



Document Maker 1.0

User Guide

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1. 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>

2. Installation

2.1 Product Files

After you download and unzip the Document Maker zip file from www.boostsolutions.com, you will find the following files:

Path	Descriptions
Setup.exe	A program that installs and deploys the WSP solution packages to the SharePoint farm.
EULA.rtf	The product End-User-License-Agreement.
Document Maker_V1_User Guide.pdf	A user guide for Document Maker in PDF format.
Library\4.0\Setup.exe	The product installer for .Net Framework 4.0.
Library\4.0\Setup.exe.config	A file containing the configuration information for the installer.
Library\4.6\Setup.exe	The product installer for .Net Framework 4.6.
Library\4.6\Setup.exe.config	A file that contains the configuration information for the installer.
Solutions\Foundation\BoostSolutions.FoundationSetup15.1.wsp	A SharePoint solution package containing Foundation files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\Foundation\BoostSolutions.FoundationSetup16.1.wsp	A SharePoint solution package that contains Foundation files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\Foundation\Install.config	A file containing the configuration information for the installer.
Solutions\DocumentMaker\BoostSolutions.DocumentMaker15.1.wsp	A SharePoint solution package containing Document Maker files and resources for SharePoint 2013 or SharePoint Foundation 2013.
Solutions\DocumentMaker\BoostSolutions.DocumentMaker16.1.wsp	A SharePoint solution package containing Document Maker files and resources for SharePoint 2016/2019/Subscription Edition.
Solutions\ DocumentMaker\Install.config	A file containing the configuration information for the installer.

2.2 Software Requirements

Before you install Document Maker, ensure your system meets the following requirements:

SharePoint Server Subscription Edition

Operating System	Microsoft Windows Server 2019 Standard or Datacenter Microsoft Windows Server 2022 Standard or Datacenter
Server	Microsoft SharePoint Server Subscription Edition
Browser	Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2019

Operating System	Windows Server 2016 Standard or Datacenter Windows Server 2019 Standard or Datacenter
Server	Microsoft SharePoint Server 2019
Browser	Microsoft Internet Explorer 11 or greater Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2016

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2016 Standard or Datacenter
Server	Microsoft SharePoint Server 2016 Microsoft .NET Framework 4.6
Browser	Microsoft Internet Explorer 10 or greater Microsoft Edge Mozilla Firefox Google Chrome

SharePoint 2013

Operating System	Microsoft Windows Server 2012 Standard or Datacenter X64 Microsoft Windows Server 2008 R2 SP1
Server	Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013 Microsoft .NET Framework 4.5
Browser	Microsoft Internet Explorer 8 or greater Microsoft Edge Mozilla Firefox Google Chrome

Client-Side Operating System & Microsoft Office Word

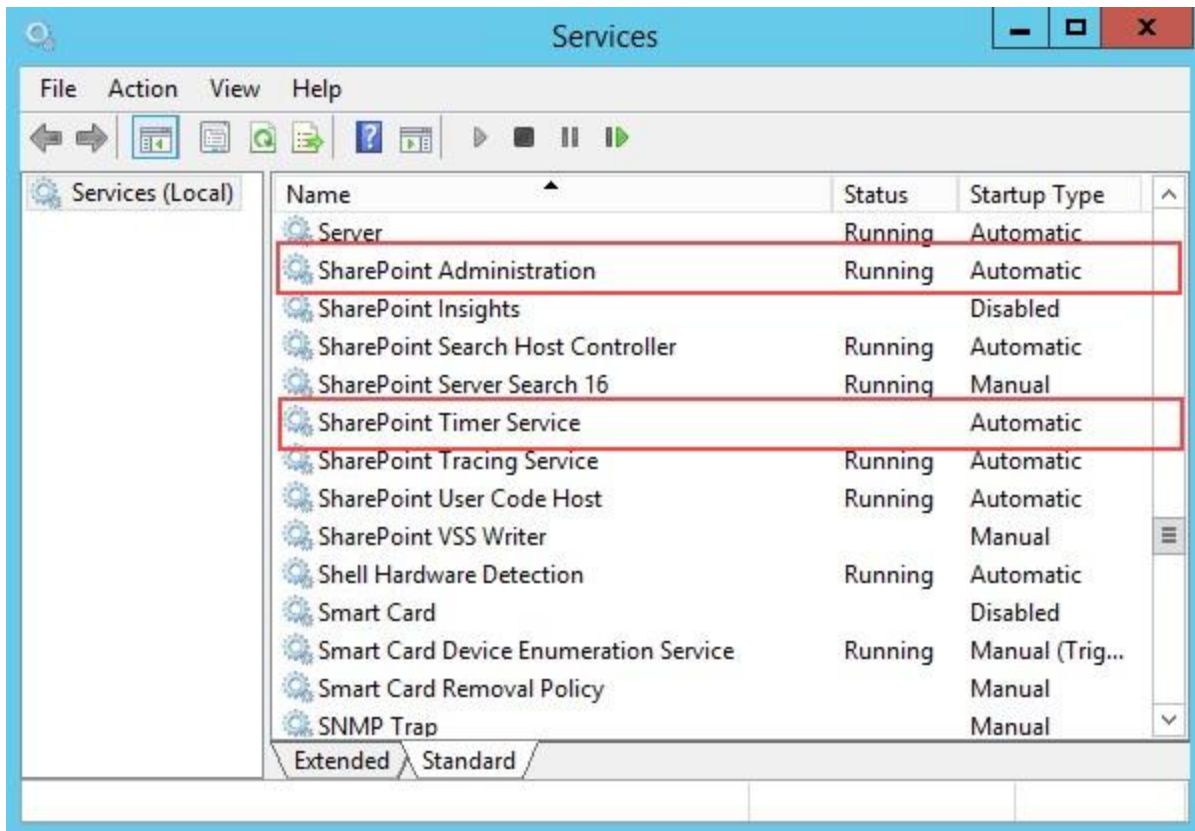
Client-Side Operating System	Microsoft Windows 11 Microsoft Windows 10 x86/64 Microsoft Windows 8 x86/64 Microsoft Windows 7 x86/x64 Microsoft Windows Server 2008 x86/x64 Microsoft Windows Server 2012 x64 Microsoft Windows Server 2016 x64 Microsoft Windows Server 2019 x64 Note: This product needs Microsoft .NET Framework 4.0 and Visual Studio Tools for Office.
Microsoft Office Word	Microsoft 365 Apps for Enterprise (Word) Microsoft Office Word 2021 Microsoft Office Word 2019 Microsoft Office Word 2016 Microsoft Office Word 2013 Microsoft Office Word 2010 Microsoft Office Word 2007 Note: Microsoft Office 2007 SP3 is needed when Microsoft Office Word 2007 is installed in Microsoft Windows 8 or Microsoft Windows Server 2012.

2.3 Server Installation

Follow these steps to install Document Maker on your SharePoint servers.

Installation Preconditions

Before you start installing the product, please make sure these services are started on your SharePoint servers: **SharePoint Administration** and **SharePoint Timer Service**.



Document Maker must be run on one front-end Web server in the SharePoint farm where **Microsoft SharePoint Foundation Web Application services** are running. Check **Central Administration** -> **System Settings** for a list of servers running this service.

Required Permissions

To perform this procedure, you must have specific permissions and rights.

- Member of the local server's **Administrators** group.
- Member of the **Farm Administrators** group.

To install Document Maker on SharePoint server.

- a. Download the zip file (*.zip) for Document Maker from the BoostSolutions website, then extract the file.
- b. Open the created folder and run the **Setup.exe** file.

Note If you cannot run the setup file, please right click the **Setup.exe** file and choose Run as administrator.

- c. A system check is performed to verify if your machine meets all the requirements for installing the product. After the system check is finished, click **Next**.
- d. Review and accept the End-User License Agreement and click **Next**.

- e. In the **Web Application Deployment Targets**, select the web applications you are going to install and click **Next**.

Note If you select **Automatically activate features**, the product features will be activated in the target site collection during the installation process. If you want to manually activate the product feature later, uncheck this box.

- f. Upon completion of the installation, details are displayed showing which web applications Document Maker has been installed to. Click **Close**.

2.4 Upgrade

Download the latest version of Document Maker and run the **Setup.exe** file.

In the **Program Maintenance** window, select **Upgrade** and click **Next**.

2.5 Uninstallation

If you want to uninstall Document Maker, double-click the **Setup.exe** file.

In the **Repair or Remove** window, select **Remove** and click **Next**. Then the application will be removed.

2.6 Command_Line Installation

The following instructions are for installing the solution files for Document Maker using the SharePoint STSADM command line tool.

Required permissions

To use STSADM, you must be a member of the local Administrators group on the server.

To install Document Maker to SharePoint servers.

- a. Extract the files from the product zip pack to a folder on one SharePoint server.
- b. Open a command prompt and make sure your path is set with the SharePoint bin directory.
- c. Add the solution files to SharePoint in the STSADM command line tool.

```
stsadm -o addsolution -filename BoostSolutions.DocumentMaker16.1.wsp  
stsadm -o addsolution -filename BoostSolutions.FoundationSetup16.1.wsp
```

- d. Deploy the added solution with the following command:

```
stsadm -o deploysolution -name BoostSolutions.DocumentMaker16.1.wsp -allowgacdeployment -url [virtual server url] -immediate
```

```
stsadm -o deploysolution -name BoostSolutions.FoundationSetup16.1.wsp -allowgacdeployment -url [virtual server url] -immediate
```

- e. Wait for the deployment to complete. Check the final status of the deployment with this command:

```
stsadm -o displaysolution -name BoostSolutions.DocumentMaker16.1.wsp
```

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp
```

The result should contain a <Deployed> parameter for which the value is TRUE.

- f. In the STSADM tool, activate the features.

```
stsadm -o activatefeature -name BoostSolutions.DocumentMaker_DocumentMakerFeature -url [site collection url] -force
```

To remove Document Maker from SharePoint servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.DocumentMaker16.1.wsp -immediate -url [virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.DocumentMaker16.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.DocumentMaker16.1.wsp
```

To remove BoostSolutions Foundation from SharePoint servers.

The BoostSolutions Foundation is designed to provide a centralized interface to manage licenses for all BoostSolutions software from within SharePoint Central Administration. If are still using BoostSolutions product on your SharePoint server, DO NOT remove Foundation from the servers.

- a. Removal is initiated with the following command:

```
stsadm -o retractsolution -name BoostSolutions.FoundationSetup16.1.wsp -immediate -url [virtual server url]
```

- b. Wait for the removal to finish. To check the final status of the removal you can use the following command:

```
stsadm -o displaysolution -name BoostSolutions.FoundationSetup16.1.wsp
```

The result should contain the <Deployed> parameter for which the value is FALSE and the <LastOperationResult> parameter with the RetractionSucceeded value.

- c. Remove the solution from the SharePoint solutions storage:

```
stsadm -o deletesolution -name BoostSolutions.FoundationSetup16.1.wsp
```

2.7 Install Document Maker Plugin

To compose a template, you must first install the Document Maker plugin in Word. With the Document Maker add-in, you can connect to SharePoint list and insert columns in the template.

Follow these steps to install the Document Maker Plugin on your client side.

Required Permissions


To perform this procedure, you must be a local administrator.

To install the Document Maker Plugin on Client Side.

- a. Download the zip file (*.zip) for Document Maker from the BoostSolutions website, then extract the file.

Or, download the Document Maker Plugin in the Document Maker Settings page.

 Create new template

 Upload a template

 **Download Document Maker plugin**

- b. Run the **DocMakerPlugin_x64** or **DocMakerPlugin_x86** file.
- c. The Document Maker Plugin Setup Wizard will appear, click **Next** to continue.
- d. In the Ready to Install window, click **Install**.
- e. While the procedure is running, installation details will be displayed in the Installation window.
- f. After the process is completed, click **Finish** to close the setup wizard.

Uninstall the Document Maker Plugin on Client Side


If you want to uninstall the Document Maker Plugin, double-click the **DocMakerPlugin_x64.exe** file.


In the **Repair or Remove installation** window, select **Remove** and click **Next**. The application will be removed.

2.8 Feature Activation

Activate features in site collection

By default, the application's features are automatically activated once the product is installed. You can also activate the product feature manually.

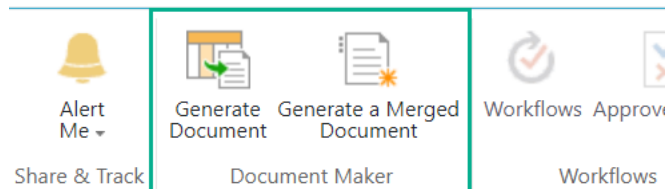
- a. Click **Settings**  and then click **Site Settings**.
- b. Under **Site Collection Administration**, click **Site collection features**.
- c. Find the application feature and click **Activate**. After the feature is activated, the Status column lists the feature as **Active**.

	BoostSolutions Document Maker 1.7.0.1013 Generates a variety of documents with list items in SharePoint such as proposals, contracts, quotes and more. (Powered by BoostSolutions)	<input type="button" value="Deactivate"/>	<input type="button" value="Active"/>
---	--	---	---------------------------------------

3. 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 or document library ribbon.



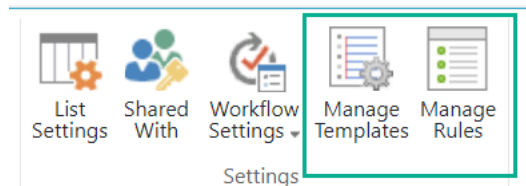
Generate Document and Generate Merged Document are located in the **Items** -> **Doc Maker** group.

- **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.

4. 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.

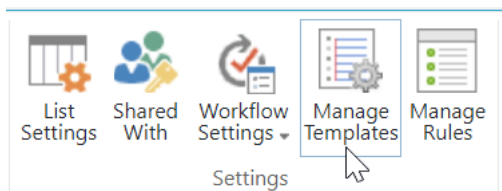
You can also provide default content that appears in every generated word document, such as a preferred framework for a sales order or an official disclaimer in a page footer.

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>

4.1 Create a Template

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

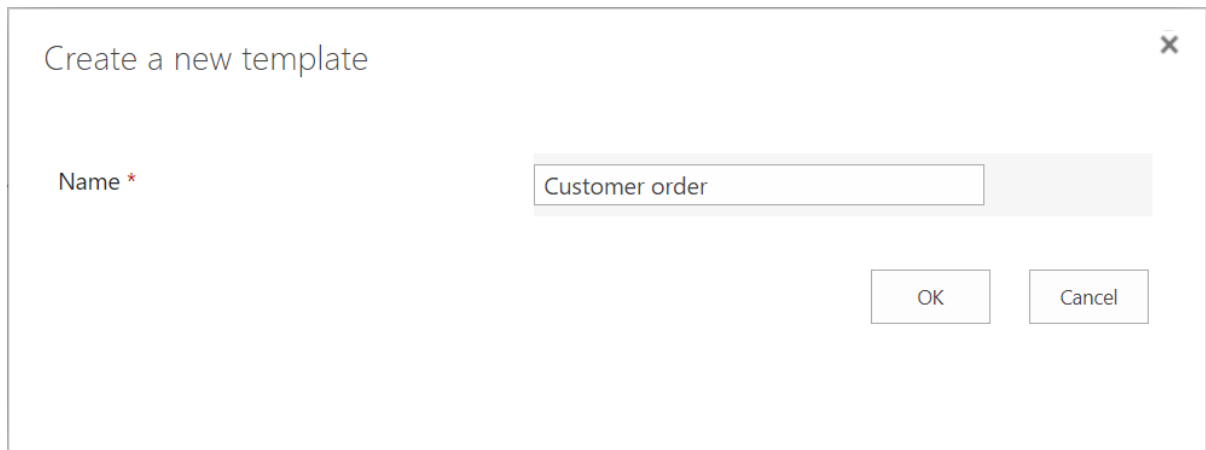


Or, enter the List or Library Settings page and under the **General Settings** section, click **Document Maker Settings (Powered by BoostSolutions)**.

General Settings

- [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](#)

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




- e. 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.

- f. 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](#).

- g. Once you have finished configuring the template, click  to save the template.
- h. 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

4.2 Upload a Template

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

- a. Navigate to the list or library where you want to upload a template to.
- b. On the Ribbon, click the List or Library tab and then click **Manage Templates** in the Settings group.

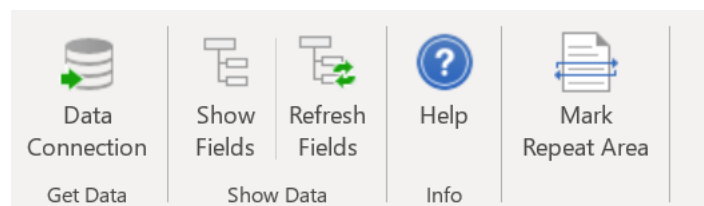
Or, enter the List or Library Settings page, in the General Settings section and click **Document Maker Settings (Powered by BoostSolutions)**.

- c. In the Document Maker Settings page, click **Upload a template**.
- d. A dialog box will appear. In the dialog box click Browse... to select your premade document template from your local computer or server.
- e. Click **OK** to upload the selected template.

4.3 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 section [2.7 Install Document Maker Plugin](#).

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.

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

Connect to SharePoint

SharePoint List

List URL:

☒ Windows Authentication
☐ Form Authentication

User Authentication

User name:

Password:

Test Connection

OK Cancel


- 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.
- b. In the template you are creating, click on the area where you want to insert a field(s).
- c. 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	<p>SharePoint list fields and related fields from lookup list.</p> <p>To show related fields, you need to select them as additional fields in the list.</p> <p>Add a column to show each of these additional fields:</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> ID <input type="checkbox"/> Title <input type="checkbox"/> Modified <input type="checkbox"/> Created <input type="checkbox"/> Version <input type="checkbox"/> Compliance Asset Id <input checked="" type="checkbox"/> Due Date
Custom Fields	<p>Custom fields, include [Today], [Now], [Me].</p> <p>[Today] represents the current day.</p> <p>[Now] represents the current date and time.</p> <p>[Me] represents the current user who generated the document.</p>
Calculated Fields	<p>A calculated fields can be used to compute data in column or items in the document.</p> <p>(The supported calculated field functions please see Appendix 2: Supported Calculated Field Functions for details.)</p>

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

4.4 Modify a Template

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

4.5 Delete a Template

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

5. 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.

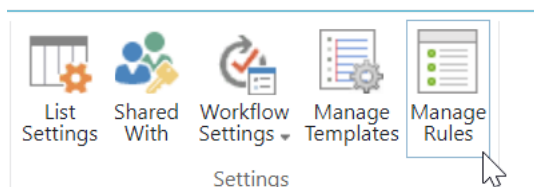
5.1 Rules Settings

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.

5.2 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.



- c. In the Document Maker Settings -> Rules page, click **Add Rule**.

Note: You cannot add a rule if no template exists in the current list.

- d. In the Rule Name section, enter a name.

Rule Name

Enter a name for this rule.

generate quote

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

Select Template

Specify which templates should be used in this rule.

☐ Customer order

☒ quotation

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.

- f. 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.

Naming Rule

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

[ID]_[Customer]_[Purchased Date]

ID	_	Customer	_
Purchased Date			

 Add element

 Remove element

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	<p>Document Number Generator allows you to insert the following functions into a formula.</p> <p>[Today]: Today's date.</p> <p>[Now]: The current date and time.</p> <p>[Me]: The user who generated the document.</p>
Customized	<p>Custom Text:</p> <p>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.</p> <div><div>Invalid character</div><div># ▾ _ ▾ Company ▾ ▾</div></div>
Separators	<p>When you add multiple elements in a formula, you can specify separators to join these elements.</p> <p>Connectors include: - _ . / \ (The / \ separators cannot be used in the Name column.)</p>

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

Date Format

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

(Default SharePoint Format) ▾

(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.

- h. 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.

- i. 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.

Attachments

Specify whether users can attach files to items in this list.

Attachments to list items are:

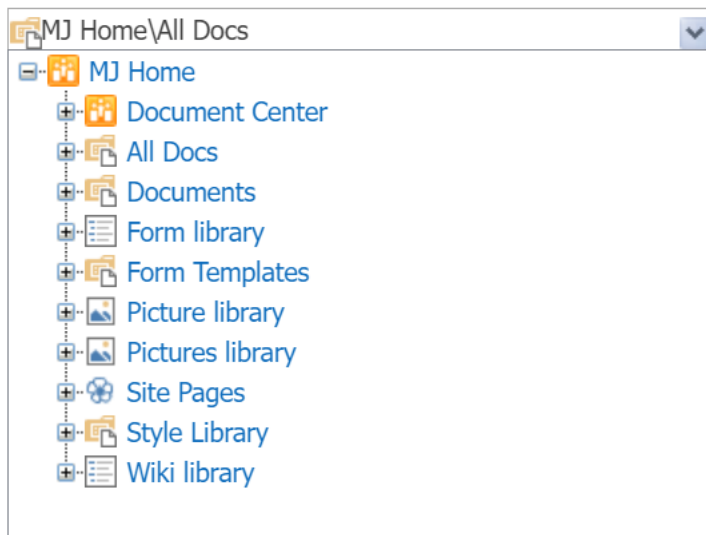
- ☒ Enabled
☐ Disabled

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.

☒ Save in document library:



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.

☒ Create a folder to save documents
Name folder by:

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

Merged Document Generation

Specify whether merged documents can be generated using this rule.

☒ Enable

- k. 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] ▼

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

5.3 Modify a Rule

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

5.4 Delete a Rule

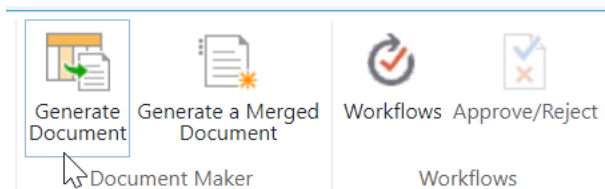
- a. Navigate to the list or library where you want to delete a rule.
- b. On the Ribbon, click the **List** or **Library** tab and then click **Manage Rules** in the Settings group.
- c. In the Document Maker Settings -> Rule page, find the rule you want to delete and click **Delete**.
- d. A message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

6. Using Document Maker

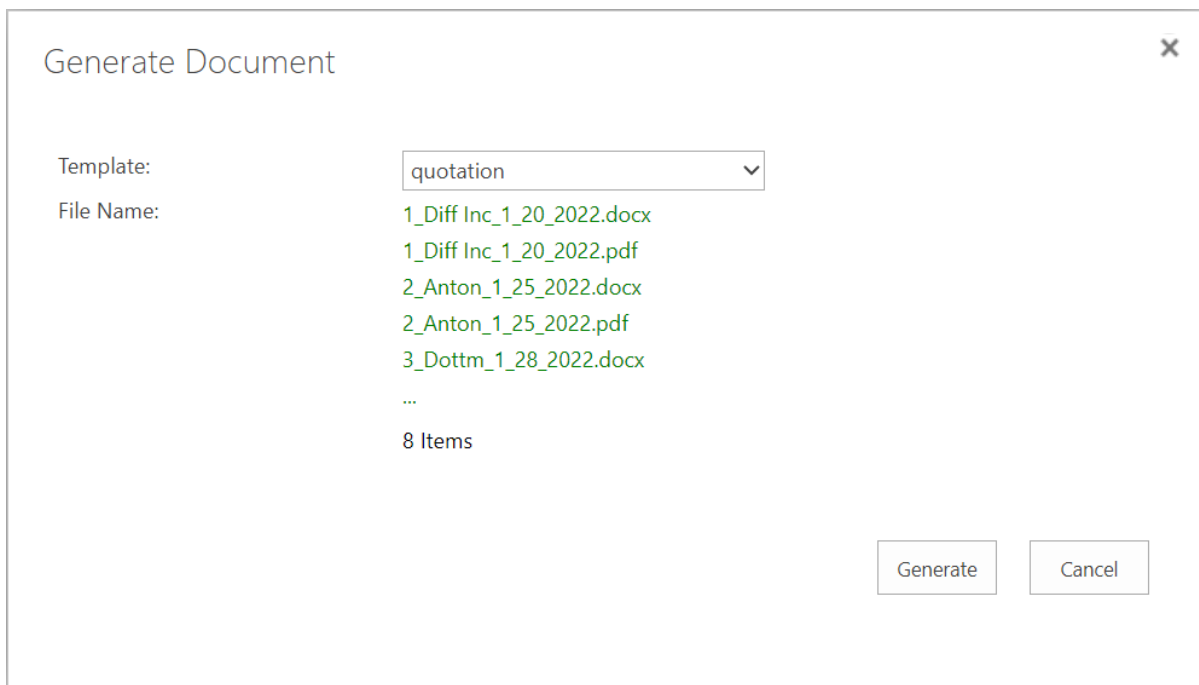
Document Maker allows you to generate individual documents for each list item or merge multiple list items into one document.

6.1 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**.

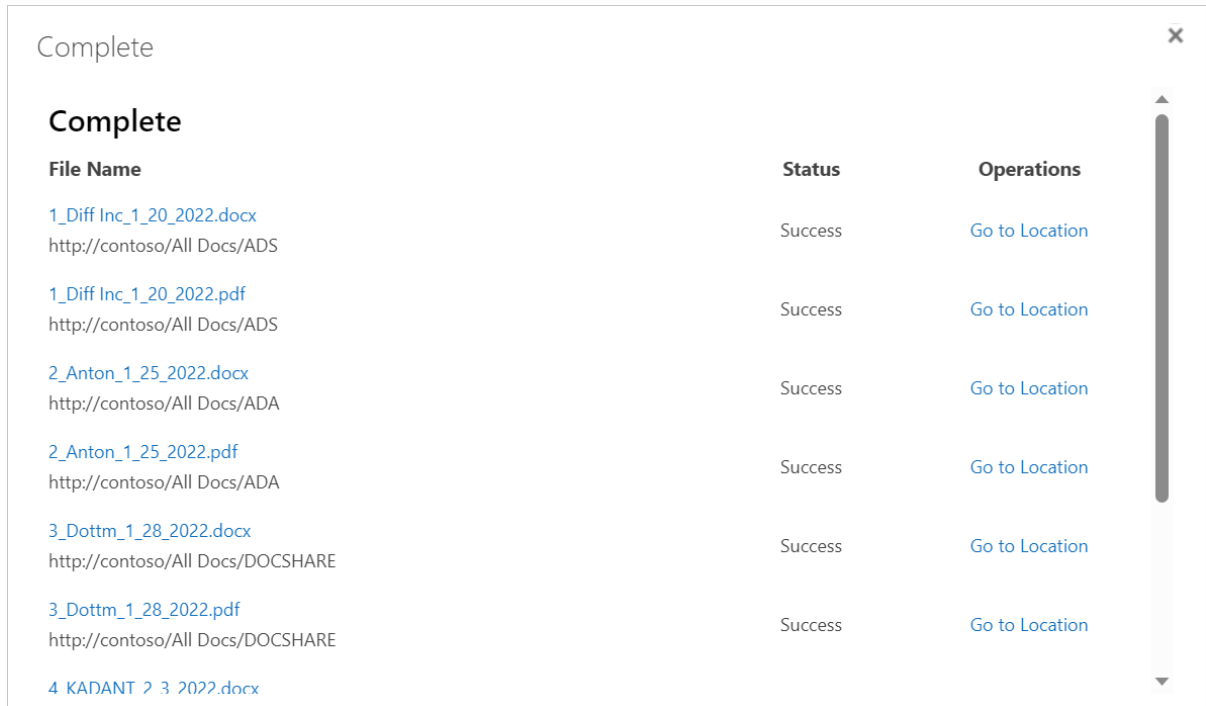


- A Generate Document dialog box will appear. You can select a template you want to use in the **Select Template** dropdown list. The generated documents file names and the number of files generated will also appear in the dialog box, under the **Select Template** dropdown list.



- Click **Generate** to generate the documents.

- f. 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.
- g. Click **OK** to close the dialog box.



The screenshot shows a dialog box titled 'Complete' with a close button (X) in the top right corner. Inside the dialog, there is a table with three columns: 'File Name', 'Status', and 'Operations'. The table lists six documents, all with a 'Success' status and a 'Go to Location' link in the 'Operations' column. A vertical scrollbar is visible on the right side of the table.

File Name	Status	Operations
1_Diff Inc_1_20_2022.docx http://contoso/All Docs/ADS	Success	Go to Location
1_Diff Inc_1_20_2022.pdf http://contoso/All Docs/ADS	Success	Go to Location
2_Anton_1_25_2022.docx http://contoso/All Docs/ADA	Success	Go to Location
2_Anton_1_25_2022.pdf http://contoso/All Docs/ADA	Success	Go to Location
3_Dotm_1_28_2022.docx http://contoso/All Docs/DOCSHARE	Success	Go to Location
3_Dotm_1_28_2022.pdf http://contoso/All Docs/DOCSHARE	Success	Go to Location
4_KADANT 2 3 2022.docx		

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

6.2 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.

- a. Navigate to the list or library you want to generate a document for.
- b. Select the items you want and click **Generate a Merged Document** on the Ribbon.
- c. 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

- d. Click **Generate** to generate the document.
- e. 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

- f. Click **OK** to close the dialog box.

7. 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.

All Orders

[+ 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:



SALES RECEIPT

DATE

[Today]

SOLD TO

[Customer:Bill to]

INVOICE #

[Order No.]

[Customer:Phone]

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]

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(+1) 555-836-2195
sales@boost.com

THANK YOU FOR YOUR BUSINESS

Set the rule for the template as follows:

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:



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:



SALES RECEIPT

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

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(+1) 555-836-2195
sales@boost.com

THANK YOU FOR YOUR BUSINESS

8. Troubleshooting & Support

Troubleshooting FAQ:

<https://www.boostsolutions.com/general-faq.html#Show=ChildTitle9>

Contact Info:

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])	<ol style="list-style-type: none"> Not case sensitive. Does not support recursively nested. Supports external scientific computing.
	Max	Max([YourColumn])	
	Min	Min([YourColumn])	
	Average	Average([YourColumn])	
	Count	Count([YourColumn])	
System functions	Abs	Math.Abs	<ol style="list-style-type: none"> Case sensitive. Supports recursively nested. Supports external scientific computing.
	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	
	Floor	Math.Floor	
	Log	Math.Log	
	Log10	Math.Log10	
	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).

Download License Information

Download the license type information and send to sales@boostsolutions.com to get license.

Choose a license type

☒ Server License
Server Code: 8fa4fcbbcab9475d8b8f10d2c7b27e1e98226161275d49c683442a828de45bdd

☐ Farm License
Farm ID: {8fa4fcbb-eab9-475d-8b8f-10d2c7b27e1e}
Number of Users: 43 user(s)

☐ Site Collection License
Site Collection ID: Select a site collection
Site Collection:

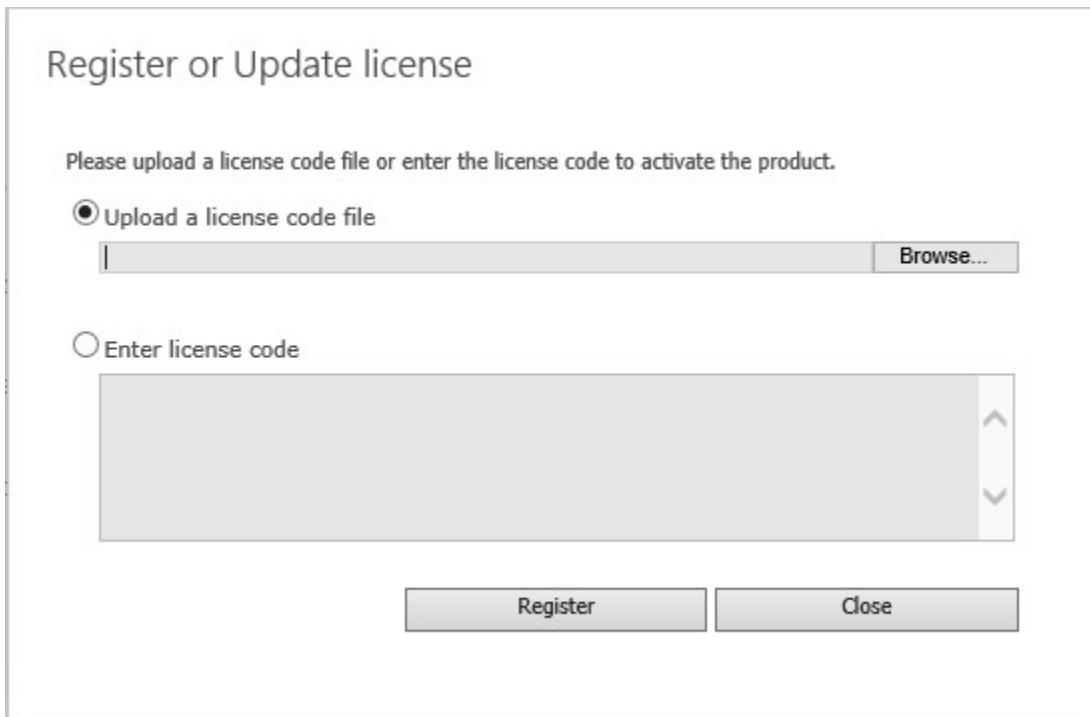
Download Close

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.

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

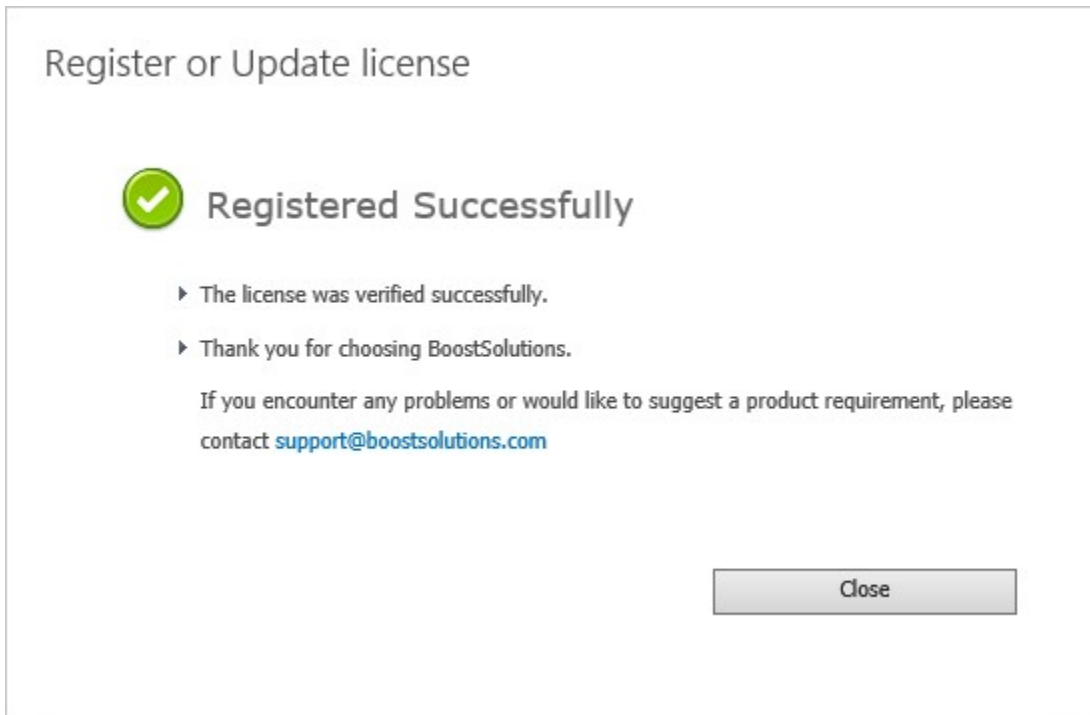
License Registration

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.



The dialog box is titled "Register or Update license". Below the title, it says "Please upload a license code file or enter the license code to activate the product." There are two radio buttons: "Upload a license code file" (selected) and "Enter license code". The "Upload a license code file" option has a text input field and a "Browse..." button. The "Enter license code" option has a large text input field. At the bottom, there are two buttons: "Register" and "Close".

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



The dialog box is titled "Register or Update license". It features a green checkmark icon and the text "Registered Successfully". Below this, there are two bullet points: "The license was verified successfully." and "Thank you for choosing BoostSolutions." A message follows: "If you encounter any problems or would like to suggest a product requirement, please contact support@boostsolutions.com". At the bottom right, there is a "Close" button.

For more details on license management, see the [BoostSolutions Foundation](#).