Manuals+ — User Manuals Simplified.

BOOST SOLUTIONS V2 Document Maker User Guide

Contents

BOOST SOLUTIONS V2 Document Maker

		Product Name	Qty.	Unit Price	Line Total	Payment Method	Check No.	Sales Tax	Discount	Customer
☑		ComposeDoc	1	$1,569.00	$1,569.00	Paypal	5562248	$0.00	$313.80	Bill Bily
☑		MergeDoc	1	$2,299.00	$2,299.00	Paypal	5562248	$0.00	$459.80	Bill Bily
☑		TransferDoc	1	$699.00	$699.00	Paypal	5562248	$0.00	$139.80	Bill Bily
		ShareDoc	1	$899.00	$899.00	Bank Transfer	11233	$0.00	$179.80	Lucy Green
		ViewDoc	1	$699.00	$699.00	Bank Transfer	11233	$0.00	$139.80	Lucy Green
		ShareDoc	2	$899.00	$1,798.00	Share-it	V24154545		$359.60	Joe Lee

Qty	Item #	Description	Unit Price	Discount	Line total
1	ComposeDoc		$1,569.00	$313.80	$1,569.00
1	MergeDoc		$2,299.00	$459.80	$2,299.00
1	TransferDoc		$699.00	$139.80	$699.00
			Total Discount	$913.40	
				Subtotal	$4,567.00
				Sales Tax	$0.00
				Total	$3,653.60

Copyright

Introduction

Document Maker enables users to generate documents based on a set of templates in SharePoint list. Users can reuse data from SharePoint lists to generate individual documents or multi-item documents and then set rules to name these documents. Documents then can be saved as attachments, saved to the document library or saved to an auto-created folder. Users can choose from four document formats to save their generated documents. This user guide is used to instruct and guide users to configure and use Document Maker. For the latest copy of this and other guides, please visit the link provided: **https://www.boostsolutions.com/download-documentation.html**

Introduction to Document Maker

Document Maker is an easy-to-use solution that quickly helps you to create repetitive and recurring documents within SharePoint using pre-made templates that you produce in Microsoft Word. Once the Document Maker features are activated, the product commands will be available in the list ribbon.
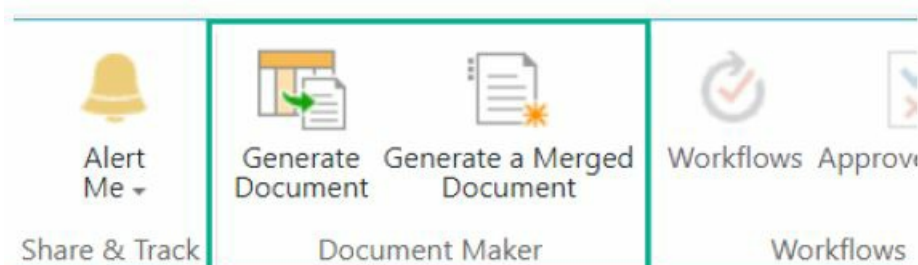
In modern experience, the product commands look like as follows:

Generate Document
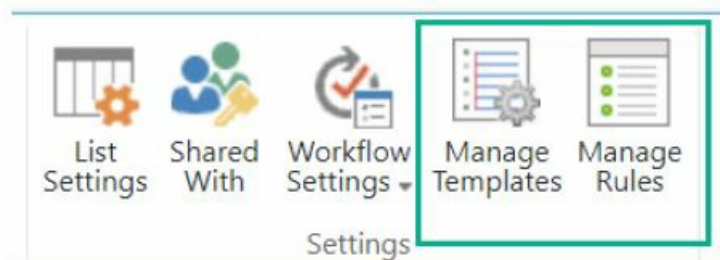
Generate individual documents for each list item.

Generate Merged Document
Generate a merged document which contains all the list items you select.

Manage Templates and Manage Rules are located in the List -> Settings group.

Manage Template
Enter the Document Maker template page to manage templates.

Manage Rules
Enter the Document Maker Rules page to specify rules for generated documents.

Manage Templates

Document Maker enables you to compose templates for document creation. To generate documents using data from list, you must first insert list columns into the templates. The value of the column, then, will be inserted in the area you designated in the template creation when the document is generated. You can also provide default content that appears in every generated word document, such as a preferred framework for a sales order or an official disclaimer in a page footer. To manage templates, you must have at least Design permission level in list or library.

Note Templates for the whole site collection will be stored in a hidden library in your root site. The URL is http://<rootsite>/BoostSolutionsDocumentMakerTemplate/Forms/AllItems.aspx

Create a Template

- Navigate to the list or library where you want to create a template.
- On the Ribbon, click the List or Library tab and then click Manage Templates in the Settings group.
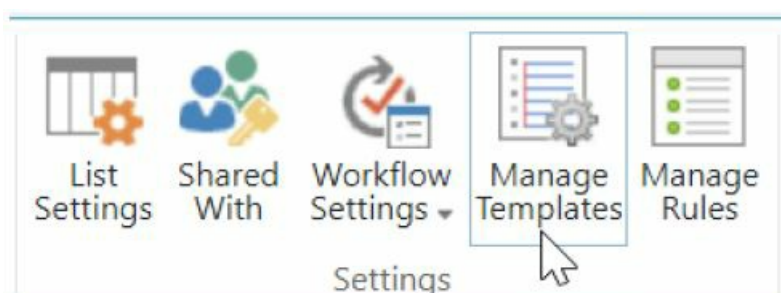
Or, enter the List or Library Settings page and under the General Settings section, click Document Maker Settings (Powered by BoostSolutions).

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Metadata navigation settings
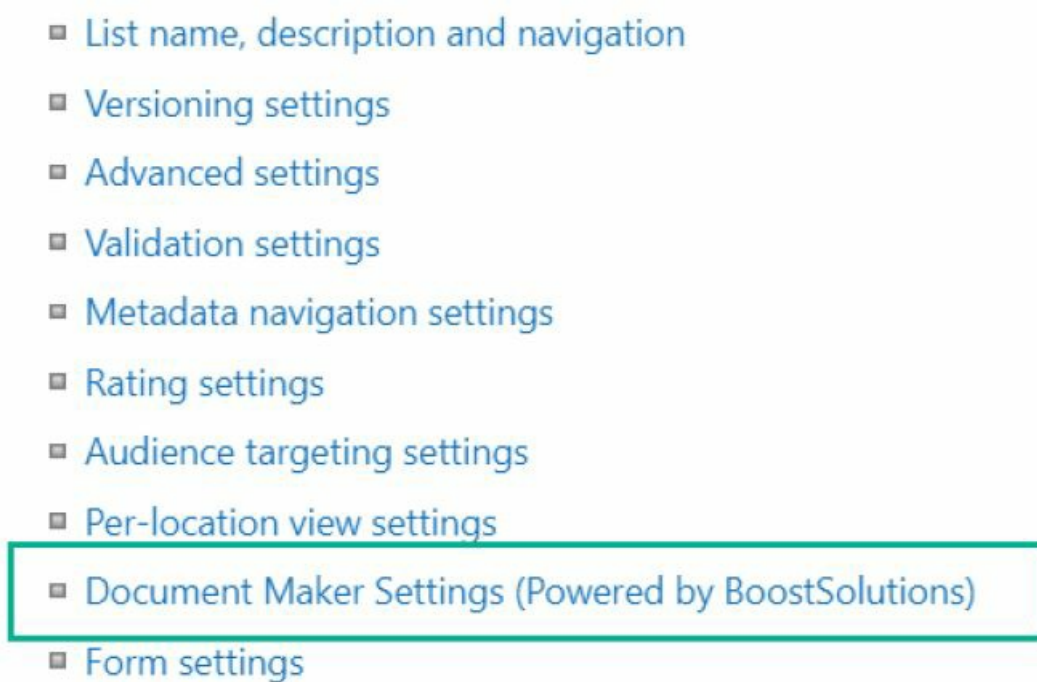- Rating settings
- Audience targeting settings
- Per-location view settings
- Document Maker Settings (Powered by BoostSolutions)
- Form settings

- On the Document Maker Settings page, click Create new template.
- Enter a name in the Create a Template dialog box.

Create a new template   ✕

Name *   Customer order

                                                OK   Cancel

- Click OK to create the template. A dialog will open asking if you want to edit the template. To edit the template,
  click OK, otherwise click Cancel.
  Note: It is recommended that you use Edge browser so that a word file will open smoothly so that you can edit
  the template.
- After clicking OK, the template will open in Word. You can configure the template based on your company
  policy. For more information on how to configure a document template, please refer to section 4.3 Configure
  Templates in Word.
- Once you have finished configuring the template, click 💾 to save the template.
- In the Template Settings page, you can view the basic information for the template (Template Name, Modified,
  Modified By, Applied Rule and Actions).

Orders › List Settings › Document Maker Settings

Templates

Template Name	Modified	Modified By	Applied Rule	Actions	
Customer order	8/21/2023 2:56:40 AM	Danies Liu		Edit Template in Word	Download a Copy
summary	8/21/2023 12:59:38 AM	Danies Liu	summary	Edit Template in Word	Download a Copy
quotation	8/17/2023 8:44:38 PM	Danies Liu	generate quote	Edit Template in Word	Download a Copy

Upload a Template

If you have premade templates, you can upload and use them to generate documents.

- Navigate to the list or library where you want to upload a template to.
- On the Ribbon, click the List or Library tab and then click Manage Templates in the Settings group. Or, enter the List or Library Settings page, in the General Settings section and click Document Maker Settings (Powered by BoostSolutions).
- In the Document Maker Settings page, click Upload a template.
- A dialog box will appear. In the dialog box click Browse… to select your premade document template from your local computer or server.
- Click OK to upload the selected template.

Configure Templates in Word

To configure a template, you will need to install the Document Maker plugin. For instructions on how to install the Document Maker Plugin, please refer to installation guide. Once the plugin is installed, a Document Maker tab will appear on your ribbon in Word.

Data Connection

Connect to a SharePoint list and get list fields and other related fields.

Show Fields

This function controls the Document Maker pane. You can decide whether or not to show the List Fields pane by clicking the Show Fields.

Refresh Fields

Click this option to refresh the fields so that you get up-to-date fields from list.

Mark Repeat Area

Mark repeat information in the document. This is very useful when you want to generate a merged document using multiple items.

Help
Get Document Maker plugin help documents from the BoostSolutions website.

- Click the Document Maker tab on the Word Ribbon and then click Data Connection in the Get Data group.

- Input the URL of the SharePoint list you want to get data from.
- Select the Authentication type (Windows authentication or Form Authentication) you want to use and enter the correct user authentication.
  Note: The user must have at least View Only permission level for SharePoint list.
- Click Test Connection to check whether the user can access the list.
- Click OK to save the connection.
    - In the template you are creating, click on the area where you want to insert a field(s).
    - In the Document Maker pane, select one field and double-click it. The field will be inserted as a Rich Text Content Control.

List Fields
SharePoint list fields and related fields from lookup list. To show related fields, you need to select them as additional fields in the list.

Add a column to show each of these additional fields:

☑ ID
☐ Title
☐ Modified
☐ Created
☐ Version
☐ Compliance Asset Id
☑ Due Date

Custom Fields

- Custom fields, include [Today], [Now], [Me].
- [Today] represents the current day.
- [Now] represents the current date and time.
- [Me] represents the current user who generated the document.

Calculated Fields
A calculated fields can be used to compute data in column or items in the document. (The supported calculated field functions please see Appendix 2: Supported Calculated Field Functions for details.)

- To get up-to-date fields from the list, click Refresh Fields.
- To generate a merged document, you will need to mark a table or area as repeat.
- Click to save template.

Modify a Template

- Navigate to the list or library where you want to modify a template.
- On the Ribbon, click the List or Library tab and then click Manage Templates in the Settings group.
- In the Document Maker Settings -> Templates page, locate the template and then click Edit Template.
- If you want to change the properties of the template, click Edit Properties.

Delete a Template

- Navigate to the list or library where you want to delete a template.
- On the Ribbon, click the List or Library tab and then click Manage Templates in the Settings group.
- In the Document Maker Settings -> Template page, locate the template and then click Delete.
- A message box will appear asking you to confirm that you want to proceed with the deletion.
- Click OK to confirm the deletion.

Managing Rules

After a template is created, you will need to configure a rule to specify the documents generation. To manage rules for a list or library, you must have at least Design permission level.
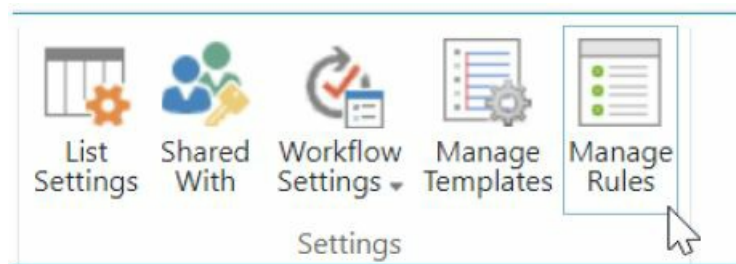
Rules Settings

When you create a rule, the following settings need to be configured:

Settings	Description
Select Template	Select a template(s) to apply the rule to.
Naming Rule	Specify a rule for automatic document naming. You can combine columns, functions, customized texts and separators to dynamically generate document names.
Date Format	Specify a date format you want to use in the document name.
Output Types	Specify the output type (DOCX, DOC, PDF, XPS) for the generated document(s).
Distribute Document	Specify the path where you want to save the generated document(s).
Merged Document Generation	Specify whether a merged document can be generated. Note: This option is optional.
Merged Documents Naming Rule	Specify a naming formula for merged documents.
Target Location	Specify the document library to save merged documents.

Create a Rule

- Navigate to the list or library where you want to create a rule.
- On the Ribbon, click the List or Library tab and then click Manage Rules in the Settings group.

- In the Document Maker Settings -> Rules page, click Add Rule.
    - **Note:** You cannot add a rule if no template exists in the current list.
- In the Rule Name section, enter a name.

- Specify which templates should use this rule. You can select multiple templates for one rule.

Note: Only one rule can be applied to a template. Once a rule has been applied to a template, a second rule then cannot be applied unless the first rule is removed.

- In the Naming Rule section, you can use Add element to add a combination of variables and separators and use Remove element to remove them.

In the dropdown list, you can select Columns, Functions and Custom Text as an element for the document name.

Columns

Almost all SharePoint columns can be inserted in a formula, including: Single line of text, Choice, Number, Currency, Date and Time, People or Group and Managed Metadata. You can also insert the following SharePoint metadata in a formula: [Document ID Value], [Content Type], [Version], etc.

Functions

Document Number Generator allows you to insert the following functions into a formula. [Today]: Today's date. [Now]: The current date and time. [Me]: The user who generated the document.

Customized

Custom Text: You can select Custom Text and enter anything you want. If any invalid characters are detected (such as: / \ | # @ etc.), the background color of this field will change, and a message will appear to indicate that there are errors.

Separators

When you add multiple elements in a formula, you can specify separators to join these elements. Connectors include: – _. / \ (The / \ separators cannot be used in the Name column.)

In the Data Format section, you can specify which date format you want to use.

```
(Default SharePoint Format)
yyyy-mm [2012-10]
mm-yyyy [10-2012]
mm-dd [10-16]
dd-mm [16-10]
MMM yyyy [Oct 2012]
yyyy MMM [2012 Oct]
MMM dd [Oct 16]
dd MMM [16 Oct]
MMMM yyyy [October 2012]
yyyy MMMM [2012 October]
mm-dd-yyyy [10-16-2012]
MMM dd yyyy [Oct 16 2012]
MMM-dd-yyyy [Oct-16-2012]
dd/mm/yy [16/10/12]
dd-mm-yyyy [16-10-2012]
yyyy-mm-dd [2012-10-16]
yyyy/mm/dd [2012/10/16]
d MMMM yyyy [10 October 2012]
yyyy-MMMM-dd [2012-October-16]
```

Note This option is used only when you add at least one [Date and Time] column in the Naming Rule section.

- In the Output Types section, specify the document format after generation.

Output Types

Specify which document format you want to use for generated documents.

☑ DOCX ☐ DOC ☑ PDF ☐ XPS

Four file formats are supported: DOCX, DOC, PDF, and XPS.

In the Distribute Document section, specify the path to save the generated documents.

Distribute Document

Specify the location where the documents are stored. If you select "save as attachments", you need to set attachment enabled in list settings. If you "save to document library" you can specify whether a folder will be created in the library. The folder name can be generated automatically based on rules such as date, created by, version, etc.

○ Save as attachment:
◉ Save in document library:

MJ Home\All Docs ⌄

☑ Create a folder to save documents
Name folder by: Product ⌄

There are two options for you to choose from to save generated documents.

Save as attachment
Choose this option to attach the generated documents to the corresponding items. To save the document as an attachment, you need to enable the attachment feature in the list.

Use the option Overwrite existing documents to decide whether to overwrite an existing attachment for the current item.

Save in document library

Choose this option to save the documents to a SharePoint document library. Simply select a library in the Save to document library dropdown list.
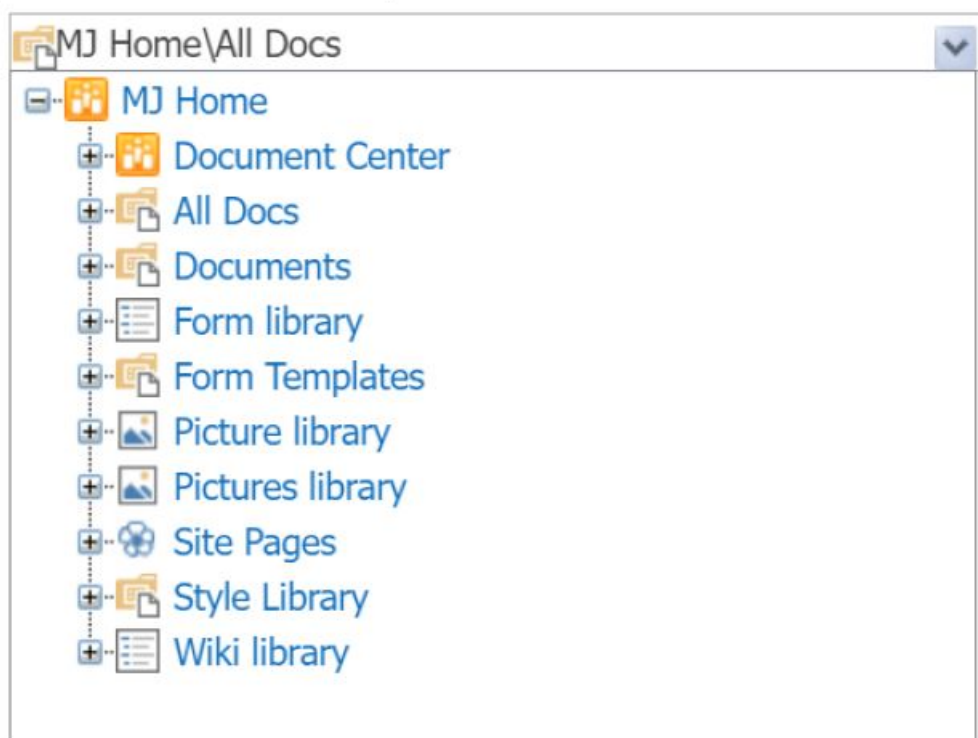
Use the Create a folder to save documents option to save the documents into an automatically created folder and specify a column name as the folder name.

In the Merged Document Generation section, select the Enable option to enable the generation of a merged document using multiple items.

In the Merged Documents Naming Rule section, specify the naming rule.You can insert [Today], [Now] and [Me] in

the rule to dynamically generate names.

Merged Documents Naming Rule
Specify a naming rule for the merged documents.

Quote-[Today]-by [Me]

[Me] ⌄

- In the Target Location section, select a document library to save the merged documents.
- Click OK to save the settings.
- In the Rule Settings page, you can view the basic information of the rule (Rule Name, OutputType, Template, Modified, and Modified By).

Modify a Rule

- Navigate to the list or library where you want to modify a rule.
- On the Ribbon, click the List or Library tab and then click Manage Rules in the Settings group.
- In the Document Maker Settings -> Rule page, find the rule and click Edit. Make your changesand then click OK to save the changes.

Delete a Rule

- Navigate to the list or library where you want to delete a rule.
- On the Ribbon, click the List or Library tab and then click Manage Rules in the Settings group.
- In the Document Maker Settings -> Rule page, find the rule you want to delete and click Delete.
- A message box will appear asking you to confirm that you want to proceed with the deletion.
- Click OK to confirm the deletion.

Using Document Maker

Document Maker allows you to generate individual documents for each list item or merge multiple list items into one document.

Generate Individual Document

- Navigate to the list or library you want to generate document for.
- Select one or more item(s).
- On the Ribbon, click Generate Document.

List Settings Shared With Workflow Settings Manage Templates Manage Rules

Settings
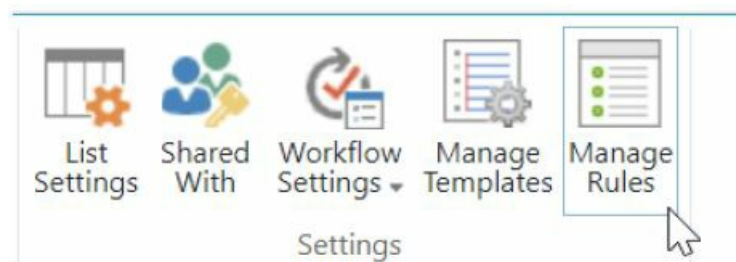
- A Generate Document dialog box will appear. You can select a template you want to use in the Select Template dropdown list. The generated documents file names and the number of files generated will also appear in the dialog box, under the Select Template dropdown list.

- Click Generate to generate the documents.
- Once the document creation is finished, you will see the results of the operation. Click Go to Location to enter the library or folder where the documents are stored. Click on a file name to open or save it.
- Click OK to close the dialog box.

- If the document generation procedure failed, the Status will show as Fail. And you can view the Error Message under the Operations column.

Generate a Merged Document
This function allows you to merge multiple items into one document. To generate a merged document, you need to enable Merged Document Generation option in rule.

- Navigate to the list or library you want to generate a document for.

- Select the items you want and click Generate a Merged Document on the Ribbon.
- A Generate a Merged Document dialog box will appear. From this dialog box, you can select a template you want to use in the Template dropdown. The generated documents file names and the number of files generated will also appear in the dialog box.

Generate a Merged Document ✕

Template: quotation

File Name: Quote-8_21_2023-by Danies Liu.docx
Quote-8_21_2023-by Danies Liu.pdf

2 Items

Generate Cancel

- Click Generate to generate the document.
- Once the creation of the document is completed, you will be able to see the operation results. Click Go to Location to enter the library or folder where the documents are stored. Click on the file name to open or save it.

Generate a Merged Document ✕

Complete

File Name	Status	Operations
Quote-8_21_2023-by Danies Liu.docx http://contoso/Document Center/Documents/8_21_2023	Success	Go to Location
Quote-8_21_2023-by Danies Liu.pdf http://contoso/Document Center/Documents/8_21_2023	Success	Go to Location

2 files were generated successfully.

OK

- Click OK to close the dialog box.

Case Studies

Suppose you are a sales specialist and after you have processed an order, you need to send an invoice or receipt

(in .pdf format) to your customer. The invoice or receipt template and the file name should be consistent and based on your company policy. Here is the All Orders list containing all the details of the customer's orders, including Product Name, Customer, Payment Method, etc.

⊕ **new item** or edit this list

All Items ··· Find an item 🔍

✓	Order No.		Customer	Product	Payment Method	Qty.	Unit Price	Tax	Discount	Line Total
	O1021-001	···	SPField	ShareDoc	Bank transfer	1	$899.00	0%	$0.00	$899.00
	O1021-002	···	SPField	ViewDoc	Bank transfer	1	$699.00	0%	$0.00	$699.00
	O1021-003	···	Boost	ShareDoc	Share-it	2	$899.00	0%	$0.00	$1,798.00
	O1021-004	···	AABBC	TransferDoc	PayPal	1	$699.00	0%	$62.91	$629.10
	O1021-005	···	AABBC	MergeDoc	PayPal	1	$2,299.00	0%	$206.91	$2,069.10
	O1021-006	···	AABBC	ComposeDoc	PayPal	1	$1,569.00	0%	$141.21	$1,412.10

In the Sales Receipt template, insert the list fields in the table as follows:

PAYMENT METHOD   [Payment Method]

QTY	ITEM	UNIT PRICE	DISCOUNT	LINE TOTAL
[Qty.]	[Product]	[Unit Price]	[Discount]	[Line Total]

TOTAL DISCOUNT	[total discount]
SUBTOTAL	[subtotal]
SALES TAX	[Tax]
TOTAL	[total]

5200 1st Ave, Saint Street, NY

(+1) 555-836-2195

sales@boost.com

THANK YOU FOR YOUR BUSINESS

Select Template

Specify which templates should be used in this rule.

☑ Sales Receipt

Naming Rule

You can combine columns, functions, customized texts and separators to dynamically generate document names.

[Customer]_[Order No.]_[Today]

| Customer | ∨ | _ | ∨ | Order No. | ∨ | _ | ∨ |

| Today | ∨ | | ∨ |

➕ Add element   ✖ Remove element

Date Format

Specify which date format you want to use in the file name.

dd-mm-yyyy [16-10-2012]   ∨

Output Types

Specify which document format you want to use for generated documents.

☐ DOCX ☐ DOC ☑ PDF ☐ XPS

Distribute Document

Specify the location where the documents are stored. If you select "save as attachments", you need to set attachment enabled in list settings. If you "save to document library" you can specify whether a folder will be created in the library. The folder name can be generated automatically based on rules such as date, created by, version, etc.

○ Save as attachment:
◉ Save in document library:

📄 MJ Home\Document Center\Receipts   ∨

☑ Create a folder to save documents
Name folder by: Product   ∨

Enable the merged Document Generation option and configure the following sections:

Merged Document Generation

Specify whether merged documents can be generated using this rule.

☑ Enable

Merged Documents Naming Rule

Specify a naming rule for the merged documents.

Receipt_[Today]_by [Me]

∨

Target Location

Specify the target location to store the merged documents.

📄 MJ Home\Document Center\Receipts   ∨
☐ Create a folder to save documents
Name folder by: [Today] ∨

If you want to send the order details to Tom Smith, for example, just select the item that is related to Tom Smith and click Generate Document on the Ribbon. You will get a PDF file as follows:

BOOST
Boost Co., Ltd.

SALES RECEIPT

DATE	8/21/2023	**SOLD TO**	4401 Freidrich Lane | Blag 2 Suite 200
INVOICE #	O1021-001		1-877-721-2195

PAYMENT METHOD   Bank transfer

QTY	ITEM	UNIT PRICE	DISCOUNT	LINE TOTAL
1	ShareDoc	$899.00	$0.00	$899.00

TOTAL DISCOUNT	$0.00
SUBTOTAL	$899.00
SALES TAX	0%
TOTAL	$899.00

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sales@boost.com

THANK YOU FOR YOUR BUSINESS

If your customer Lucy Green, for example, has purchased three products, you would want to place the three orders into one document. In this example, you should select the three items and then click Combine Generate on the Ribbon. The resulting PDF file will be generated as follows:

DATE	8/21/2023	SOLD TO	4401 Freidrich Lane	Blag 2 Suite 200
INVOICE #	O1021-001,O1021-002		1-877-721-2195

PAYMENT METHOD   Bank transfer

QTY	ITEM	UNIT PRICE	DISCOUNT	LINE TOTAL
1	ShareDoc	$899.00	$0.00	$899.00
1	ViewDoc	$699.00	$0.00	$699.00

TOTAL DISCOUNT	$0.00
SUBTOTAL	$1,598.00
SALES TAX	0%
TOTAL	$1,598.00

5200 1st Ave, Saint Street, NY

(+1) 555-836-2195

sales@boost.com

THANK YOU FOR YOUR BUSINESS

Troubleshooting & Support

- **Product & Licensing Inquires: sales@boostsolutions.com**
- **Technical Support (Basic): support@boostsolutions.com**
- **Request a New Product or Feature: feature_request@boostsolutions.com**

Appendix 1: Supported Lists, Libraries and Galleries

- Document Maker can work on these lists and libraries.

Lists	Announcement, Calendar, Contacts, Custom List, Custom List in Datasheet View, Discussion Board, External List, Import Spreadsheet, Status list(do not show product buttons), Survey(do not show product buttons), Issue Tracking, Links, Project Tasks, Tasks	
Libraries	Asset, Data Connection, Document, Form, Wiki Page, Slide, Report, picture (product buttons are in the Settings menu)	
Galleries	Web Parts Gallery, List Templates Gallery, Master Pages Gallery, Themes Gallery, Solutions Gallery	
Special lists	Categories, Comments, Posts, Circulation, Resources, Whereabouts, Group Calendar, Phone Call Memo, Agenda, Attendees, Objectives, Decisions, Things To Bring, Text Box	

Appendix 2: Supported Calculated Field Functions
The following table shows the calculated field functions that are supported in Microsoft Word.

	Name	Instance	Comment
Custom Functions	Sum	Sum([YourColumn])	
	Max	Max([YourColumn])	1. Not case sensitive.
	Min	Min([YourColumn])	2. Does not support recursively nested.
	Average	Average([YourColumn]	3. Supports external scientific computing.
	Count	Count([YourColumn])	
	Abs	Math.Abs	
	Acos	Math.Acos	
	Asin	Math.Asin	
	Atan	Math.Astan	
	Atan2	Math.Astan2	
	BigMul	Math.BigMul	
	Ceiling	Math.Ceiling	
	Cos	Math.Cos	
	Cosh	Math.Cosh	
	Exp	Math.Exp	

System functions	Floor	Math.Floor	1. Case sensitive.
	Log	Math.Log	2. Supports recursively nested.
	Log10	Math.Log10	3. Supports external scientific computing.
	Max	Math.Max	
	Min	Math.Min	
	Pow	Math.Pow	
	Round	Math.Round	
	Sign	Math.Sign	
	Sin	Math.Sin	
	Sinh	Math.Sinh	
	Sqrt	Math.Sqrt	
	Tan	Math.Tan	
	Tanh	Math.Tanh	
	Truncate	Math.Truncate	

Appendix 3: License Management

You can use Document Maker without entering any license code for a period of 30 days from when you first use it. To use the product after expiration, you will need to purchase a license and register the product.

Finding License Information

1. In the products main page, click the trial link and enter the License Management Center.
2. Click Download License Information, choose a license type and download the information (Server Code, Farm ID or Site Collection ID).

In order for BoostSolutions to create a license for you, you MUST send us your SharePoint environment identifier (Note: different license types need different information). A server license needs a server code; a Farm license needs a farm ID; and a site collection license needs a site collection ID.

- Send the above information to us (sales@boostsolutions.com) to generate a license code.

License Registration

1. When you receive a product license code, enter the License Management Center page.
2. Click Register on the license page and a Register or Update license window will open.

3. Upload the license file or enter the license code and click Register. You will get confirmation that your license has been validated.

For more details on license management, see the BoostSolutions Foundation.

Documents / Resources

BOOST Document Maker 2.0 User Guide	**BOOST SOLUTIONS V2 Document Maker** [pdf] User Guide V2 Document Maker, V2, Document Maker, Maker

References

- 👁 **BoostSolutions Apps for SharePoint Online | Subscription Edition | 2019 | 2016**
- 👁 **BoostSolutions Apps for SharePoint Online | Subscription Edition | 2019 | 2016**
- 👁 **Free SharePoint Tool | BoostSolutions Foundation**
- 👁 **Product Documentations | BoostSolutions**
- **User Manual**