



MY FIRST PDF/MERGICIAN PROJECT

This guide will help you create your first PDF/Mergician Professional project.

INTRODUCTION

We'll create a letter to send to your customers. Each letter will be personalized with the name of the customer. All letters will be combined into a single PDF document for easy printing.

The result will look like this:


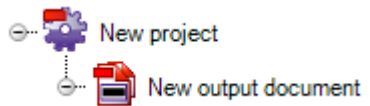
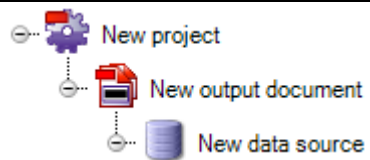
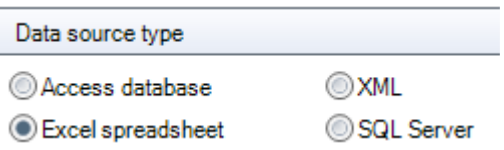
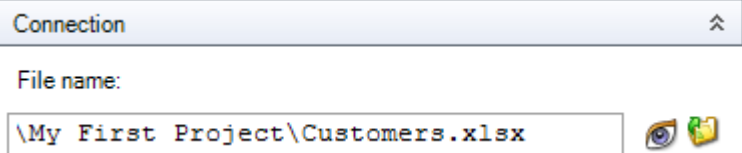


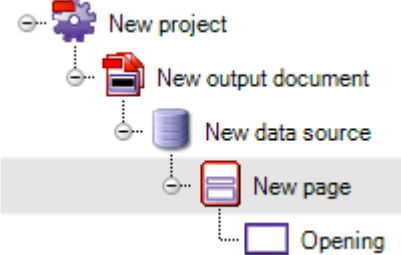
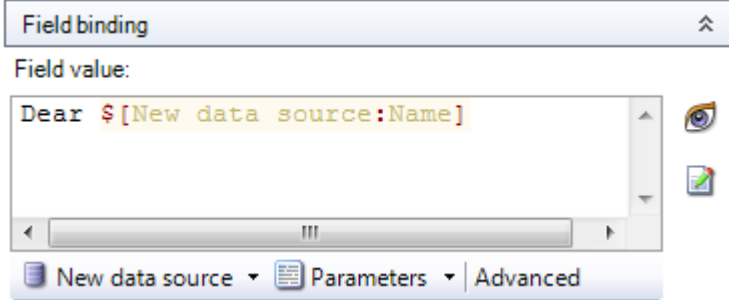
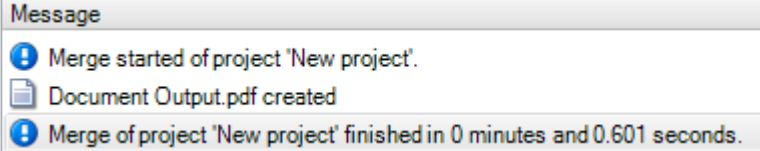
PREREQUISITES

In this guide we're going to use a PDF letter template and an Excel spreadsheet containing customer names. You can find these files in the PDF/Mergician Professional Samples folder. Furthermore we assume that PDF/Mergician Professional has already been installed.

STEP BY STEP INSTRUCTIONS

To create the project, follow the steps below. For each steps you will find what the step does, how to execute it and what results you can expect after it has been executed.

| Step | Description | How | Result |
|------|---|---|---|
| 1 | Start PDF/Mergician Professional. | Find PDF/Mergician Professional 4 in the Start menu Click on PDFMergician Professional | PDF/Mergician Professional is started. |
| 2 | Create a new empty project | Click on New > Empty project |  |
| 3 | Insert an Output Document | Click on Insert > Output Document |  |
| 4 | Insert a Data source | Click on Insert > Data > Data |  |
| 5 | Choose data source type "Excel spreadsheet" | Click on Excel spreadsheet |  |
| 6 | Select the "Customers.xlsx" spreadsheet | Click on the yellow folder icon Browse to Customers.xlsx Click OK |  |

| Step | Description | How | Result |
|------|--|--|--|
| 7 | Choose the “Customers” sheet | Choose Customers\$ in Database table | Database table: Customers\$ |
| 8 | Insert the letter template page | Click on Insert > Pages > Template page(s) Click Next Select Use an existing PDF document (default) Click Next Choose LetterTemplate.pdf Click Next Choose Use individual pages (default) Click Next Click Finish |  |
| 9 | Personalize the letter using the customer name | Click on the Opening field Select the Binding tab (on the right) In Field value: type “Dear “ Click on New data source (below Field value) Click on New data source:Name |  |
| 10 | Create the letters | Click on Actions > Merge |  |

CONGRATULATIONS

You have now created your first PDF/Mergician Professional Project.

For more information please consult the user guide. If you have any questions or need assistance, do not hesitate to contact our support team at support@pdfmergician.com.