# How to use datasets

Datasets may be of great use if you have tables with data that you would like to use in your templates. Datasets let you pick the necessary piece of information from the cell you indicate or link a table in a template to a ready-made dataset.

### **Create simple dataset**

A **simple** dataset is a plain table with data, that is created and stored in the add-in. The maximum size of a simple dataset is 32 rows, 32 columns, and 255 symbols in each cell.

#### Step 1

In the tree, right-click a folder and select New Dataset:



#### Step 2

In your default browser, a new tab with the email-templates.app will open. Click **Simple**:



#### Step 3

Click on cells and enter values. To add rows, click **Plus** below the table; to add columns, click **Plus** on the right:

	] Save	X Cano	cel	🕁 Import	?	Help
Му	Templates	> Sales >				
N	ew dat	taset				
	Key colun	n	٨	Discount		$\times$ +
$\times$	Default pr	ogram		5%		
×	Program /	4		10%		
×	Program B	3		15%		
	+					

The leftmost column of the dataset is always the **key column** with values that identify the rows from which data will be taken. For example, to pick the 9/1/21 value from the dataset below, we will select **Expiry date** as a column and **Program A** as a row:

Program name	P Discount	imes Expiry date $ imes$
imes Default program	5%	10/1/2021
× Program A	10%	9/1/2021
× Program B	15%	8/1/2021
× Program C	20%	7/1/2021

#### More detailed information about simple datasets



9

# Import dataset from CSV

A simple dataset may be imported from a CSV file.

#### Step 1

Create a Simple dataset (see steps above).

#### Step 2 Click Import:

🔚 Save 🗙 Cance	el 🕁 Import ? Help
My Templates > Sales >	
New Dataset	
Key column	₽ +
Value 1	
+	

Step 3				
Select the file: Import datasets	(TXT)	or (	CSV	file

# **Create Excel-based dataset**

You can also create an Excel-based dataset. In this case, it will be linked to an Excel file from OneDrive or SharePoint. The main advantage is that such a dataset has no limitations in size (only those imposed by Excel) but the drawback is that it may work slower. An Excel-based dataset is not stored in the add-in.

#### Step 1

In the tree, right-click a folder and select New Dataset:

L+ New Template
📮 New Template in Browser
E⊋ New Folder
目 New Dataset
Сору

#### Step 2

Click Excel table from OneDrive or Excel Table from SharePoint depending on the location of your Excel workbook:

#### Step 3

Select the book and your table: Connect Excel table

# How to add fixed dataset value to template

**Step 1** In the template editor:

	New Template
1. Click Insert Macro	try (font) ∨ (size) ∨ 🖉 ∨
2. Pick the macro	Add information to message or appointment body ~%ClearBody ~%FromAccount[] ~%Subject ~%Date ~%WhatToEnter[] ~%DatasetValue[]

Step 2

	Dataset Value	
	Select dataset	
1—	Discount programs	$\sim$
	Select column	
2—	Expiry date	$\sim$
	Key value	
3—	Program A	$\sim$
	Insert	Cancel

**1. Select the dataset** from which you want a value to retrieve.

**2.** Pick the column from which the value shall be taken.

**3.** Choose **the value in the key column** to indicate the row from which the value will be added.

The value that will be inserted is located at the intersection of the selected column and row (defined by the key value). For example:

	Program name 🛛 👂	Discount $\times$	Expiry date $\qquad  imes$
$\times$	Default program	5%	10/1/2021
$\times$	Program A	10%	9/1/2021
$\times$	Program B	15%	8/1/2021
$\times$	Program C	20%	7/1/2021

#### Step 3

In your template, the macro will look like this:



#### Step 4

When you paste the template into the message body, the chosen dataset value is added:

► Send	To Cc Subject			
	Subject			
Hello,				
Thank you fo valid until 9/	or the question	. Your current d	discount is	



In a template, you can add not only a fixed dataset value but also create a placeholder and select the required value each time while pasting a template.

#### Step 3

#### Step 1

In the template editor:



#### Step 2 Select Dataset in the first drop-down list:

Text field	
Dropdown list	
Date	
Dataset	
elect column	
Discount	
Insert	Cancel



**1.** Enter a clear **window title**, it will be displayed while pasting the template.

**2. Select dataset** from which data will be retrieved to your message.

**3.** Select column from which a value should be brought.

#### Step 4

That's how the macro looks like in the template text. Click **Paste**:



9

#### Step 5

When pasting the template, the window with the entered title appears. In the dropdown, select the row in the dataset so the value that is located at the intersection of the chosen on the previous step column and the row picked now will be taken:



#### For example:

×         Default program         5%         10/1/2021           ×         Program A         10%         9/1/2021           ×         Program B         15%         8/1/2021           ×         Program C         20%         7/1/2021		Program name 🧳	Discount $\times$	Expiry date $\qquad  imes$
Program A         10%         9/1/2021           Program B         15%         8/1/2021           Program C         20%         7/1/2021	$\times$	Default program	5%	10/1/2021
×         Program B         15%         8/1/2021           ×         Program C         20%         7/1/2021	$\times$	Program A	10%	9/1/2021
× Program C 20% 7/1/2021	$\times$	Program B	15%	8/1/2021
	$\times$	Program C	20%	7/1/2021

#### Step 6

The selected dataset value is pasted:

	$\triangleright$	То	
	Send	Cc	
		Subject	
H Ti Va	ello, hank you fo alid until 7/	r the question 1/2021.	. Your current discount is

# How to fill tables with dataset values

9

#### Step 1

In the template editor, create a table. It can include two rows, the first for headers and the second for values from a dataset. Right-click any cell of the row that you want to complete with values from a dataset and select **Bind to dataset**:

🕼 (font)	∽ (size	) v 🖉 v
<u>A</u> ~ B	I <u>U</u> ab ≣	= = =
≣ ∷ ∽	i≡ v ≥ ∈	≡~ % ∘
& <> \5		
Program		
name	Discount	Expiry date
	@ Link	Ctrl+K
	C-11	N N
	Row	>
	Column	>
	Table pro	operties
	I Delete ta	ible
	EX Delete to	

#### Step 2

Enter the title and select the dataset:

Select dataset	×
Title	
New programs	
Dataset	
Discount programs	· ·
ок	Cancel

#### Step 3

As soon you click **OK**, the add-in fills in empty cells in the row with the names of columns from the dataset of your choice. To insert the template into the message body, click **Paste**:

# New Template I (font) $\checkmark$ (size) $\checkmark$ A B I U ab $\equiv$ $\equiv$ $\equiv$ $\equiv$ $\checkmark$ $\checkmark$ $\blacksquare$ $\checkmark$ $\checkmark$ $\checkmark$ $\equiv$ $\equiv$ $\checkmark$ $\checkmark$ $\blacksquare$ $\checkmark$ $\checkmark$ $\bigcirc$ $\equiv$ $\equiv$ $\checkmark$ $\checkmark$ $\blacksquare$ $\checkmark$ $\bigcirc$ $\bigcirc$ $\bigotimes$ $\checkmark$ $\vdash$ $\checkmark$ $\equiv$ $\equiv$ $\blacksquare$ $\checkmark$ $\bigcirc$ $\bigcirc$ Program name Discount Expiry date $\sim$ %[Discount] $\sim$ %[Expiry date] $\bullet$

#### Step 4

In the pop-up window, check the dataset rows which you want to see in the table:

New programs	>
Search	
Default program	
✓ Program A	
✓ Program B	
Program C	
ок	Cancel

#### Step 5

In the message, the table will be filled with the values from the checked rows:

Send	To Cc Subject		My Templates >	Cancel ? Hel	р
Program name	Discount	Expiry date	New Template	× (size)	
Program A Program B	10% 15%	9/1/2021 8/1/2021	A ~ B	IU ab E	
			≣ I × ⊗ <> ⊢∕ Program name	Discount	Expiry date
			~%[Discount level]	~%[Discount]	~%[Expiry date]
			~%[Discount level]	~%[Discount]	~%[Expiry date]

More about dataset binding: Bind a table to dataset

# **Unbind from dataset**

In the template editor, right-click any cell of the table and select **Unbind from dataset**:

#### New Template font) ✓ (size) ~ *Q* ~ $\underline{A} \lor \mathbf{B} \quad I \quad \bigcup \quad ab \equiv \equiv \equiv$ = = ~ = ~ ≥ ⊂ = = ~ ⊗ © Program Discount Expiry date name ~%[Discount ~%[Expiry ~%[Discount] level] 'ate] ල Link... Ctrl+K Cell > Row > Column > Table properties Delete table 🔒 Bind to dataset 🗟 Unbind from dataset

# Find more information

 How to create and use datasets ablebits.com/docs/outlook-shared-templates-datasets

9

- Auto-fill rows and tables in templates ablebits.com/office-addins-blog/2021/04/19/auto-fill-tables -email-template-outlook
- How to create fillable templates from datasets ablebits.com/office-addins-blog/2021/04/05/create-fillable -outlook-email-templates-datasets

## ?) Need more details?

- Shared Email Templates for Outlook documentation ablebits.com/docs/#shared-email-templates-outlook
- More Shared Email Templates features and benefits ablebits.com/outlook-shared-email-templates
- Shared Email Templates tips and tricks ablebits.com/office-addins-blog/tag/shared-email -templates
- All Shared Email Templates cheat sheets ablebits.com/docs/outlook-shared-templates-cheat -sheets

