

Platform	Pros	Cons
Organisational assets library	<ul style="list-style-type: none"> All templates appear in office applications, reducing the effort for the employee to find a template Increases employee confidence that they are using the most current template Creates a central templates repository, they are updated in one place, and all updates are pushed out automatically All updates can be made directly in the library if needed, using Office applications No additional cost to the business 	<ul style="list-style-type: none"> No additional information is pushed into the document (e.g. document title) There is an ongoing activity to manage the permissions of the templates to ensure they are only edited by specific users. Requires a Global Admin to run a PowerShell script to be executed (no GUI interface to turn this on)
Word templates with document properties	<ul style="list-style-type: none"> No additional cost to the business Does not require any other technologies (such as Power Automate or third party tools) 	<ul style="list-style-type: none"> This is only available to Word documents The document information panel can be tricky to find
Word documents with metadata	<ul style="list-style-type: none"> No additional cost to the business Templates can be easily updated in place as needed Data inserted into documents can also be used to filter, sort or group the documents 	<ul style="list-style-type: none"> This is only available to Word documents When a document is open in Word online in view mode, sometimes the document property value is not shown in the document Documents content updates when you update the metadata. If you need a snapshot of what the document looked like at a certain time, save a PDF version
Power Automate	<ul style="list-style-type: none"> Part of the existing Power Platform offering - no additional set up required The resulting document can be uploaded into a library or attached to an email and sent out Similar to other solutions listed, the Word templates live in a SharePoint online library and can be updated using the Word desktop application The Word Power Automate action set includes two actions; one to populate a Word template, the other to convert it to PDF 	<ul style="list-style-type: none"> It requires a premium license for anyone who wants to generate a document There is an ongoing activity to manage the permissions of the templates to ensure they are only edited by specific users Only supports Word documents (Excel documents can be populated by inserting rows of data into a pre-determined table in the spreadsheet)
Microsoft Syntex	<ul style="list-style-type: none"> Templates are easy to create and update as new columns are created Supports conditional sections where rules can be applied to show/hide parts of the document as needed When Power Automate is not being used, a table can be inserted into the template and populated by SharePoint list data 	<ul style="list-style-type: none"> You will need to set up pay as you go billing for Microsoft Syntex, where the cost is for each document created. At the time of writing, this is a price of 15 cents per generation Only supports Word documents Images and tables are not supported by Power Automate, but can be added otherwise The Power Automate only works with the following triggers: <ul style="list-style-type: none"> When an item is created When an item is created or modified When an item is deleted
3rd party solutions - Encodian	<ul style="list-style-type: none"> Integrates with Power Automate - no additional logins needed Images can be inserted dynamically Both Word and Excel spreadsheets are supported 	<ul style="list-style-type: none"> The data inserted into the document is provided as a JSON string - this may be fiddly to update as the token in the document must match the JSON There is an additional subscription cost for this product
3rd party solutions - Plumsail	<ul style="list-style-type: none"> Integrates with Power Automate - no additional logins needed Documents can be easily updated using the desktop apps and content controls Plumsail does have a Form option as well which can be externally facing Document generations can be purchased as a one-off if needed 	<ul style="list-style-type: none"> Only works with Word documents Updating the JSON may be tricky to keep everything aligned and working There is an additional subscription cost for this product The supporting documentation suggests it can perform document generation with Excel and Google Sheets, but this leverages standard Power Automate actions of 'add row' to insert data The supporting documentation suggests it can perform document generation with a PDF however this process creates a Word document and then saves it as a PDF using out of the box actions
3rd party solutions - Muhimbi	<ul style="list-style-type: none"> Integrates natively with Power Automate and can be used in Flows once a subscription has been purchased Data from a PDF form can be extracted and processed using Power Automate As part of a flow, multiple PDF documents can be merged into one document A wide variety of file types is supported for conversion to PDF including HTML, Email, PPT, SharePoint list or page and MS forms 	<ul style="list-style-type: none"> Data cannot be inserted into a document template from a SharePoint list (as an example) There is an additional cost to license this product
3rd party solutions - Nintex	<ul style="list-style-type: none"> The tags generated by the tagger are plain text and can be typed or copied and pasted into multiple places (e.g. <<Title>>) Can combine multiple documents into one final document, however not all need to have extra text inserted The resulting document can either be the original file type or a PDF Can generate Word, PowerPoint or Excel documents There is a salesforce specific document generation product 	<ul style="list-style-type: none"> There are additional costs - the Nintex license which includes some document generation runs. For example, the base license Pro (\$35,000/year) includes 2,000 document generations per year however if you need to generate more documents in a year you may need to either move to the next plan of premium (\$70,000/year) or liaise with Nintex for a custom plan Is not natively integrated with Office 365, so anyone creating Nintex flows will require Nintex Cloud login details There is an ongoing activity to manage the permissions of the templates to ensure they are only edited by specific users
Community solutions	<ul style="list-style-type: none"> They are free of charge and usually out of the box functionality These solutions can be great accelerators in getting a solution going, particularly if you need something tricky or unusual 	<ul style="list-style-type: none"> There is no support for these solutions if there is an issue which may lead to more work in trying to get it working vs. building your own solution They are also not updated as Power Automate changes so there may be a large time investment to get them working
Power Automate direct to PDF	<ul style="list-style-type: none"> These Power Automate actions are included in most Microsoft/Office 365 licenses A template can be passed to the flow and used, rather than other solutions where the template must be pre-set 	<ul style="list-style-type: none"> Can be time consuming to implement As the flow is replacing specific placeholders (such as [Customer Name]), adding in new tags or updating the templates may require significant updates to the flow
Dynamics 365 / Model-driven Power Apps templates	<ul style="list-style-type: none"> Native Power Automate functionality No additional costs (requires the same premium license as the model driven app) 	<ul style="list-style-type: none"> While the document is being generated, it may look like the app is not doing anything
Word templates & Model-driven apps	<ul style="list-style-type: none"> There are some sample templates available for testing Doesn't require a flow or any additional licensing There are permission controls in place already - only System administrator and System customizers can create templates Tables are supported and can be populated using repeating sections in Word 	<ul style="list-style-type: none"> Setting the template up can be tricky - there are a few steps involving working with the XML settings of the document There is a known issue which can cause Word to freeze while the template is being updated such as changing the capitalisation or adding text to a content control