

Instructions for Document Merge App Remote Event Receiver

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

Step 1: Click on document merge app landing page:

 SharePoint Document Merge



Document Merge Pre-set Configuration Settings

Register Document Merge Events

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!

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.

How does SharePoint Document Merge Work?

After you have added the SharePoint Document Merge App, the Document Merge Option will now be available for all list items within a site.

Create your Word or 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.

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

 SharePoint Document Merge

Register Document Merge event to lists

Source List

Event Type

Register

Go Back

List Title	Event Type	Remove
Demo	ItemAdded	
Demo	ItemUpdated	

- Here you can register the doc merge event to the specific list on which you want to perform document merge events.

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- 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

Register

GO BACK

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.

Columns

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

Column (click to edit)

Type

Required

Title

Single line of text

✓

Source

Single line of text

Destination

Single line of text

Save As Pdf

Yes/No

Output File Name

Single line of text

Display Image

Yes/No

OverWrite

Yes/No

Modified

Date and Time

Created

Date and Time

Created By

Person or Group

Modified By

Person or Group

- Then you have to 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
 - Output file name: Name of the merged file(e.g. <<Title>>)
 - Display Image: Yes/No
 - OverWrite: Yes/No

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Edit all

Home

Notebook

Documents

Pages

Site contents

Edit

Demo > Test

Title *

Test

Source

Shared Documents/TitleTest.docx

Destination

Shared Documents

Save As Pdf

Yes

Output File Name

ReRTest

Display Image

Yes

OverWrite

Yes

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.