JoLauterbach Software GmbH

XTensions Software, Plug-Ins and individual solutions

JoLetter 7.5

Mail and merge with QuarkXPress™

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Content

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

- QuarkXPress™ 2015-2020, MacOS

3.   Installation

For installation run the application "JoLetterQXP Installer" within the downloaded package. Two folders "Quark 2015+16" und "Quark 2017-20" will be created. Within that folders you find the according version of the XTension (JoLetter.xnt) and aliases to all found XTensions folders to make installation easier. For Quark 2017 till 2020 there are two possible XTensions folders, one for the current user and one for all users. Please copy FontFilter.xnt in one and only one of those folders and restart QuarkXPress.

XTensions folder for QuarkXPress 2015/16:

/Applications/QuarkXPress 20xx/XTensions

XTensions folder for QuarkXPress 2017-2020 (current user, all users):
- ~/Library/Application Support/Quark/QuarkXPress 20xx/XTensions
- /Library/Application Support/Quark/QuarkXPress 20xx/XTensions

XTensions folder for QuarkXPress 2018/19/20 Pro (App Store):

~/Library/Containers/com.quark.quarkxpress.20xx.pro/Data/Library/Application Support/Quark/QuarkXPress 20xx/XTensions

4.   The JoLetter window

By choosing „Window/JoLetter" you can open the JoLetter window with all elements for controlling the personalization process.
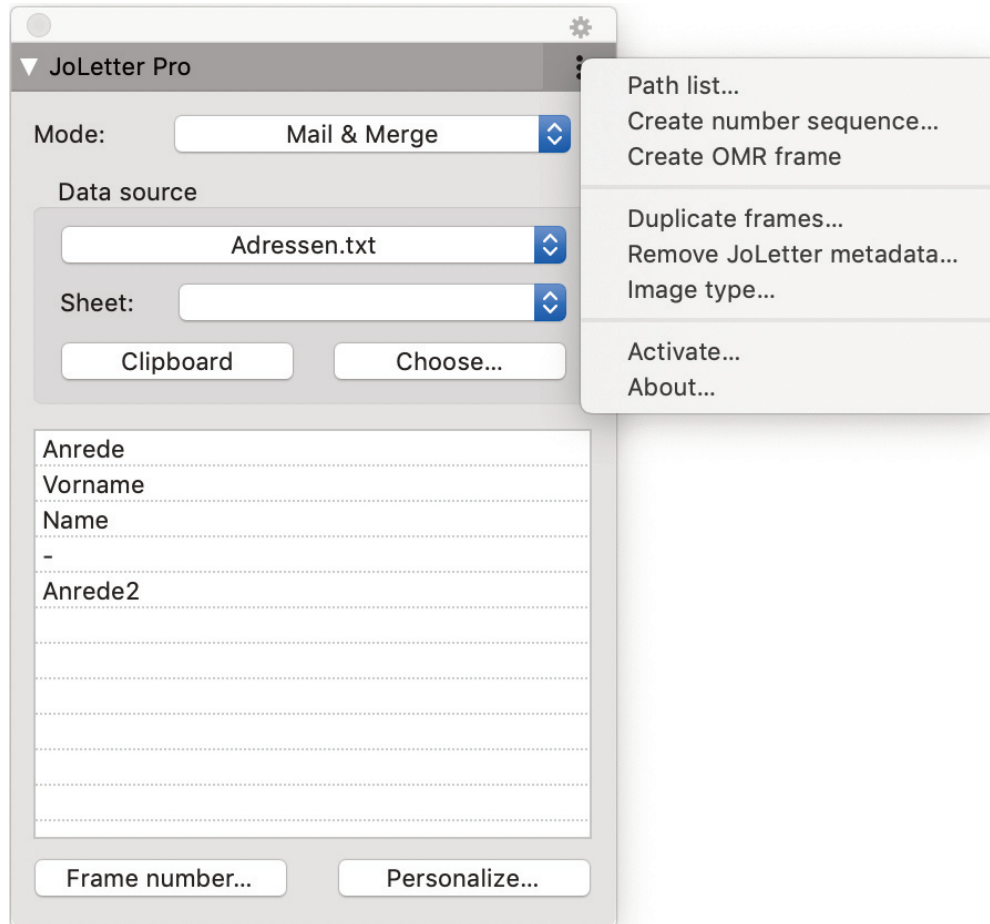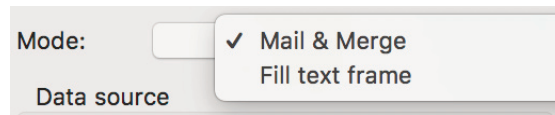
The JoLetter window

The window contains 5 control groups:

- •   Mode (Mail & Merge/Fill text frame)
- •   Data source
- •   Placeholders (Column titles)
- •   Personalization
- •   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
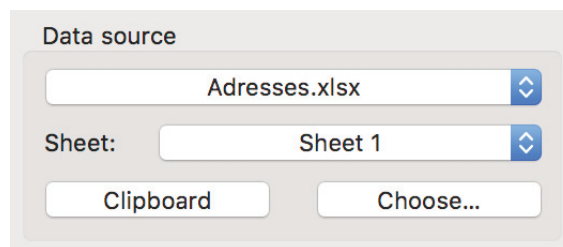
Data source

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

- Tab separared text (.txt)

- CSV separrated Text (.csv)

- Microsoft Excel (.xls, .xlsx), requires Microsoft Excel

- Numbers (.numbers), requires Numbers from 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.
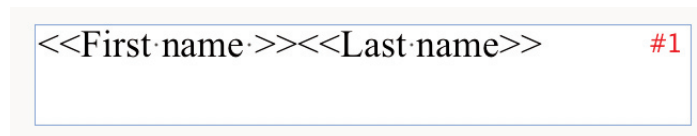
4.3   Placeholders

Placeholders (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.

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 avoide unnecessary spaces between placeholders. By pressing the „option" key on double clicking on a placeholder in the window the space is inserted automatically.
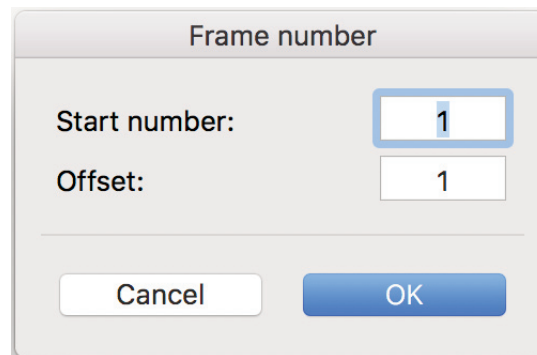
5.   Personalization

Frame number...   Personalize...

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.

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

5.2 Personalize

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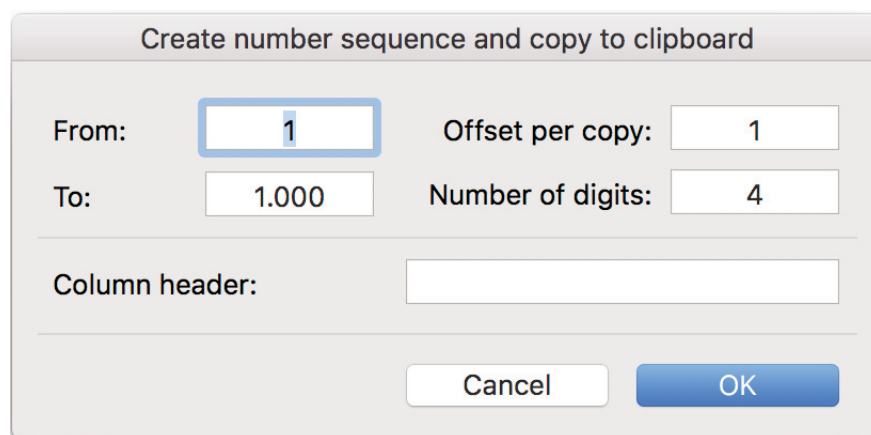
„On missing pictures" defines the bahaviour for missing pictures during personalization (Warning/Ignore).

6.   Additional functions

6.1   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

6.2   Create number sequence (JoLetter Pro)

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.

6.3   Create OMR frame (custom extension)

This feature creates lines similar to barcodes for post processing the personalization result.

6.4   Duplicate frames

This feature removes the JoLetter meta data from the document or text frames.
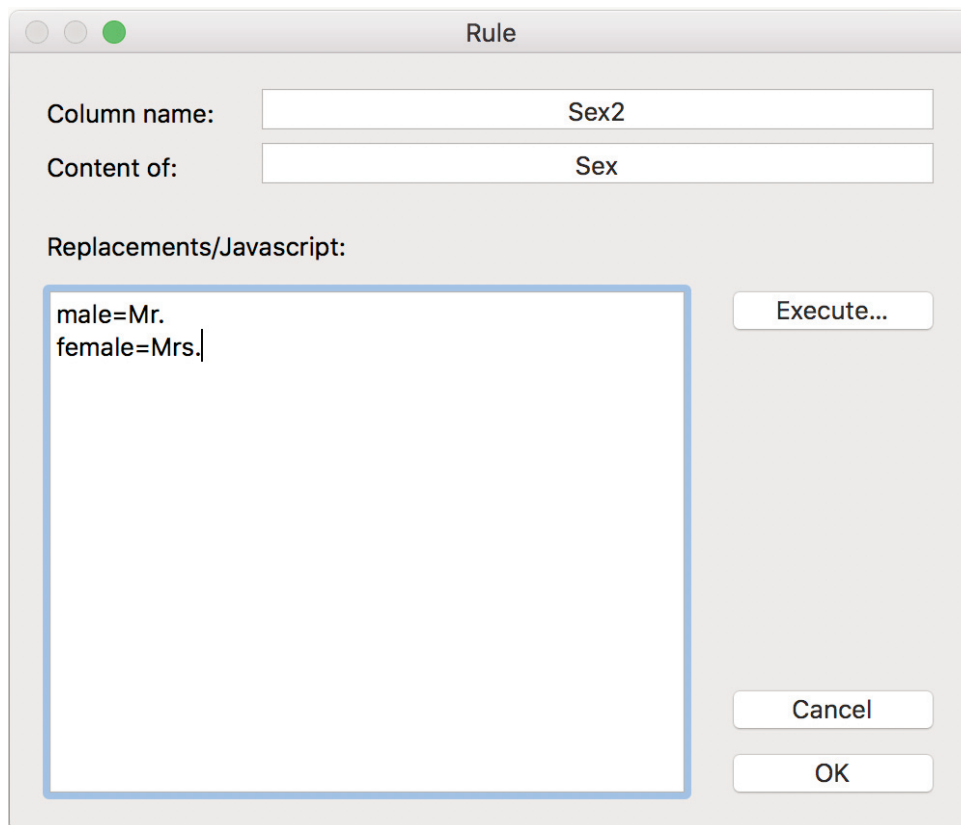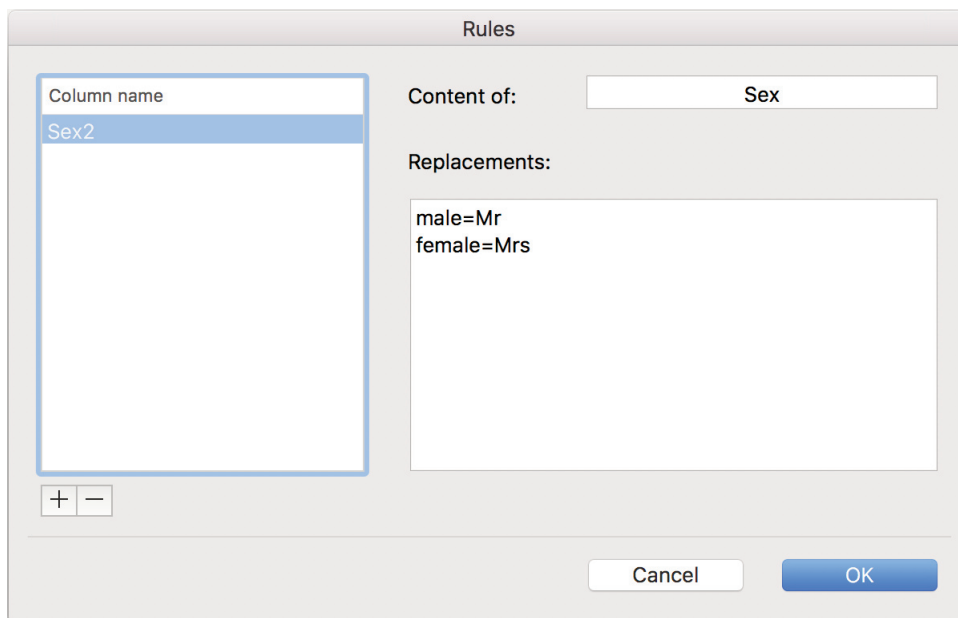
6.5 Remove meta data

This feature removes the JoLetter meta data from the document or text frames.

6.6 Image type

This feature lets you define the content of a data column for picture boxes. It is possible to choose between "Image path", "QR", "EAN 13" and "EAN 128". Both EAN codes require JoLetter Pro.

If the value of „Content of" is empty, the content of „Replacements" will be interpreted as Javascript code. The code can return both a string or an array of two strings. In the first case the string is the replacement string for the placeholder. In the second case the first string is the replacment string and the second string is a char style name. This char style will be applied to the replaced text.
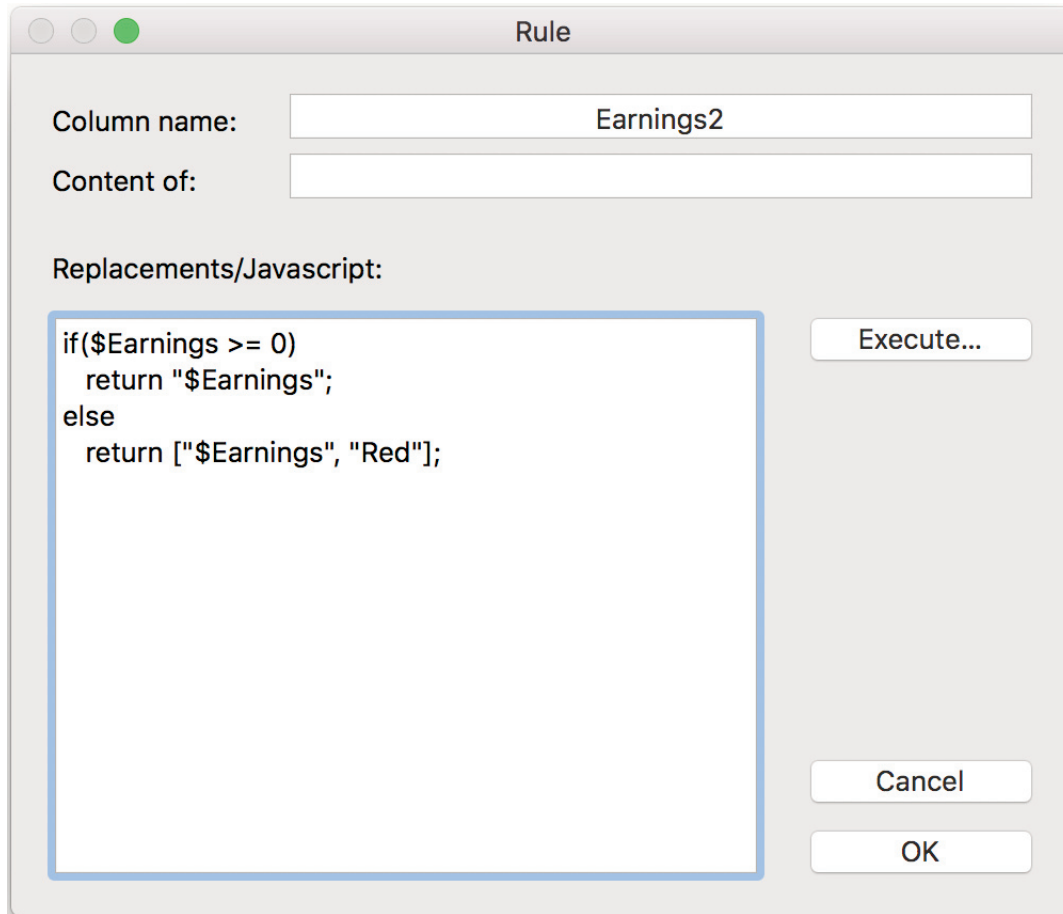
Rule with Javascript code

In the Javascript code all columns can be specified as variables by adding a „$" prefix. Those variables will be replaced by the values of the columns during import.

6.6   Activate
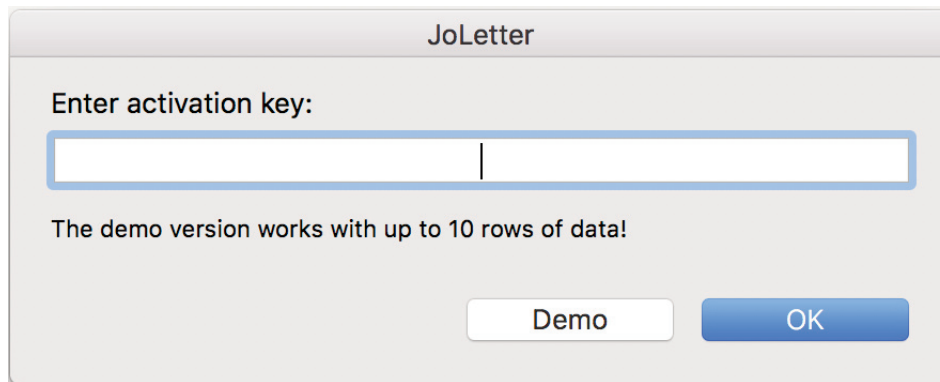
Activate

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.   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.

8. Fill text frame (JoLetter Pro)

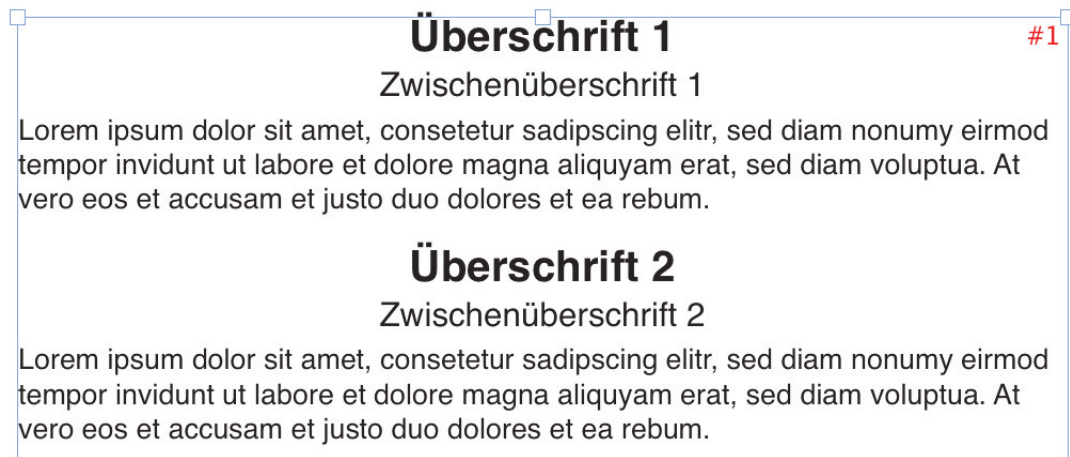In mode „Fill text frame" a selected text frame can be connected to an external data source. On personalization no dialog pops up, but the content of the data source will be loaded into the text frame immediately, data row for data row.

<<Überschrift>>

<<Zwischenüberschrift>>

<<Fließtext>>

Überschrift 1

Zwischenüberschrift 1

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Überschrift 2

Zwischenüberschrift 2

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Fill text frame

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