

Smarter Word DOC Generator

What issue are we resolving with this tool?

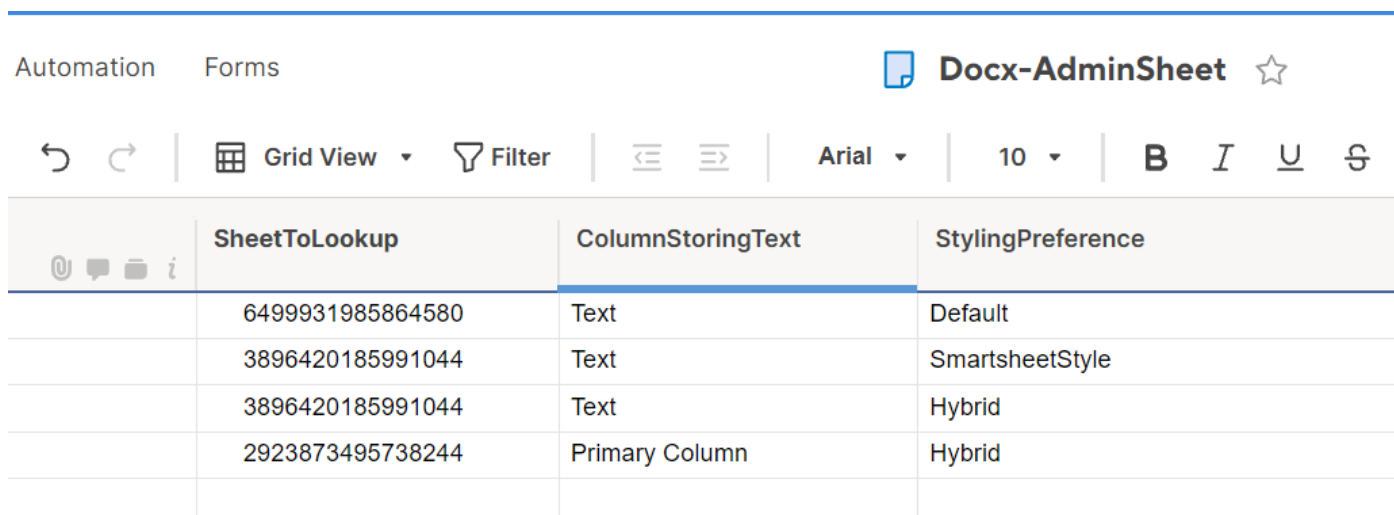
Smartsheet Power users have asked us if there is any way to create a “mail Merged” Word Doc for data held vertically in multiple rows on one sheet. There are multiple use cases where a “Hard Copy” (a Word doc) needs to be sent to eg Clients which shows a Snapshot in time report, or the current plan progress and that Word doc be stored as an attachment in Smartsheet and emailed out to the audience.

So how have we satisfied his need?

Principle

When the defined sheet is modified, a word document (docx) can be generated from the content within 10 minutes of the trigger being actuated.

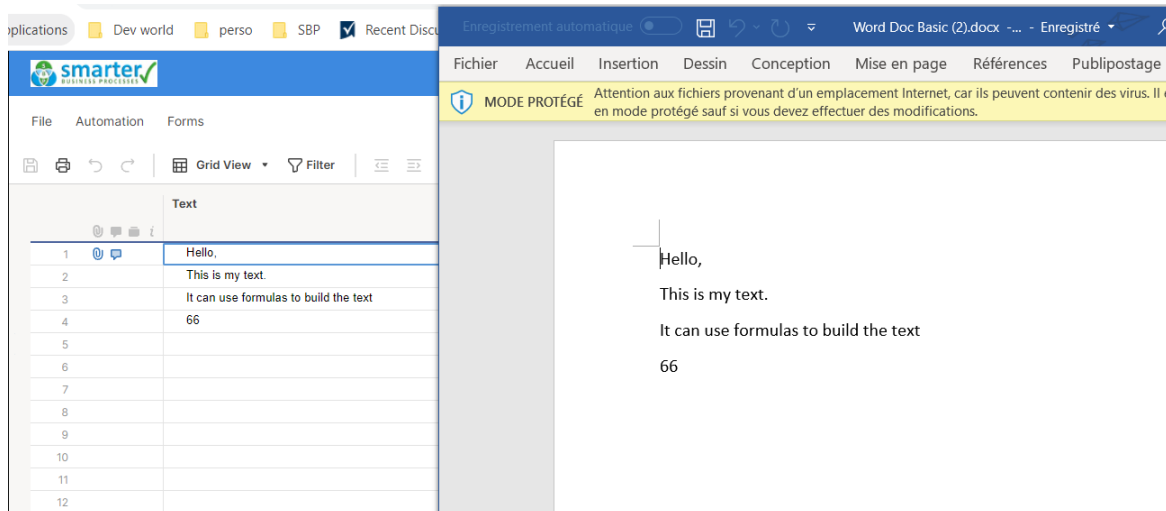
The core information is stored in the admin Sheet :



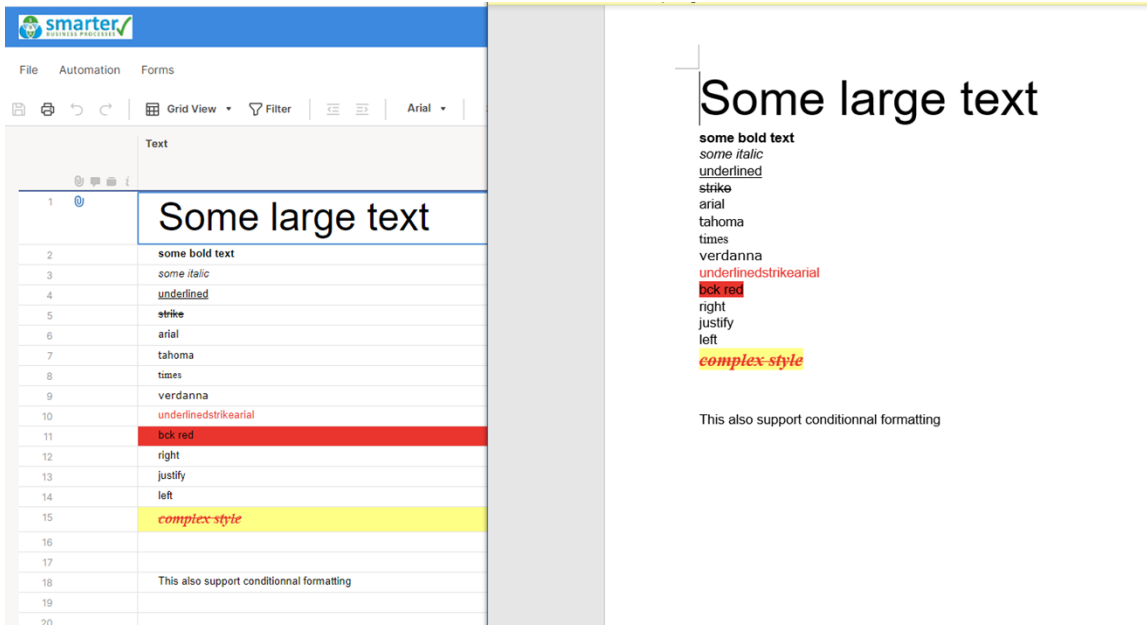
	SheetToLookup	ColumnStoringText	StylingPreference
	6499931985864580	Text	Default
	3896420185991044	Text	SmartsheetStyle
	3896420185991044	Text	Hybrid
	2923873495738244	Primary Column	Hybrid

Every row on the sheet will generate a paragraph and different generator can be used. Thus, the generator can create :

- A very basic black and white document.



- A document that replicate smartsheet formatting (both cell formatting and conditional formatting included) :
 - Font size
 - Font color
 - Font Family
 - Font Style
 - Background Color
 - Text Align



- A document that can contain more specific styling, including titles and bullet list.
 - Does include previous style, plus :
 - Cells starting with '#' will be considered as title1
 - Cells starting with '##' will be considered as title2
 - Cells starting with '###' will be considered as title3
 - Rows with sub rows considered as title (same logic as above)
 - Cells starting with '-' will be considered as bullet list item 1
 - Cells starting with '--' will be considered as bullet list item 2
 - Cells starting with '---' will be considered as bullet list item 3
 - Cells starting with '----' will be considered as bullet list item 4

	Primary Column
1	Main title
2	Second Title Level
3	Third Title Level (only if has children rows)
4	some text
5	some text
6	
7	# Main title
8	## Second Title Level
9	## Second Title Level
10	### Third Title Level
11	### Third Title Level
12	### Third Title Level
13	
14	- some bullet list item (the dash prefix indicate that this is a bullet list)
15	- some bullet list item (the dash prefix indicate that this is a bullet list)
16	- some bullet list item (the dash prefix indicate that this is a bullet list)
17	- some bullet list item (the dash prefix indicate that this is a bullet list)
18	
19	-- some second bullet list item (the dash prefix indicate that this is a bullet list)
20	-- some second bullet list item (the dash prefix indicate that this is a bullet list)
21	-- some second bullet list item (the dash prefix indicate that this is a bullet list)
22	
23	--- some third bullet list item (the dash prefix indicate that this is a bullet list)
24	--- some third bullet list item (the dash prefix indicate that this is a bullet list)
25	--- some third bullet list item (the dash prefix indicate that this is a bullet list)
26	
27	--- The smartsheet style is also interpreted

Main title
 Second Title Level
 Third Title Level (only if has children rows)
 some text
 some text

Main title
 Second Title Level
 Second Title Level
 Third Title Level
 Third Title Level
 Third Title Level

- some bullet list item (the dash prefix indicate that this is a bullet list)
 - some bullet list item (the dash prefix indicate that this is a bullet list)
 - some bullet list item (the dash prefix indicate that this is a bullet list)
 - some bullet list item (the dash prefix indicate that this is a bullet list)
- some second bullet list item (the dash prefix indicate that this is a bullet list)
 - some second bullet list item (the dash prefix indicate that this is a bullet list)
 - some second bullet list item (the dash prefix indicate that this is a bullet list)
- some third bullet list item (the dash prefix indicate that this is a bullet list)
 - some third bullet list item (the dash prefix indicate that this is a bullet list)
 - some third bullet list item (the dash prefix indicate that this is a bullet list)
- The smartsheet style is also interpreted

Output

The generated document can be :

- Attached to the configuration row
- Attached to the first row of the sheet
- Attached to the sheet
- Directly sent to the user’s email

If necessary, automations can be also configured on top to mention or notify specific people.

In the future we hope to create further innovation

Support more complex word paragraphs such as:

- Numbered lists
- Headers and footers