



JoLauterbach Software GmbH

XTensions Software, Plug-Ins and individual solutions

# JoLetter 7

Mail and merge with Adobe InDesign

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## 1. Overview

JoLetter personalizes QuarkXPress™ documents with data from external sources like Microsoft Excel. There are two main functions, mail and merge by creating additional pages and filling a text frame or a list of linked text frames.

## 2. System requirements

- Adobe InDesign CC 2018/2019, macOS

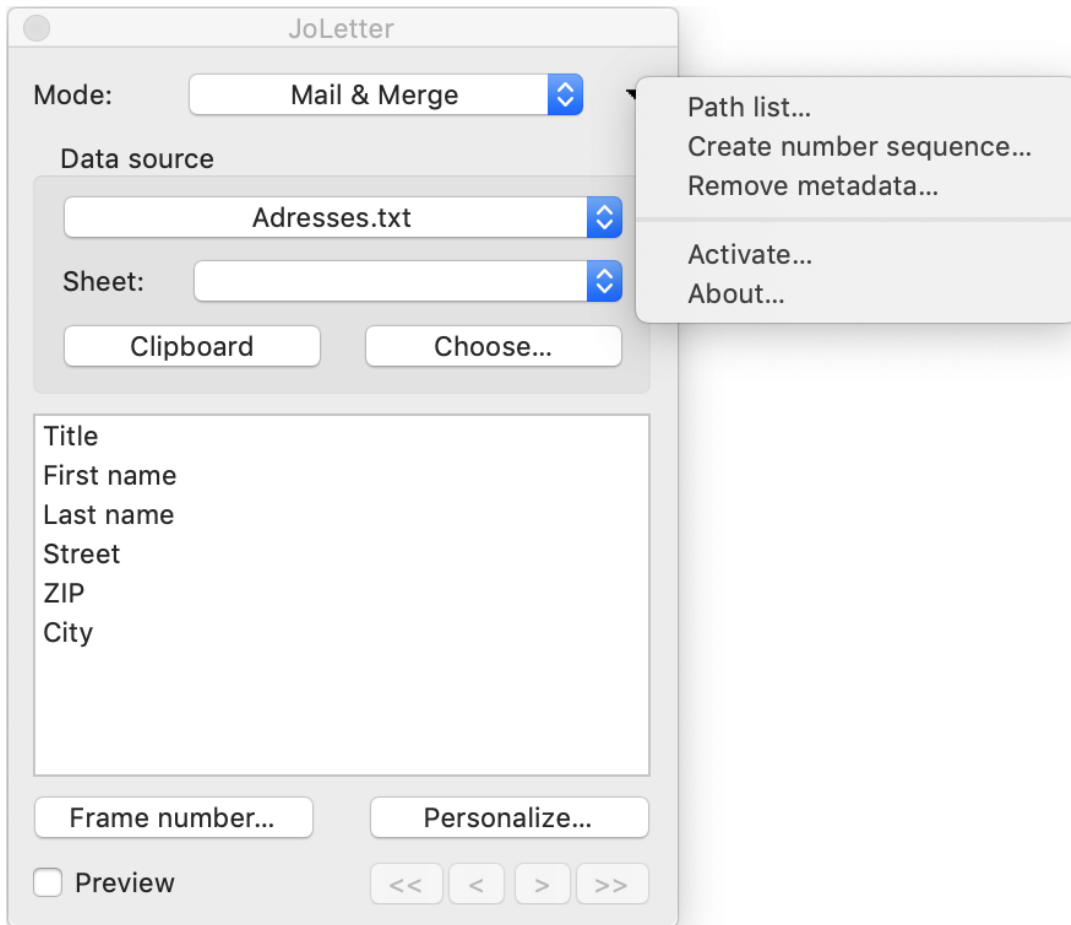
## 3. Installation

For installation simply copy the file „JoLetter.InDesignPlugin“ into the Plug-Ins folder of Adobe InDesign, located within the program folder of InDesign. After restarting InDesign JoLetter is ready to use.



#### 4. The JoLetter palette

By choosing „Window/JoLetter“ you can open and close the JoLetter palette with all elements for controlling the personalization process.



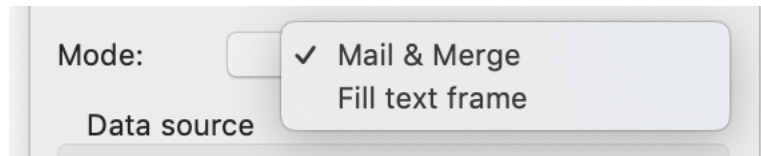
*The JoLetter palette*

The window contains 6 control groups:

- Mode (Mail & Merge/Fill text frame)
- Data source
- Placeholders (Column titles)
- Personalization
- Preview
- Additional functions via the popup menu in the top right corner



## 4.1 Mode



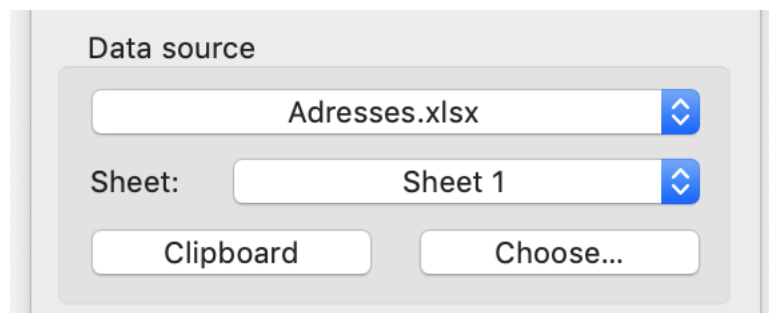
*Mode*

„Mode“ defines the current working mode, either „Mail & Merge“ or „Fill text frame“.

„Mail and Merge“ is related to the whole document and adds pages on personalization, dependant on number of data rows and variable data frames in the document.

„Fill text frame“ is related to one text frame, which is filled with the data from the external data source. This feature requires JoLetter Pro!

## 4.2 Data source



*Data source*

With „Choose...“ it is possible to select an external file as the data source. The following data formats are supported:

- Tab separated text (.txt)
  - CSV separated Text (.csv)
  - Microsoft Excel (.xls, .xlsx), requires JoLetter Pro and Microsoft Excel
  - Numbers (.numbers), requires JoLetter Pro and Numbers von Apple
- each with the column titles in the first row!

Alternatively it is possible to choose the content of the clipboard as the data source, if it contains tab separated text. In that case a temporary file is created and connected to the document.



### 4.3 Placeholders

Title
First name
Last name
Street
ZIP
City

*Column titles*

The first row of the data source will be interpreted as placeholders for personalization. By double clicking a placeholder it will be inserted at the current text position of the current text frame (content tool active). The placeholders will be added with double brackets at start and end.

```
<<First name >><<Last name>> #1
```

*Placeholders*

By adding a placeholder to a text frame, a frame number #1 will be assigned to that text frame, marking it as a frame containing variable data. The frame number defines the data row taken on personalization. So it is easily possible to define more than one variable frame on a page

The space between „<<First name“ and „>>“ produces a space between „First name“ and „Last name“ only, when the content of „First name“ is not empty. So you can avoid unnecessary spaces between placeholders. By pressing the „option“ key on double clicking on a placeholder in the window the space is inserted automatically.

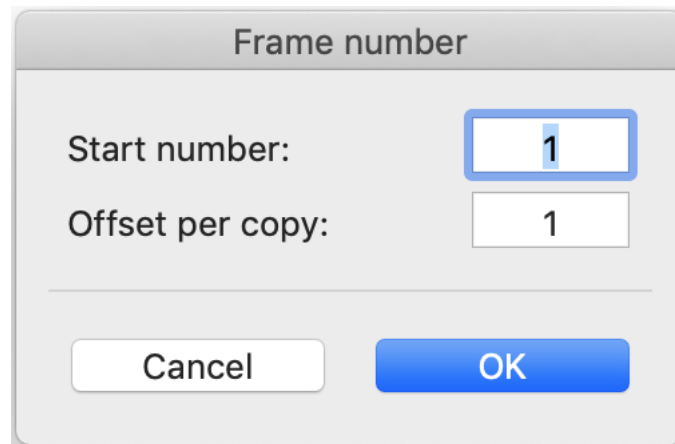


## 5. Personalization



*Personalization*

### 5.1 Frame number



*Frame number*

With „Frame number“ a frame number is assigned to one or more selected text or picture frames. That number defines the data row taken for personalization, useful for more than one variable frame on a page (e.g. 1, 2, 3,...)

The frame number can also be assigned by pressing the number on the keyboard with the object tool active.

If more than one frame is selected, the assigned numbers can be increased by setting the field „Offset“.



## 5.2 Personalize

The screenshot shows the 'Personalize' dialog box with the following settings:

- Data source:** /Volumes/Data/Daten/JoLetter/InDesign/1x1000.txt (Data rows: 1000)
- Data rows:** From - to: 1-1000, Offset per copy: 2
- Output:**
  - Remove empty lines
  - Variable data only
  - PDF export style: [Druckausgabequalität]
  - Variable background (PDF): None
  - Open PDF after export (within subfolder 'JoLetter' of document)
  - On text overset: Cancel
  - On missing pictures: Cancel
- Cut and Staple

*Personalize*

### 5.2.1 Data source

Shows the path of the data source together with number of data rows.

### 5.2.2 Data rows

„From - to“ defines the range of data for personalization. It contains two numbers (first and last data row) with a hyphen between them.

Offset“ defines the offset of data rows between each personalization. In most cases this will be „1“, for multiple variable frames on a page this may be a higher value.

„Cut and staple“ (JoLetter Pro) is a special function described in chapter 8.

### 5.2.3 Output

„Remove empty lines“ removes empty lines resulting of personalization, e.g., if all placeholders in one line are empty.

Variable data only“ processes the personalization with the variable frames only, which may be much faster.

Merge with static data“ (JoLetter Pro) creates a PDF file of the static data only and merges that with the PDF file of the variable data only. This process is much faster than processing in one step and results in a much smaller PDF file.

„PDF export style“ defines the export style used on PDF creation.

With „Variable background“ a column with file paths can be specified. Those paths will be





imported as a background picture after PDF export.

„Open PDF afer export“ opens the resulting PDF file after personalization. The pdf file can be found in a subfolder „JoLetter“ of the document.

„On text overset“ defines the bahaviour on finding a text overset during personalization (Warning/Ignore).

„On missing pictures“ defines the bahaviour for missing pictures during personalization (Warning/Ignore).

## 6. Preview



*Preview*

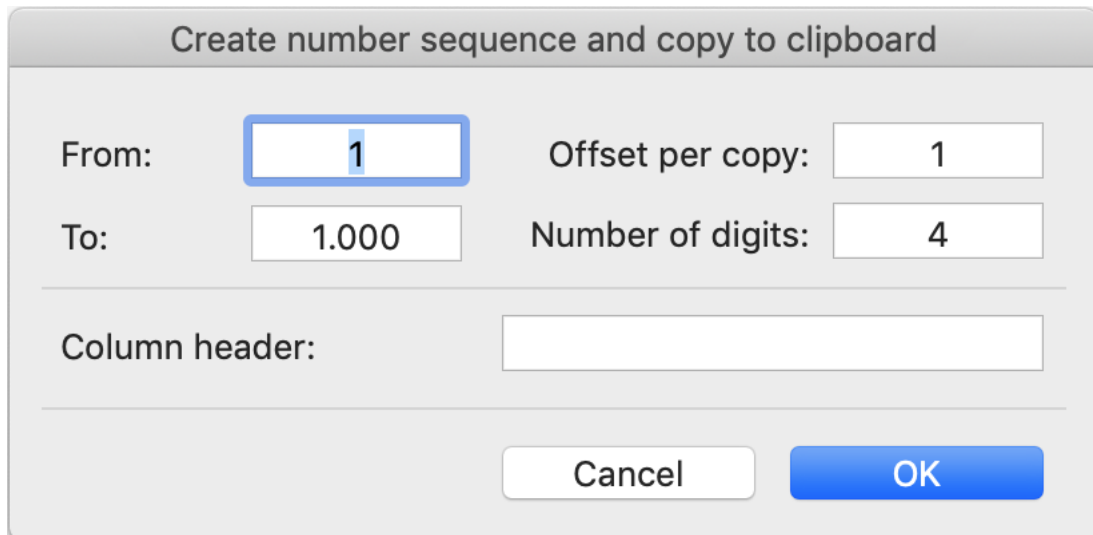
With „Preview“ active the placeholders are replaced by the first row of data to see the result of personalization. With the arrow keys you can navigate forward and backward through the data rows. The number in the middle of that area is the current displaced data row.

## 7. Additional functions

### 7.1 Path list (JoLetter Pro)

For importing pictures the data cells of the according column must contain the full path of each picture. With „Path list“ it is possible to create a path list for all pictures within a folder. This list is copied to the clipboard and can be pasted into a column of the data source file. A column title can also be defined

### 7.2 Create number sequence (JoLetter Pro)



The dialog box titled "Create number sequence and copy to clipboard" contains the following fields and controls:

- From:** Input field containing the number 1.
- To:** Input field containing the number 1.000.
- Offset per copy:** Input field containing the number 1.
- Number of digits:** Input field containing the number 4.
- Column header:** An empty text input field.
- Buttons:** "Cancel" and "OK" buttons at the bottom right.

*Create number sequence*

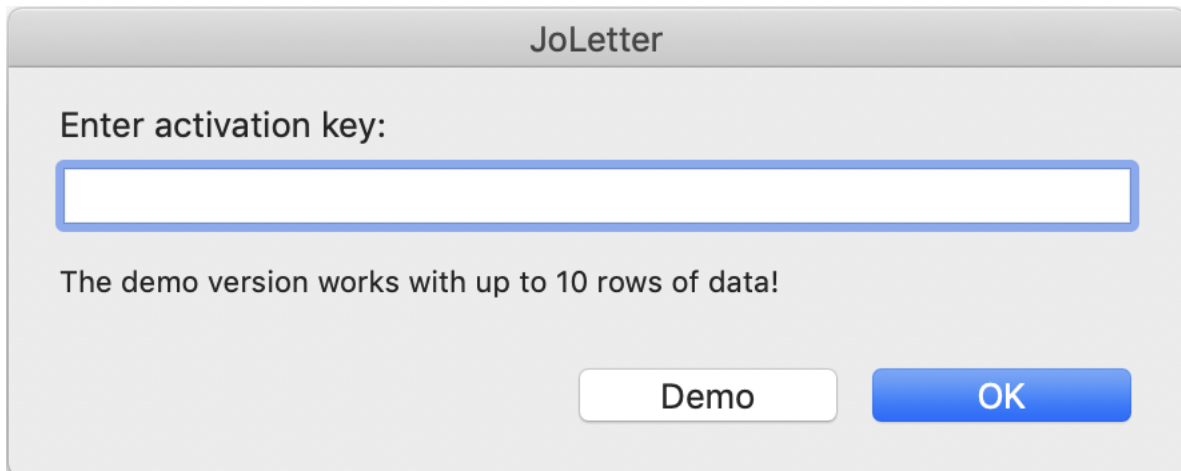
A common need for some personalizations is a number sequence (e.g. ticket numbers). This can easily be done with „Create number sequence“. The according dialog needs start number, end number, distance between the numbers and number of digits per number (e.g. 0012). The number sequence is copied to the clipboard and can be pasted from there.

### 7.3 Remove meta data

Removes the JoLetter meta data from the document or text frames.



## 7.4 Activate



*Activate*

With „Activate...“ JoLetter can be activated by copying a valid activation key into the text field. In demo mode only 10 rows of data are processed.

## 7.5 About

Shows version and serial number.



## 8. Picture import

With JoLetter it is also possible to import pictures. For that the data cells of a column must contain the full paths of the images. To get that work select a picture box and double click the according column title in the JoLetter window.



*Assign path to picture box*

In the top right corner of the picture box appears the column title together with the frame number. JoLetter Pro allows to create a list of paths of all pictures within a folder, see 7.1.

## 9. Cut and staple (JoLetter Pro)

In order to combine two staples of sheets after cutting the paper JoLetter Pro offers the option „Cut and staple“. For that you have to create two frames on a page numbered 1 and 2 and activate the option „Cut and staple“ in the dialog „Personalization“. In case of 100 data rows you get 1-50 in the first and 51-100 in the second frame.



## 10. Fill text frame (JoLetter Pro)

In mode „Fill text frame“ a selected text frame can be connected to an external data source. On personalization no dialog pops up, but the content of the data source will be loaded into the text frame immediately, data row for data row.

<<**Headline**>> #1  
<<Subheadline>>  
<<Text>>

**Headline 1** #1  
Subheadline 1  
Arit utempor atquunt, nobis desto est, qui  
ducitaquo eaque nim ab iderum ut quas  
aboreius invent et aligendita quis de sequibus  
asped utatius imporerit, quassuntotas dolu-  
pidust qui ra quiberum sustia dolor sapedis  
simperum fugiti to cus inveri voluptatur rem  
laboratius nis ut eum esecto to consent.  
**Headline 2**  
Subheadline 2  
Aperum faccupatatem doluptatet porporepe-  
rum quid utemoloreiur adisi volut andaerit

*Fill text frame*