
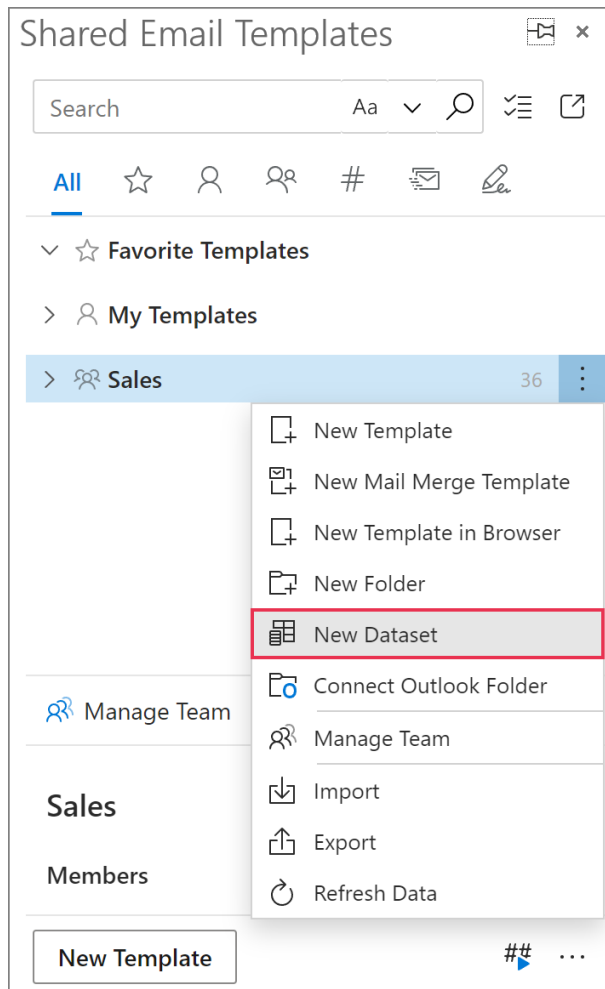


Create a dataset

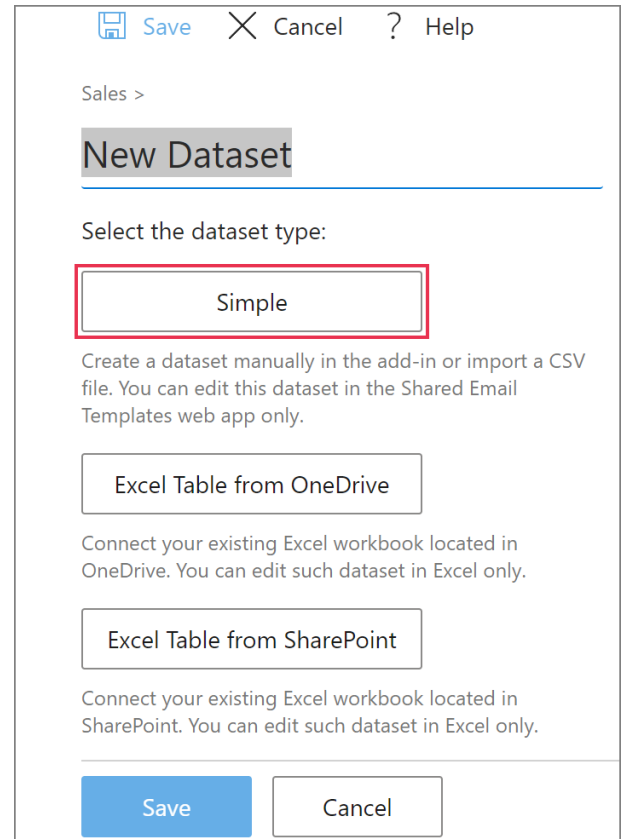
Create a simple dataset

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

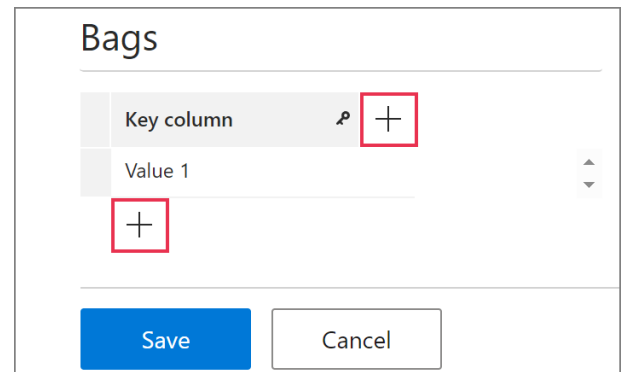
- 1 In your Outlook, right-click a folder on the Shared Email Templates pane and select **New Dataset**.




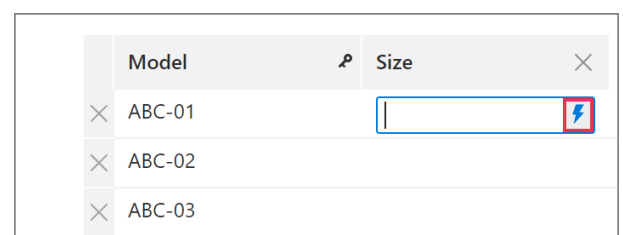
- 2 In your default browser, the Shared Email Templates app will open making it possible to create a dataset. Enter the name of your new dataset, and then select **Simple** as the dataset type.



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



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



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 all the 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 **TEXT** or **CSV** format by clicking **Import**.

Save

×

 Cancel

📄 Import

?

Sales >

New Dataset

Key column

+

Value 1

+


Save

Cancel

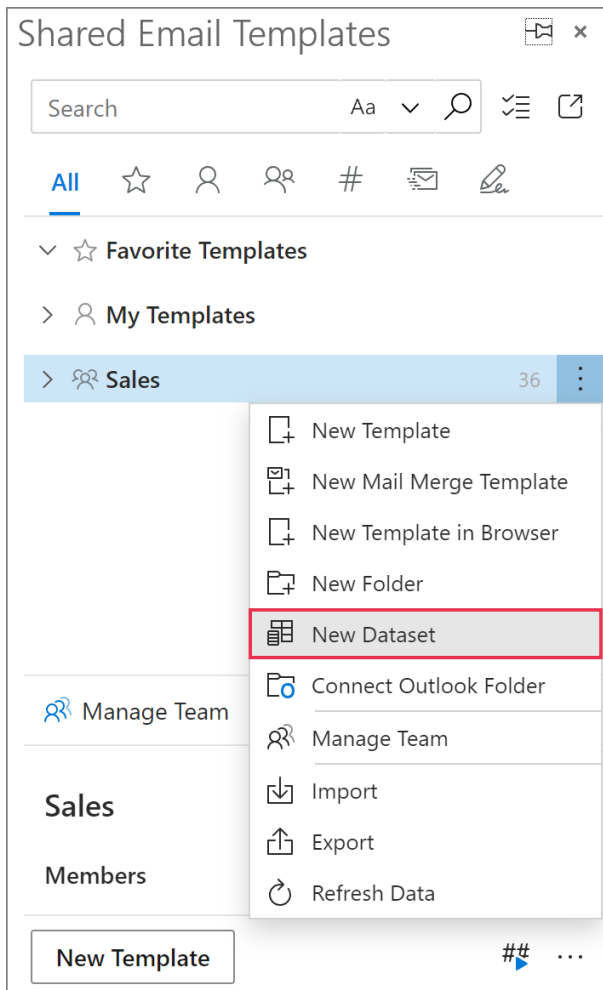
Learn more

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

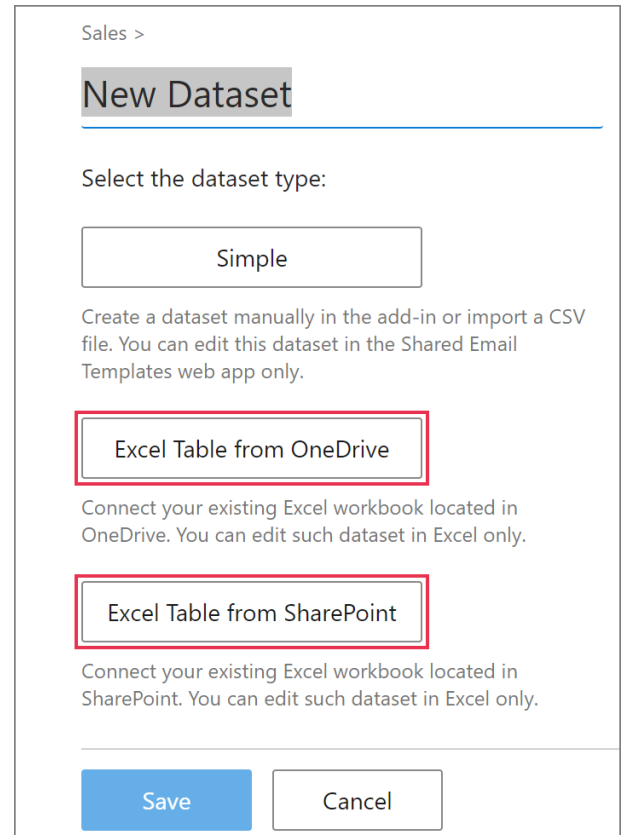
Create an Excel-based dataset

 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.

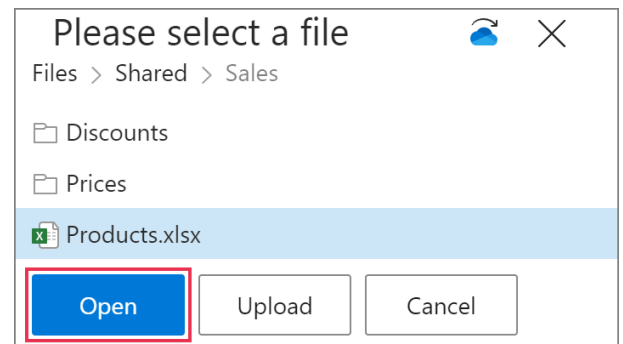
- 1 In your Outlook, right-click a folder on the Shared Email Templates pane and select **New Dataset**.



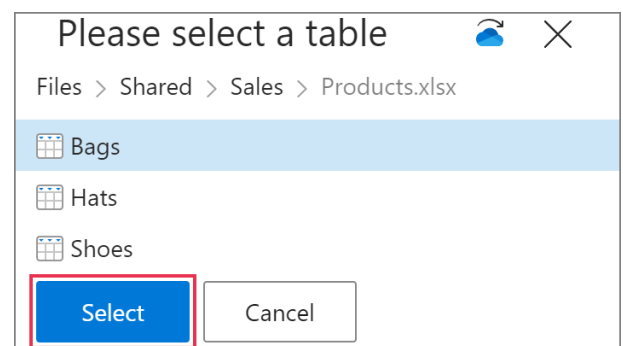
- 2 When the Shared Email Templates app opens in your default browser, enter the name of your new dataset, and then select either **Excel Table from OneDrive** or **Excel Table from SharePoint**, depending on where the Excel workbook that you want to use is stored.



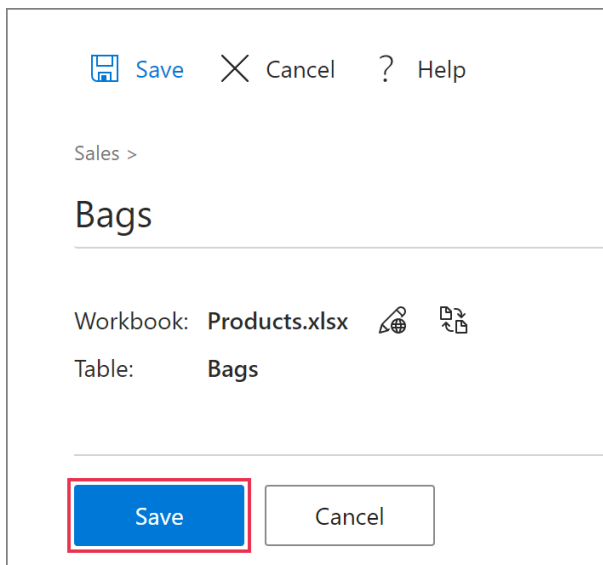
- 3 Select the necessary file, and then click **Open**.



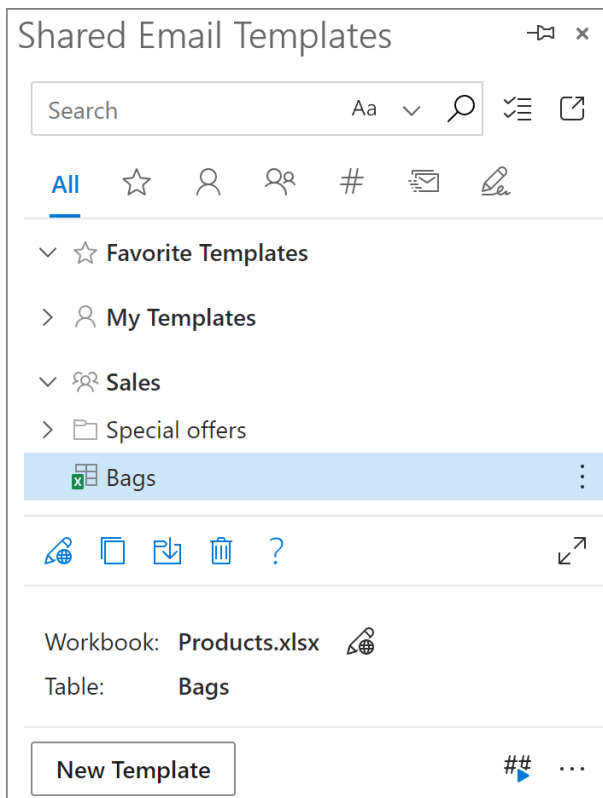
- 4 Select the necessary table.



5 Save your dataset.

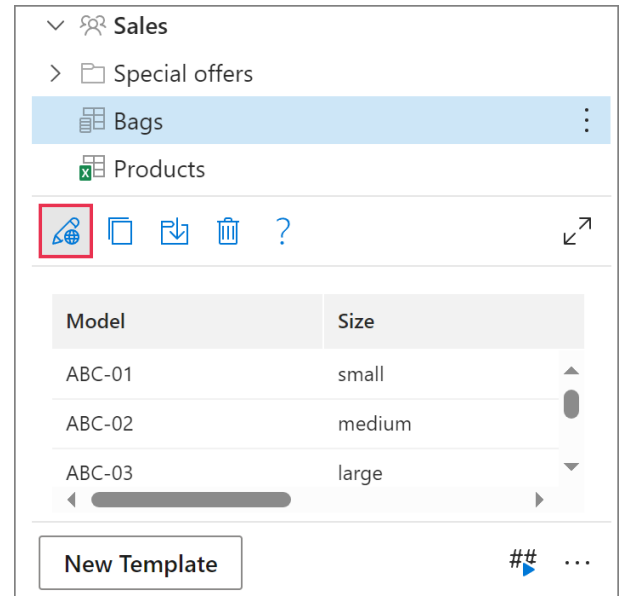


The Excel-based dataset you created will appear on the Shared Email Templates pane.



Edit a dataset

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

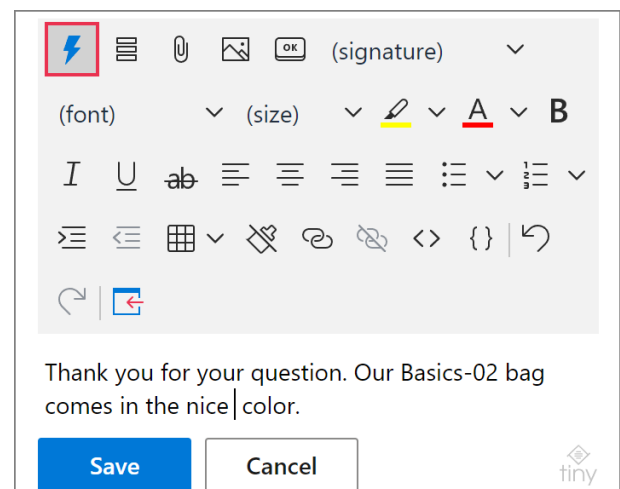


Use dataset values

In auto-fillable fields

To automatically insert a value from a dataset into an email message, create an auto-fillable field with the [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 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 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

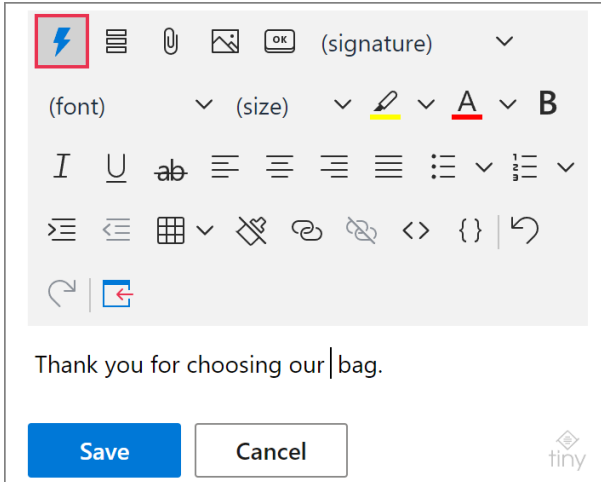
Subject Basics-02 bag: Color

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

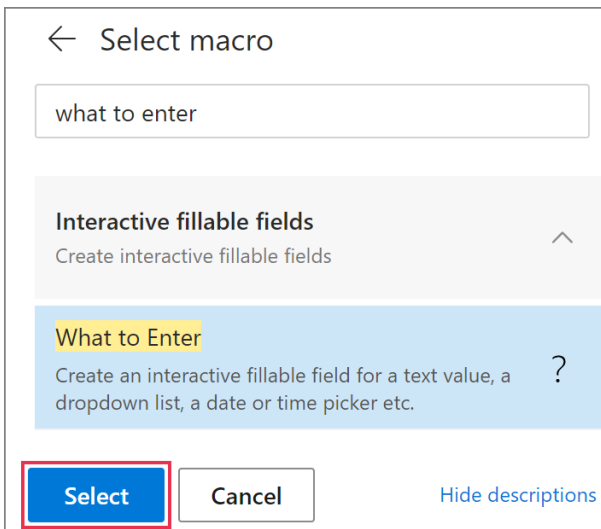
In interactive fillable fields

To insert a value from a dataset into an email message via a dialog, create an interactive fillable field (input field) with the [WhatToEnter](#) 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**.

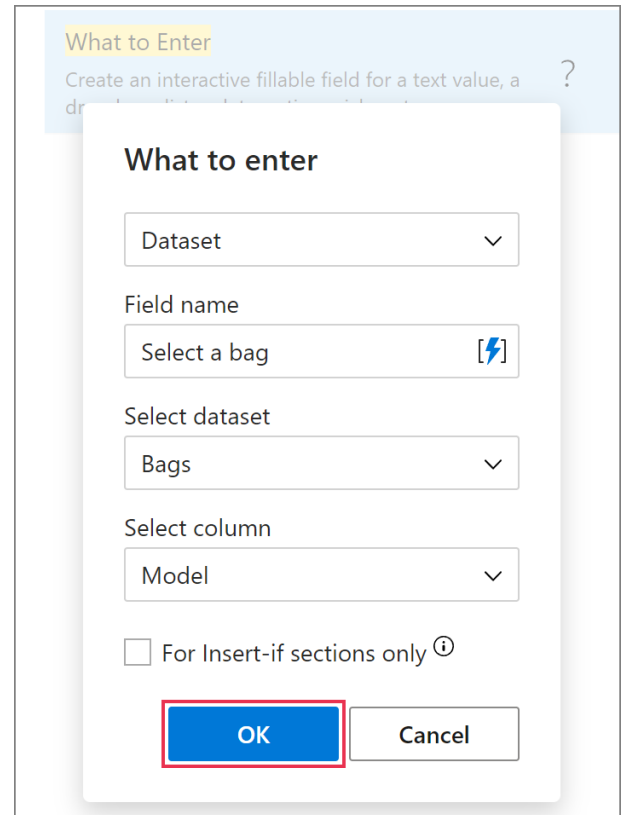


- 3 In the **What to enter** dialog, select **Dataset**.

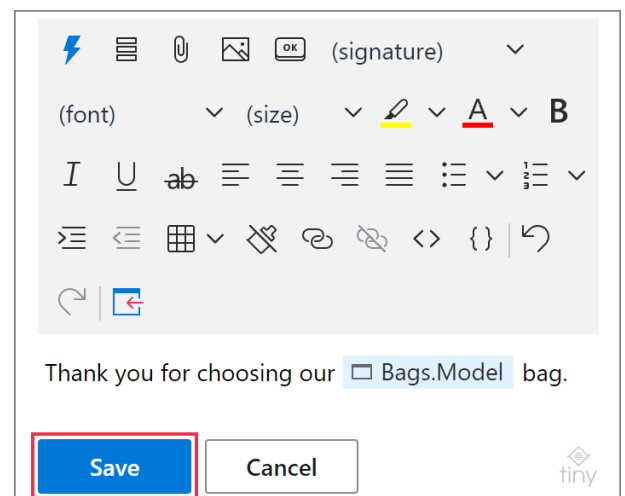
- Specify the **field name**. You'll see it in a dialog when inserting your template into an email message.
- Select a **dataset** from the list of available datasets.
- Select the **column** that contains the necessary values.

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](#).

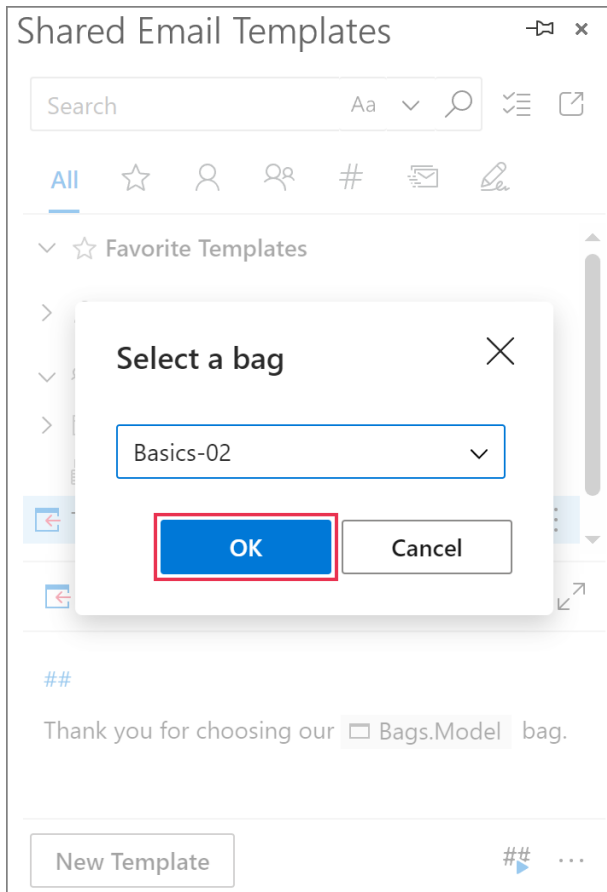
Click **OK**.



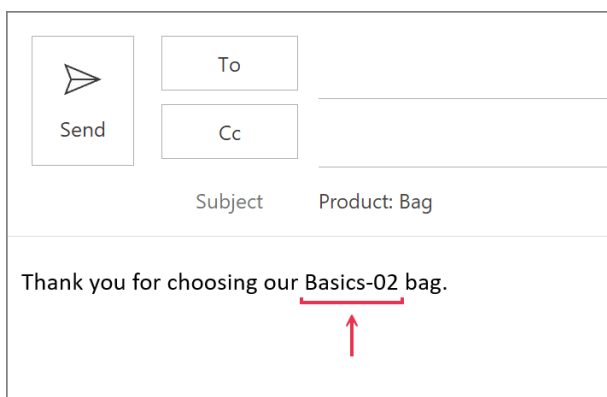
- 4 The WhatToEnter macro placeholder will be added to your template. Save the changes by clicking **Save**.




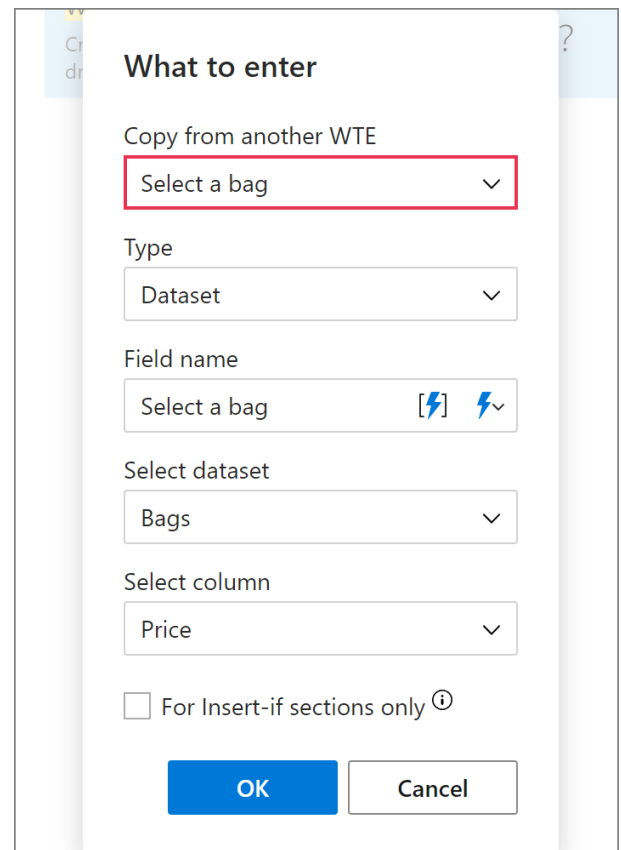
When you insert such a template into an email message, a dialog will show up. It will contain a dropdown menu listing key values of the specified dataset. To select a row from where the macro will return data, select a key value. After selecting the key value, click **OK**.



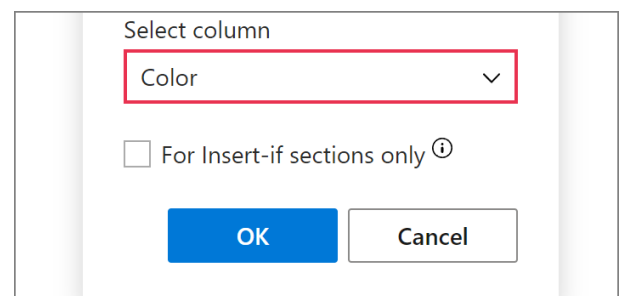
The dataset value returned by the macro will appear in the email message.



 If you want to create several interactive fillable fields (input 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, a dialog will appear. Select a key value, and then click **OK**.

A screenshot of a 'Select a bag' dialog box. The dialog has a title bar with a close button (X). Below the title is a text input field containing 'ABC-03' and a dropdown arrow. At the bottom are two buttons: 'OK' (highlighted with a red rectangle) and '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.

[illegible]

- 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**.

The screenshot shows a context menu for a table. The table has three columns: **Model**, **Size**, and **Color**. The menu options are:

- Link... (Ctrl+K)
- Cell >
- Row >
- Column >
- Table Properties
- Delete Table
- Paste (Ctrl+V)
- if Add Condition for Table
- if Add Condition for Row
- Bind to Dataset (highlighted with a red box)

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**.

Select dataset

Field name
Product(s)

Select dataset
Bags

Select columns
Model, Size, Color

OK Cancel

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

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

Save Cancel

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

Product(s)

Search

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

OK Cancel

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.

Send 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 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 dialog.

Bags

Product(s)

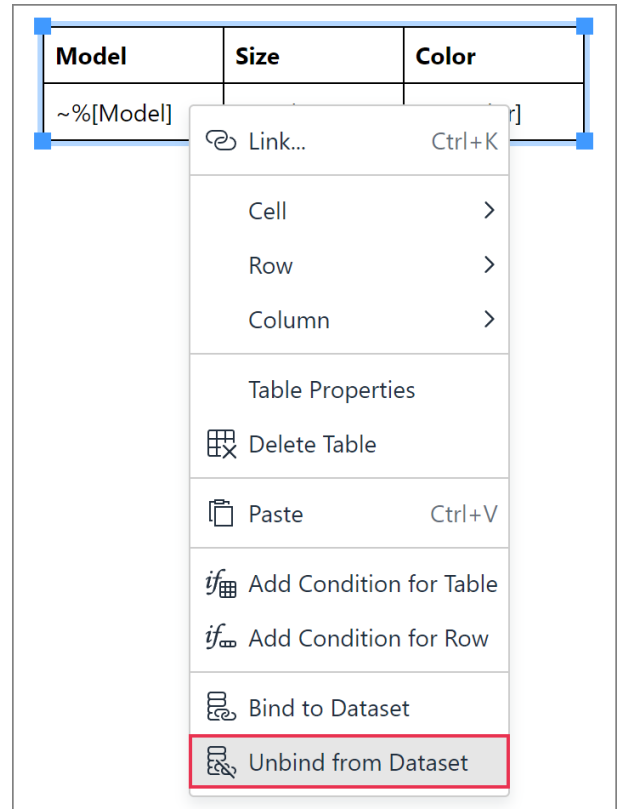
Search

- ☒ 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**.



In lists

Bind a list to a dataset

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

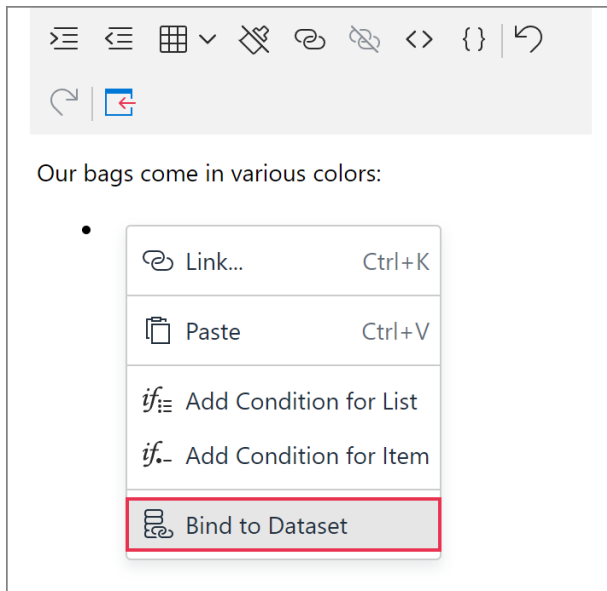
(font) (size)

Our bags come in various colors:

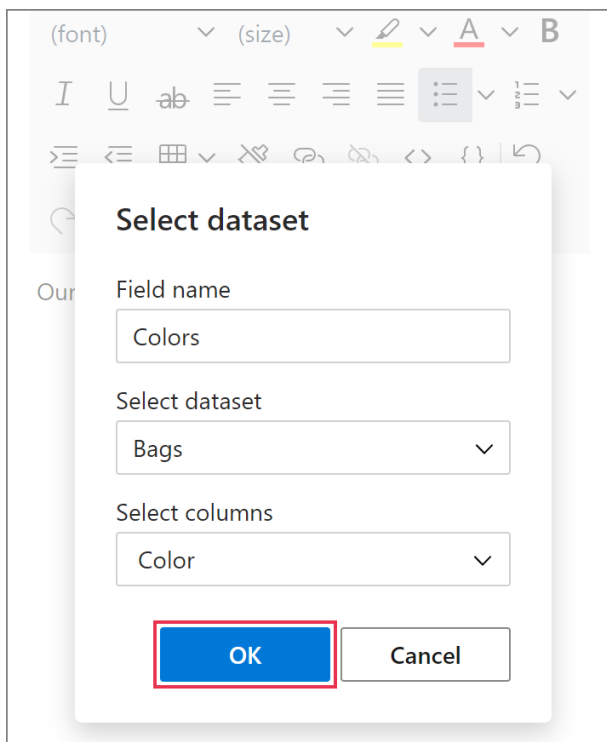
-

Save Cancel

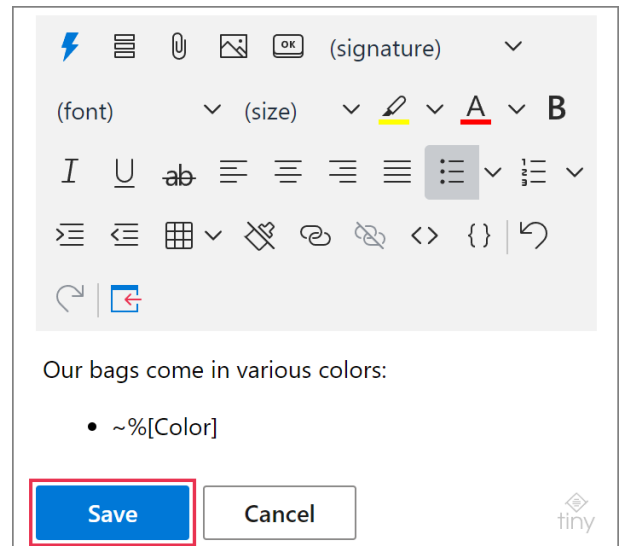
- 2 Right-click the line intended for the first list item, and then select **Bind to dataset**.



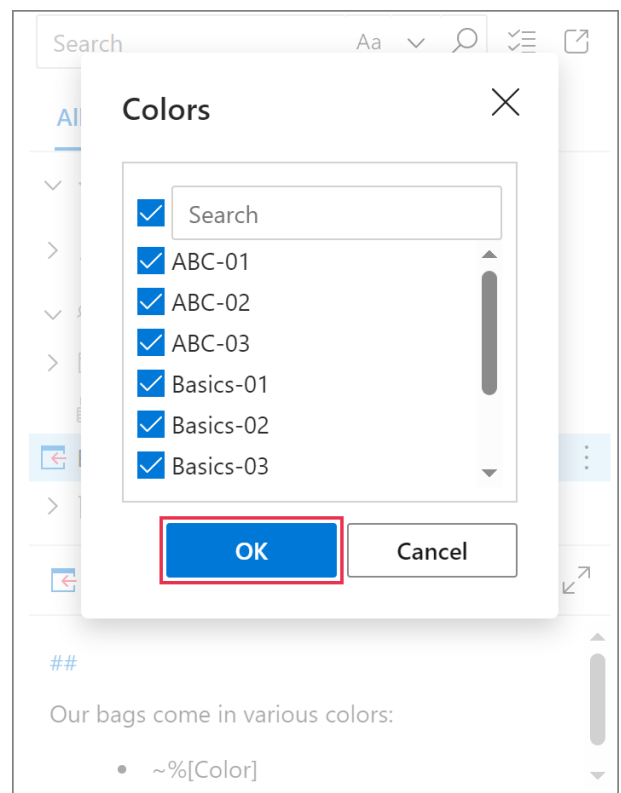
- 3 The **Select dataset** dialog will appear. Specify the **field name**. You'll see it in a dialog when inserting the template into an email message. Select a **dataset** and the necessary **column(s)**. Then click **OK**.



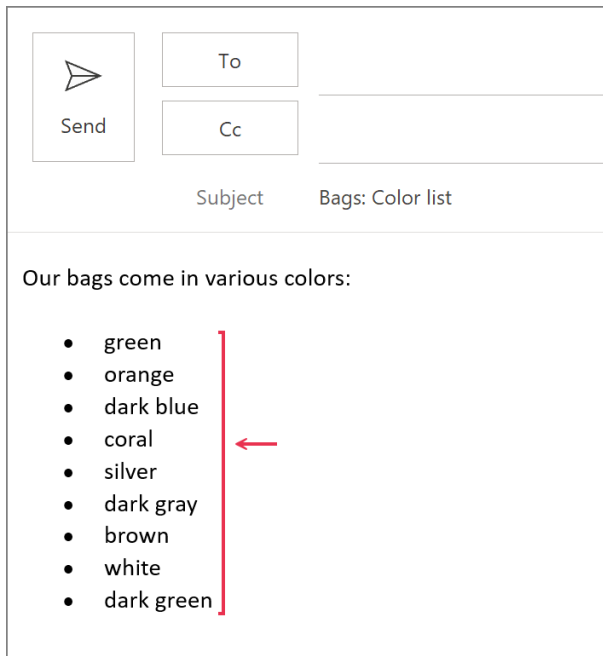
- 4 The name(s) of the selected dataset column(s) will be added to the line. Click **Save**.



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**.

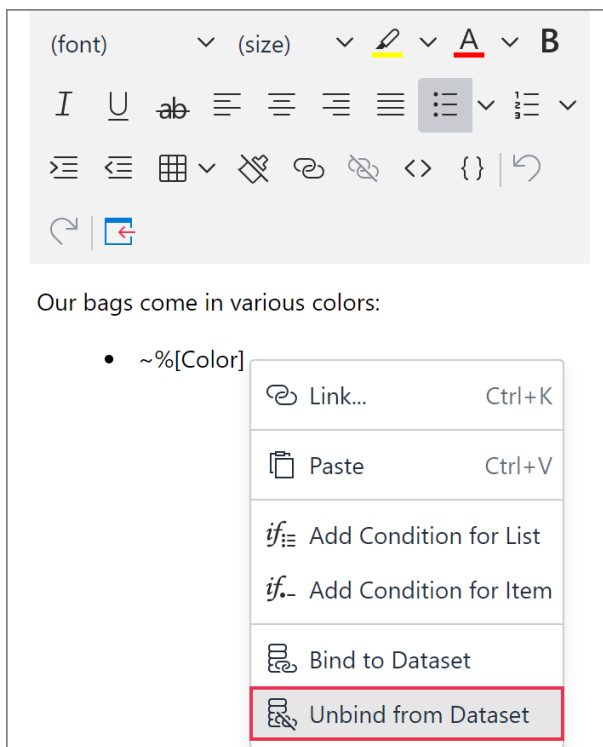


In the email message, the list containing values from the specified rows will appear.



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



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