

DOCUMENT MERGE

for SharePoint



INSTALLATION AND CONFIGURATION MANUAL



APPS
365



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Current Version for SharePoint Online

Name	Version Approved	Compatibility	Date
SharePoint Document and Mail Merge	SharePoint Document and Mail Merge Version 7.0.0.0	SharePoint Online / Microsoft 365.	2022, April

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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://appssource.microsoft.com/en-us/product/office/WA104379659>)

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 14 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:

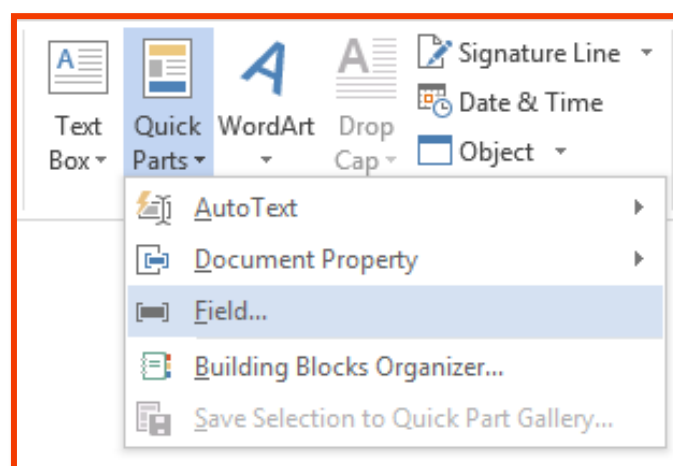
/_layouts/15/FldEdit.aspx? List={E67400DD-5986-4E99-B8A5-13BA9CD2559E}&Field=FirstName

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

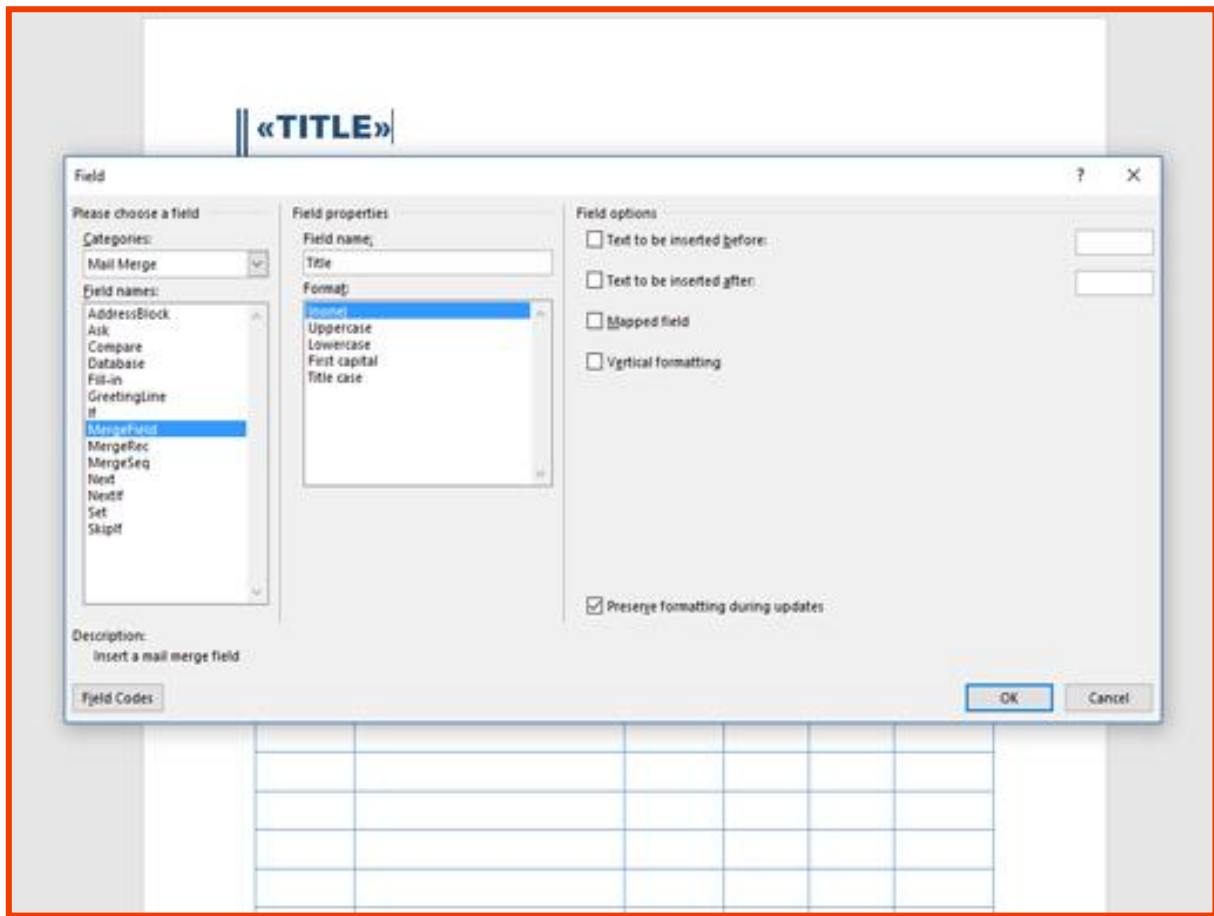
Create a Microsoft Word Template

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

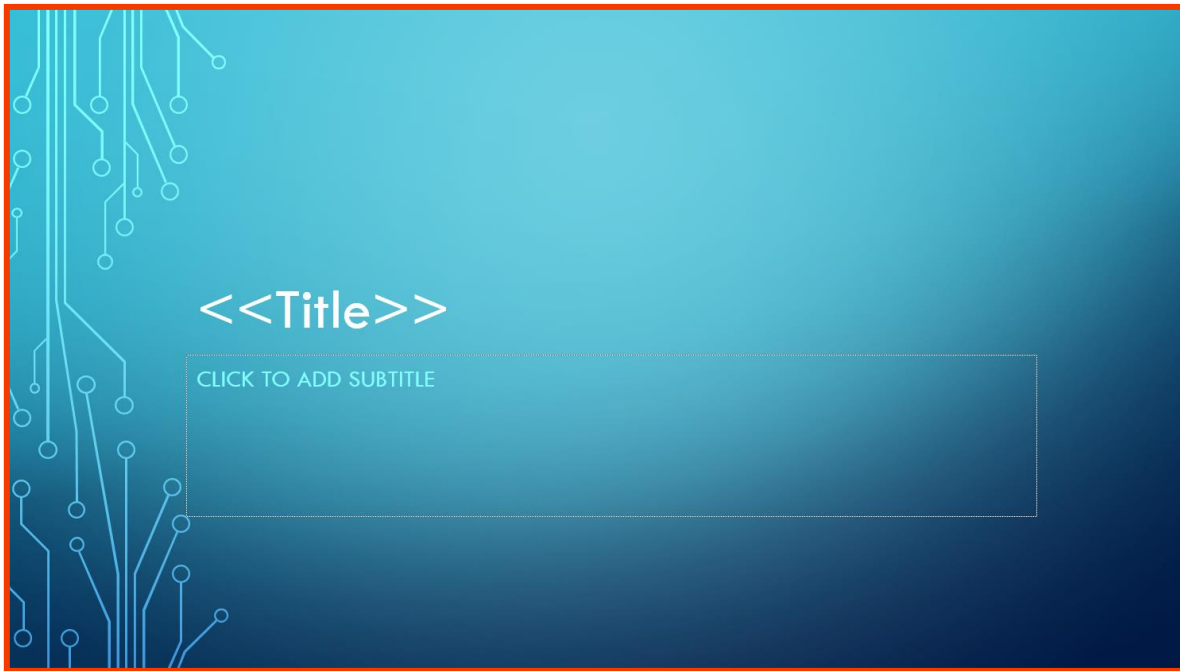
Title	Date	Hours	Price	
<<rangeStart:WorkedHours#Invoices#Unit_Price:Dsc>><<Title>>	<<Date>>	<<Work_Hours>>	<<Unit_Price>>	<<Total>><<rangeEnd:WorkedHours#Invoices#Unit_Price:Dsc>>



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).

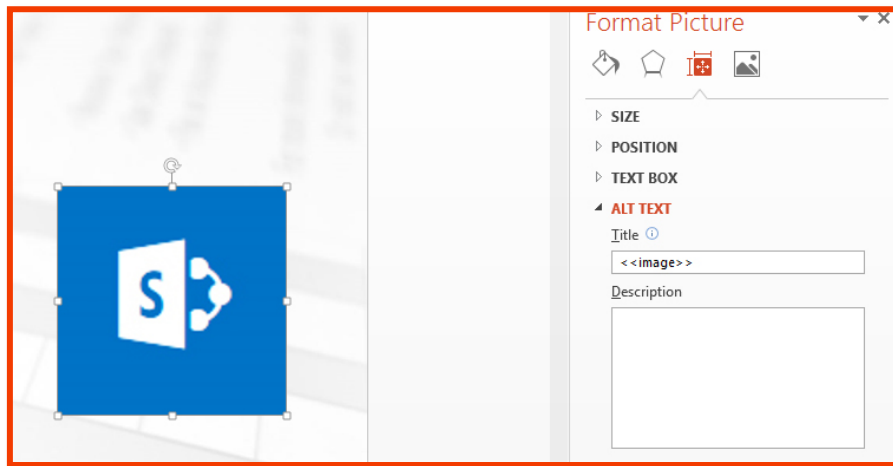


- Apply Place Holders (corresponding to the SharePoint List data) as required for the layout of the template and save the document as .pptx. This template is now ready to be used for **SharePoint Document and Mail Merge**.

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

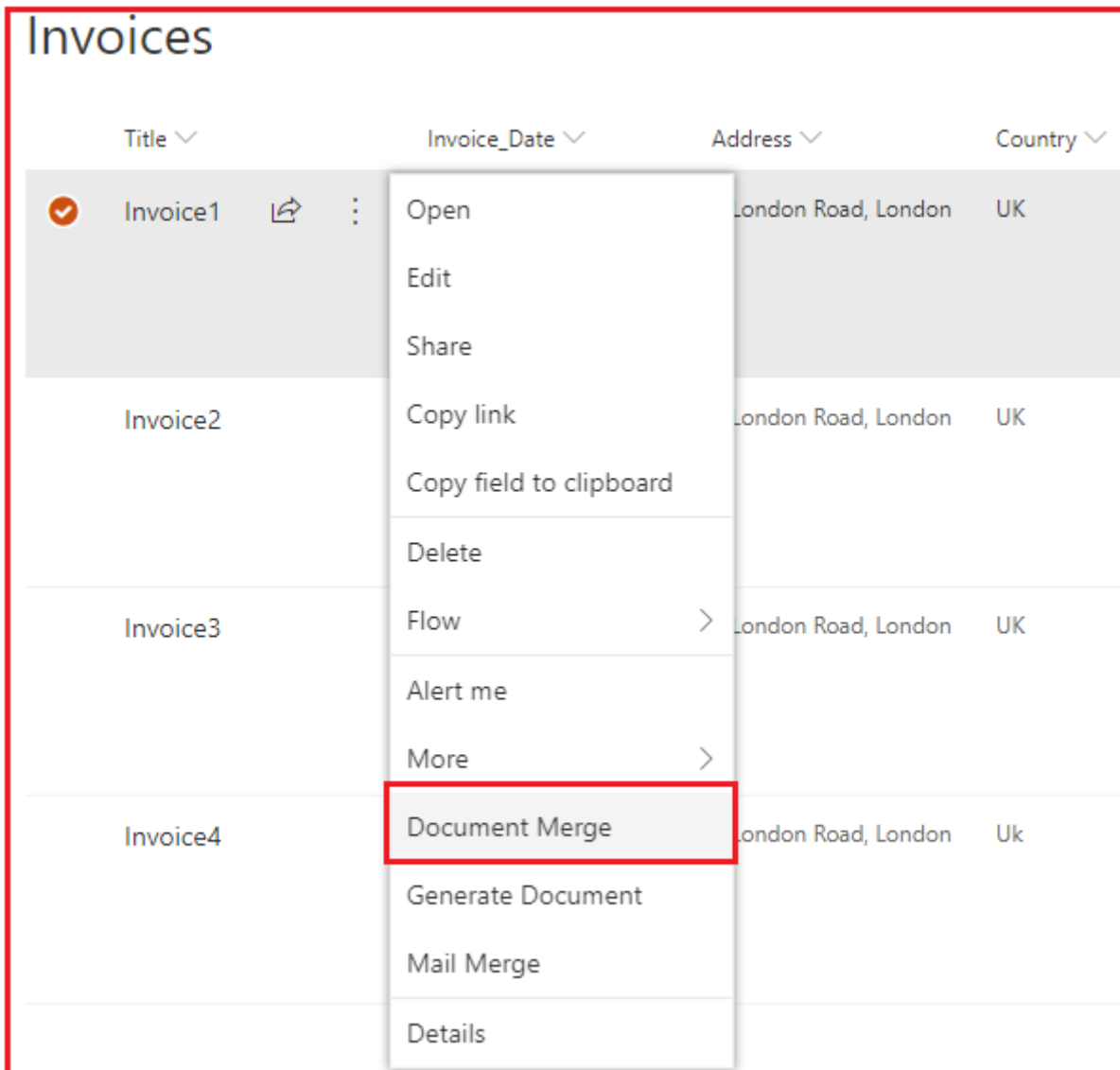
Once installed **SharePoint Document and Mail Merge** options are made available on all List Items Context Menu and the Lists Ribbon Menu. Also, for Word Documents within Document Libraries.

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
BACK TO LIST

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 for SharePoint

Select Document Template Library

No folder

Select Document Template File

Output Information (required)

Document Merge for SharePoint

Select Output Library

No folder

☐ Display Images for Image Hyperlinks
☐ Send an email

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

Merge Item(s) to Document
Back to Site

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 '_' separator 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.

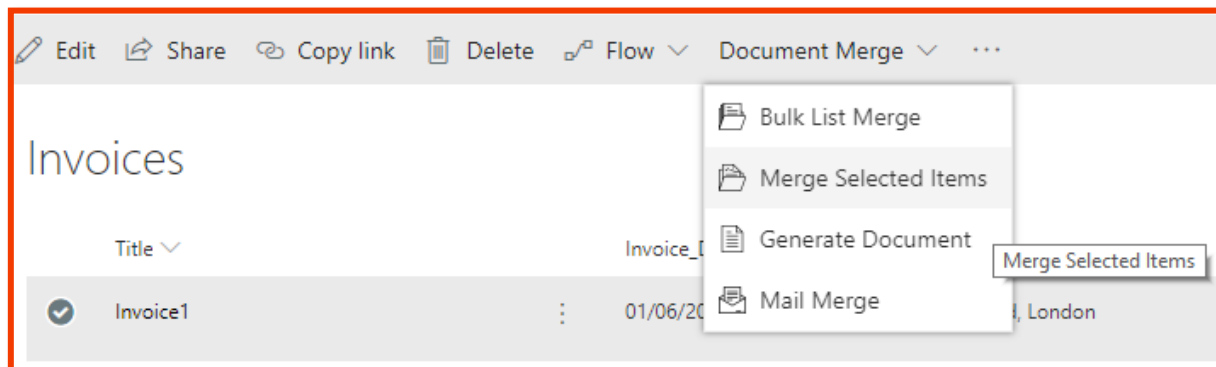
Once processing is complete the Documents will be saved in the user specified SharePoint Site / Sub Site / Document Library / Document Library Sub folder with the List Items replacing any Merge Fields (Word) Place Holders (Excel, PowerPoint).

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!).

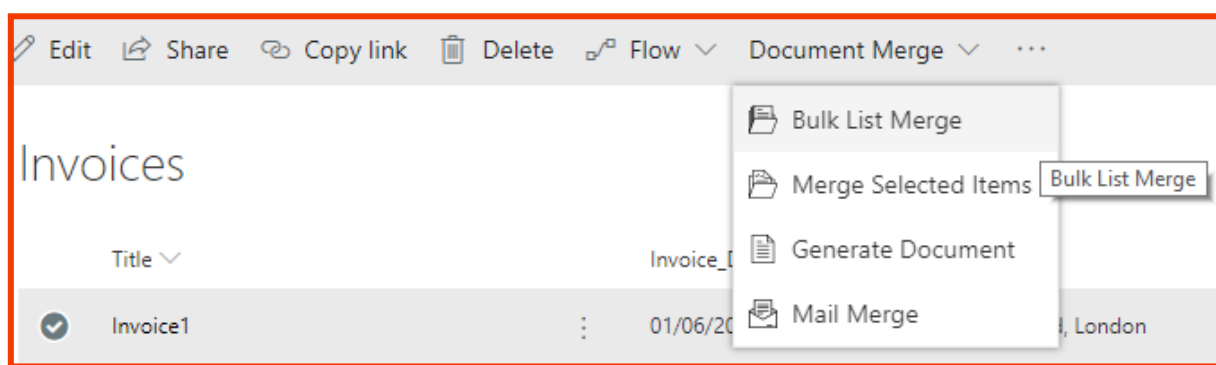


Once processing is complete the Documents (one for each List Item row or for .docx 1 Single Document if selected) will be saved in the user specified SharePoint Document Library with the List Items replacing any Merge Fileds (Word) Place Holders (Excel, PowerPoint).

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 Fields (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.

SharePoint Document and Mail Merge
DOCUMENT MERGE
for SharePoint

Overview
Configuration
Mail Merge
Events
Generate Link
Usage
FAQ's
Support
Version

You can create Templates with Pre-set Configuration Settings to perform merge operations on SharePoint lists on a single click.

Document Merge Pre-set Configuration Settings

Please refer to the SharePoint Document and Mail Merge Add-in Manual for detailed Configuration Information [click here for the SharePoint Document and Mail Merge Add-in Manual](#).

DOCUMENT MERGE - PRE-SET CONFIGURATION SETTINGS								BACK TO SITE
Add New		Go Back						
Edit	Delete	Template Title	Source List Site	Source List	Default Template Site	Template Library	Template File	Site For Ou
		Invoice Configuration 1	/sites/Products/DocumentMerge	/sites/Products/DocumentMerge/Lists/Invoices	/sites/Products/DocumentMerge	/sites/Products/DocumentMerge/SPDM_Templates	InvoiceTemplateSPDM.docx	/sites/Produc
		Invoice Configuration 2	/sites/Products/DocumentMerge	/sites/Products/DocumentMerge/Lists/Invoices	/sites/Products/DocumentMerge	/sites/Products/DocumentMerge/SPDM_Templates	RangeStrat-EndTemp - Sort.docx	/sites/Produc
		RC_SDM_Template	/sites/Products/DocumentMerge	/sites/Products/DocumentMerge/Lists/RC_List	/sites/Products/DocumentMerge	/sites/Products/DocumentMerge/RC_Templates	RC1_Template.docx	/sites/Produc

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

DOCUMENT MERGE
BACK TO SITE

Template Settings and Configuration Options

Enter Unique Template Name

☐ Set as list default
☐ Allow Edits when loaded (will increase wait time)

Document Merge for SharePoint

Select the source list for which this template settings apply

Template Information

☐ Show All Sites (In Site Collection)
☐ Show Sub Sites

☐ Show Library Sub Folders

Document Merge for SharePoint

Select Document Template Library

No folder

Select Document Template File

Output Information

Document Merge for SharePoint

Select Output Library

No folder

☐ Display Images for Image Hyperlinks

☐ Send an email

Locale Formatting Options

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

Go Back

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.

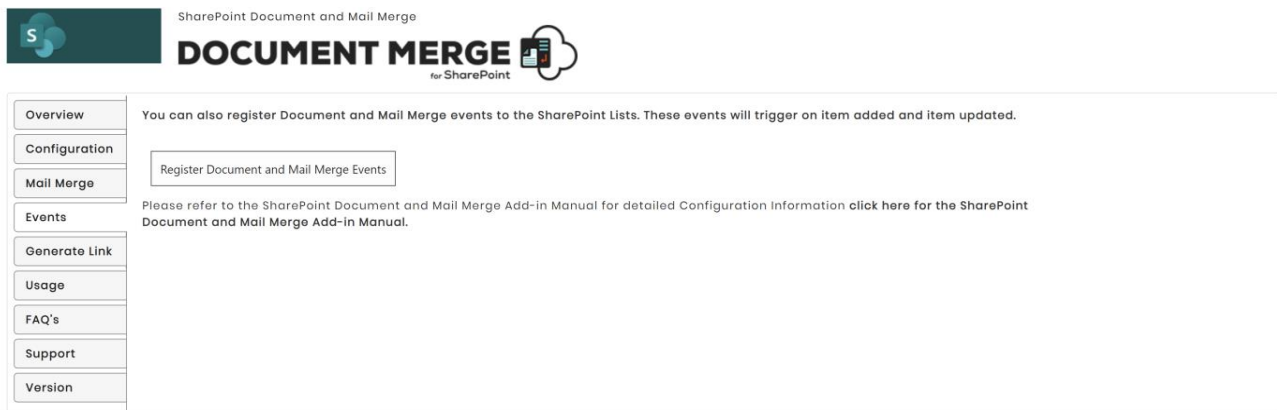
Select the source list for which this template settings apply: Select the SharePoint list, from within the site, for which the pre-set configuration settings will apply.

*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
Select the source list to register document merge event ▼

Event Type

When item is added ▼
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. Because this list allows multiple content types	
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.

Merge Options

Document Merge ▼

- Document Merge
- Mail Merge
- 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

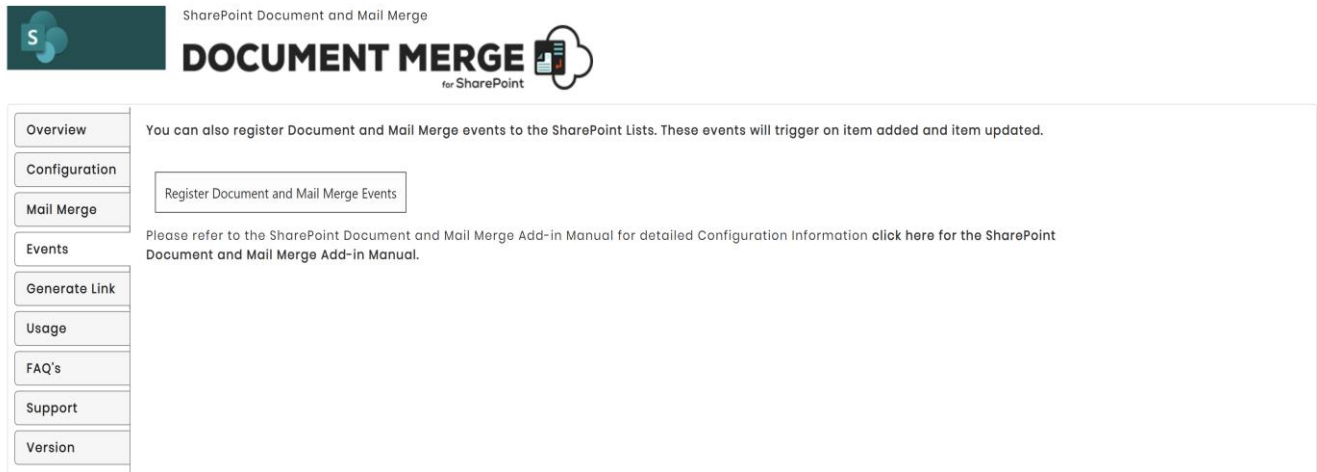
Add or remove attachments

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.

Register Document and Mail Merge event to lists

Source List

Event Type



List Title	Event Type	Remove
Invoices	ItemAdded	

- 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

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

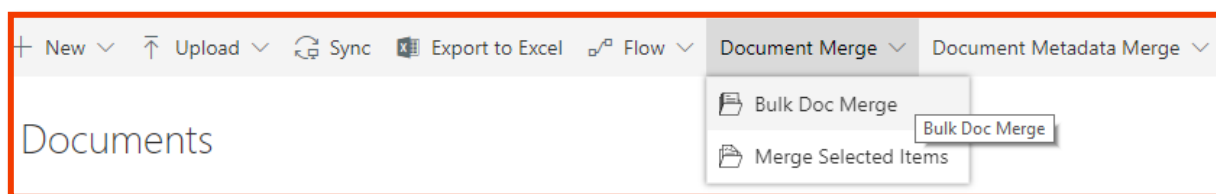
- Then you are required to select correct template title which you have created, from the dropdown, whenever you add an item to the list to perform doc merge event:

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

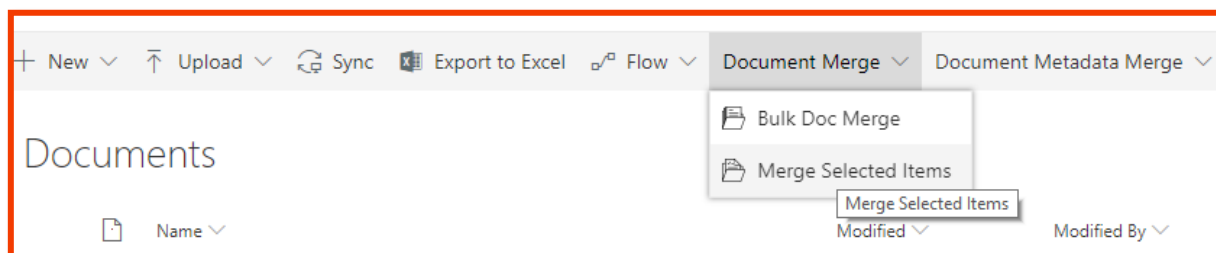
Merge Multiple Word or PowerPoint Documents to a Single Word or PowerPoint Document

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

DOCUMENT MERGE

BACK TO LIST

List Content type Options

All

Sub Site and Library Subfolder Options

☐ Show All Sites (In Site Collection)

☐ Show Sub Sites

☐ Show Library Sub Folders

Output / Save Information (required)

Document Merge for SharePoint

Select Output Library

No folder

Custom File Name

File Options

Merge Word Files

Include Individual Document Headers

☐ Overwrite Files

☐ Save as PDF

☐ Save as PDF only

Merge Item(s) to Document

Back to Site

Bulk Doc Merge

DOCUMENT MERGE

BACK TO LIST

List View and Content type Options

All Documents

All

Sub Site and Library Subfolder Options

☐ Show All Sites (In Site Collection)

☐ Show Sub Sites

☐ Show Library Sub Folders

Output / Save Information (required)

Document Merge for SharePoint

Select Output Library

No folder

Custom File Name

File Options

Merge Word Files

Include Individual Document Headers

☐ Overwrite Files

☐ Save as PDF

☐ Save as PDF only

Merge Item(s) to Document

Back to Site

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

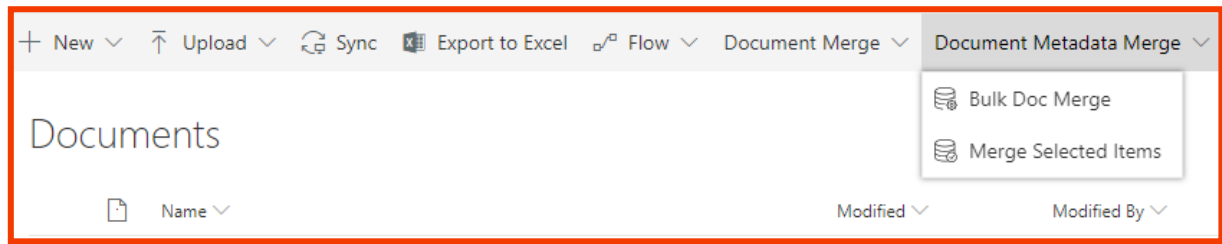
You can also merge metadata of documents of Document Library.

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.

DOCUMENT MERGE

BACK TO LIST

Configuration Options

☐ Show All Sites (In Site Collection)
 ☐ Show Sub Sites

☐ Show Library Sub Folders

Template Information (required)

Document Merge for SharePoint

Select Document Template Library

No folder

Select Document Template File

Output Information (required)

Document Merge for SharePoint

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

Merge Item(s) to Document

Back to Site

- 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	
_INVOICE_GBP	GBP_201...	About a minute ago	Deepa	C1001	£10,000.00	06/12/201	

- 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: [REDACTED] _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 shows the 'File and Save Options' section of the Document Merge interface. It includes a 'Custom File Name' input field, an 'Overwrite Files' checkbox, a 'Save as PDF' checkbox, and a 'Save as PDF only' checkbox which is highlighted with a red box. Below these are 'Merge Item(s) to Document' and 'Back to Site' buttons.

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.

The screenshot shows the 'File and Save Options' section of the Document Merge interface. It includes a 'Custom File Name' input field, an 'Overwrite Files' checkbox, a 'Save as PDF' checkbox (which is checked), a 'Save as PDF only' checkbox, and a 'Save PDF as PDF/A' checkbox which is highlighted with a red box. Below these are 'Merge Item(s) to Document' and 'Back to Site' buttons.

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 the 'List View and Content' section of the Document Merge interface. It includes a 'List View and Content' dropdown menu with 'All Items' selected. To the right, a 'Select content type for bulk merge' dropdown menu is open, showing options: 'All', 'All Item', 'TestInDM', and 'Category'. The 'Category' option is highlighted with a blue bar. Below these are 'Merge Item(s) to Document' and 'Back to Site' buttons.



Bulk Merge

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

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 displays the 'Configuration Options' section of the Document Merge interface. The 'No Preconfigured Template' dropdown is selected. Under the 'List View and Content type Options' section, the 'Show All Sites (in Site Collection)' checkbox is checked and highlighted with a red box. Other options include 'Export to Document', 'Show Sub Sites', and 'Show Library Sub Folders'. Below this, the 'Select Site For Document Template Library' dropdown shows a list of sites: 'Home > SDMAApp', 'Home', 'Home > Clients', and 'Home > Clients > BML'. The 'Output Information (required)' section shows the 'Home > SDMAApp' dropdown and a 'Select Output Library' dropdown.

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 displays the 'Configuration Options' section of the Document Merge interface. The 'No Preconfigured Template' dropdown is selected. Under the 'List View and Content type Options' section, the 'Use multiple templates' checkbox is checked and highlighted with a red box. Other options include 'Show All Sites (in Site Collection)', 'Show Sub Sites', and 'Show Library Sub Folders'. Below this, the 'Template Information (required)' section shows the 'SDMAApp' dropdown and a 'Select Document Template Library' dropdown. The 'Output Information (required)' section shows the 'SDMAApp' dropdown and a 'Select Output Library' dropdown.

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.

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:

SharePoint Document and Mail Merge

DOCUMENT MERGE

for SharePoint

Overview

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

Configuration

To do so, replace the following parameters with actual value to create your link as shown below:

`https://documentmergeapp.azurewebsites.net/Pages/GenerateDocument.aspx?SPHostUrl=https%3A%2F%2Fapps365ltd%2Esharepoint%2Ecom%2Fsites%2FDocumentMerge&SPLanguage=en%2DUS&SPClientTag=0&SPProductNumber=16%2E0%2E22413%2E12006&SPAppWebUrl=https%3A%2F%2Fapps365ltd%2Dc02c45888b7e66%2Esharepoint%2Ecom%2Fsites%2FDocumentMerge%2FSharePointDocumentMerge&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".

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 Document and Mail Merge Add-in Manual](#).

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&SPLanguage=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:

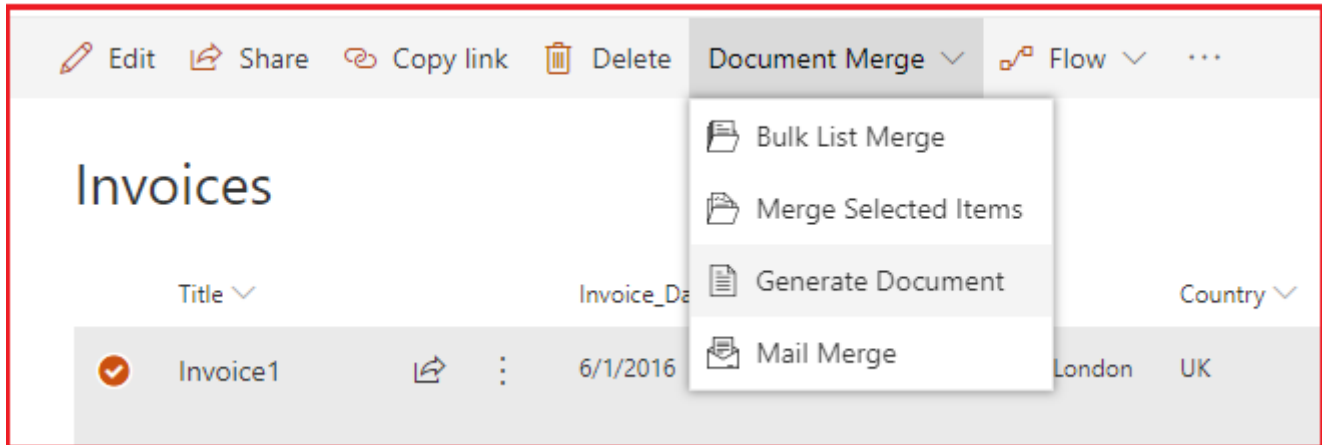
<<NumberField#numofdecimalplaces>>

For eg: **<<Total#1>>**

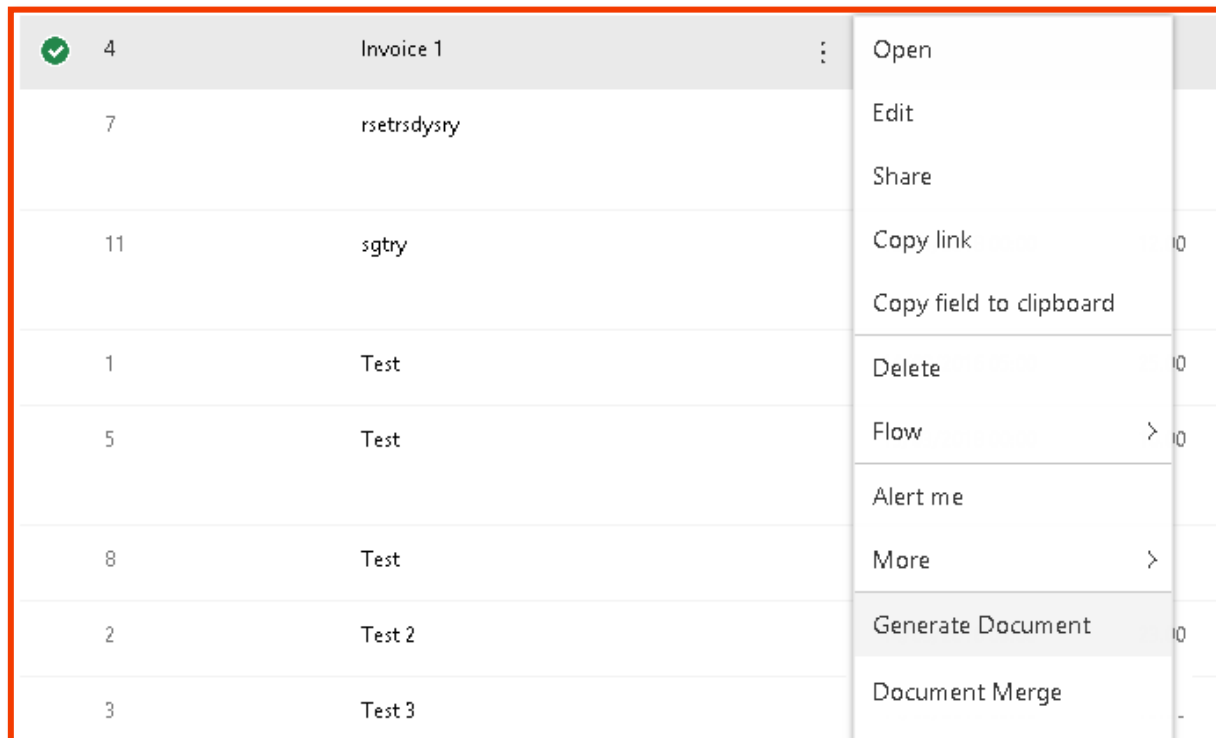
- Here **NumberField**: is the internal name of the column.
- **NumOfdecimalplaces**: Number of decimal places can be between 0 to 5.

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.

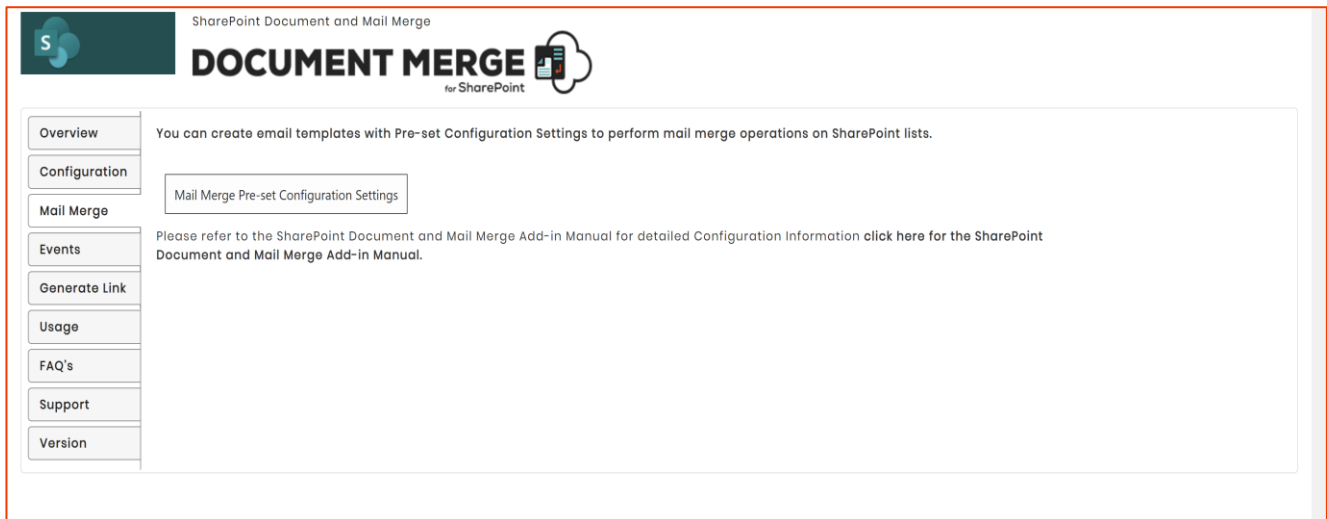


Send Mail Option

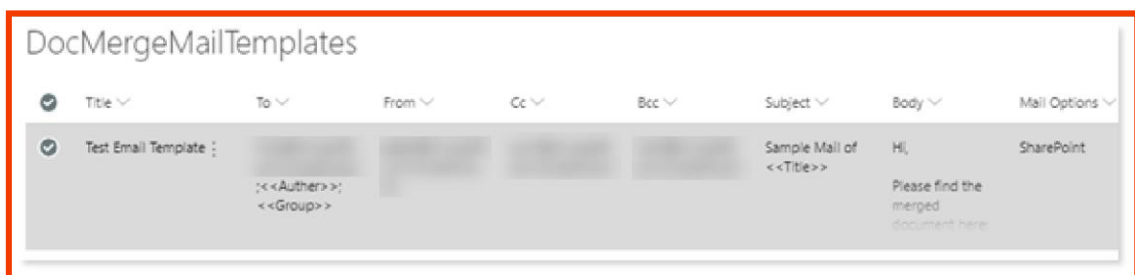
Now you can send merged document's link via email. This will help you to specify the email template. You can merge the selected data to the email template along with the data merge and merged document's link will be sent via email after merge processing.

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.





Test Email Template

Title *

Test Email Template

To

<<Author>>;<<Group>>

From

Cc

Bcc

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

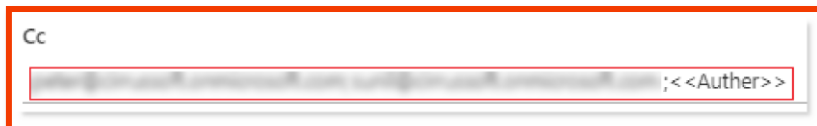
Cancel

- **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:



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:



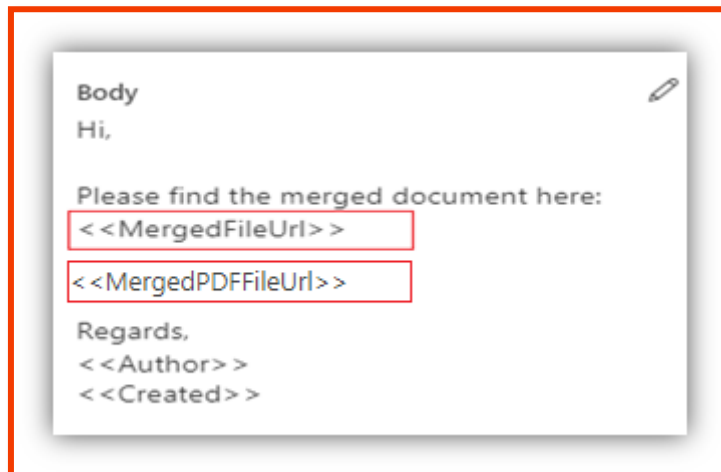
You can specify the column names as a placeholder which contains SharePoint users or groups.

- **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:

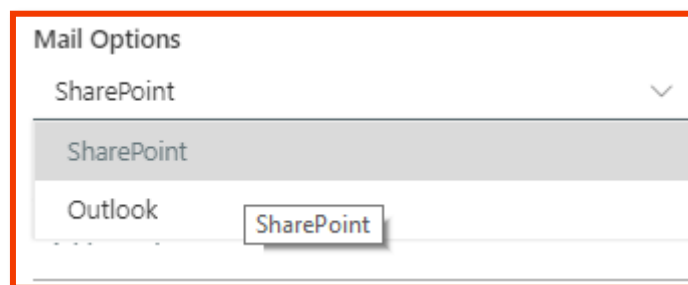


You can specify the column names as a placeholder which contains SharePoint users or groups.

- **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

BACK TO LIST

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 for SharePoint

Select Document Template Library

No folder

Select Document Template File

Output Information (required)

Document Merge for SharePoint

Select Output Library

No folder

☐ Display Images for Image Hyperlinks

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

--Select--

--Select--

Sample Mail

Outlook template

Custom File Name

Locale and Number Formatting Options (required)

English (United States) en-US

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.

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 :

From :

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 nuncipit sit amet. Ut at sem erat.

/DocumentMerge/Shared Documents/InvoiceTemplateSPDM_Invoice1.docx

Regards,

Back to Site

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

SharePoint Document and Mail Merge Add-in (V7.0.0.0) Manual
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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”.

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 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 :	
From :	
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 rhencus sit amet, volutpat eu felis. Maecenas eu purus ornare, trincidunt arcu sit amet, fermentum nibh. Fusce id libero enim. Sed pulvinar purus id nisi pellentesque, ac tempor nulla trincidunt. 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> /DocumentMerge/Shared Documents/InvoiceTemplateSPDM_Invoice1.docx</p> <p>Regards,</p> <p></p>
Link :	Open in Outlook for Invoice1

[Back to Site](#)

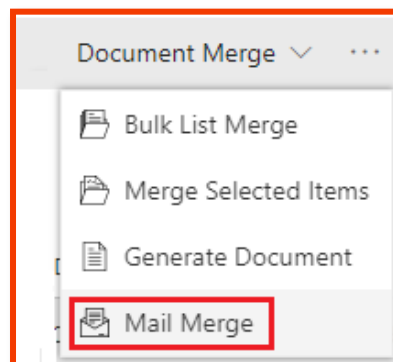
Mail Merge Menu Option

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

BACK TO LIST

Configuration Options

No Preconfigured Template

Locale and Number Formatting Options (required)

English (United States) en-US

2 decimal places

MailMerge

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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.

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 :	
From :	
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. <u>Impardiet 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.</u> </p> <p>Regards,</p> <p></p>
Link :	Open in Outlook for Invoice1

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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".



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 :	
From :	
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,</p> <p></p>
Link :	Open in Outlook for Invoice1

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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;

Configuration Options

☐ No Preconfigured Template

☐ Export to Document

☐ Show All Sites (In Site Collection) ☐ Show Sub Sites

☐ Show Library Sub Folders

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.

<https://sharepointdocumentmerge.com>

INSTALLATION AND CONFIGURATION MANUAL

CONTACT US www.sharepointdocumentmerge.com | info@sharepointdocumentmerge.com

