



JoLauterbach Software GmbH

# JoLetter 6.1

Mail and Merge for QuarkXPress™ and Aobe InDesign

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## 1. Overview

JoLetter is a mail & merge plug-in for QuarkXPress™ or Adobe InDesign. The data are supplied by ASCII files with tab separated entries or in CSV format. Most available database and spreadsheet applications are able to export their data in that way. In addition the clipboard can be used as the data source.

JoLetter provides the following functions:

- Several rows of data on one page
- Intelligent space
- Removing of empty rows
- Import of personalized pictures
- Rules

There is also a Pro-Version with additional features:

- Creation of OMR frames for inserting systems (Optical mark recognition)
- Creation and combining of static and variable data for much better performance
- Create a list of picture paths from a folder
- Create a list of sequenced numbers, e.g. for tickets

## 2. Requirements

- QuarkXPress™ 8/9/10/2015 or Adobe InDesign 6/CC/CC 2014
- MacOS X 10.7-10.10

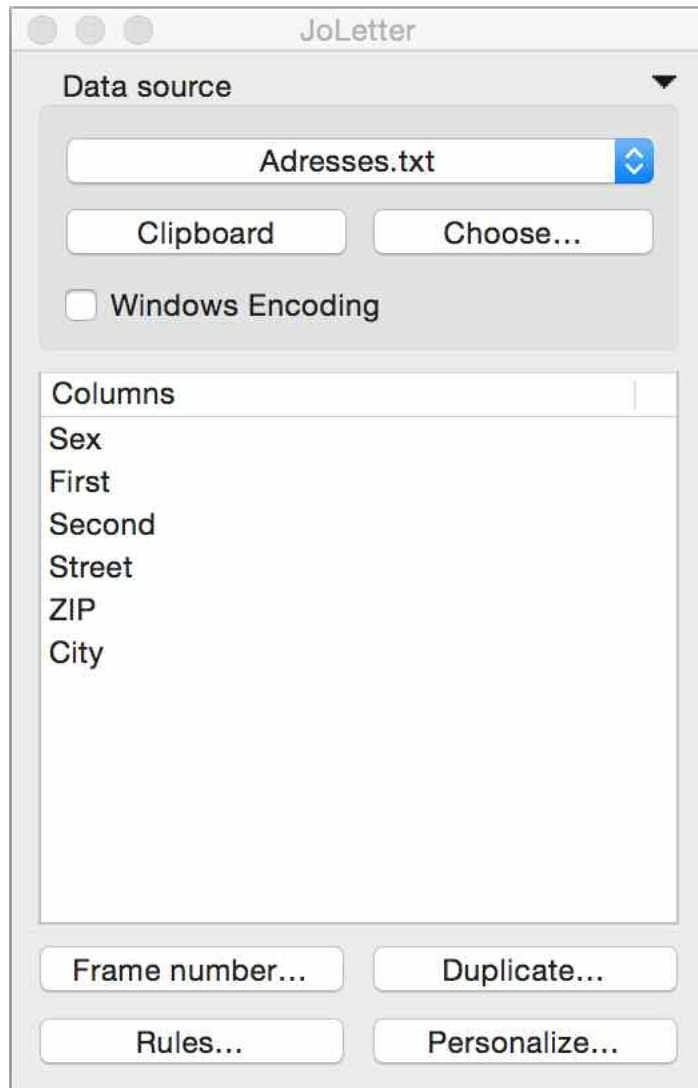
## 3. Installation

For installation of JoLetter you have to copy “JoLetter.xnt” to the XTensions folder of QuarkXPress™ or “JoLetter.InDesignPlugin” to the Plug-ins folder of Adobe InDesign. After restarting QuarkXPress™ or Adobe InDesign JoLetter is ready to use.



#### 4. The JoLetter palette

JoLetter adds a menu item “JoLetter” to the “Window” menu of Adobe InDesign. After choosing “JoLetter” the JoLetter palette appears on the desktop.



*The JoLetter palette*



## 4.1 Data source

With the button “Choose...” the current document will be associated with a data source. This data source is a text file with tab separated data or in CSV format. The first line must contain the column names of the following rows of data. Most available databases and spreadsheet applications are able to export their data in one of that formats. It is also possible to use the clipboard as the data source.

The button “WinEncoding” is useful for importing data from Windows applications. JoLetter maps the high ASCII chars to MacRoman format, if it does not detect the encoding automatically.

## 4.2 Add placeholders

Adding placeholders at the current text position is done by double clicking a row in the columns table. The placeholders are embedded in angle brackets.

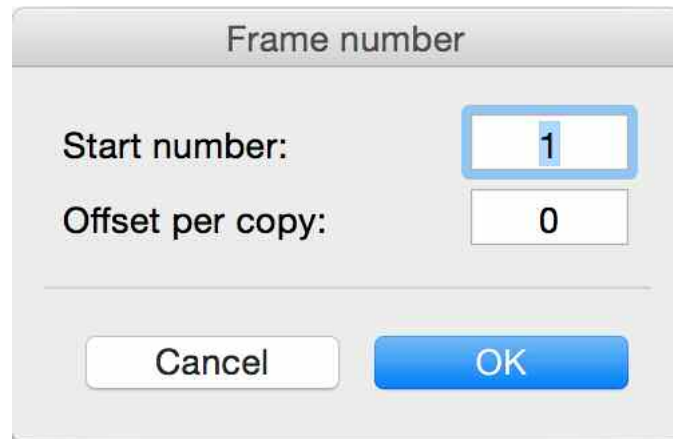
```
<<First>><<Second>> #1  
<<Street>>  
<<ZIP>> <<City>>
```

*Adding placeholders to a text frame*



### 4.3 Frame numbers

Each frame with variable data has a frame number assigned, which specifies the data row to be used for personalization, e.g. 1 for the first row, 2 for the second row, etc. So it is possible to work with multiple rows of data on one page. The frame number can be set by choosing “Frame number...” from the palette or by the keyboard with the object tool active.

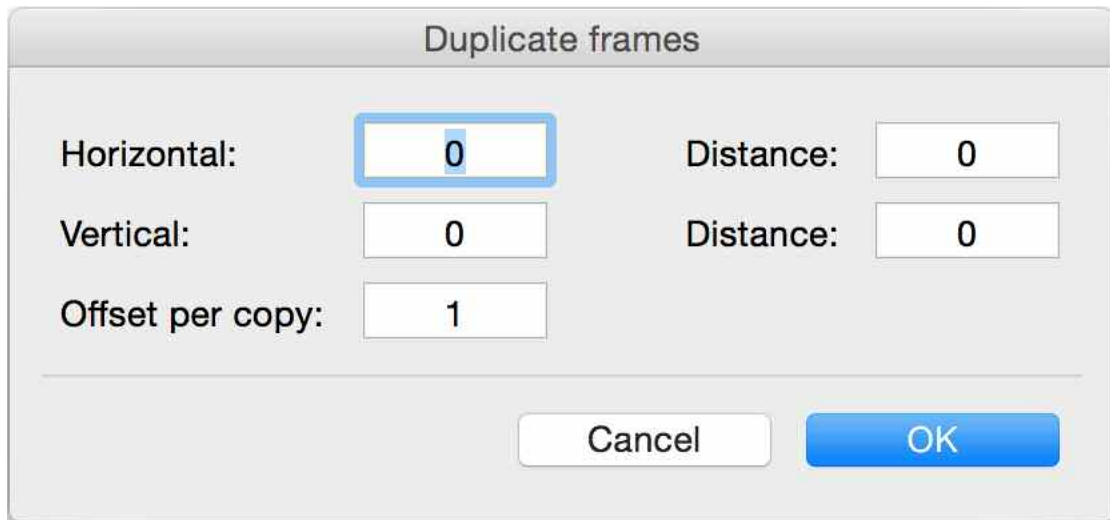


*Frame number*

The number is shown in the top right corner of the frame for text boxes and in the top left corner for picture boxes (screen only). You can set several selected boxes at once and assign them increasing numbers via “Offset”, if necessary.



#### 4.4 Duplicate



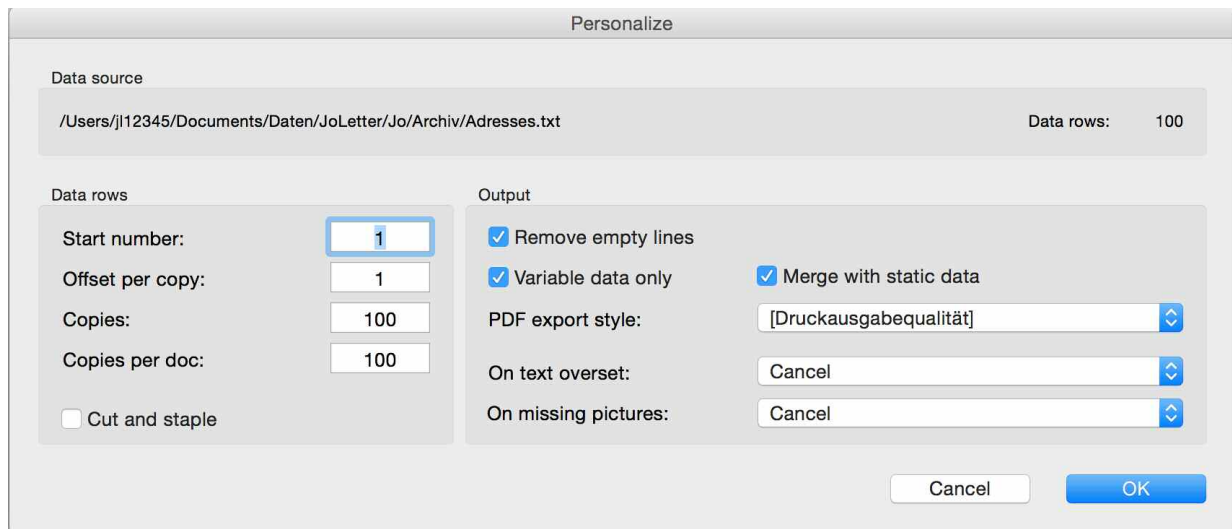
#### *Duplicate*

With “Duplicate” it is possible to copy one or more selected frames horizontally and vertically and automatically setting the frame number (with or without an offset).



## 4.5 Personalization

After pressing the button “Personalize...” the following dialog appears:



*Personalize...*

The dialog shows the path of the data source and number of found data rows.

For personalization the user has to enter the start number, the offset per copy and the number of copies to process. The offset may be different than “1” in case of multiple rows of data per page. In case of several thousands of rows of data it may be useful to create multiple docs (Copies per doc).

There are several options available:

“Cut and staple” is illustrated with a sample:

The document contains two text frames with numbers 1 and 2. With 100 rows of data, an offset of 1 and 50 copies you get 50 pages with data rows 1 and 51 on the first page, 2 and 52 on the second page, etc.

“Remove empty lines” is on by default and results in removing empty lines due to empty fields.

“Variable data only” leads to a document with only variable data, which may be much faster than with static data. The result can be merged automatically with the static data (JoLetter Pro).

With “PDF export style” it is possible to create a PDF file afterwards. This is off by default.

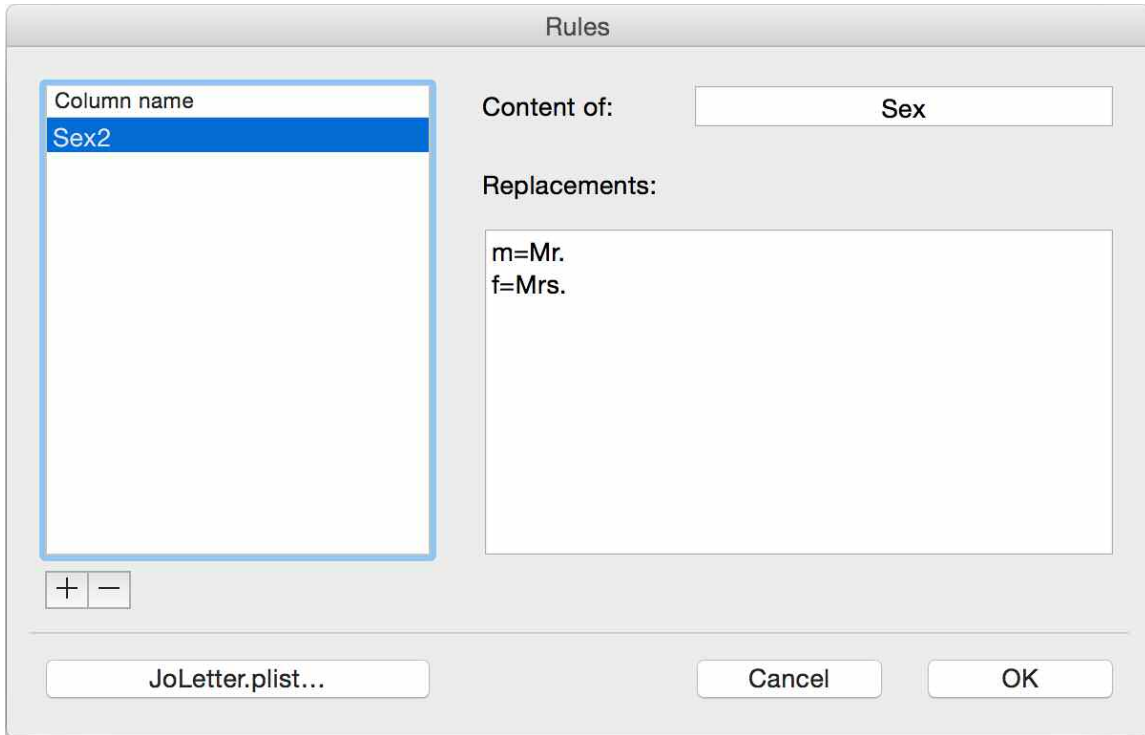
The option “On text overset” controls the behaviour, if there are text oversets during personalization. By default JoLetter aborts processing and shows the according text frame.

The option “On missing pictures” controls the behaviour, if there are missing pictures during personalization. By default JoLetter aborts processing and shows the according picture frame.



#### 4.6 Rules:

Sometimes it is necessary not to add the field data but some other text dependant on the data (especially for some European languages due to their grammar). For this reason it is possible to define global rules (“Rules...”).



*Rules*

Each rule is based on a data field and defines a number of text replacements. In the sample above there is field “Sex” with entries “m” for male and “f” for female. During personalization the “m” is replaced by “Mr.” and the “f” is replaced by “Mrs.”.

#### 4.7 Intelligent spaces

If several placeholders are placed side on side you get unwanted spaces for empty data fields. For that problem it is possible to add a space directly after the placeholder and before the embedding “>>”. In that case a space will be only be added, if the data field is not empty.

```
<<Sex >><<First >><<Second>> #1
```





#### 4.8 End of line character

With the following sample line there is a problem.

```
<<First >><<Second>>, #1
```

The line ends with a “comma”. If the content of “Name” is empty, there may be an unnecessary space before the comma. This can be solved by embedding the “comma” in double brackets.

Die Zeile ist mit einem Komma abgeschlossen. Wenn nun der Inhalt des Feldes “Name” leer ist, entsteht ein störender Leerschlag vor dem Komma. Dies kann vermieden werden, wenn das Komma in Platzhalter eingeschlossen wird.

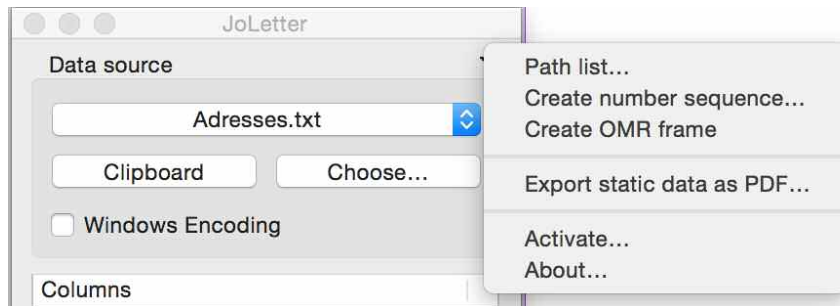
```
<<First >><<Second>><<,>> #1
```

In that case the space is removed by JoLetter, if necessary. This technique works with every single character.



## 5. Additional features (JoLetter Pro)

Via the popup menu in the top-right corner there are additional functions available:



*Additional features*

- Path list...

With a standard file dialog it is possible to create a list of paths for a given folder (for importing pictures)

- Create number sequence...

Creation of a single column number sequence with start number, offset, end number and number of digits per entry. The result is copied to the clipboard and can be pasted in your favourite table application

- Create OMR frame (optical mark recognition)

Modern inserting systems have scanners to check for sequence and matching of paper from different sheet sources, if there are special marks on the page. If there is any problem, the machine stops working and the operator can look for the problem.

- Export static data as PDF...

In case of complex documents it may be useful to create static and variable data separately and to merge them afterwards. This may be much faster than conventional processing all in one step.

- Activate...

Activation of the software by entering an activation key.

- About...

Info-Dialog with serial number and number of users



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