

JoLetter 6.7

Mail and merge with QuarkXPress™

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1. Overview

JoLetter is XTensions-Software for mail and merge with QuarkXPress™. The data are supplied by ASCII files with tab separated entries or CSV (separated by ‘;’ or ‘,’). The clipboard can also be used as a data source, if it contains tab separated text.

JoLetter (Standard) provides the following functions:

- Import of text files (tab separated or CSV)
- Building the necessary pages with a maximum of 2000!
- Multiple rows of data on one page
- Adding spaces if necessary (intelligent spaces)
- Picture import
- Versions for QuarkXPress™ 2017 / 2016 / 2015 (XPress 2018 after delivery)

JoLetter for macOS is also available in a Pro-version with additional functions:

- Import of native Excel files (xlsx, xls)
- Creation of several documents to avoid the 2000 page limit
- Separation between static and variable data
- Creation of a number sequence (e.g ticket numbers)
- Creation of a path list for picture import

2. System requirements

System requirements are defined by the according version of QuarkXPress™.

3. Installation

3.1 QuarkXPress™ 2015/16, macOS - QuarkXPress™ 2015/16/17, Windows

To install copy the file “JoLetter.xnt” into the XTensions folder of QuarkXPress™. After a restart of QuarkXPress™ JoLetter is ready to use.

3.2 QuarkXPress™ 2017, macOS

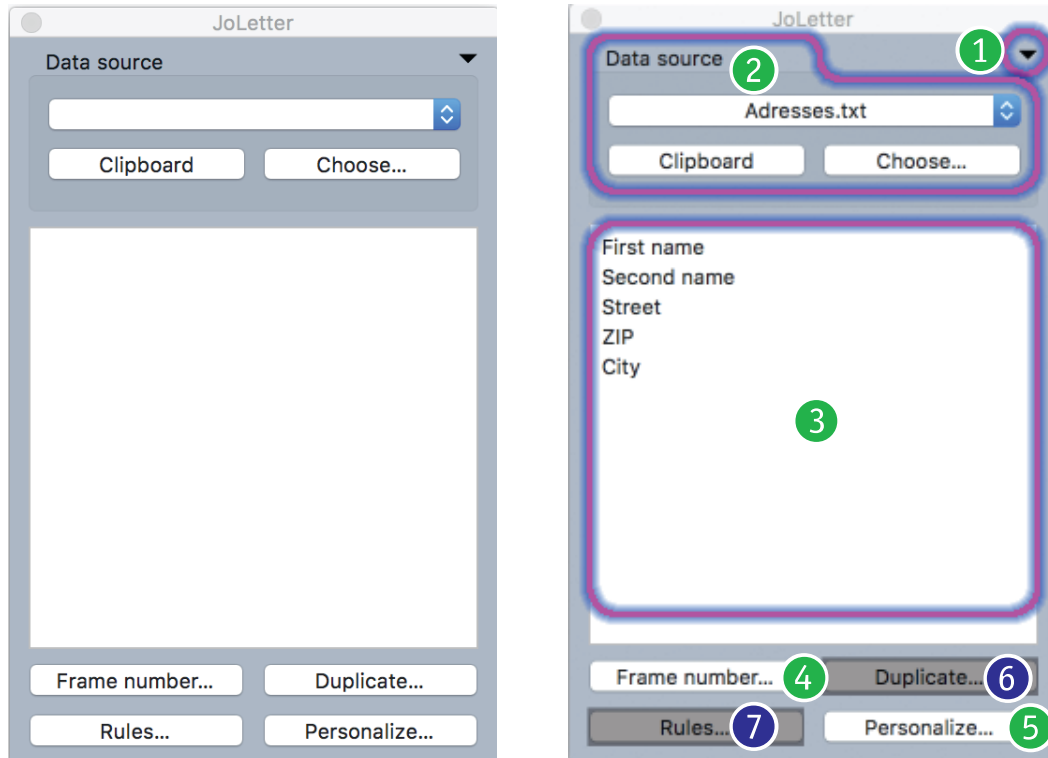
For QuarkXPress™ 2017, macOS, there are two possible locations for installing XTensions software (current user/all users). Please use only one of them!

- ~/Library/Application Support/Quark/QuarkXPress 2017/XTensions
- /Library/Application Support/Quark/QuarkXPress 2017/XTensions

In case the according folder do not exist, you have to create them!

4. The JoLetter Palette

JoLetter adds a menu entry “JoLetter” to the “Window” menu. After choosing that entry the JoLetter palette appears on the screen for controlling all necessary operations.



The JoLetter palette

The JoLetter palette contains 5 functional areas

- ① Additional functions
- ② Controlling the data source
- ③ List of placeholders imported from the data source
- ④ Frame number for text frames
- ⑤ Starting the personalization process

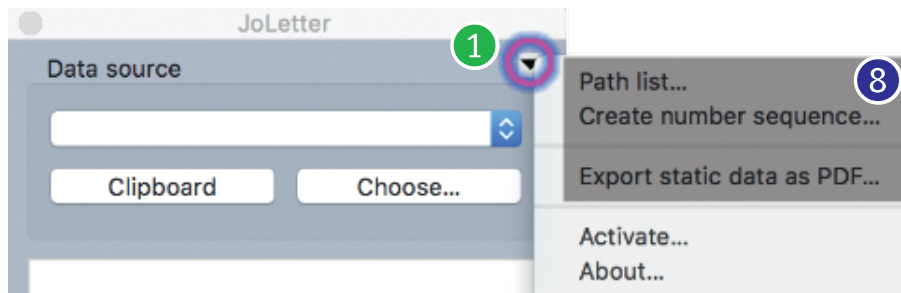
The JoLetter palette for the Pro version provides two additional buttons

- ⑥ Intelligent duplication of frames
- ⑦ Rules for text exchange

5. Activation

Without activation JoLetter works in demo mode. Only 10 rows of data can be processed.

The menu item for activation can be found in the button for the additional functions **1**. The additional functions in **8** are only available in JoLetter Pro.



“Activate” can be found within the button for additional functions



Dialog for entering the activation key

Enter the 32 digit activation key you got by E-mail and press OK.

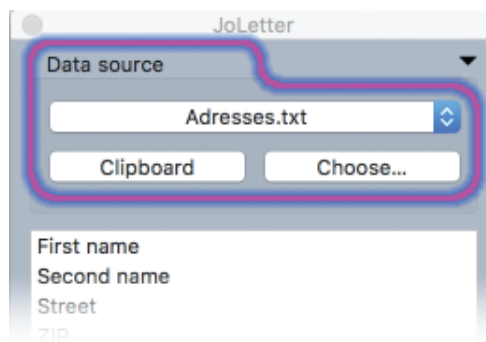
6. Creation of personalized data

Building of personalized data with JoLetter is a 4 step process

- 6.1. Choosing the data source (file or clipboard)
- 6.2. Add the placeholders in your text frames
- 6.3. Control the sequence of processing different data rows
- 6.4. Personalization

6.1. Data source

Data source are either text files (tab separated or CSV) or the clipboard, if it contains tab separated data. JoLetter interprets the first row of data as column headers and creates the placeholder names from them.



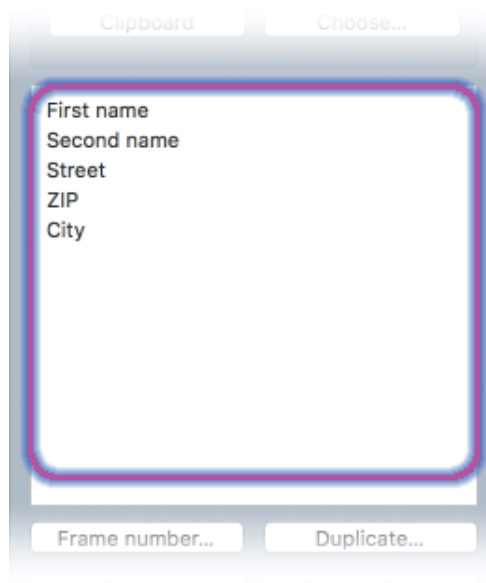
The data source area

Via **Choose...** oder **Clipboard** (e.g. copied content from a spreadsheet) JoLetter imports the text and creates the placeholder names..

In the **Dropdown button** (Adresses.txt) you can verify the file location and navigate to the parent folders of the data source file.

6.2. Adding placeholders

Create a text frame in your document and add the placeholders simply by double clicking on an entry.



Placeholder names

The placeholder will be visualized by double brackets before and after the placeholder name, similar to word processing applications. The placeholder can be formatted arbitrarily.

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

Placeholders within a text frame

You don't have to use all placeholders and don't have to care about their sequence.

6.2.1. Intelligent spaces

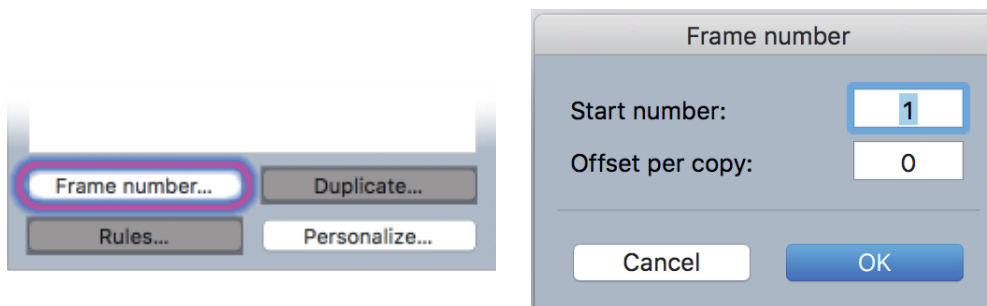
If placeholders are placed side by side it very likely to get unwanted spaces, if some fields are empty. To avoid this problem you can use a so called “intelligent space”. Simple delete the space between the placeholders and add it at the end of a placeholder name before the closing brackets.

```
<<Title>><<First name>><<Second name>>¶
```

Spaces are only added, if the according fields are not empty.

6.3. Frame numbers

Each text frame gets a number controlling the data row for text exchange, by default “1” for the first row of data. This is done automatically on adding the first placeholder in a text frame. In case you have several text frames on one page, which are be filled with different rows of data, this number can be changed by pressing the button “Frame number...”.



Setting frame numbers

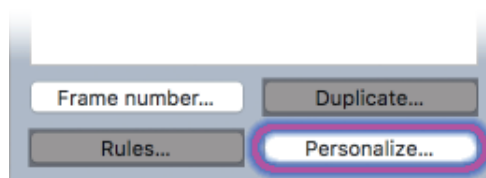
The according number will be displayed as a marker in the top right corner of the text frame. It is also possible to assign several different numbers in ascending order in one step. Simply select the according frames by shift clicking just in the right sequence and press “Frame number...”. You can then define the start number and offset for assigning numbers to the selected frames. In case you enter “0” for the offset, all frames will be assigned the start number.

Now it is time to personalize the document.

6.4. Personalization

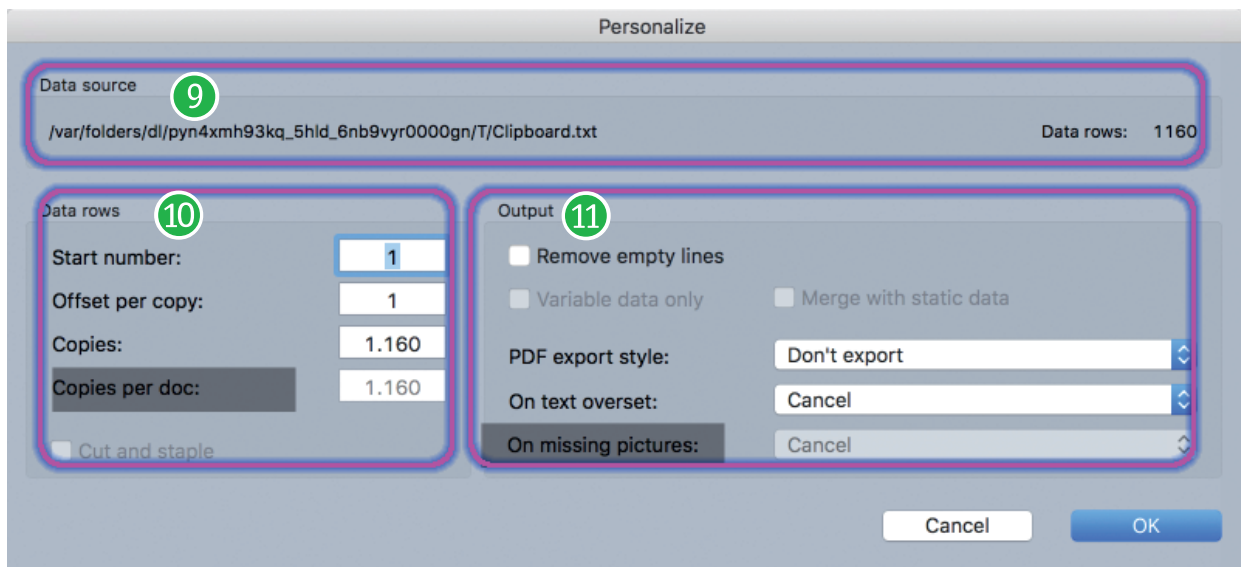
On “Personalize...” JoLetter will create a copy of your document and build all necessary pages to process all data in the data source. There is a limit of 2000 pages per document.

To start the process press “Personalize...” on the JoLetter palette



A dialog comes up with the following areas:

- 9 Data source
- 10 Data rows
- 11 Output



Personalize...

The area Data source 9 shows the path to the data source file and the number of data rows found.

In the area Data rows **10** you have to enter the first row of data (**Start number**), the **Offset** for advancing the data for each personalization and the number of **Copies** to be created (data rows divided by number of different frame numbers on your template).

In case of several thousand rows of data it may be useful or necessary to create several documents. This is a feature of JoLetter Pro.

Three sample scenarios in case you have a data source with 1160 rows of data:

- 1) The template contains **1 page** with **1 frame**, frame number 1. 1160 copies with offset 1 have to be created. The first page will be filled with the data from row 1, the second with row 2, and so on.
- 2) The template contains **2 pages** mit **1 frame**, frame number 1. 1160 copies with offset 1 have to be created, exceeding the limit of 2000 pages per document (2320). In that case you have to divide the process in two steps with e.g. 580 copies each. The start number in step 2 will then be 581.
- 3) The template contains **1 page** with **3 frames**, numbered from 1 to 3. 387 copies with offset 3 have to be created, resulting in 387 pages.

In the area Output **11** you have several options:

Remove empty lines removes any empty paragraphs resulting from empty fields in the data.

Via **PDF export style** you can automatically create a PDF from the personalized document, which will be closed afterwards.

With the option **On text overflow** you can abort the personalization process in case of text overflow after text exchange.

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