

Find matching strings with regexes

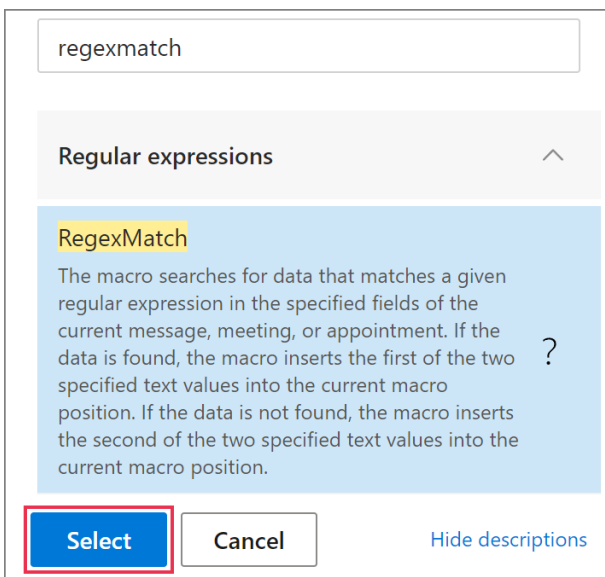
With the [RegexMatch](#) macro, you can use a regular expression (regex) to find a string that matches a certain pattern, for example an order ID, and automatically insert some text depending on whether a matching string is found or not.

Let's say you have two versions of a thank-you phrase. You choose which one to use in your email depending on whether an order ID is mentioned in a customer's request or not. You can get specific fields of a customer's email checked for an order ID and the suitable thank-you phrase inserted into your reply automatically. You just need to follow these steps:

- 1 In your template, place the cursor where a thank-you phrase is needed and select the **Insert macro** button.



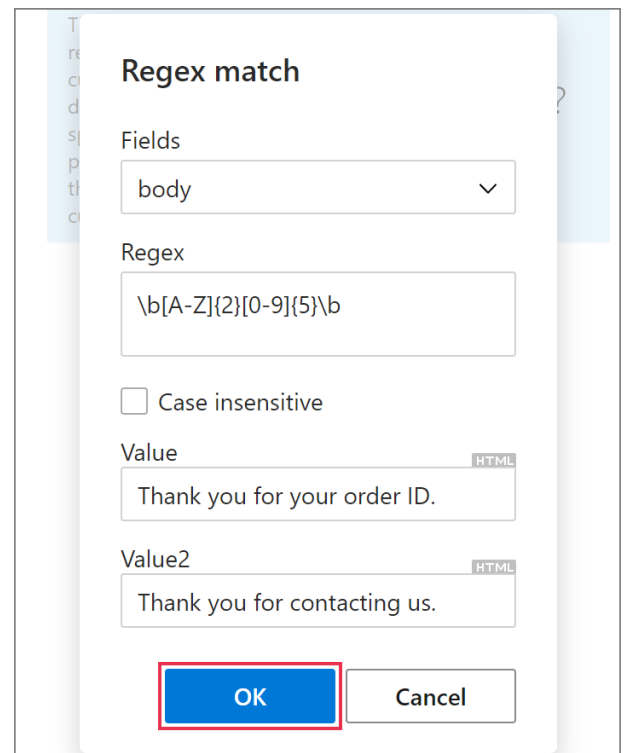
- 2 Select **RegexMatch**.



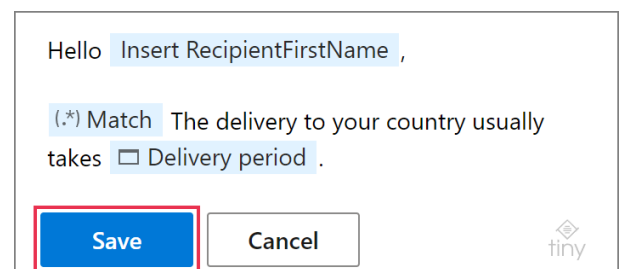
- 3 In the **Regex match** dialog, specify:
 - **Field(s)** where to look for a matching string.
 - A **regex** that corresponds to the string.
 - A text **value** that will be inserted if a matching string is found.
 - Text **value2** that will be inserted if a matching string is not found.

To make the search **case insensitive**, select the corresponding checkbox.

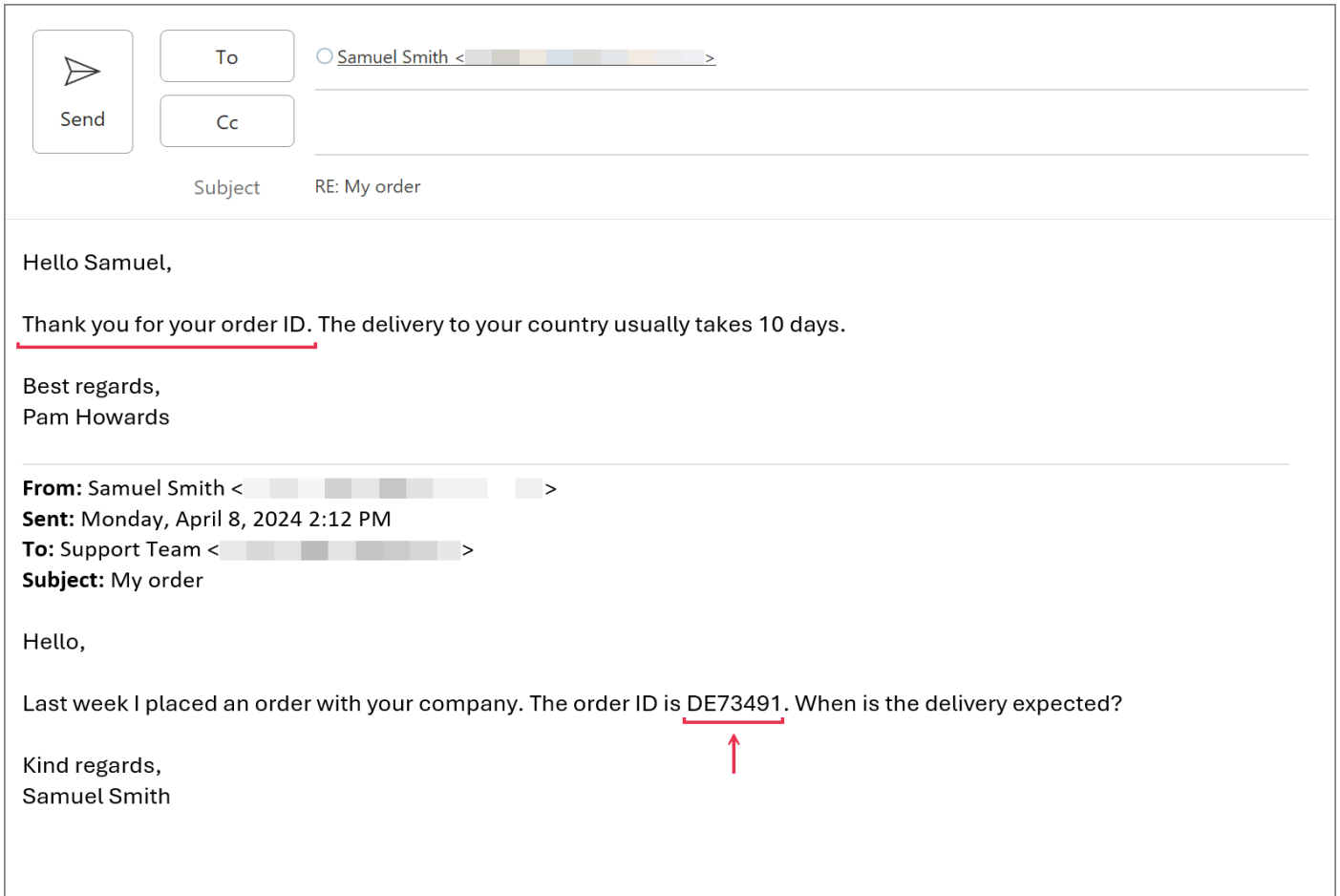
When you're done, select **OK**.



- 4 Save your template.



When you insert such a template into your reply, the specified field(s) will be checked for the first occurrence of the specified regex pattern. One of the specified text values will be inserted depending on whether a matching string is found or not.

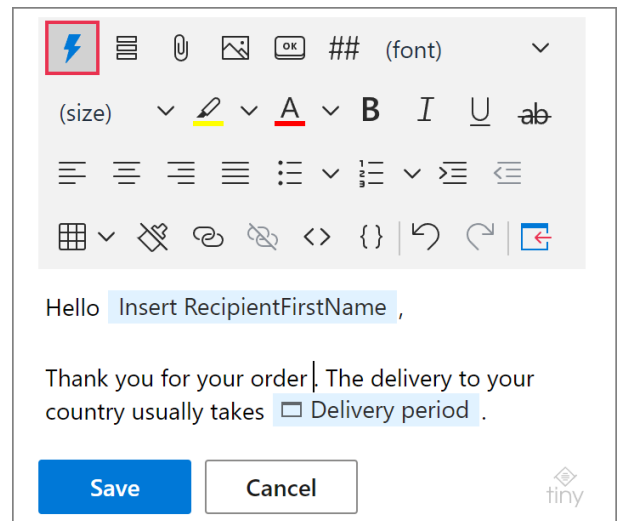


Extract matching strings with regexes

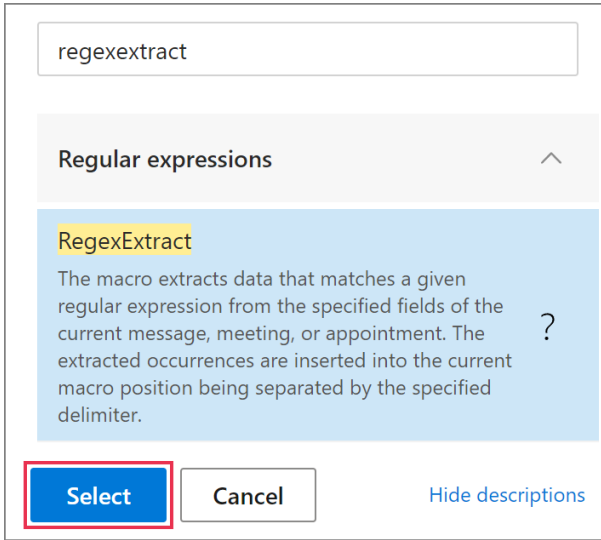
The [RegexExtract](#) macro will help you find strings that match a certain pattern, say, order IDs, and insert them into your email messages.

For example, your customers' requests contain order IDs and you'd like to automatically include them in your replies. You can get the desired result by following these steps:

- 1 Start creating or editing a template. Place the cursor where an order ID is needed. On the template editor toolbar, select the **Insert macro** button.




- 2 Select **RegexExtract**.

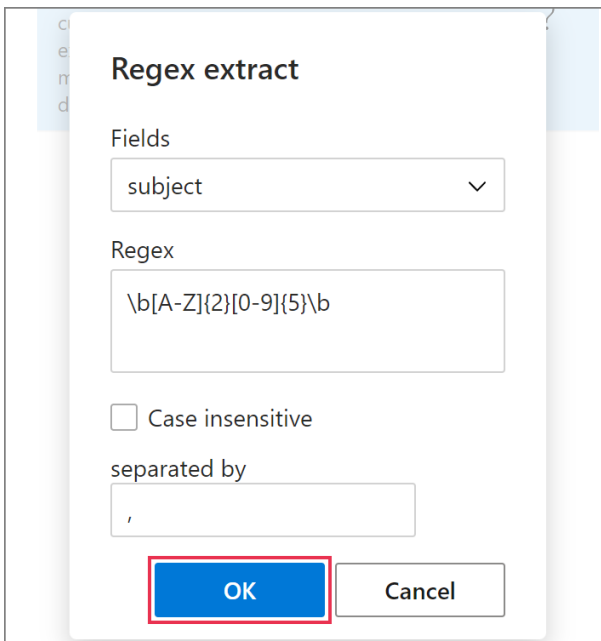


3 The **RegexExtract** dialog will appear.

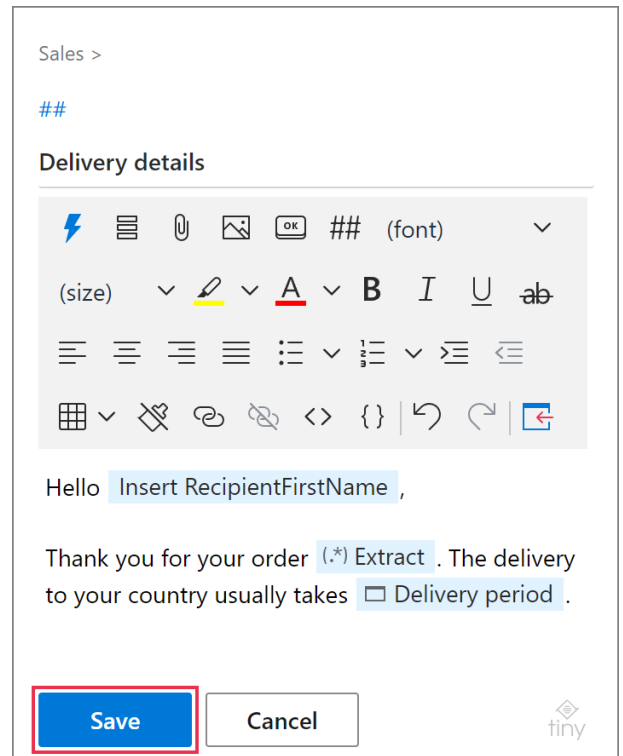
- Select **field(s)** to check for matching strings.
- Enter a **regex** that corresponds to the string that you want to find.
- Enter a **delimiter** that will separate matching strings if two or more are found.

 To make the search **case insensitive**, select the corresponding checkbox.

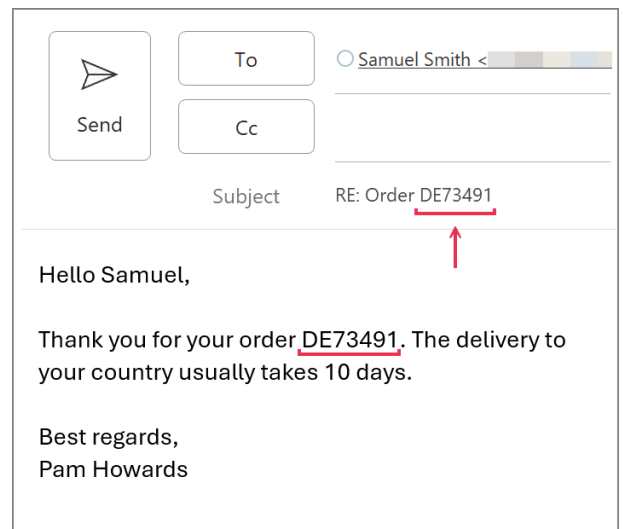
Select **OK**.



4 The **RegexExtract** macro placeholder will appear in your template. Save the changes by selecting the **Save** button.



When you insert such a template into your reply, the specified field(s) will be checked for matching strings and all the found occurrences of the specified regex pattern will be inserted in place of the **RegexExtract** macro placeholder.



Insert part of a template by regex condition

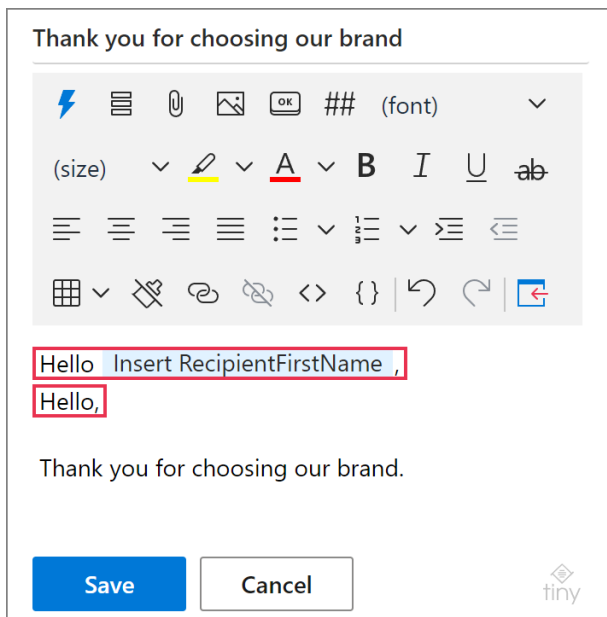
You can use regular expressions for [Insert-if sections](#) in your templates when adding a condition to a paragraph, a list, a list item, a table, or a table row.

Suppose you want to start your reply to a customer's request with the customer's first name in the opening line if the To field contains the customer's name. If the name is missing, you'd like to use a simple "Hello". So, you'll need:

- Two paragraphs containing greeting phrases, each with its own condition.
- A regular expression (regex) corresponding to the string that the To field will be checked for: `^\w+\s`.

These are the steps to follow:

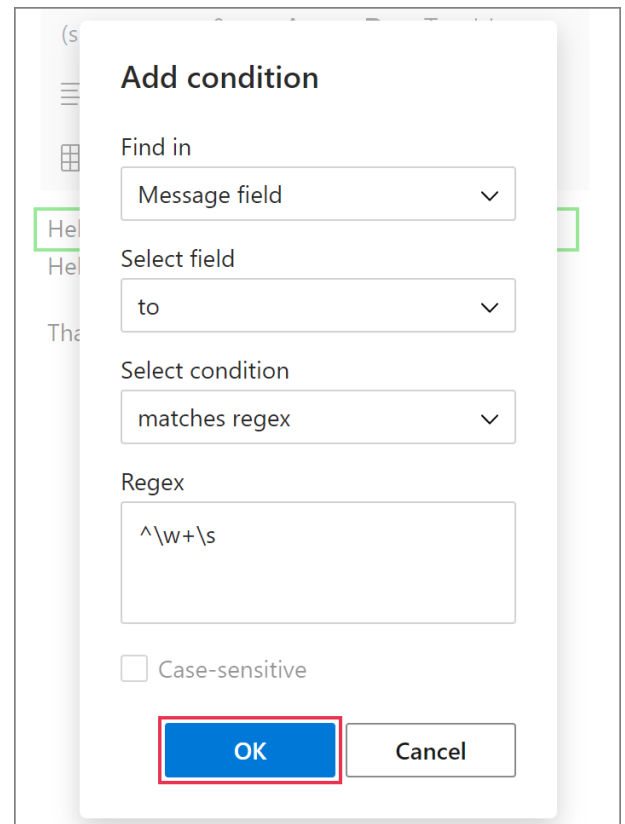
- 1 Add two paragraphs containing greeting phrases to the template you're creating or editing. Use the [Insert](#) macro in one of them to return the recipient's first name.



- 2 Right-click the paragraph that contains the Insert macro placeholder, select the **Add Condition** option, and configure the condition.

- Select **Message field**.
- Select the **field** that you want to check for a matching string.
- Select **matches regex**.
- Enter the **regex** itself.

Then select **OK**.

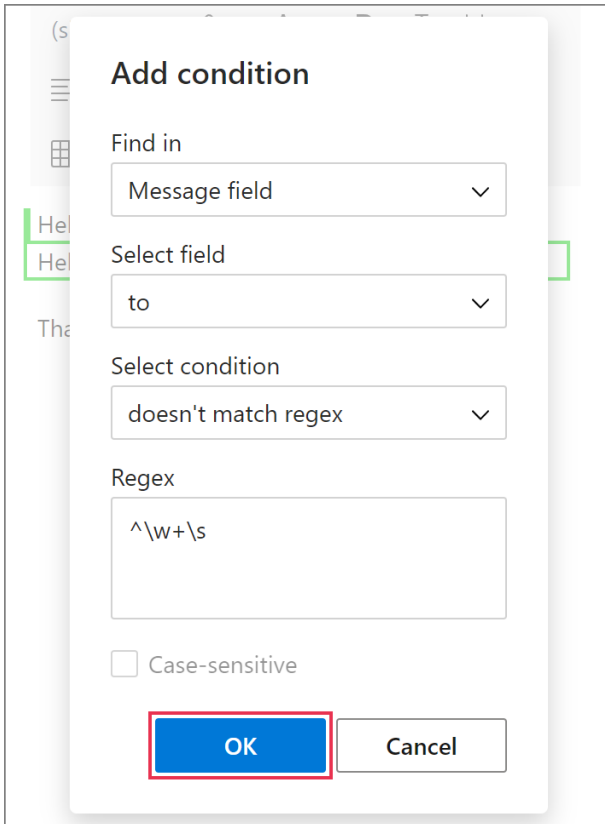


- 3 Right-click the paragraph that contains a greeting phrase without the recipient's first name. Select the **Add Condition** option. Then add the condition itself.

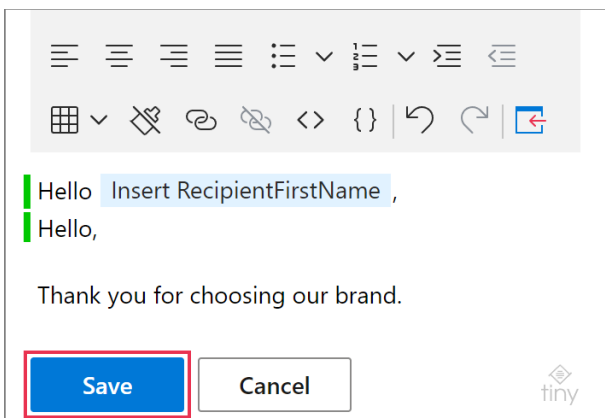
- Select **Message field**.
- Select the **field** that will be checked for a matching string.

- Select **doesn't match regex**.
- Enter the **regex** itself.

Select **OK**.

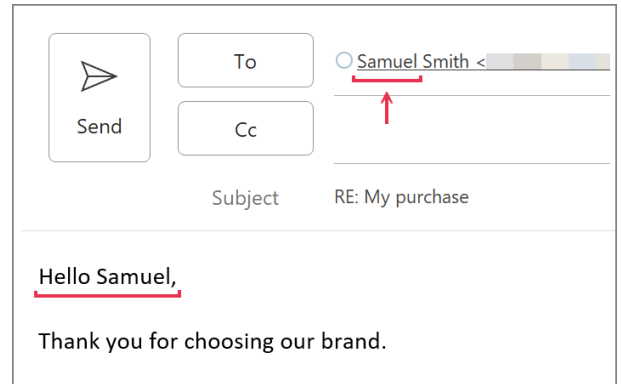


- 4 The two paragraphs with assigned conditions—Insert-if sections—will be marked with green indicators. Save the template.



When you insert such a template into your email message, the selected message field will be

checked for the specified pattern and one of the two paragraphs will be inserted depending on which of the specified conditions is met.



Pull relevant values from datasets using regexes

With regular expressions in your datasets, you can automatically insert values from datasets into email messages if matching strings are found.

Let's say, for example, that your customers' requests often have order IDs in the message body. Those order IDs consist of two letters—an abbreviated country name—followed by five digits. When you reply to a customer's request, you want the message body to be checked for an order ID so that dataset values relevant to a specific country can be automatically inserted into your email. You can get such a result by following these steps:

- 1 Create a [simple dataset](#). Add the **Regex field** and **Regex** columns to it.
 - In the **Regex field** column, select a message field that will be checked for matching strings.
 - In the **Regex** column, enter regular expressions (regexes) that correspond to order IDs.

When your dataset is ready, select the **Save** button.

Sales >

Orders

Country	Delivery	Regex field	Regex
Argentina	30 days	body	\bAR[0-9]{5}\b
Germany	10 days	body	\bDE[0-9]{5}\b
USA	3 days	body	\bUS[0-9]{5}\b
worldwide destinations	90 days	body	\b[a-zA-Z]{2}[0-9]{5}\b

Save Cancel

- Start creating or editing a template. Place the cursor where a value from the dataset is needed. On the template editor toolbar, select the **Insert macro** button.

##

Delivery

Insert macro (lightning bolt icon)

Hello `Insert RecipientFirstName`,

Thank you for your order. The delivery to | usually takes .

Save Cancel

- Select **Insert Dataset Value**.

Shared Email Templates

Select macro

insert dataset value

Auto-fillable fields

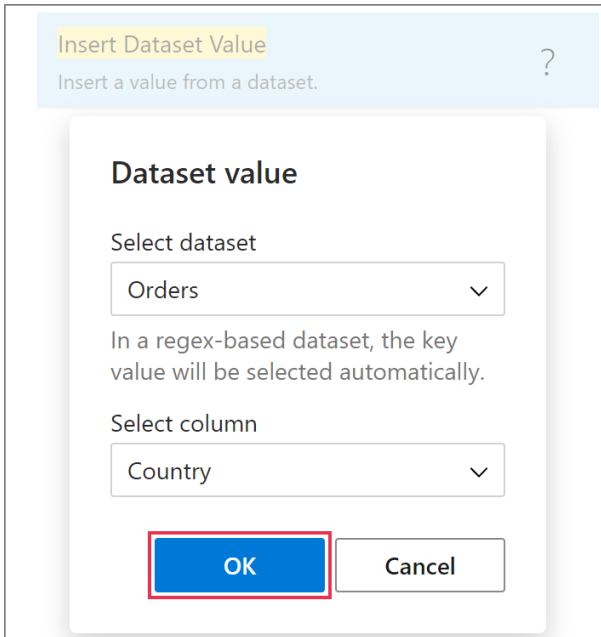
Add information to the body of a message, an appointment, or a meeting

Insert Dataset Value ?

Insert a value from a dataset.

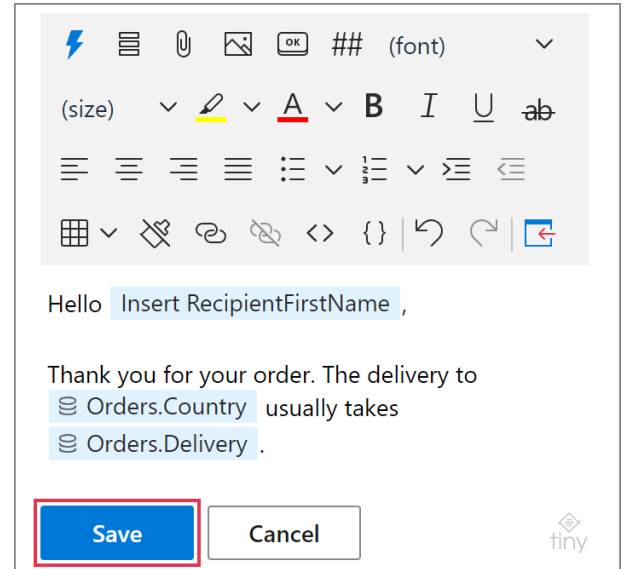
Select Cancel Hide descriptions

4 In the **Dataset value** dialog, select the necessary **dataset** and the **column** from where a value will be taken. Then select **OK**.

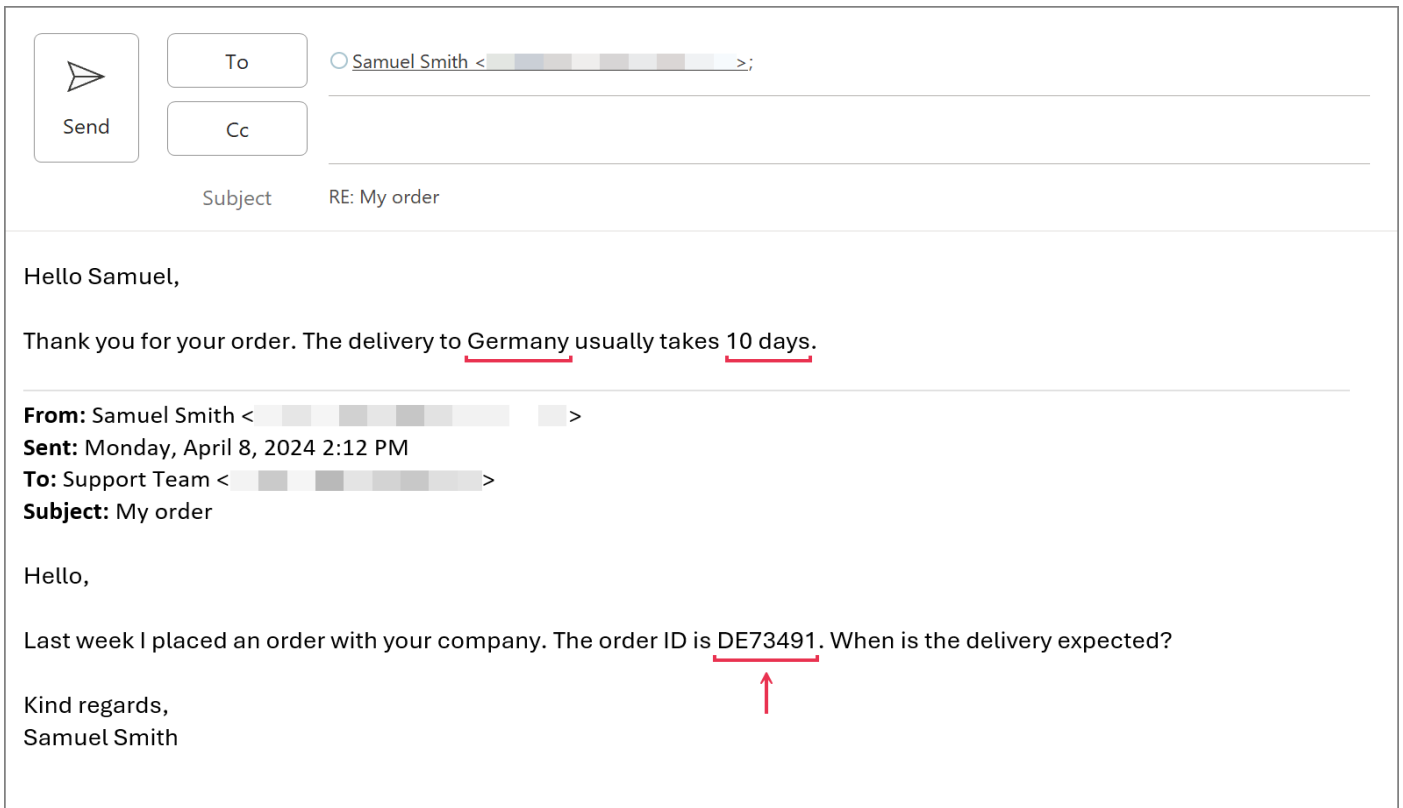


In the same way, you can add as many auto-fillable fields for dataset values as you need.

5 Save your template.



When you use such a template, the specified message field will be checked for the matching string, and values from the corresponding row of the selected dataset will be automatically inserted into your email.



See also

- "Regular expression syntax cheat sheet" on MDN Web Docs developer.mozilla.org/en-US/docs/Web/JavaScript/Guide/Regular_expressions/Cheatsheet

? 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/docs/outlook-shared-templates-tips-tricks
- Shared Email Templates cheat sheets ablebits.com/docs/outlook-shared-templates-cheat-sheets

