


How to use datasets

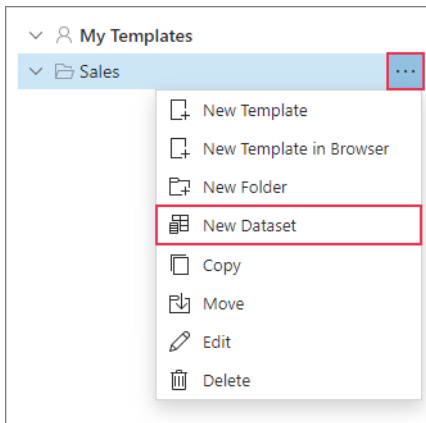
 Datasets may be of great use if you have tables with data that you would like to use in your templates. Datasets let you pick the necessary piece of information from the cell you indicate or link a table in a template to a ready-made dataset.

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.

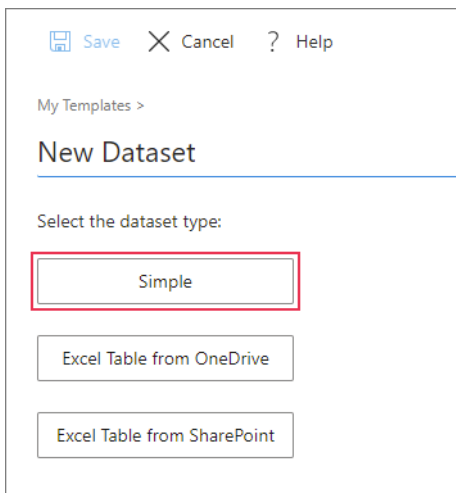
Step 1

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



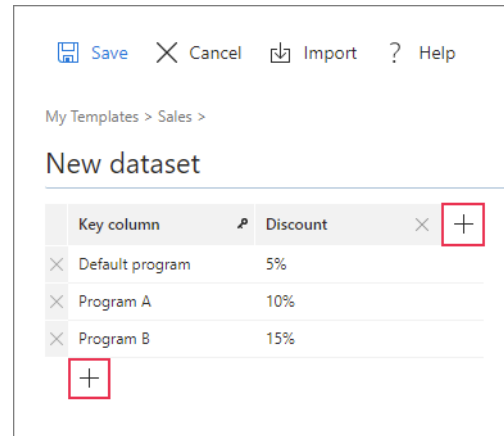
Step 2

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:



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 **ExpiryDate** as a column and **Program A** as a row:

| ProgramName | Discount | ExpiryDate |
|-----------------|----------|------------|
| 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](#)



Import dataset from CSV

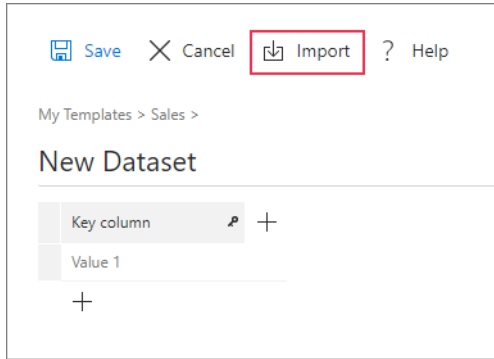
A simple dataset may be imported from a CSV file.

Step 1

Create a **Simple** dataset (see steps above).

Step 2

Click **Import**:



Step 3

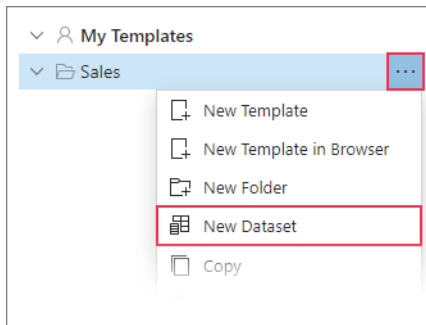
Select the file: [Import datasets \(TXT or CSV file\)](#)

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.

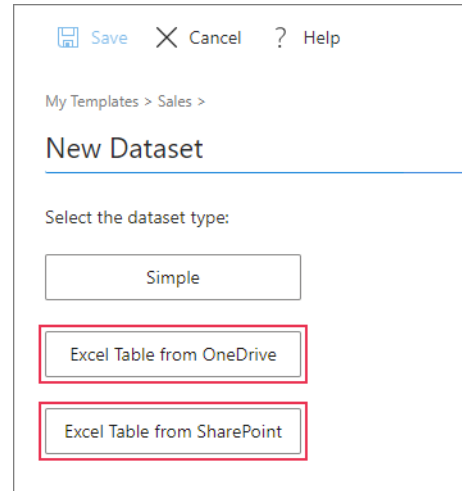
Step 1

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



Step 2

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



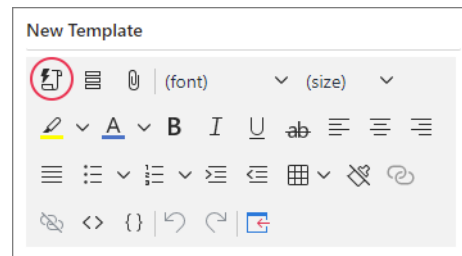
Step 3

Select the book and your table: [Connect Excel table](#)

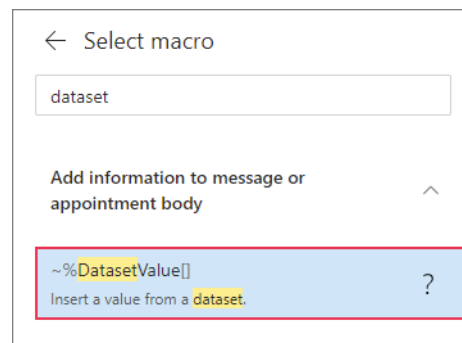
How to add fixed dataset value to template

Step 1

In the Edit mode, click **Insert Macro**:



Into the Search box, type "dataset". Double-click `~%DatasetValue[]`:



Step 2

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:

| | ProgramName | Discount | ExpiryDate |
|---|-----------------|----------|------------|
| × | Default program | 5% | 10/1/2021 |
| × | Program A | 10% | 9/1/2021 |
| × | Program B | 15% | 8/1/2021 |
| × | 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:



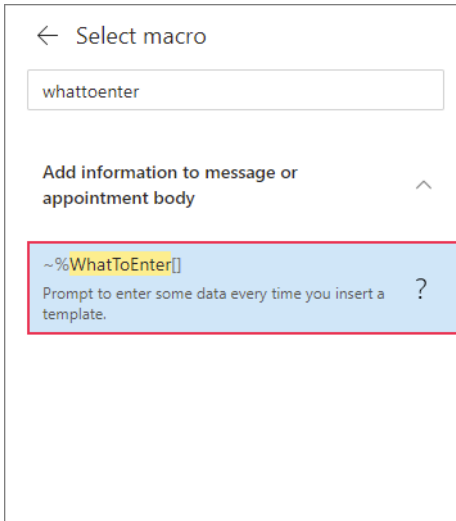


How to create placeholder for dataset value

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.

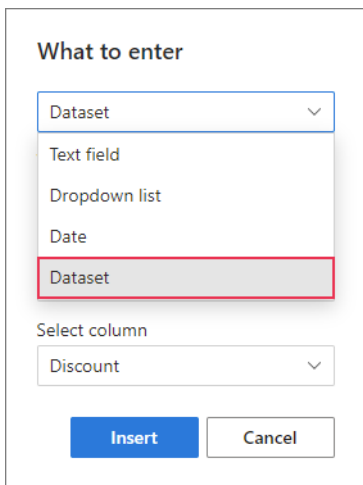
Step 1

Into the Search box, type "whattoenter". Double-click ~%WhatToEnter[]:

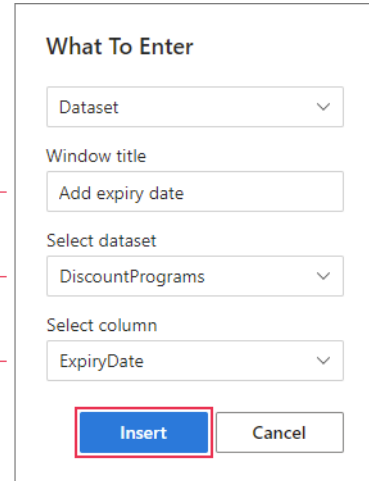


Step 2

Select Dataset in the first drop-down list:



Step 3



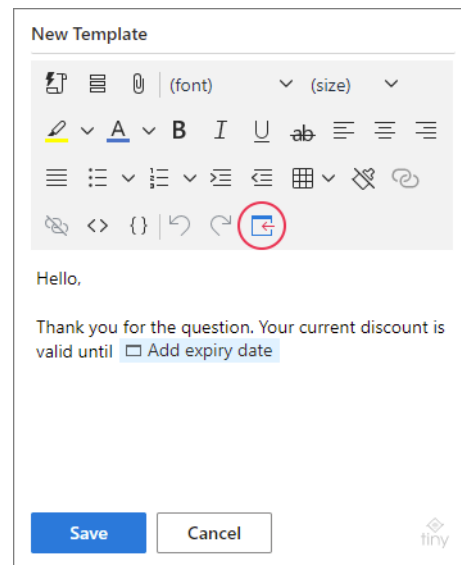
1. Enter a clear **window title**, it will be displayed while pasting the template.

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

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

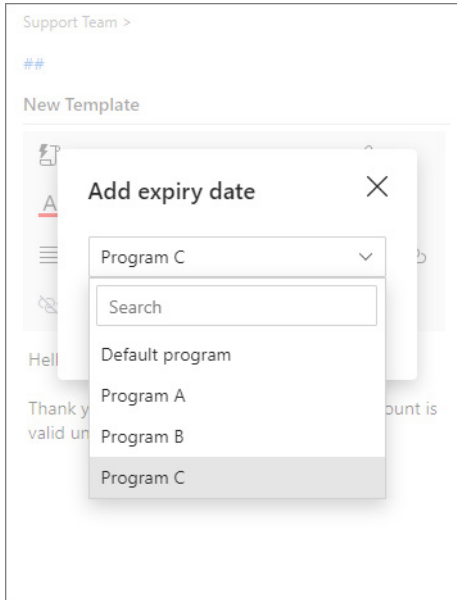
Step 4

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



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:

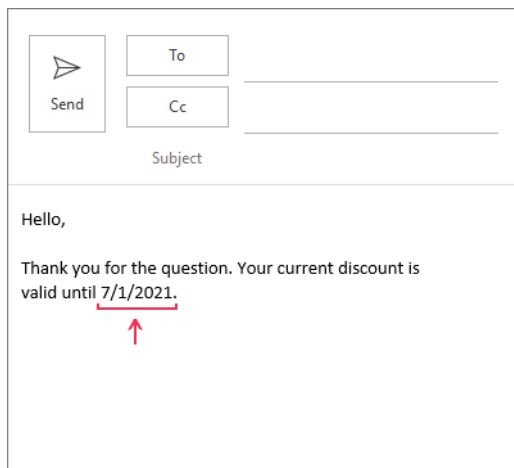


For example:

| ProgramName | Discount | ExpiryDate |
|-----------------|----------|------------|
| Default program | 5% | 10/1/2021 |
| Program A | 10% | 9/1/2021 |
| Program B | 15% | 8/1/2021 |
| Program C | 20% | 7/1/2021 |

Step 6

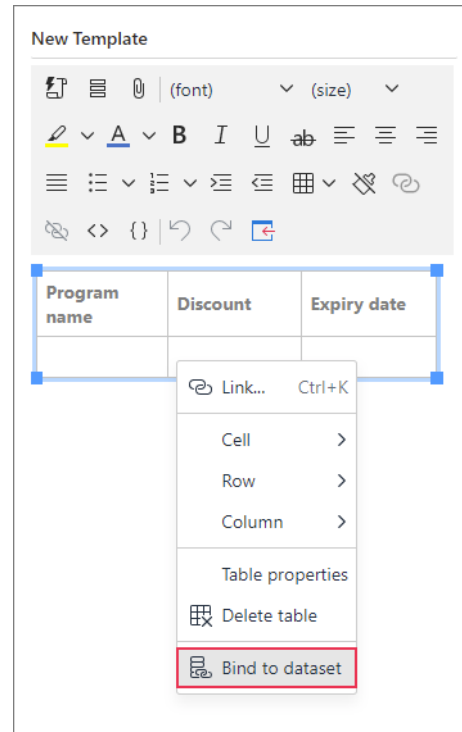
The selected dataset value is pasted:



How to fill tables with dataset values

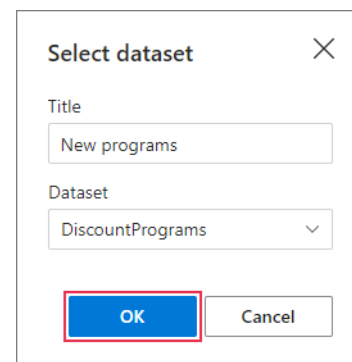
Step 1

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**:



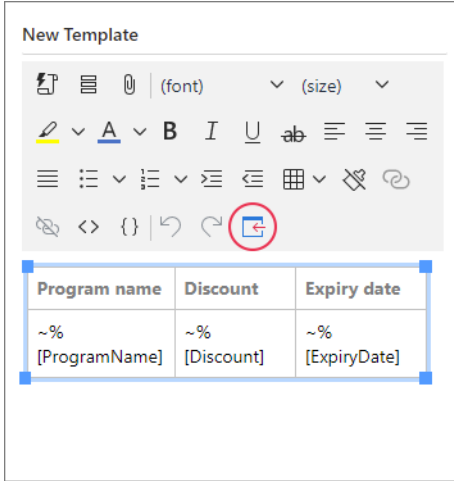
Step 2

Enter the title and select the dataset:



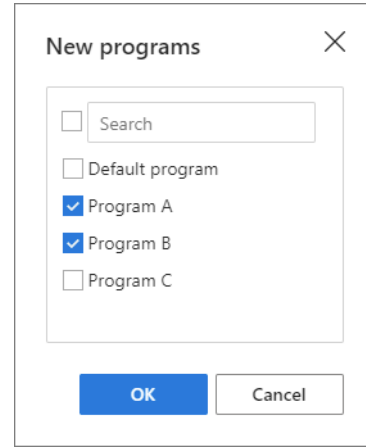
Step 3

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**:



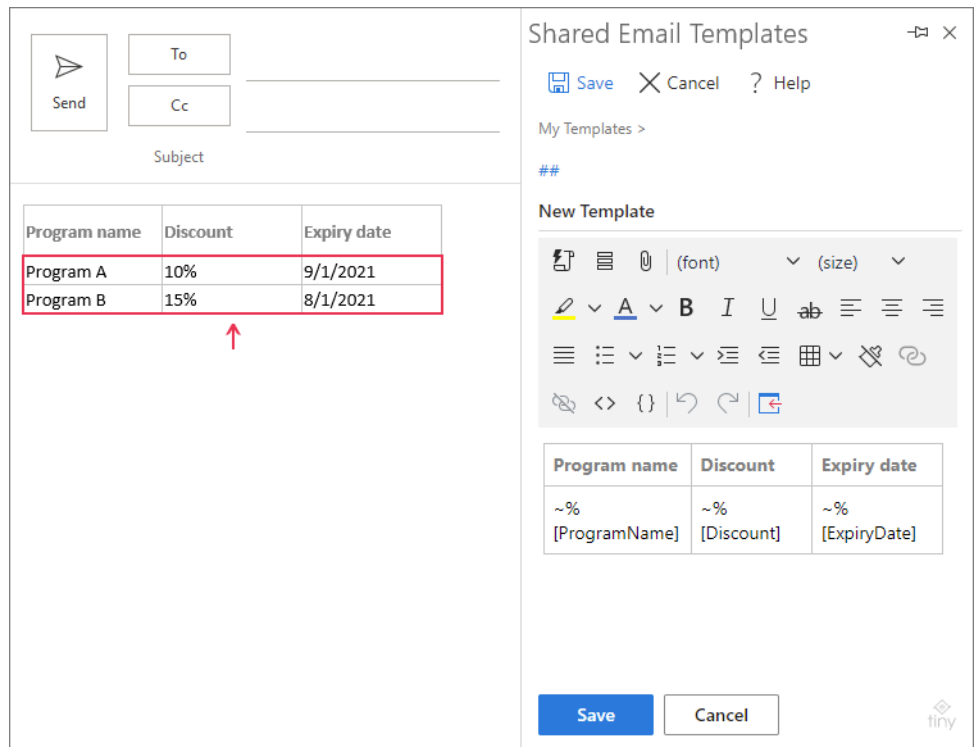
Step 4

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



Step 5

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

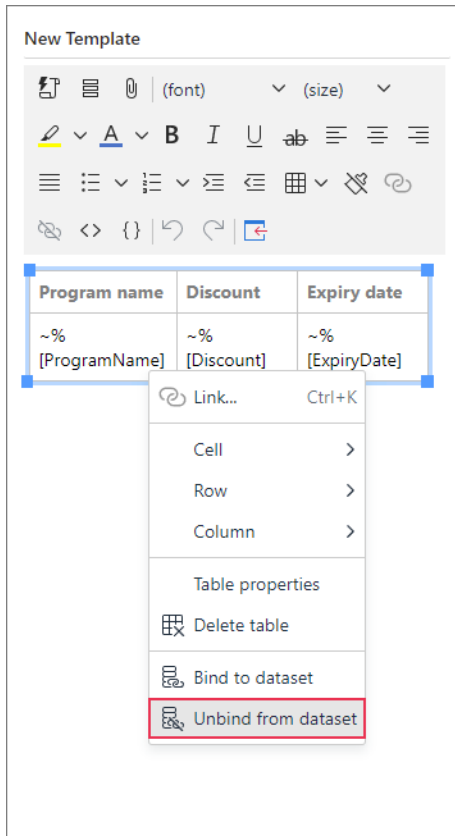


More about dataset binding: [Bind a table to dataset](#)



Unbind from dataset

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



Find more information

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