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Tech sheet: Introducing Variable data merge

Variable Data Merge reads a text file containing information, then uses that information to add text and pictures to a PDF. Text is added as if by the Stick On Text And Numbers function, and pictures are entire PDF pages, as if added by Stick On PDF Pages. The text file is called a "data source".

There are two ways to use Variable Data Merge.

1. With a master document. The master document is copied again and again, and each copy has different text or pictures added from the data source. This is similar to Data Merge/Mail Merge functions in many apps, such as Microsoft Word® and Adobe InDesign®.

2. With a normal document, which is not duplicated. Instead, the data source is used to add information to pages in the document. This is like using Stick On Text And Numbers/Stick On PDF Pages, but sticking different text or images on each page of the document (or each group of pages).

The text file contains "columns" of information, with a heading. The columns are separated by commas, tabs, or semi-colons (;). Consider this file:

Name,Company Name,State,Logo number
Robert Smith,Printing Wins Inc, New York,2
Lisa Roberts,,California
"Phillipa Thompson, Jr.",Images Matter,Mass,1

This uses commas to show these rows and columns

Name	Company Name	State	Logo number
Robert Smith	Printing Wins Inc	New York	2
Lisa Roberts		California	
Phillipa Thompson, Jr.	Images Matter	Mass	1

There are four lines in this file. The first line has the names of the columns. Column 1 is Name, Column 2 is Company Name, Column 3 is State and Column 4 is Logo number.

The other lines show three "records". You can see a few points of interest: Lisa Roberts has no company name, so you see two commas together (,,), and no Logo number. Phillipa Thompson, Jr. has a name containing a comma, so the entire name is put in straight quotes as "Phillipa Thompson, Jr."

Files like this are commonly exported from spreadsheet apps. Now, we choose **Variable Data Merge**.

We first have to choose whether we have a master document or not. If we have a master document, it is usually just one page, but it might be more than one, for example front and back of a sheet. The *entire document* is the master, and if you choose "Single page master" the current document must have only one page. This is a simpler case and used to check the input.

If you choose **Not a master document** you need to choose how many pages in the current document are used for each record. The usual value is 1. You can choose whether an incorrect number of pages is an error.

Variable data 2 - choose source

Next you choose a data source. This file lists all the variable data. It might be made as a text file, or exported from Excel. The first line is column names. Every other line has one record to merge.

Data source file: `C:\Users\aandi\Documents\Var data\Job 1\Fake addresses.csv`

File format: `Comma separated (CSV)`

Encoding: `Windows Western`

Data source info

Source records: 3
Source columns (total 8): Account, Title, First name, Last name, Address 1, Address 2, Address 3, Zip code
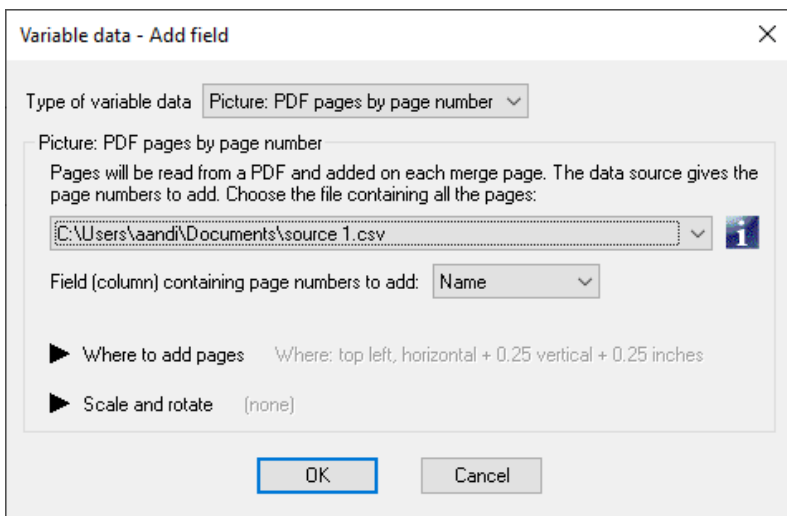
[Next] [Back] [Cancel]

Next you choose the data source file.

You say what separator and encoding to use. If not sure, you may have to experiment, but look closely at the Data source info, which should show the columns you wanted.

Variable data 3 - adding fields

You now choose how where to put each of the fields.

You need to add one or more fields to pages.
Double click here or use the Add field button.

[Add field...] [Add text block...] [Edit...] [Delete]

☑ Skip records where all fields above are blank

[Finish] [Back] [Cancel]
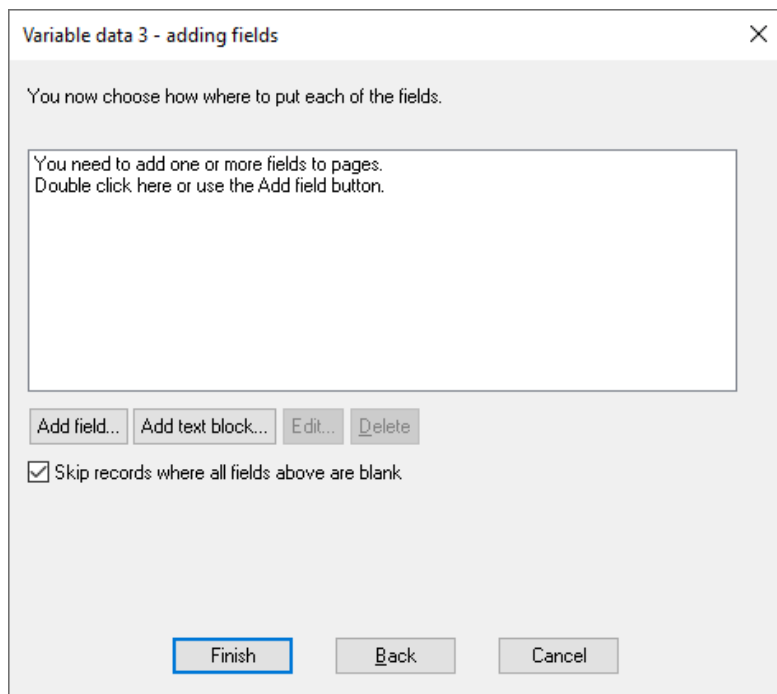
Now you need to choose where the information is to be added to your document. You must add one or more "fields".

If the fields are simple text, you will choose the font, size, position, colour etc. for the text each time the information is added. To add more than one piece of text together, see Text blocks, below.

Variable data - Add field

Type of variable data: `Picture: PDF pages by page number`

Picture: PDF pages by page number

Pages will be read from a PDF and added on each merge page. The data source gives the page numbers to add. Choose the file containing all the pages:

`C:\Users\aandi\Documents\source 1.csv`

Field (column) containing page numbers to add: `Name`

▶ Where to add pages   Where: top left, horizontal + 0.25 vertical + 0.25 inches

▶ Scale and rotate   (none)

[OK] [Cancel]

If the fields are pictures you must prepare a single PDF with pages containing the pictures to be added. The data contains a simple number giving the page number to add.
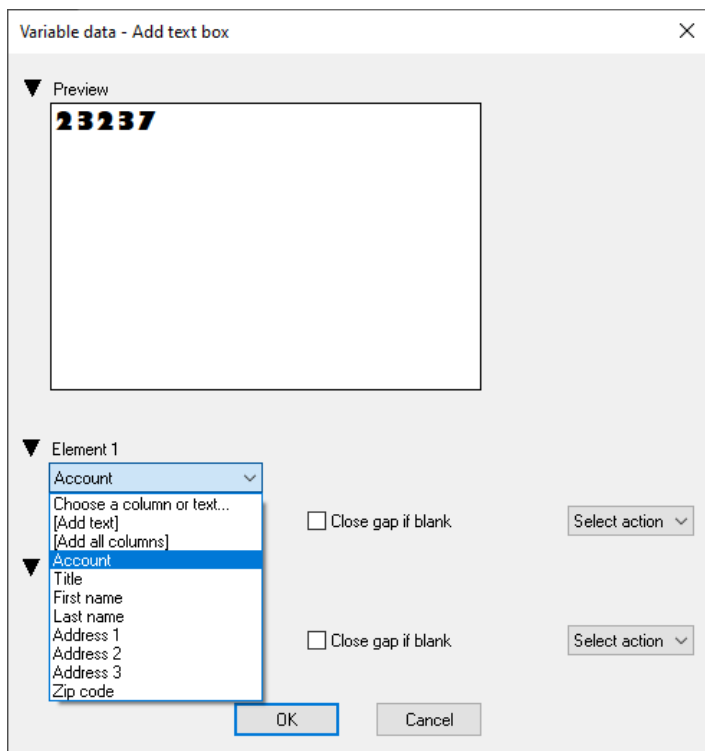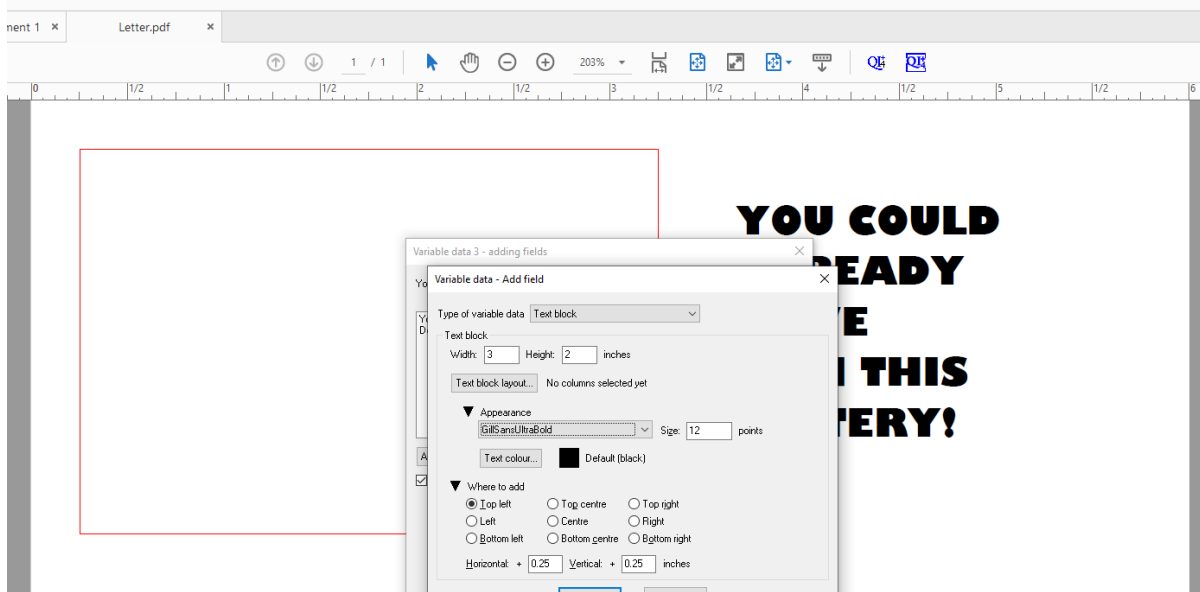
Text blocks

Text blocks are a powerful feature of Variable data merge which allow you to create a block of text for applications such as mailing labels, with features including

- Preview of the block showing exactly how a record will appear
- Combine columns onto a single line
- If a line would be blank, optionally close up the gap
- Add extra text mixed with the columns

To show this we take a typical contact spreadsheet with columns Account, Title, First name, Last name, Address 1, Address 2, Address 3, Zip code. After defining the source, we go to the Variable data 3 – adding fields dialog and click **Add text block**.

On the Add text block dialog you will choose a block size, here 3 x 2 inches. The current page (in Acrobat only) will show a red box where the block is to be added. We type in the required offset on the page. We choose a font and size. Now we click **Text block layout**.

The text block has as many elements as you need. To get started it has added the Account column, but we want most of the columns.

Variable data - Add text box

▼ Preview

23237
Mr
Norman
Catalina
105 Easy St
Midtown
Ohio
34344

▼ Element 1
Account
☐ Same line   ☐ Close gap if blank   Select action ∨

▼ Element 2
Title
☐ Same line   ☐ Close gap if blank   Select action ∨

▼ Element 3
First name
☐ Same line   ☐ Close gap if blank   Select action ∨

▼ Element 4
Last name
☐ Same line   ☐ Close gap if blank   Select action ∨

▼ Element 5
Address 1

So we pull down the "Account" field and choose **[Add all columns].**

We now have an element for each of the columns.

Variable data - Add text box   ✕

▼ Preview

Mr Norman Catalina
105 Easy St
Midtown
Ohio
34344

▼ Element 1
Title
☐ Same line   ☐ Close gap if blank   Select action ∨

▼ Element 2
First name
☑ Same line ☐ Join (no space)   ☐ Close gap if blank   Select action ∨

▼ Element 3
Last name

We now adjust the columns as needed.

- To remove the account number, click **Select action** at the right and select **Delete**.

- For First name and Last name, we click **Same line** to run the name onto one line

- For Address 1, Address 2 and Address 3 we click **Close gap if blank** to remove blank address lines.

The new preview will appear.

You can have multiple text blocks, and mix them with simple text and picture fields too.