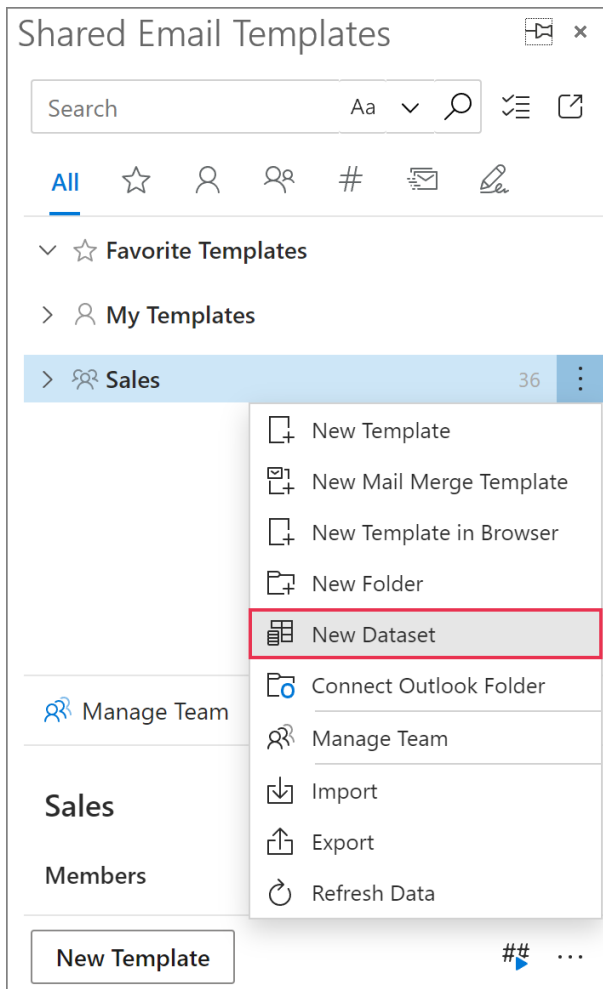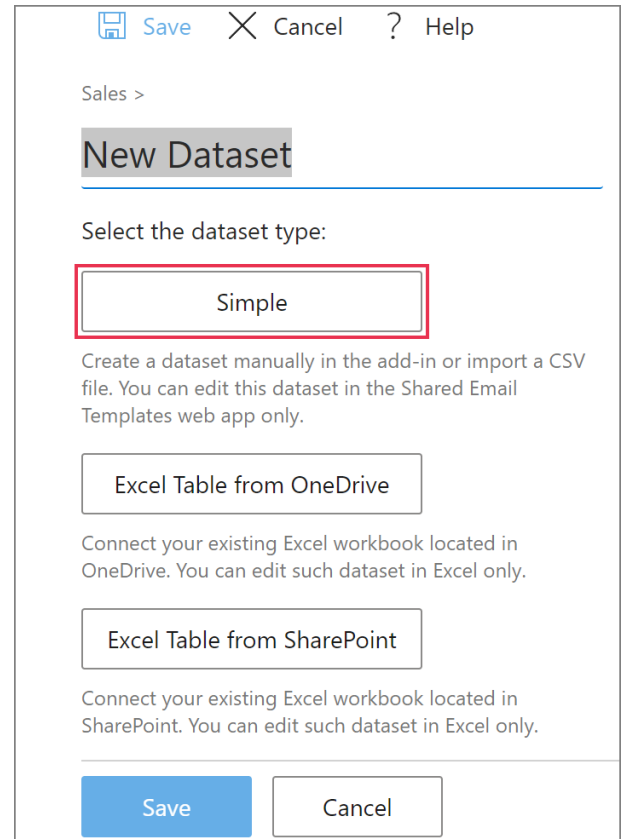## Create a dataset

Simple dataset

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

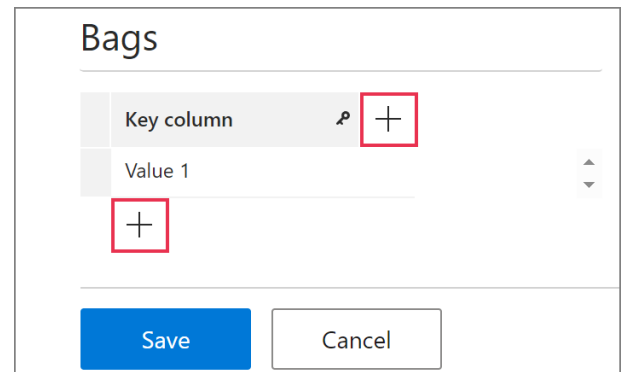1   In your Outlook, right-click a folder on the Shared Email Templates pane and select **New Dataset**.

Shared Email Templates	📌 ✕

Search   Aa ⌄ 🔍 ☰ ⬈

All ☆ 👤 👥 # ✉ ✎

⌄ ☆ Favorite Templates

❯ 👤 My Templates

❯ 👥 Sales   36 ⋮

  🔲 New Template
  📧 New Mail Merge Template
  🔲 New Template in Browser
  🗂 New Folder
  🔳 New Dataset
  📁 Connect Outlook Folder
  👥 Manage Team
  ⬇ Import
  ⬆ Export
  🔄 Refresh Data

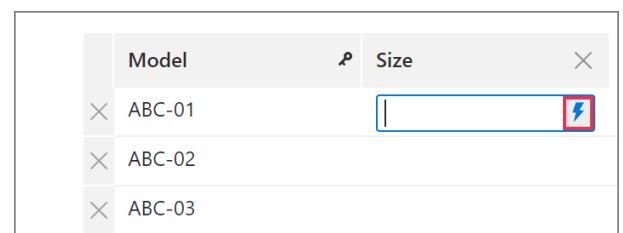👥 Manage Team

Sales

Members

New Template   ## ⚡ ⋯

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

💾 Save ✕ Cancel ❓ Help

Sales >

New Dataset

Select the dataset type:

Simple

Create a dataset manually in the add-in or import a CSV file. You can edit this dataset in the Shared Email Templates web app only.

Excel Table from OneDrive

Connect your existing Excel workbook located in OneDrive. You can edit such dataset in Excel only.

Excel Table from SharePoint

Connect your existing Excel workbook located in SharePoint. You can edit such dataset in Excel only.

Save	Cancel

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

Bags

Key column	🔑 +
Value 1	
+	

Save	Cancel

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

	Model	🔑	Size	✕
✕	ABC-01		|	⚡
✕	ABC-02			
✕	ABC-03			

The key column is always the leftmost column in a dataset. It's intended for key values identifying rows from where data will be retrieved. Make sure that key values are **unique**.

To rename the key column, enter another name.

Bags

Model	
✕ ABC-01	
✕ ABC-02	
✕ ABC-03	

[Save] [Cancel]

4 When your dataset is ready, click **Save**.

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 simple dataset will appear on the Shared Email Templates pane.

All ☆ 👤 👥 # ✉ ✍

> ☆ Favorite Templates
> 👤 My Templates
> 👥 Sales
> 📁 Special offers
🏷 Bags ⋮

✏ 📋 📥 🗑 ?   ⤢

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

[New Template]   ##▶ ⋯

You can import a dataset in a **TXT** or **CSV** format by clicking **Import**.

💾 Save   ✕ Cancel   📥 Import   ?

Sales >

New Dataset

| Key column	🔑	+
Value 1		

[Save] [Cancel]

Learn more

- Import datasets (TXT or CSV file)
 ablebits.com/docs/outlook-shared-templates-datasets/#import-dataset

Excel-based dataset

📄 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.

**1** In your Outlook, right-click a folder on the Shared Email Templates pane and select **New Dataset**.
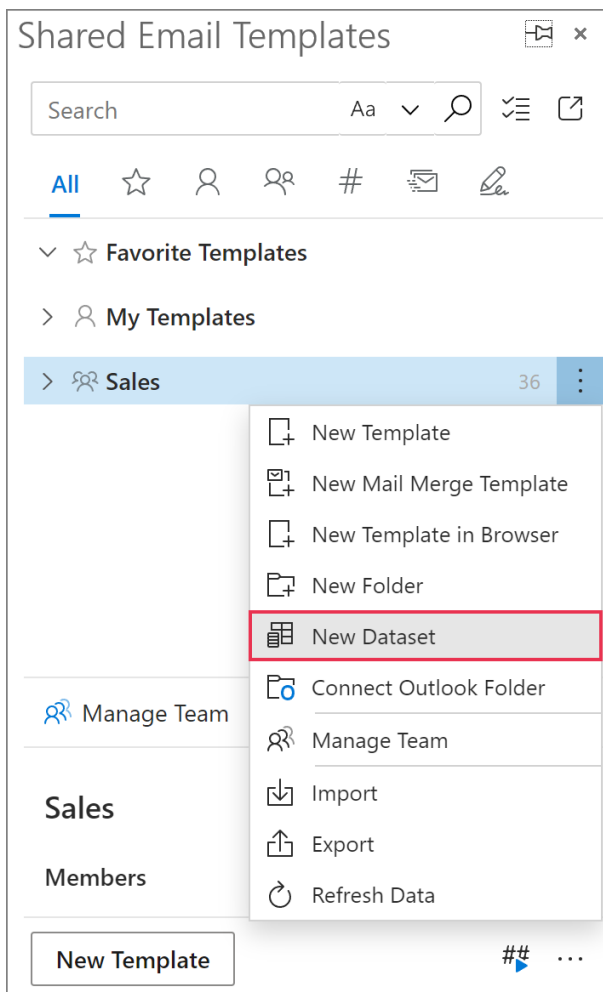
2 When the Shared Email Templates app opens in your default browser, name your new dataset, and then select either **Excel Table from OneDrive** or **Excel Table from SharePoint**, depending on where the Excel workbook that you want to use is stored.
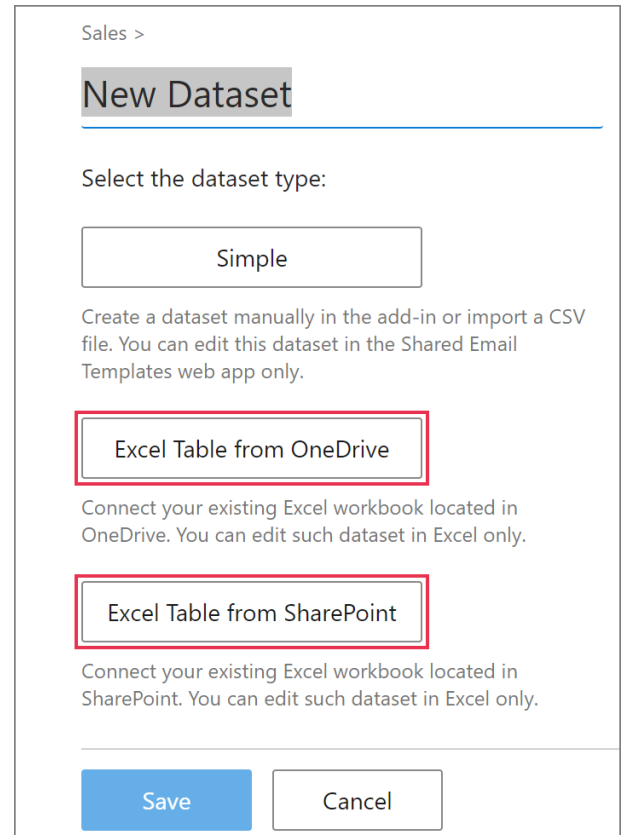
3 Select the necessary file, and then click **Open**.
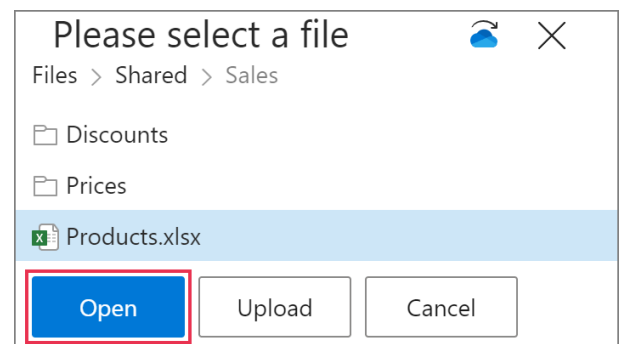
4 Select the necessary table.
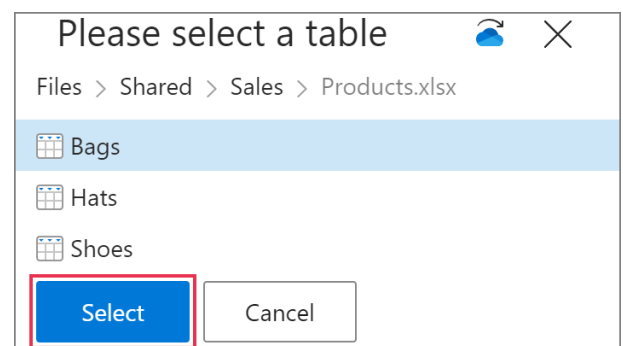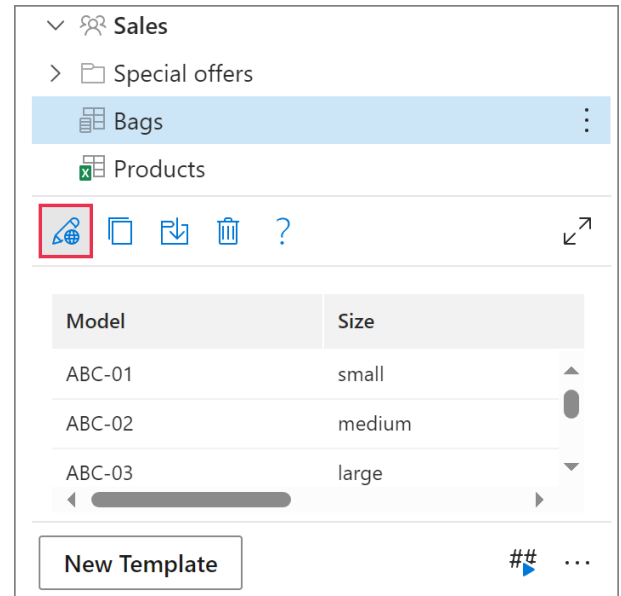
5 Save your dataset.
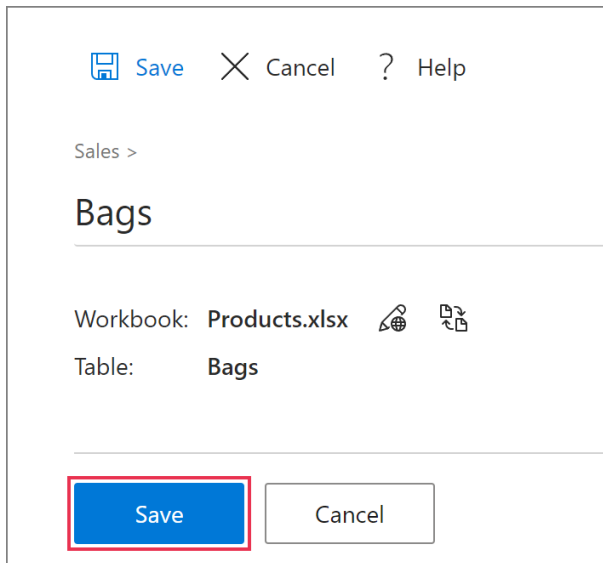
The Excel-based dataset you created will appear on the Shared Email Templates pane.
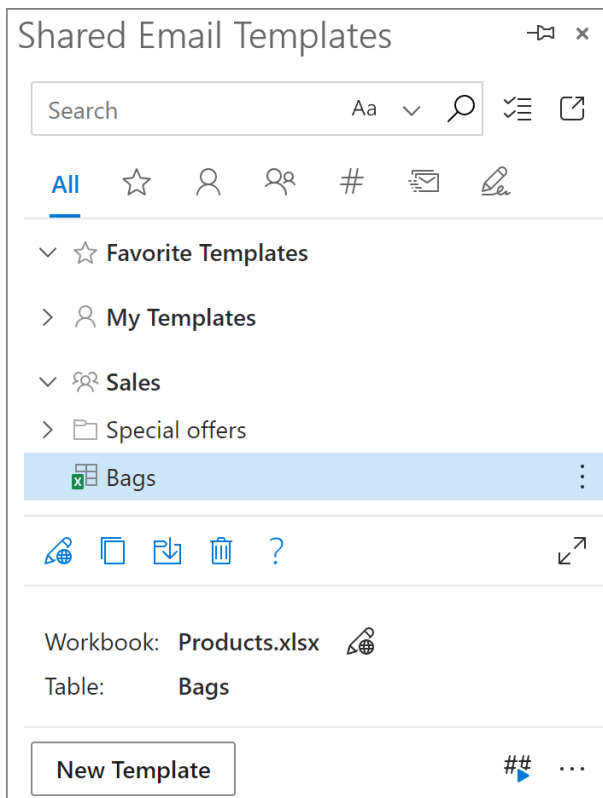
Edit a dataset

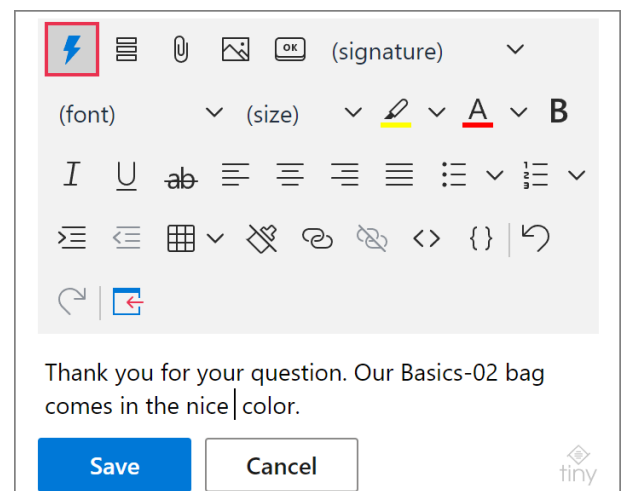To start editing a dataset, select it and click **Edit in browser**.

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 DatasetValue 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 message or appointment body

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 specify 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 DatasetValue 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   tiny

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

✏ Edit   ⧉ Copy   ⤓ Move   🗑 Delete

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.

➤   To
Send
             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 an interactive dialog, create an interactive fillable field with the WhatToEnter 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**.
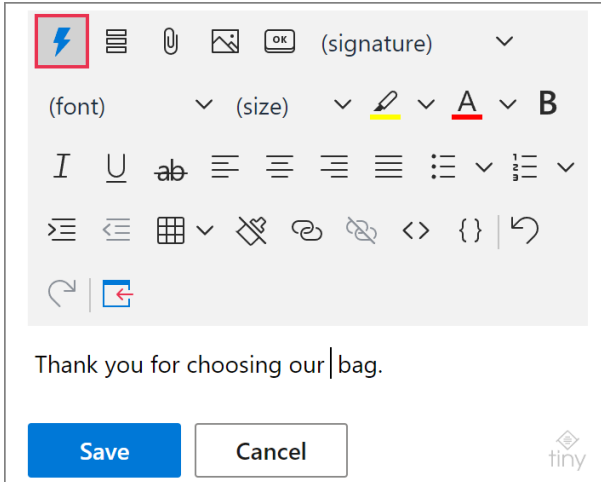

2 Select **What to Enter**.
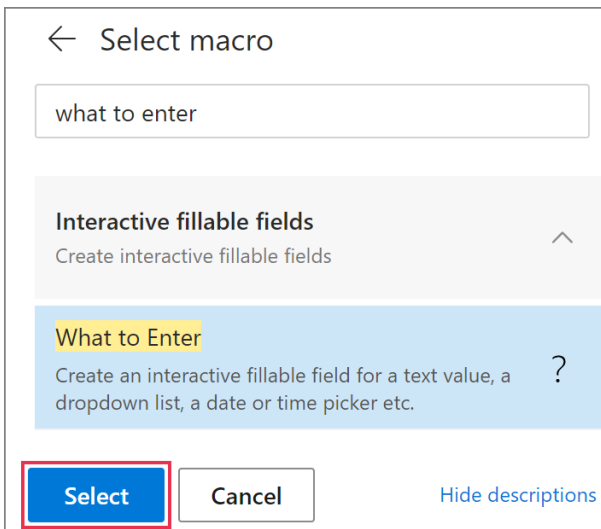
**3** In the **What to enter** dialog, select **Dataset**.

- Specify the **field name**. You'll see it in an interactive 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.

If you select **For Insert-if sections only**, the value returned by the WhatToEnter macro won't be inserted into an email message and will be used only for checking a condition.
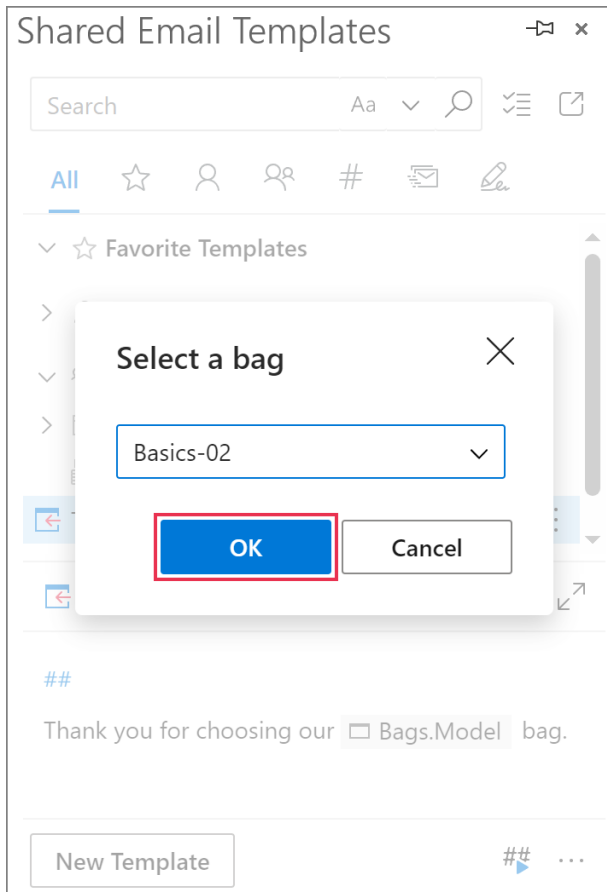
Click **OK**.
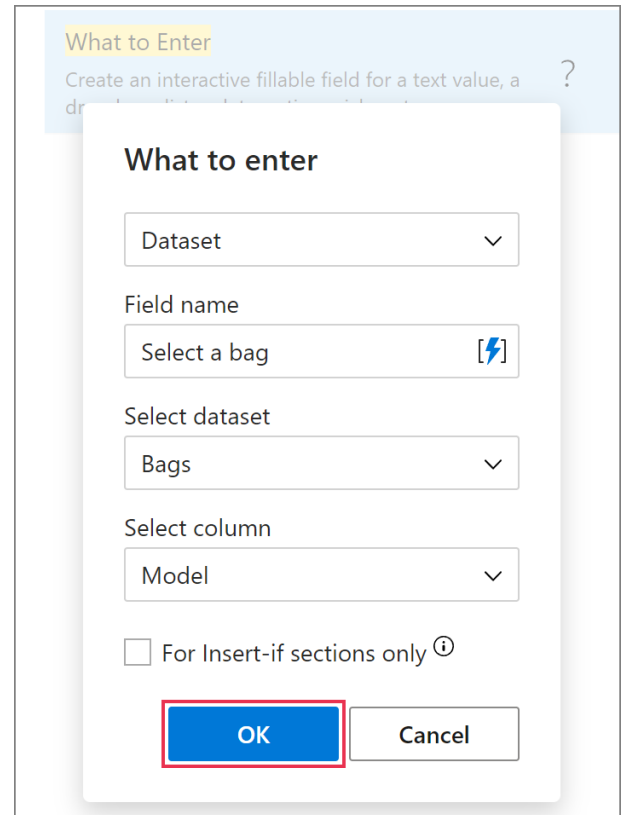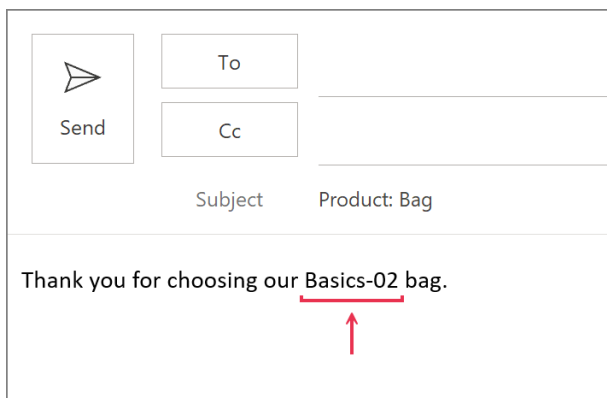
4 The WhatToEnter macro placeholder will be added to your template. Save the changes by clicking **Save**.
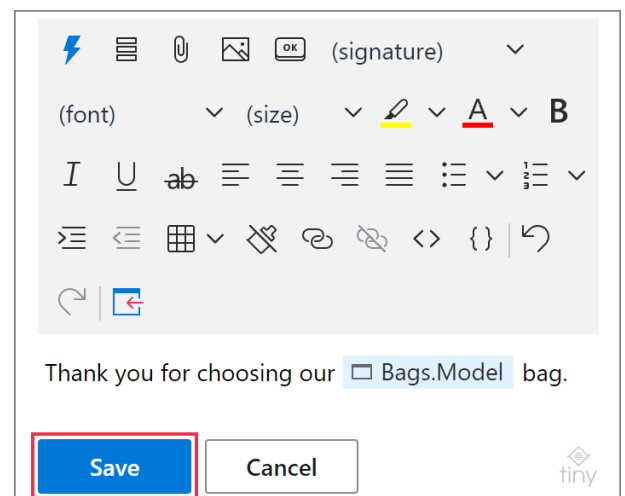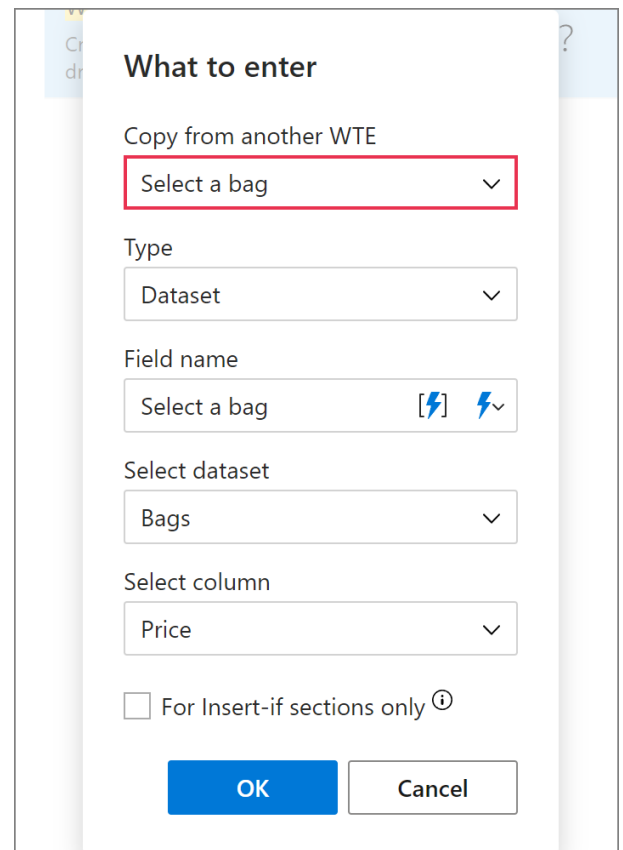
When you insert such a template into an email message, an interactive dialog shows up. The dialog contains a dropdown menu listing key values of the specified dataset. To select a row from where the macro will return data, select a key value. After selecting the key value, click **OK**.
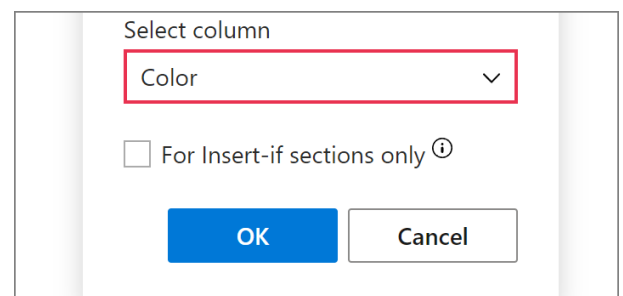

The dataset value returned by the macro will appear in the email message.

If you want to create several interactive fillable fields for data returned from the same row of a dataset, you can save your time by copying the WhatToEnter macro. For example, if the price, the color, and the size of the same model are needed for your template, create an interactive fillable field with the WhatToEnter macro only once and then simply copy the macro by selecting it under **Copy from another WTE** in the **What to enter** dialog.

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

The template will look like this:

> ##
>
> 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, an interactive 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.

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

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**.

📄 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.

3 In the **Select dataset** dialog, enter the **field name** (you'll see it in an interactive 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**.

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

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

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

💡 If you want to get some key values selected automatically when using a template with a table bound to a dataset, add the **Default Row** column to the dataset and mark the rows that you want to set as default ones with any symbol or text there.

Bags

Model	Size	Color	Price	Default Row
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	

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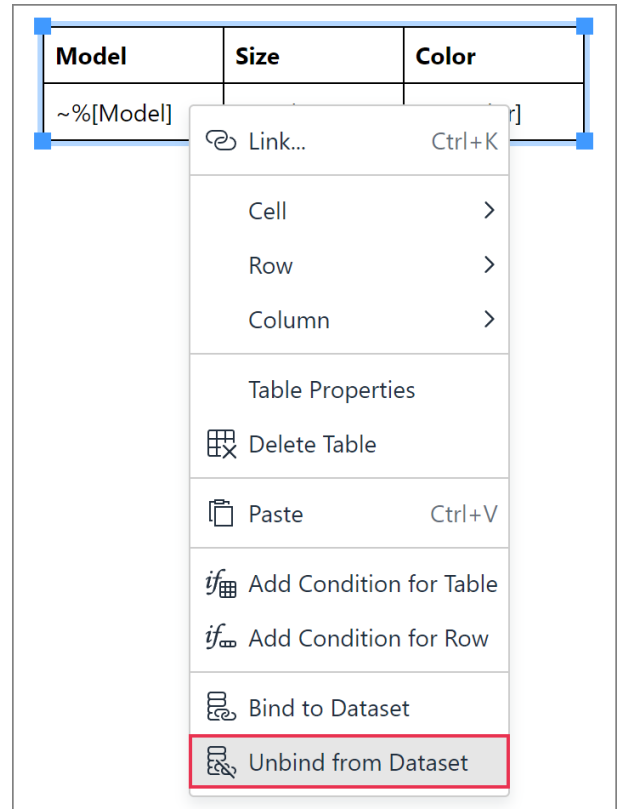

Unbind a table from a dataset

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

In lists

Bind a list to a dataset

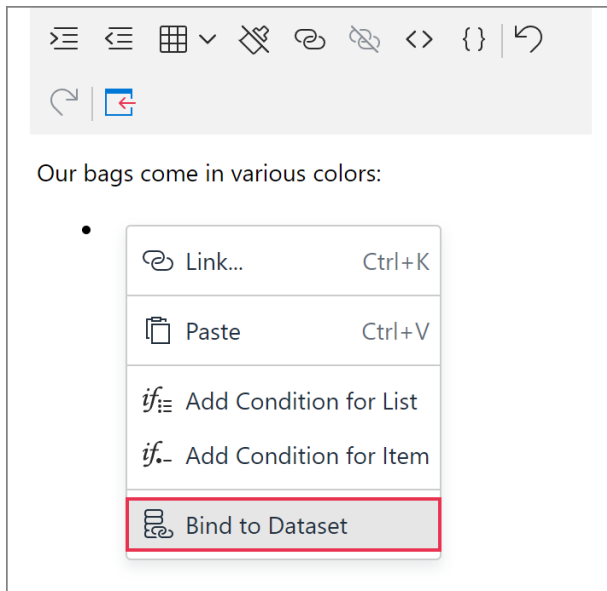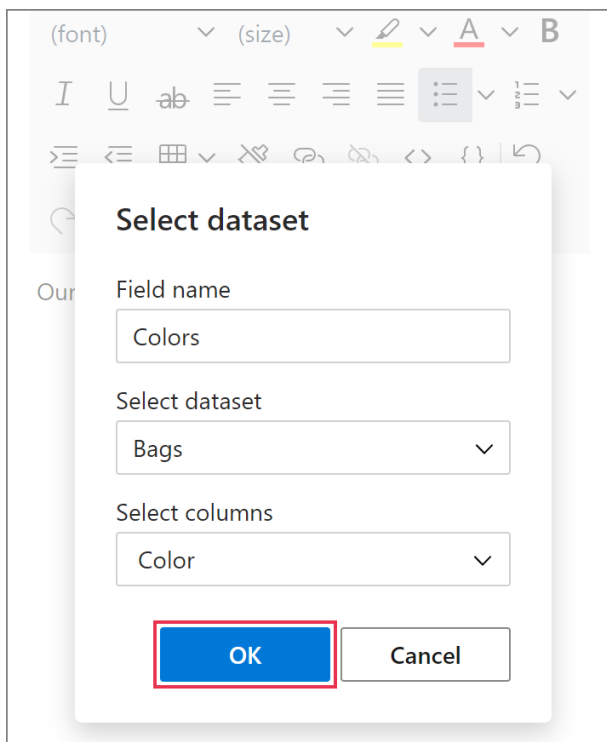1 In the **Edit** mode, add a bulleted or numbered list to your template.

**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 an interactive dialog when inserting the template into an email message. Select a **dataset** and the necessary **column(s)**. Then click **OK**.


4 The name(s) of the selected dataset column(s) will be added to the line. Click **Save**.
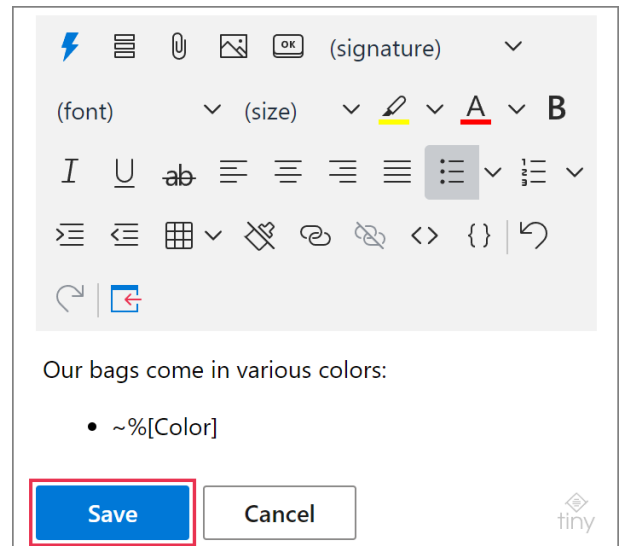
When you insert such a template into an email message, an interactive dialog will show up. Select key values to specify the rows that will form a list. If all the rows are needed for the list, select the very first checkbox. Then click **OK**.
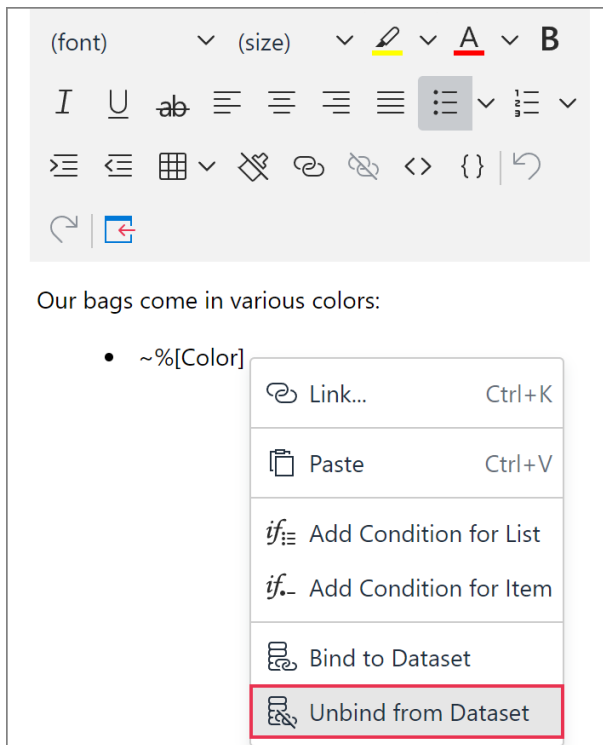
Shared Email Templates
for Microsoft Outlook
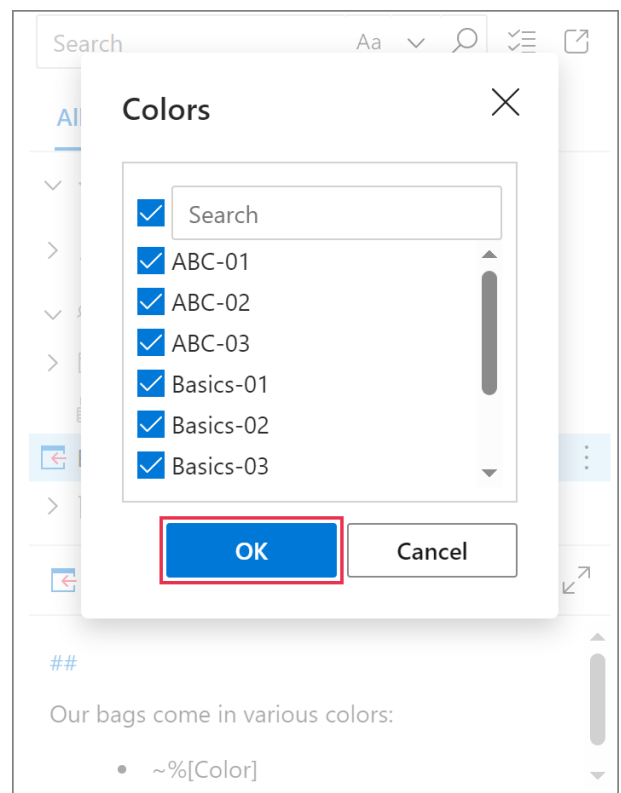
In the email message, the list containing values from the specified rows will appear.
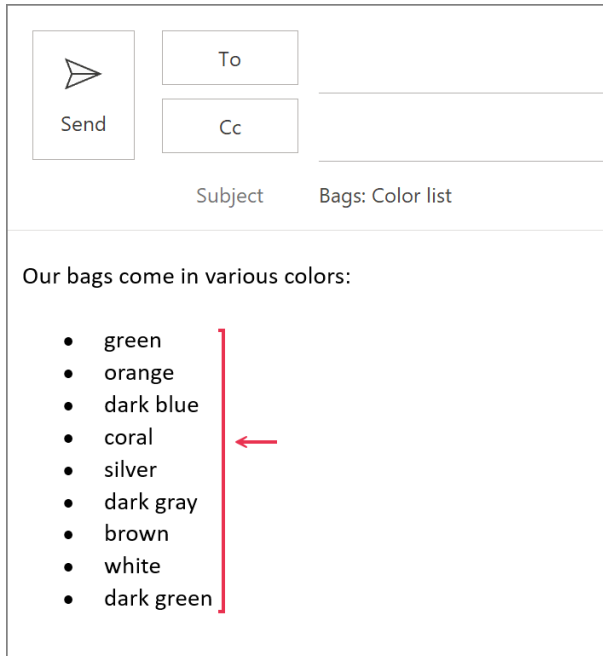
Unbind a list from a dataset

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

Learn more

- How to create and use 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

(?) **Need more details?**

- Shared Email Templates for Outlook documentation
  ablebits.com/docs/#shared-email-templates-outlook

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