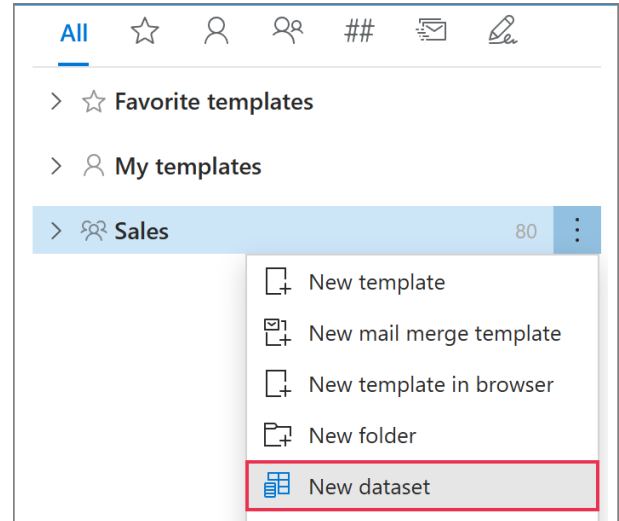


Datasets: Important definitions

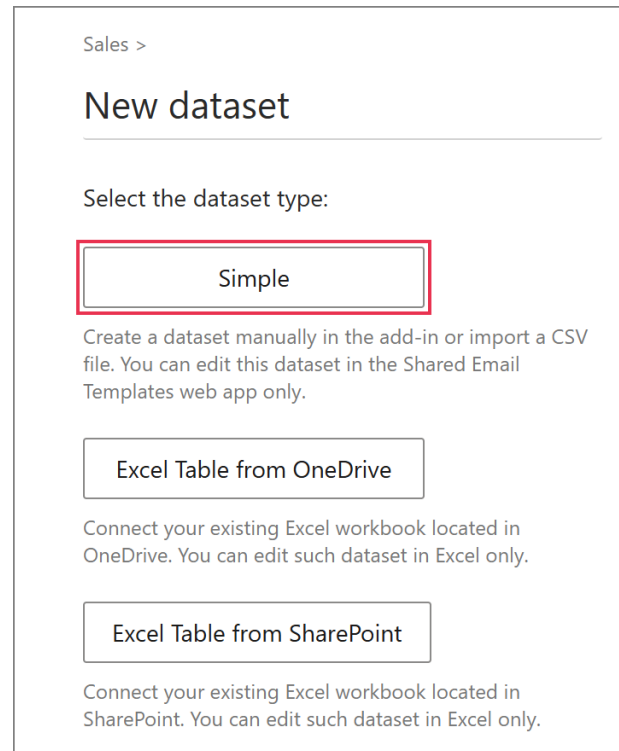
- **Dataset.** A set of data organized into a table from which values for your email messages can be retrieved.
- **Simple dataset.** A dataset that you create in the add-in manually or import from a TXT or CSV file.
- **Key column.** The leftmost column of a dataset. It contains values that identify the rows from which data will be retrieved.
- **Key values.** Values in the key column.
- **Default Items column.** A column where you can mark rows to get them automatically selected for the WTE macro dialog or automatically inserted into tables and lists bound to datasets.
- **File column.** A column where you can specify OneDrive and SharePoint files to get them attached with the Attach, Insert, and WTE macros as well as with tables and lists bound to datasets.
- **Regex Field column.** A column where you can specify email fields. For the WTE macro dialog and tables bound to datasets, this column enables automatic selection of dataset rows where the content of the specified email fields matches regular expressions in the Regex column.
- **Regex column.** A column where you can specify regular expressions. For the WTE macro dialog and tables bound to datasets, this column allows automatic selection of dataset rows where the content of email fields specified in the Regex Field column matches the specified regular expressions.

Create a simple dataset

- 1 In your Outlook, right-click a folder on the add-in pane and select **New dataset**.



- 2 In your default browser, the Shared Email Templates app will open making it possible to create a dataset. Enter the name of your new dataset, and then select **Simple** as the dataset type.



- 3 Start entering values. To add a row or a Text column, click the corresponding plus sign.

Bags

Model	
ABC-01	

To add a File column, a Default Items column, a Regex Field column, or a Regex column, click the arrow next to the plus sign.

Bags

Model	
ABC-01	

- Text
- File
- Default Items
- Regex Field
- Regex

To insert a macro into a cell, click the **Insert macro** icon in the cell.

Bags

Model	Size
ABC-01	
ABC-02	
ABC-03	

You can enter a piece of HTML code into a cell.

Bags

Model	Size
ABC-01	Some text
ABC-02	
ABC-03	

The maximum size of a simple dataset is 32 rows, 32 columns, and 512 symbols in each cell.

- 4 When your simple dataset is ready, don't forget to save it by clicking the **Save** button.

Bags

	Model	Size	Color	Price
×	ABC-01	small	green	\$30.00
×	ABC-02	medium	orange	\$50.00
×	ABC-03	large	dark blue	\$70.00
×	Basics-01	small	coral	\$35.00
×	Basics-02	medium	silver	\$55.00
×	Basics-03	large	dark gray	\$75.00
×	Props-01	small	brown	\$37.00
×	Props-02	medium	white	\$57.00
×	Props-03	large	dark green	\$77.00

Save **Cancel**

Your dataset will appear on the Shared Email Templates pane.

All ☆ 👤 👥 ## 📧 ✎

> ☆ Favorite templates

> 👤 My templates

✓ 👤 Sales

> 📁 Offers

📄 **Bags** ⋮

🌐 📄 📧 🗑️ ? ↗

Model	Size
ABC-01	small
ABC-02	medium
ABC-03	large

To import a dataset in a **TXT** or **CSV** format, opt for a **Simple** dataset and then click **Import**.

Create an Excel-based dataset

- 1 In your Outlook, right-click a folder on the Shared Email Templates pane and select **New dataset**.

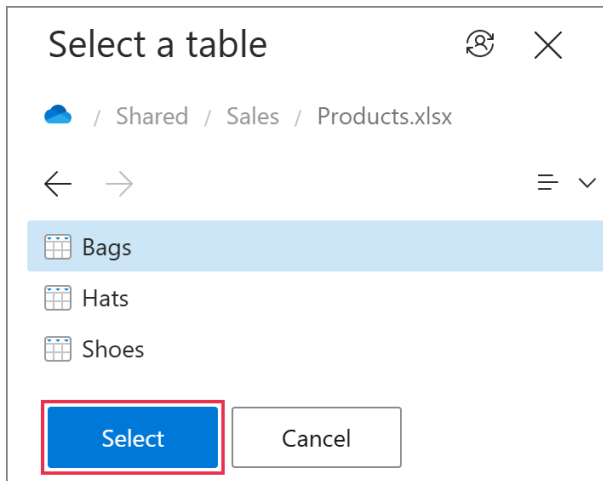
- 2 When the Shared Email Templates app opens in your default browser, enter the name of your new dataset, and then select either **Excel Table**

from **OneDrive** or **Excel Table from SharePoint**, depending on where the Excel workbook that you want to use is stored.

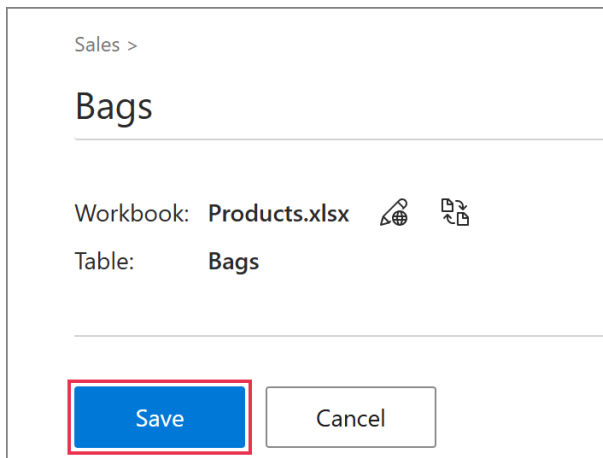
Only an Excel table can be connected to a dataset. To convert a range to an Excel table, select the range and press **Ctrl+T** on your keyboard.

- 3 Select the necessary file, and then click **Open**.

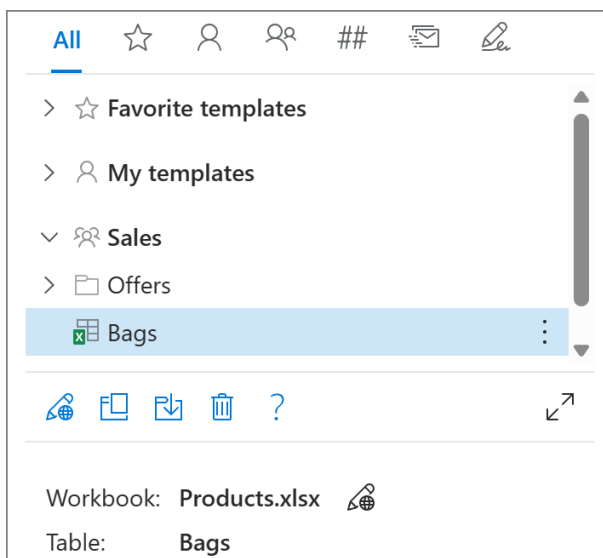
4 Select the necessary table.



5 Save your dataset.

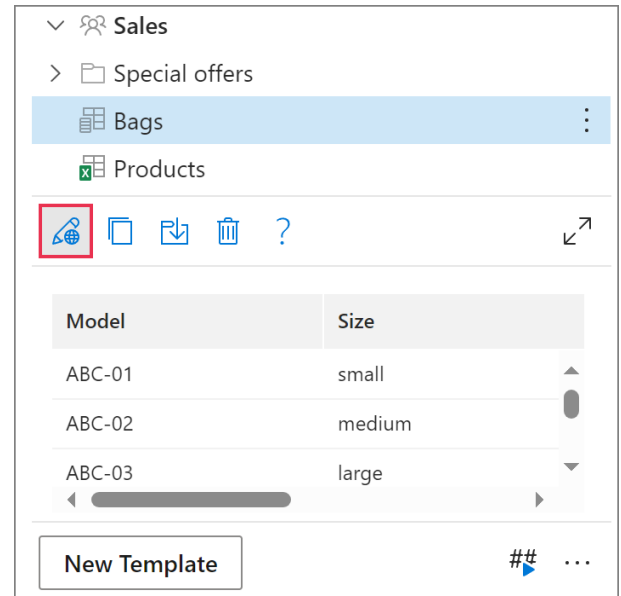


The dataset will appear on the add-in pane.



Edit a dataset

To start editing a dataset, select it and click **Edit in browser**.

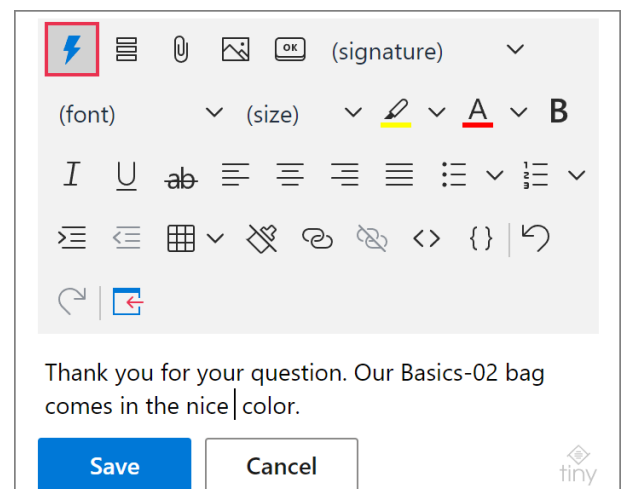


Use dataset values

In auto-fillable fields

To automatically insert a value from a dataset into an email message, create an auto-fillable field with the [Insert](#) macro in your template.

- 1 In the **Edit** mode, decide where an auto-fillable field is needed, put the cursor there, and then click **Insert macro**.



2 Select **Insert dataset value**.

← Select macro

insert dataset value

Auto-fillable fields
Add information to the body of a message, an appointment, or a meeting

Insert dataset value
Insert a value from a dataset.

Select Cancel Hide descriptions

3 Select a **dataset**, a **column** that contains the necessary value, and a **key value** to identify the row where the necessary value is. Click **OK**.

Dataset value

Select dataset
Bags

Select column
Color

Key value
Basics-02

OK Cancel

4 The macro placeholder will appear in the template. Click **Save**.

Thank you for your question. Our Basics-02 bag comes in the nice Bags.Color color.

Save Cancel

When you insert such a template into an email message, the macro will find the value to be retrieved.

Sales >

Bags

Model	Size	Color	Price
ABC-01	small	green	\$30.00
ABC-02	medium	orange	\$50.00
ABC-03	large	dark blue	\$70.00
Basics-01	small	coral	\$35.00
Basics-02	medium	silver	\$55.00
Basics-03	large	dark gray	\$75.00
Props-01	small	brown	\$37.00
Props-02	medium	white	\$57.00
Props-03	large	dark green	\$77.00

The dataset value will appear in the email message.

Send To Cc

Subject Basics-02 bag: Color

Thank you for your question. Our Basics-02 bag comes in the nice silver color.

In interactive fillable fields

To insert a value from a dataset into an email message via a dialog, create an interactive fillable field (input field) with the [WhatToEnter \(WTE\)](#) macro in your template.

- 1 When creating a new template or editing an existing one, choose a place for an interactive fillable field, put the cursor there, and then click **Insert macro**.

Thank you for choosing our |bag.

Save Cancel

- 2 Select **What to enter**.

Select macro

what to enter

Interactive fillable fields
Create interactive fillable fields

What to enter
Create an interactive fillable field for a text value, a dropdown list, a date or time picker etc.

Select Cancel Hide descriptions

- 3 In the **What to enter** dialog, select **Dataset**.
 - Specify the **field name**. You'll see it in a dialog when inserting your template into an email message.
 - Select a **dataset** from the list of available datasets.
 - Select the **column** that contains the necessary values.

To select several items when using a template, select the **User can select multiple items** checkbox. Then enter a separator.

If you select the **For Insert-if sections only** checkbox on the **Advanced** tab of the dialog, the value returned by the WTE macro won't be inserted into an email message and will be used only for checking a [condition](#).

Click **OK**.

What to enter

General Advanced

Type
Dataset

Field name
Select a bag

Select dataset
Bags

Select column
Model

☐ User can select multiple items
separated by

☒ Required

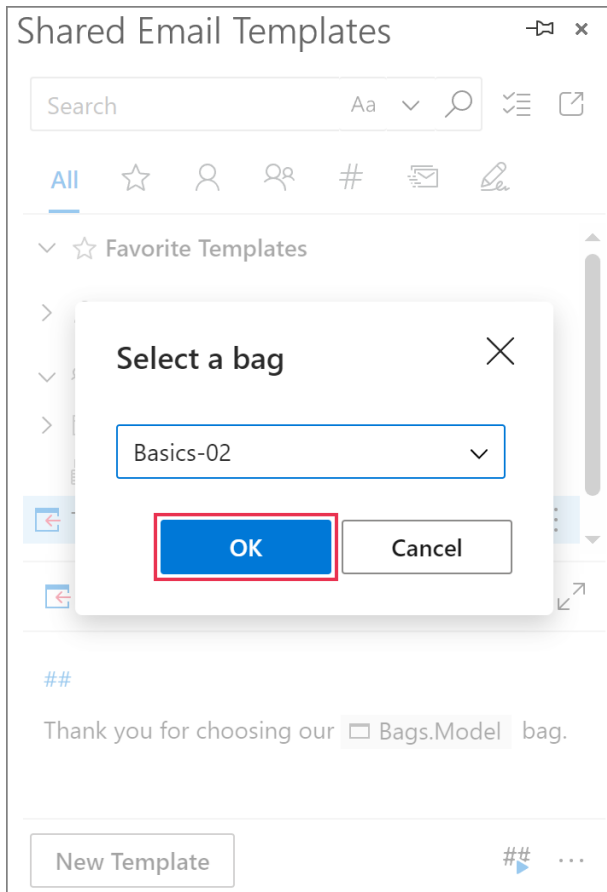
OK Cancel

- 4 The WhatToEnter macro placeholder will be added to your template. Click **Save**.

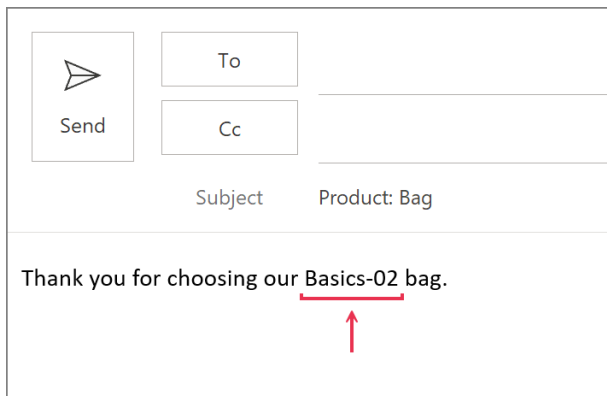
Thank you for choosing our |Bags.Model| bag.


Save Cancel

When you insert such a template into an email message, a dialog will show up. It will contain a dropdown menu listing key values of the specified dataset. To select a row for retrieving data, select the corresponding key value. Then click **OK**.



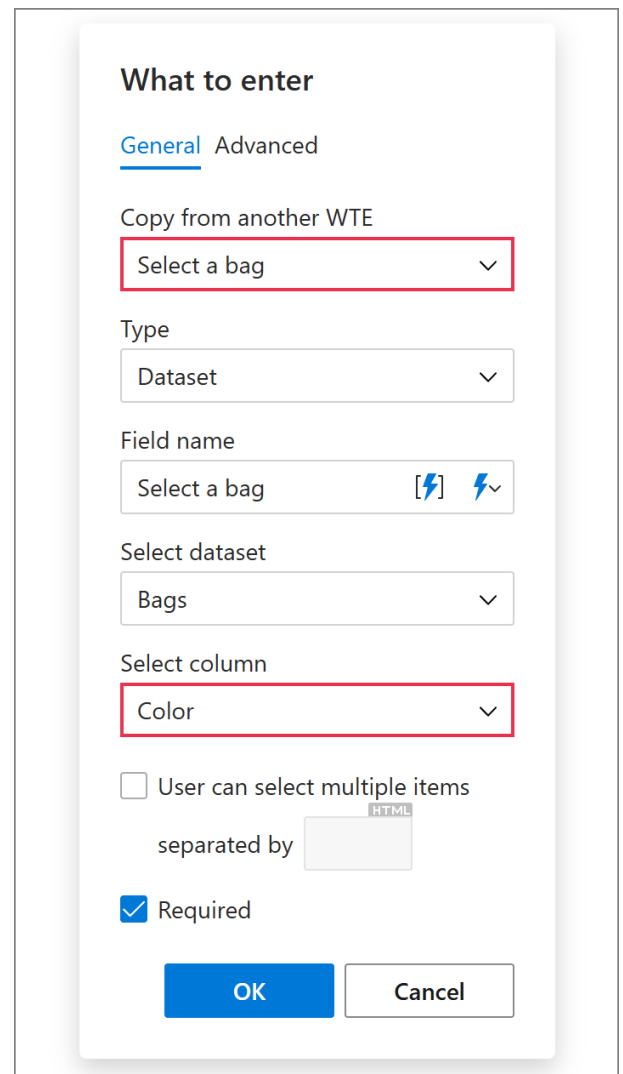
The dataset value returned by the macro will appear in the email message.



 If you want to create several interactive fillable fields (input fields) for data returned from the same row of a dataset, copy the WTE macro.

For example, if you need to include the price, the color, and the size of the same model in your template, you can create an interactive fillable field with the WTE macro only once and then copy that macro by selecting it under **Copy from another WTE** in the **What to enter** dialog.

You'll only need to specify the column from where the necessary value will be retrieved.



When your template is ready, it will look like the screenshot below.

##

Thank you for choosing our brand. Please see the details below.

Price: ☐ Bags.Price
Color: ☐ Bags.Color
Size: ☐ Bags.Size

When you insert such a template into an email message, a dialog will appear. Select a key value, and then click **OK**.

Select a bag

ABC-03

OK Cancel

Using the key value, the macro will find the necessary row in the dataset and return the values you need in one go.

Send To Cc Subject Product: Bag

Thank you for choosing our brand. Please see the details below.

Price: \$70.00
Color: dark blue
Size: large

In tables

Bind a table to a dataset

- 1 In the **Edit** mode, add a table to your template reserving only one row for the values to be returned from a dataset. After you bind a table to the dataset, you'll be able to add as many

rows as you need when inserting the template into an email message.

Our bags come in various colors. Please see the details below.

Model	Size	Color

Save Cancel

- 2 In the table, right-click any cell of the row that you want to populate with values from a dataset. Then select **Bind to dataset**.

Model	Size	Color

Link... Ctrl+K

Cell >

Row >

Column >

Table Properties

Delete Table

Paste Ctrl+V

Add Condition for Table

Add Condition for Row

Bind to Dataset

Make sure that all the cells in the row are empty because the add-in won't overwrite the data that the cells already contain.

- In the **Select dataset** dialog, enter the **field name** (you'll see it in a dialog when inserting your template into an email message), then select a **dataset** and the necessary **columns**.

The names of the selected columns will populate the row in the order that they are present in the **Select columns** box. If a different order is needed, clear all the checkboxes under **Select columns**, and then select columns in the order you need for your table.

When you're done, click **OK**.

When binding a table to a dataset that contains the [Regex Field](#) and [Regex](#) columns, you can select the **Auto-insert matched rows** checkbox.

With this checkbox selected, data from matched dataset rows will populate the inserted table automatically, without a dialog showing up. If matches are not found, no rows will be added to the table.

- When the names of the selected columns appear in the table, click **Save**.

Model	Size	Color
~%[Model]	~%[Size]	~%[Color]

When you insert such a template into an email message, you'll see a dialog. Using that dialog, select key values to specify the rows that you want to add to the table. Then click **OK**.

Our bags come in various colors. Please see the details below.

Model	Size	Color
~%[Model]	~%[Size]	~%[Color]

New Template

In the email message, the table will be populated with the values from the specified rows.

To

Cc

Subject Bags: Colors

Our bags come in various colors. Please see the details below.

Model	Size	Color
Basics-01	small	coral
Basics-02	medium	silver
Basics-03	large	dark gray

💡 If you want to get some key values selected automatically, add the **Default Items** column to the dataset and mark the rows to be set as default ones by selecting **"true"** in the corresponding cells.

Model	Size	Color	Price	Default Items
ABC-01	small	green	\$30.00	true
ABC-02	medium	orange	\$50.00	
ABC-03	large	dark blue	\$70.00	
Basics-01	small	coral	\$35.00	true
Basics-02	medium	silver	\$55.00	
Basics-03	large	dark gray	\$75.00	
Props-01	small	brown	\$37.00	true
Props-02	medium	white	\$57.00	
Props-03	large	dark green	\$77.00	

When you insert a template that contains a table bound to such a dataset into an email message, you'll see that key values from default rows are already selected in the dialog.

Bags

Product(s)

☐ Search

☒ ABC-01
☐ ABC-02
☐ ABC-03
☒ Basics-01
☐ Basics-02
☐ Basics-03
☒ Props-01

OK

Cancel

Unbind a table from a dataset

In the **Edit** mode, right-click the bound row, and then select **Unbind from dataset**.

Model	Size	Color
~%[Model]		

Link... Ctrl+K

Cell >

Row >

Column >

Table Properties

Delete Table

Paste Ctrl+V

Add Condition for Table

Add Condition for Row

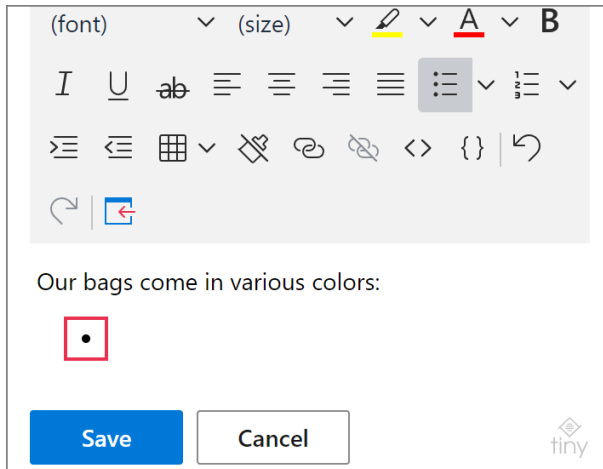
Bind to Dataset

Unbind from Dataset

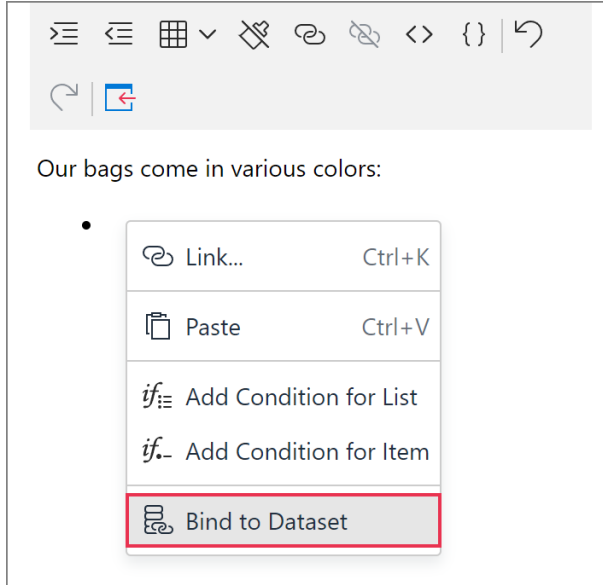
In lists

Bind a list to a dataset

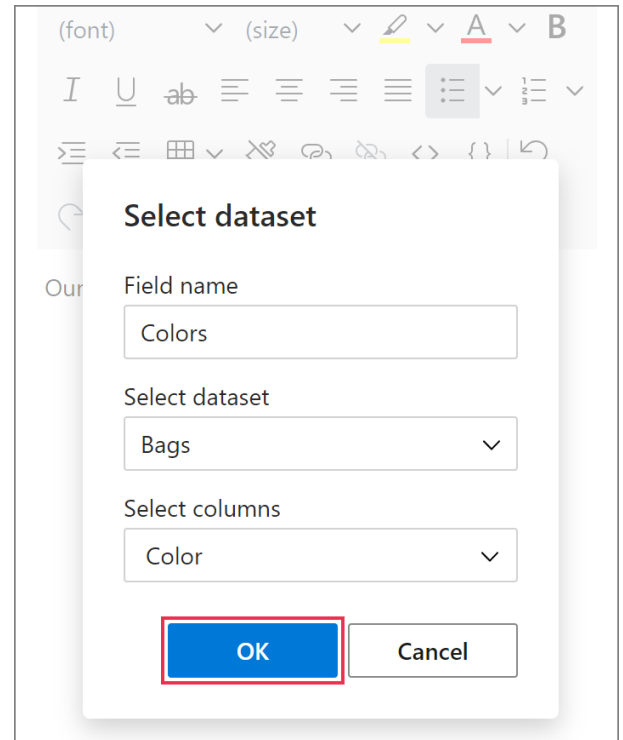
- 1 In the **Edit** mode, add a bulleted or numbered list to your template.



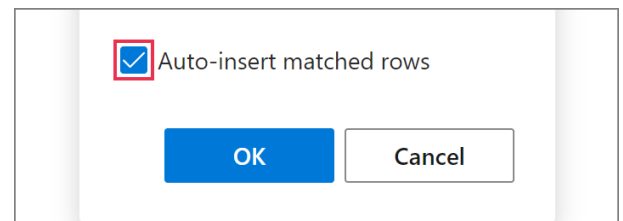
- 2 Right-click the line intended for the first list item, and then select **Bind to dataset**.



- 3 The **Select dataset** dialog will appear. Specify the **field name**. You'll see it in a dialog when inserting the template into an email message. Select a **dataset** and the necessary **column(s)**. Then click **OK**.

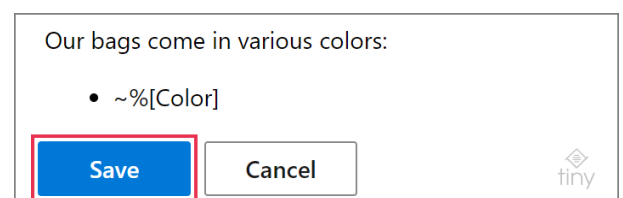


When binding a list to a dataset that contains the [Regex Field](#) and [Regex](#) columns, you can select the **Auto-insert matched rows** checkbox.

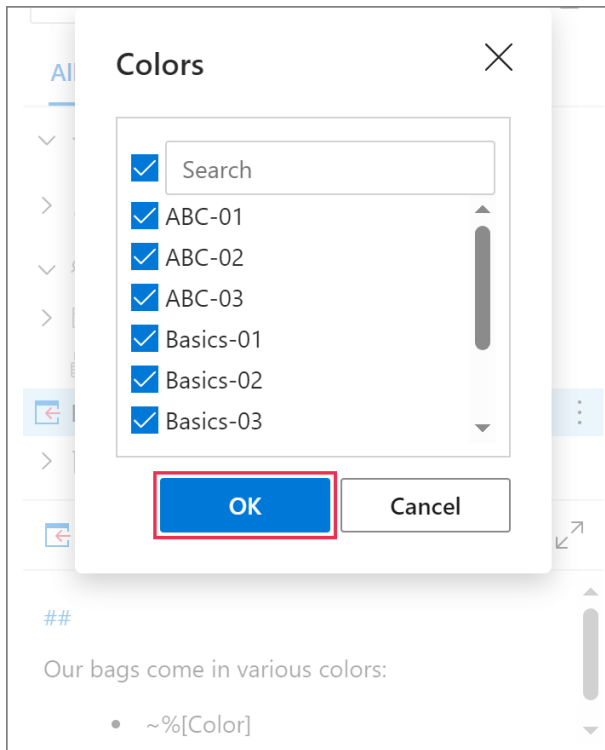


With this checkbox selected, data from matched dataset rows will populate the list automatically, without a dialog showing up. If matches are not found, the list won't be inserted.

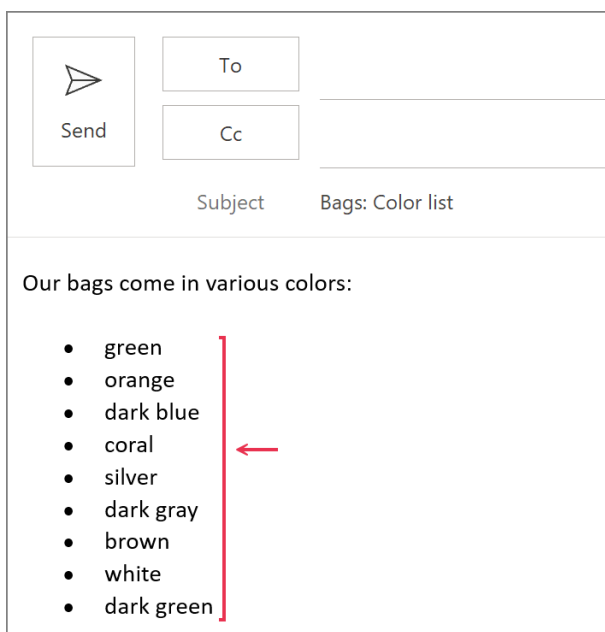
- 4 The name(s) of the selected dataset column(s) will be added to the line. Click **Save**.



When you insert such a template into an email message, a dialog will show up. Select key values to specify the rows that will form a list. If all the rows are needed for the list, select the very first checkbox. Then click **OK**.



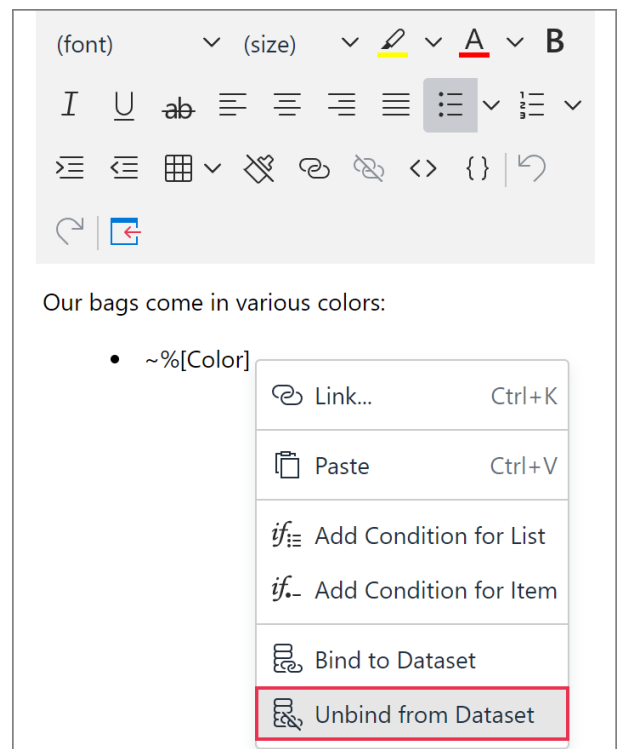
In the email message, the list containing values from the specified rows will appear.



💡 If you want to get some key values selected automatically, add the **Default Items** column to the dataset and mark the rows to be set as default ones by selecting "true" in the corresponding cells. [Learn more](#)

Unbind a list from a dataset

In the **Edit** mode, right-click the bound list item and select **Unbind from dataset**.



Learn more

- How to create and edit datasets
ablebits.com/docs/outlook-shared-templates-datasets
- How to add regular expressions to datasets
ablebits.com/docs/use-regexes-in-outlook-shared-email-templates
- How to attach files from datasets
ablebits.com/docs/attachments-from-datasets-in-outlook-shared-email-templates/



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