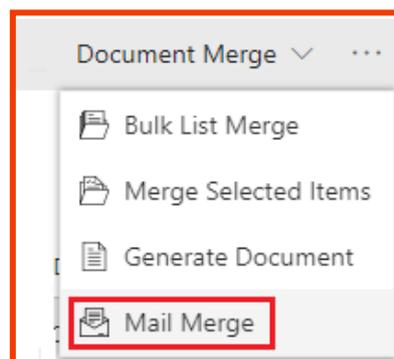
Mail Merge Menu Option

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

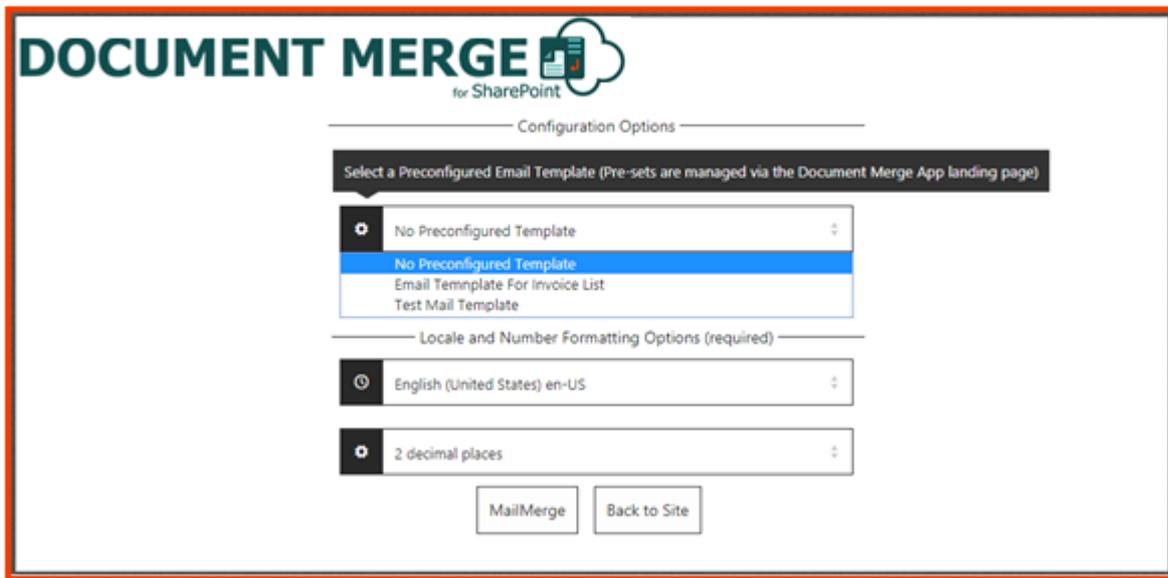
To achieve this first you need to create the [email template](#) as specified above

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.



DOCUMENT MERGE
for SharePoint

Configuration Options

Select a Preconfigured Email Template (Pre-sets are managed via the Document Merge App landing page)

- No Preconfigured Template
- No Preconfigured Template
- Email Template For Invoice List
- Test Mail Template

Locale and Number Formatting Options (required)

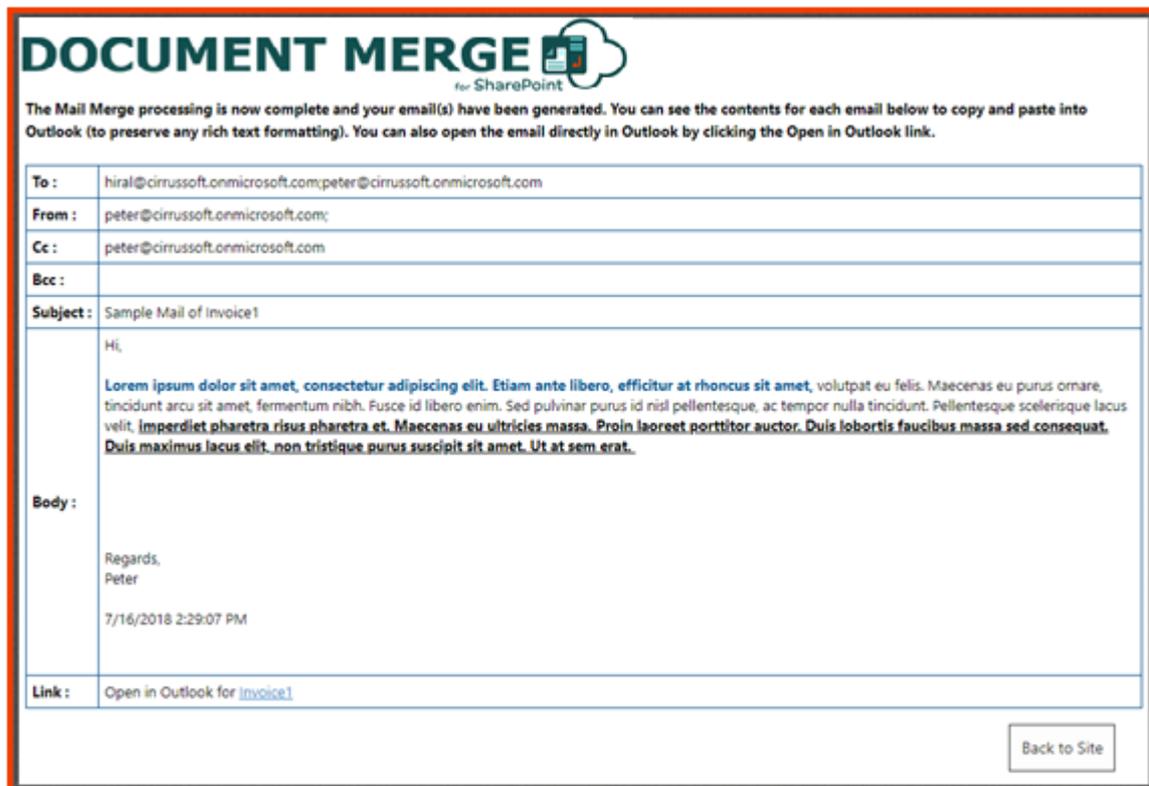
- English (United States) en-US
- 2 decimal places

[MailMerge](#) [Back to Site](#)

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.



DOCUMENT MERGE
for SharePoint

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 : hiral@cirrussoft.onmicrosoft.com;peter@cirrussoft.onmicrosoft.com

From : peter@cirrussoft.onmicrosoft.com;

Cc : peter@cirrussoft.onmicrosoft.com

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.

Regards,
Peter

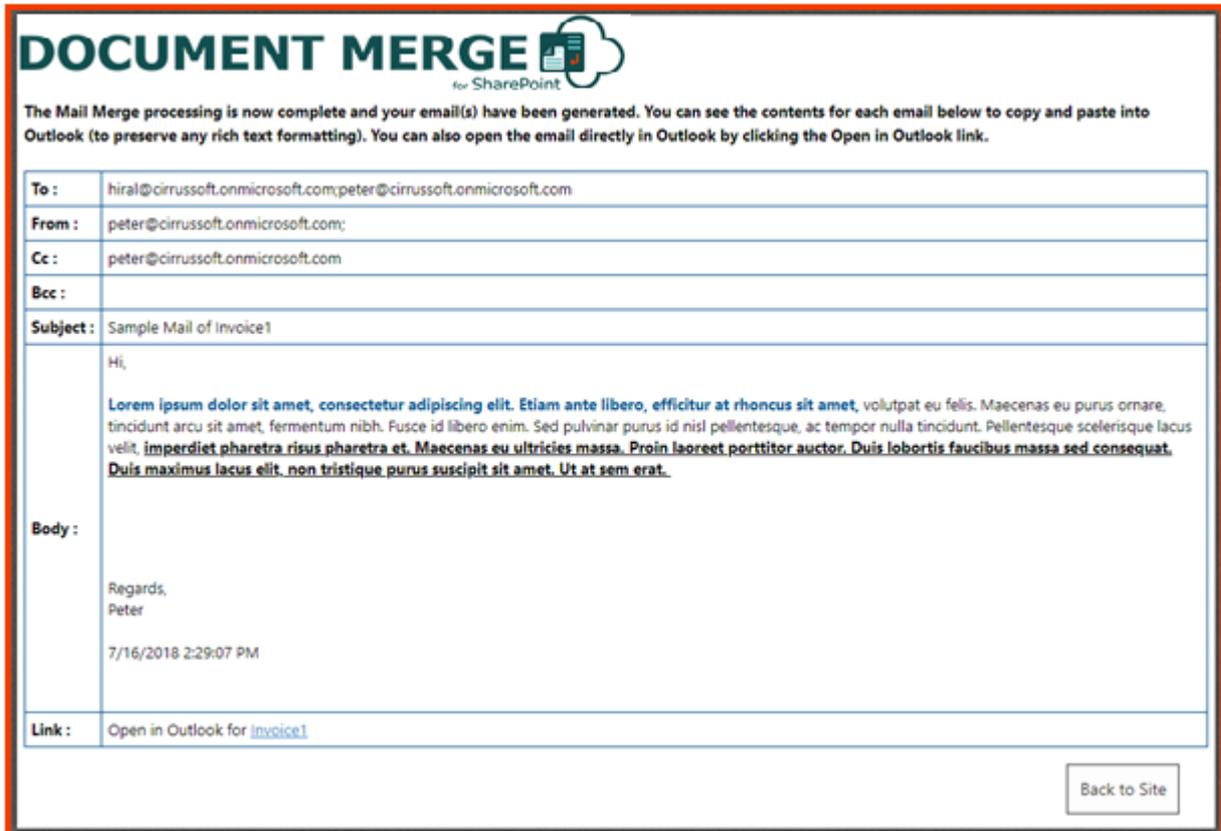
7/16/2018 2:29:07 PM

Link : [Open in Outlook for invoice1](#)

[Back to Site](#)

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”.



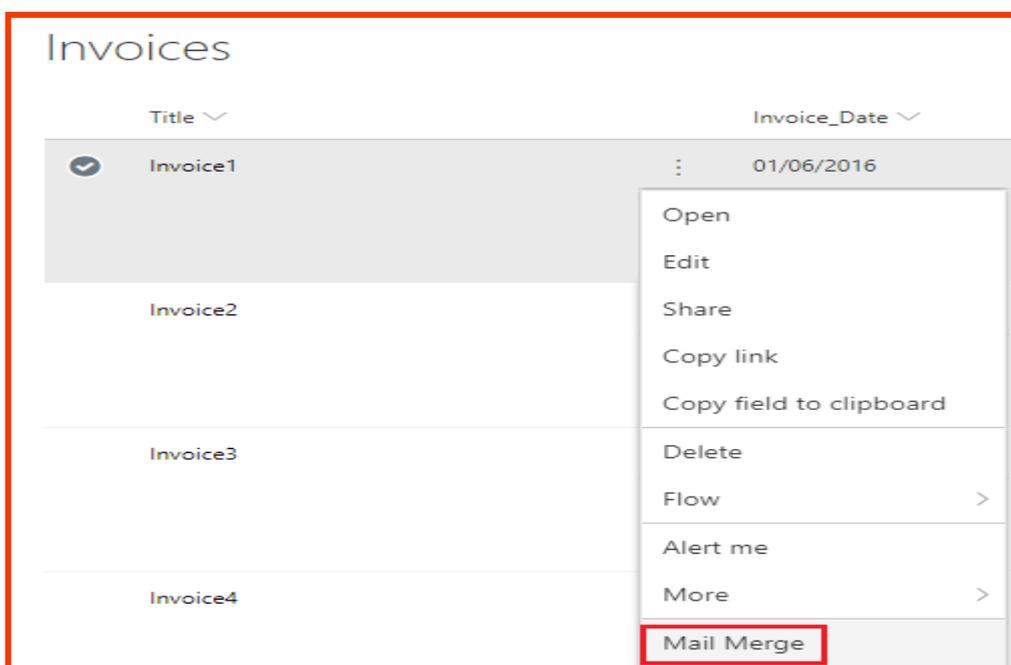
DOCUMENT MERGE 
for SharePoint

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 :	hiral@cirrussoft.onmicrosoft.com;peter@cirrussoft.onmicrosoft.com
From :	peter@cirrussoft.onmicrosoft.com;
Cc :	peter@cirrussoft.onmicrosoft.com
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</p> <p>7/16/2018 2:29:07 PM</p>
Link :	Open in Outlook for Invoice1

[Back to Site](#)

Context menu also available for mail merge functionality.



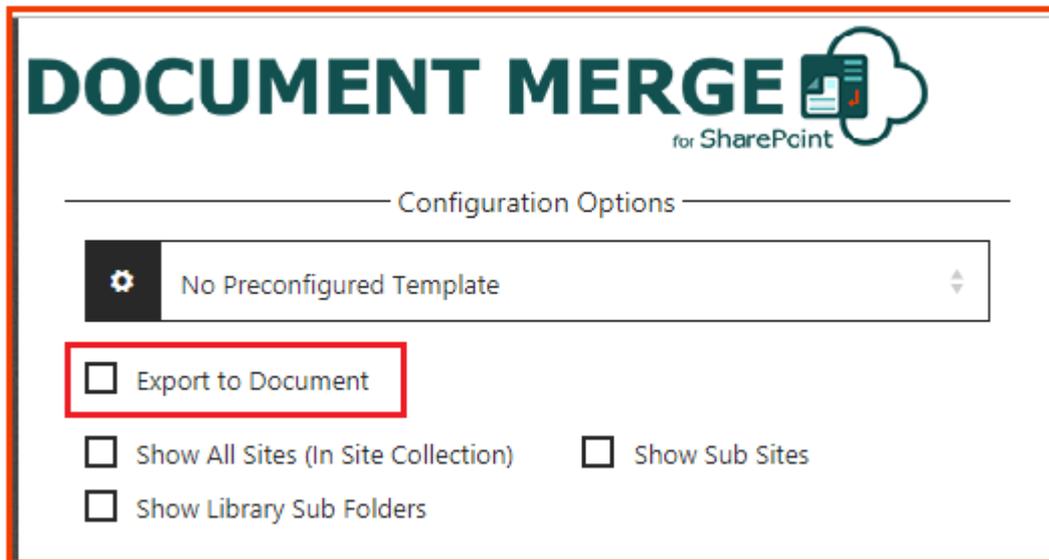
Invoices

Title	Invoice_Date
Invoice1	01/06/2016
Invoice2	
Invoice3	
Invoice4	

- Open
- Edit
- Share
- Copy link
- Copy field to clipboard
- Delete
- Flow >
- Alert me
- More >
- Mail Merge**

Export to document feature:

You can now Merge SharePoint List items to a single document in a table format with column level sorting;



To achieve this, you need to first create template file as shown below:

Title	Country	Created
«RangeStart»«Title»	«Country»	«Created»«RangeEnd»

Then on screen, you need to select “Export to Document” option to export selected items to the template file.

You can also sort the data at column level by specifying column name and order type, as shown below:

Title	Country	Created
«RangeStart:Title#Asc»«Title»	«Country»	«Created»«RangeEnd:Title#Asc»

This will sort the data according to its title in ascending order. Same way you can do sorting in descending order as shown below.

Title	Country	Created
«RangeStart:Title#Dsc»«Title»	«Country»	«Created»«RangeEnd:Title#Dsc»

This functionality is supported for word files and excel files, for selected merge and bulk merge on list items.

SharePoint Document and Mail Merge Support

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

<http://cirrussoft.support>

<https://sharepointdocumentmerge.com>

INSTALLATION AND CONFIGURATION MANUAL

CONTACT US

www.sharepointdocumentmerge.com | info@sharepointdocumentmerge.com

+44 (0) 845 388 8019

