

# **Form Letter Tutorial**

## **Part Two — Using Rules**

This tutorial, the second part of the Form Letter tutorial, covers the basic Rules-based processing capabilities of AccurioPro® VDP. You can use AccurioPro Rules to apply conditional processing to Links, frames and pages while merging. In this tutorial, you will see how to create and assign the three different types of Rules — Link, Frame, and Page. The sample document is a modified version of the Form Letter used in the first part of the Form Letter tutorial. You will merge data from a tab-separated text file to generate a PDF file that contains all of the merged pages.

Topics covered in this tutorial:

- ✓ Using a Link Rule for a Text Link
- ✓ Using a Link Rule for a Picture Link
- ✓ Using “Rules Interactive Mode” while previewing data
- ✓ Viewing Rule assignments
- ✓ Creating Variable PDF File Output

## Overview

In this second part of the Form Letter tutorial, you will use Rules-based processing to modify the data that you wish to merge. You will learn how to create and apply Rules to Variable Links, frames, and pages while merging.

## The Sample Document

The name of the sample document for this tutorial is “Form Letter Rules.indd” and it exists in the “1) Form Letter” Tutorial Files folder. The document is similar to the personalized form letter used in **Tutorial #1a**. While it requires the same variable elements as the first Form Letter, a new variable picture (a map) will be added in this tutorial. The sample document looks like this:

 Hollywood Branch  
117 Rio d'Oro Boulevard, Hollywood, California, 90036

Name  
Address\_1  
Address\_2  
City, State ZIP

**Logo**

Dear Customer:

Thank you for requesting a credit card from Los Angeles Metropolitan Bank.

After reviewing your application and credit history, we have approved you to receive a Los Angeles Metropolitan Bank credit card at an annual percentage rate of 9.5% for the first nine months and at 12% A.P.R. following your initial welcome period.

You will receive your card in the mail within ten business days. Please call us at 1-888-983-6746 upon receiving your card in order to activate your account.

Thank you for banking with Los Angeles Metropolitan Bank.

Sincerely,

  
LAMB Bank Cards Department

Please direct any questions to:

Mr. Steven James  
Los Angeles Metropolitan Bank  
Hollywood Branch  
117 Rio d'Oro Boulevard  
Hollywood, California 90036  
800/555-6350  
sjames@lambankna.com

**Map**

(Please see reverse side for EQUAL CREDIT OPPORTUNITY ACT NOTICE and INFORMATION FOR CALIFORNIA RESIDENTS)

## The Sample Data File

The sample data file for this tutorial is the same tab-separated text file used in **Tutorial #1a**. The file is named “Form Letter.txt” and it exists in the “1) Form Letter” Tutorial Files folder. Also, the contents of the data file have been placed on the document’s pasteboard for your viewing convenience only. Below is a picture of the data in this file:

Name	Gender	Address #1	Address #2	City	ST	Zip	Logo	Contact
Roland Reed	M	1267 Vernon Ct	Suite #244	Hollywood	CA	90036	VISA.eps	contact1.txt
Cindy Olsen	F	4577 Roanoke St		Glendale	CA	90148	MSTR.eps	contact2.txt
Thomas Corbo	M	4522 Troy Ave	Unit 3-B	Burbank	CA	91504	AMEX.eps	contact3.txt
Beth Stein	F	294 Eagle St		Glendale	CA	90148	MSTR.eps	contact2.txt
James Blish	M	1433 Van Dyke	#22	Hollywood	CA	90036	VISA.eps	contact1.txt



For more information about data files for AccurioPro, see the **Database Files** manual, which is available in PDF format in the “Supplemental Documentation” folder in AccurioPro VDP Documentation.

## What is “Rules-Based Processing”

With Rules-based processing, a merge session can apply specific actions—that are based upon the content of one or more data fields—to Links, frames, and pages. For example, you can create a Rule to add a salutation (“Mr.” or “Ms.”) based on the gender information in the current record.

### What is a Rule

A Rule consists of one or more statements. Each statement consists of a set of criteria and a set of actions, as in the following example:

**If <<Gender>> is “M”, then Add Prefix: “Mr. ”**

The criteria consist of “If Expressions” that compare given data against a condition. When there is a match, then one or more actions are performed. Each action defines a modification that will be made to the data, or to the document, while merging.

## Types of Rules

There are three types of Rules — Link, Frame, and Page. Each type of Rule is designed to be applied to a different type of object and has its own unique set of actions. Below is an introduction to each Rule Type:

### **Link Rules**

Link Rules can be assigned to any Variable Link in a document. Use a Link Rule to modify the data that AccurioPro is merging into a Link. For example, you can set the data to a substitute value, set the data to be empty, get the data from a different Variable Link, add a prefix/suffix, or apply a paragraph/character style.

### **Frame Rules (Premium Only Feature)**

Frame rules can be assigned to any frame and not just frames that contain Links. In fact, you can assign a Frame Rule to any frame. Use a Frame Rule to modify the attributes of a frame or to delete the frame, based upon the conditions you set for the Rule. For example, set the background color and shade of a frame. A Frame Rule can also set the color, shade, and width of a frame's stroke.

### **Page Rules (Premium Only Feature)**

Page Rules can be assigned to any page in the document. Use a Page Rule to modify the entire page when merging. For example, apply a specific master page while merging or omit a page from Print Output. See **Tutorial #1c** for more information about using Page Rules.

## More Information about Rules

This tutorial provides a preliminary introduction to AccurioPro Rules. Complete details can be found in the **AccurioPro Rules** manual, which is available in PDF format in the “Supplemental Documentation” folder in AccurioPro VDP Documentation.

## Preliminary Setup

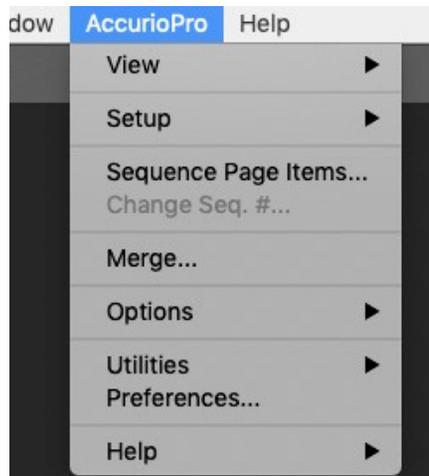
### Prerequisites

#### Tutorial #1a

This tutorial assumes that you have completed **Tutorial #1a**. If you have not completed it, we recommend you do so before continuing.

### Run Adobe® InDesign®

If you are not currently running the InDesign application where you installed AccurioPro, launch it now. If AccurioPro has loaded successfully, you will see the **AccurioPro** menu appear on the menu bar. If you do not see the **AccurioPro** menu, repeat the instructions in the **AccurioPro Installation** manual, which is available in PDF format with the installer.



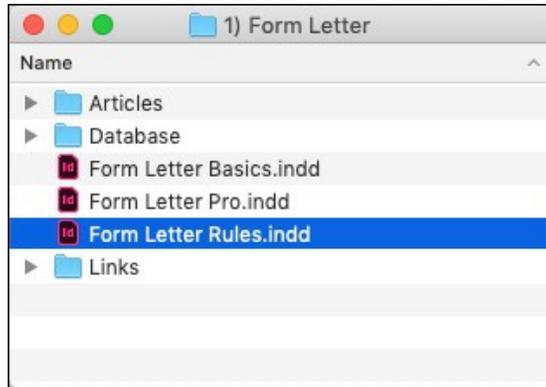
If the Rules Module has loaded successfully, then selecting **Setup** ⇨ **Rules** from the **AccurioPro** menu will open the **Rules** window (which is described later in this tutorial). If instead you see a message indicating the Rules Module is not installed, repeat the instructions provided in the **AccurioPro Installation** manual. If the **Rules** window opened, you may close it by clicking the **Cancel** button and then continue to the next set of steps.

## Open the Sample Document

To open the document that has been prepared for this tutorial, follow the steps below:

- 1) Select **Open** from the **File** menu.
- 2) Select the file **“Form Letter Rules.indd”**.

The name of the sample document is “Form Letter Rules.indd” and it exists in the “1) Form Letter” folder, which is inside the “AccurioPro Tutorial Files” folder.

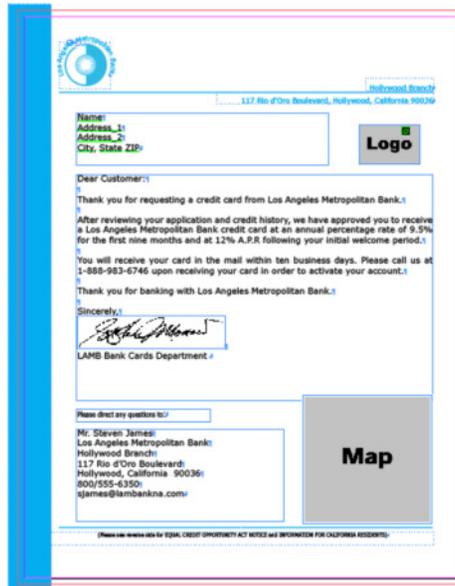


- 3) Click the **Open** button to complete your selection.

Replace any missing fonts and update any modified pictures (the pictures are included in the same Tutorial Files folder as the sample document).

## Form Letter Tutorial — Part Two — Using Rules

The sample document, where the same Variable Links that you used in **Tutorial #1a** have already been assigned, looks like this:



If you do not see green indicators for the Variable Links, confirm your **InDesign View** menu has its **Screen Mode** set to **Normal** and to **Show Frame Edges**.

## This Document's Data Source Definition (DDF)

A DDF has already been set up and assigned to the sample document for this tutorial. The document's DDF's settings will be automatically loaded into your AccurioPro installation when you open the document.

However, if you are running the Premium edition and have turned Off (unchecked) the **Always use Document DDF** preference, open the **AccurioPro** menu and select **Setup** ⇒ **Data Source Definitions**. If you see a warning that the document's DDF "1) Form Letter (Rules)" is missing, click **Yes**. The **Data Source Definitions** window will open and you will see "1) Form Letter Pro" is the document's **Current DDF**. Click **OK** to close the **Data Source Definitions** window. Either one of these DDFs—"Document" or "1) Form Letter ( Rules)"—is appropriate for this tutorial. For more information, see the **Database Definitions** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.



*Do **NOT** run **Setup** since the DDF is already set up.*



*For more information about AccurioPro Data Source Definitions, see the **Database Definitions** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.*

## Using a Link Rule for a Text Link

The Form Letter has a “Name” Link that will be filled with data from the “Name” field in the data file, but this “Name” field does not include any salutation such as “Mr.” or “Ms.”.

However, there is a field in the data file that does indicate the gender (“M” or “F”). So, you can use a Link Rule to modify the “Name” data based on the “Gender” data. The Link Rule can insert “Mr.” as the salutation when the “Gender” data is “M”, “Ms.” when the “Gender” is “F”, and otherwise insert no salutation at all.

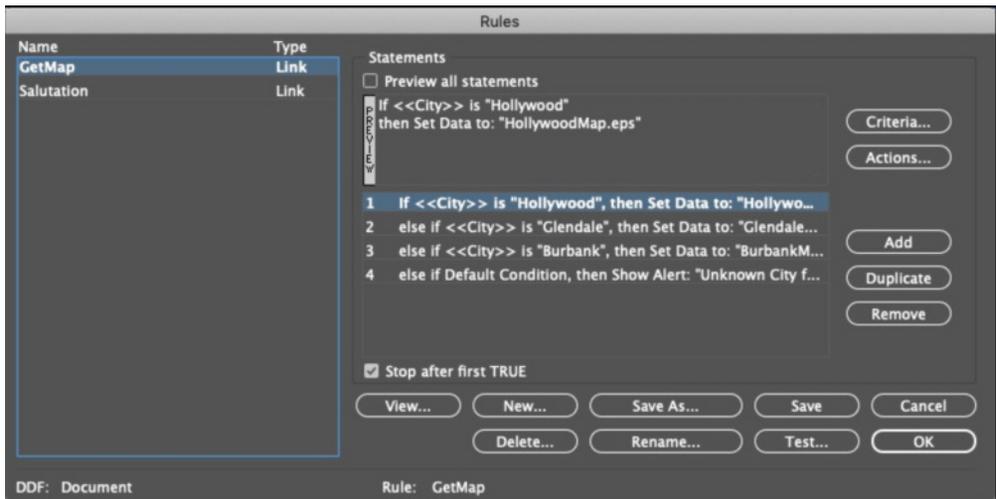
First, you will see how to create this Link Rule. Then, you will see how to assign the Link Rule to the “Name” Link in the document.

### Create a Link Rule

To create a Link Rule, do the following:

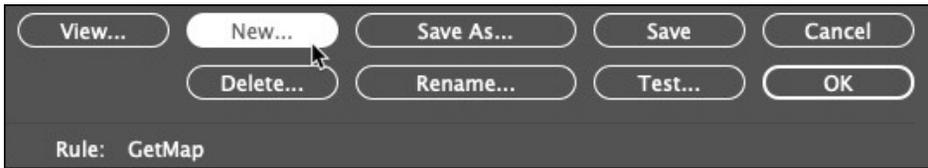
**1) From the AccurioPro menu, select **Setup** ⇨ **Rules**.**

This opens the **Rules** window, where you will see that this tutorial’s DDF already has some Rules set up in it, as shown below:



2) On the **Rules** window, click the **New** button.

To create a new Rule, click the **New** button, as shown below:



3) On the **New Rule** window, enter “**Salutation**” as the name for the new Rule.

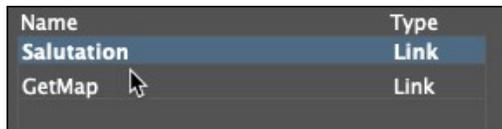
4) Select **Link** from the **Type** popup menu.

The **New Rule** window should now look like this:



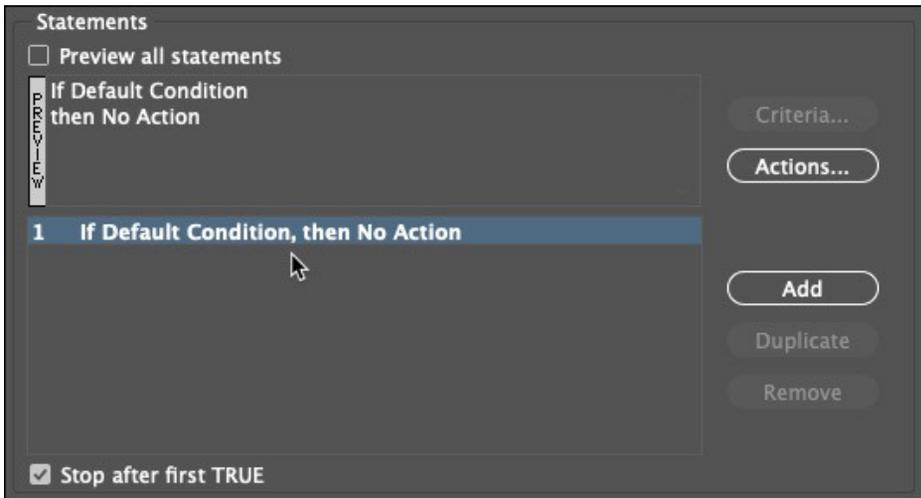
5) Click the **OK** button to create this new **Link Rule**.

Initially, you may be presented with a message indicating that a Rule of this name already exists and prompting whether to replace it. If so, for this tutorial, click **Yes** to replace it. The **Rules** window should now display the name of the new Rule in the list, as shown in the picture below:



## Set the “Default Condition” Statement

A Rule will always have a Default Condition Statement, which is automatically included in any new Rule. For example, the new “Salutation” Link Rule that you just created has a Default Condition Statement. To see this statement in the new “Salutation” Link Rule, click on **Salutation** in the list of Rules on the **Rules** window. The **Rules** window will then display that Rule’s statements in the **Statements** list, as shown below:



The Default Condition Statement is the final statement whose actions will always be performed if no other actions for the Rule were performed. Although you cannot edit the criteria for the Default Condition Statement, which will always be evaluated as True, you can edit the statement’s actions. Its default action is “No Action”, which means the Link, frame, or page will be merged as if no Rule had been applied to it. However you can assign other actions to a Default Condition Statement.

For the Default Condition Statement in the “Salutation” Link Rule, if a record does not have an “M” or an “F” in the “Gender” field, then you do not want to add any salutation to the “Name” Link. Instead, you want the Link to display the data as it normally would if no Rule were assigned to it. Therefore, you want to keep the default “No Action” setting for this Rule’s Default Condition Statement.

## Add a Statement to Insert “Mr.” as a Prefix

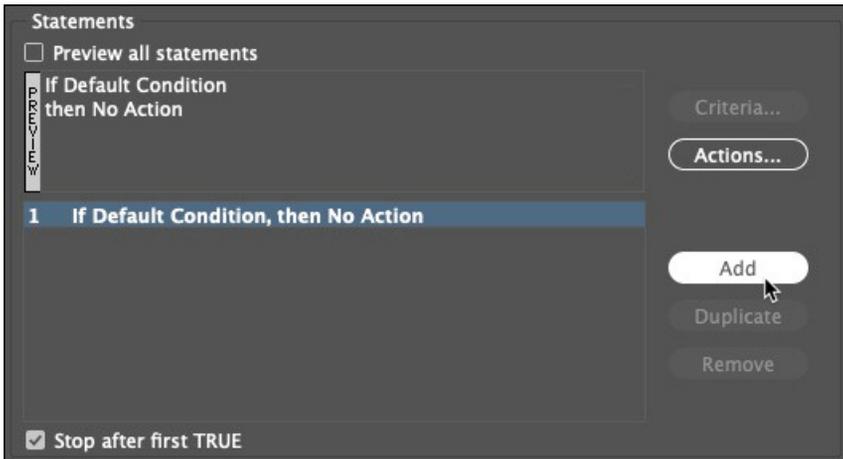
Next, you will add a statement to insert the prefix “Mr.” when the “Gender” data is “M”, as shown below:

**If <<Gender>> is “M”, then Add Prefix: “Mr. ”**

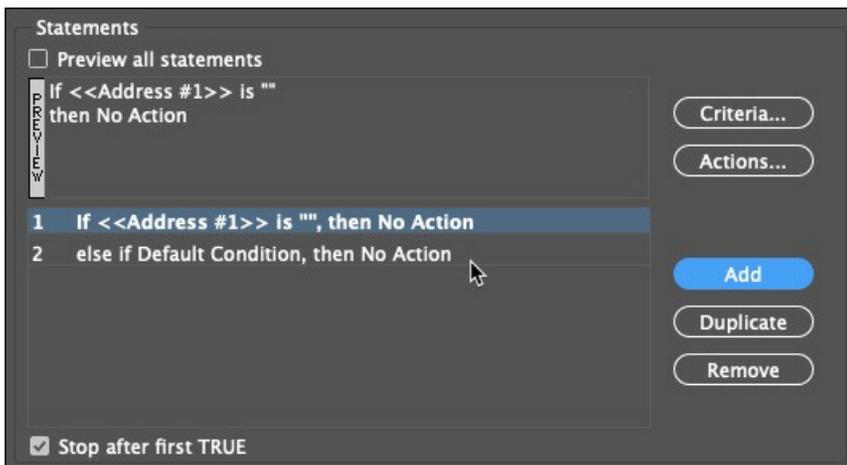
### Add the New Statement

To add a new statement, do the following:

- 1) On the **Rules** window, click the **Add** button.



- 2) The **Rules** window now displays two statements for the Rule.

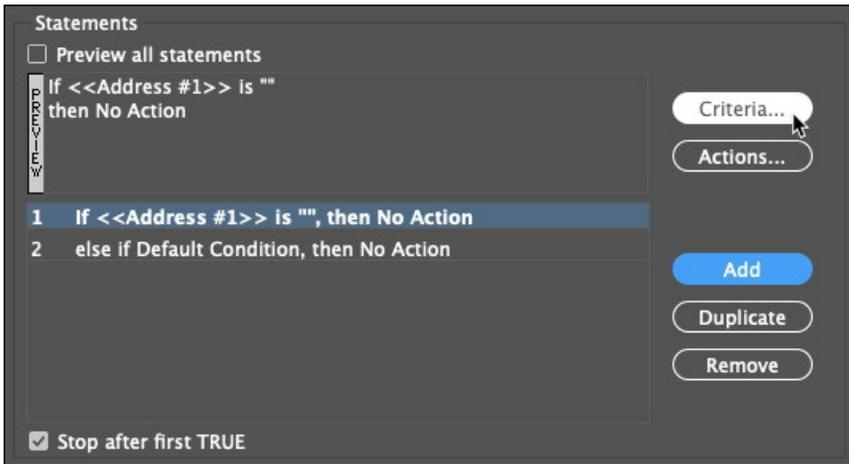


## Edit the Statement's Criteria

A statement associates a set of criteria with a set of actions. The criteria you specify will either be True or False. If the criteria evaluates to True for a given data record, then the actions associated with that criteria are performed. You will add the actions for this statement in a later step. To specify the criteria for this statement, do the following:

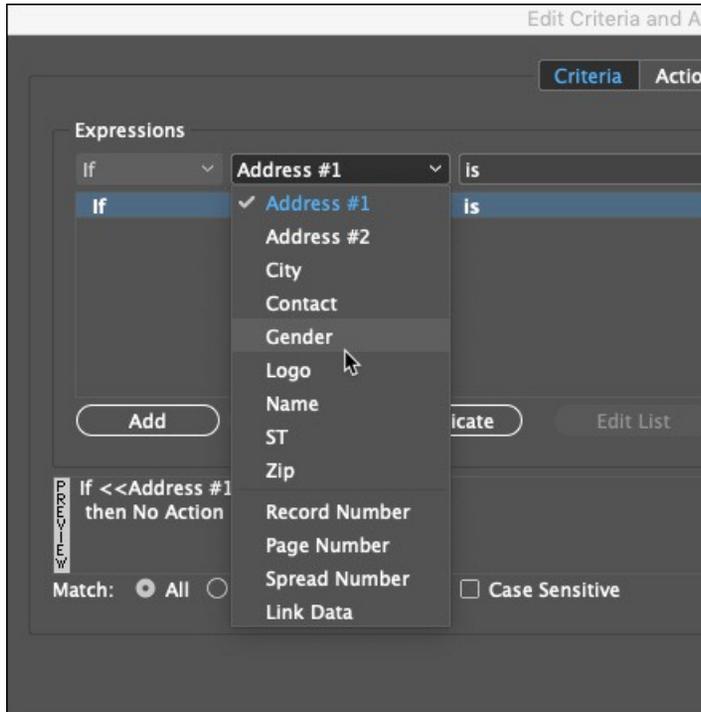
**1) Highlight the first statement and click the Criteria button.**

To edit a statement's criteria, click on the statement in the **Statements** list and then click the **Criteria** button, as shown below (this opens the **Edit Criteria and Actions** window, which is described in the following steps):



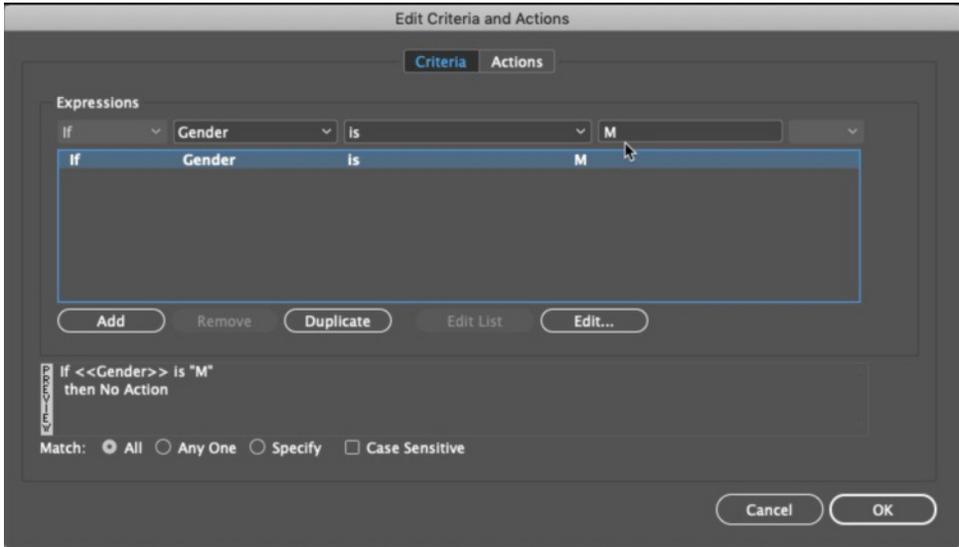
**2) Select Gender from the Variable Link popup menu for the current expression.**

This determines which data the currently selected expression will evaluate. You may select any Variable Link, including Variable Links that will not be assigned to content in the document. For this example, you will set up this Link Rule to evaluate the “Gender” Variable Link’s data, as shown below:



**3) Select is from the Qualifier popup menu and enter “M” for the value.**

This sets the expression to evaluate if the Gender field “is” (i.e. exactly contains) the letter “M”. If the Gender field has a “M” as the only character, then this criteria evaluates to True. You have finished setting up the criteria and will set up the statement’s actions next. The **Edit Criteria and Actions** window should now look like this:



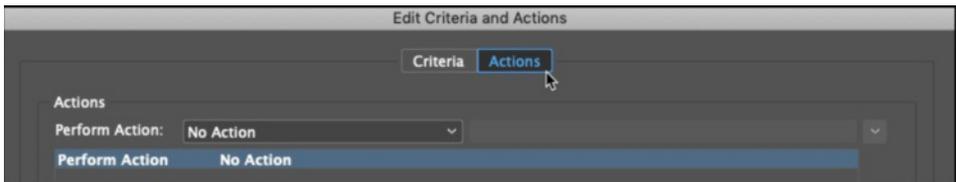
### Edit the Statement’s Actions

When a statement’s criteria evaluates to True for a data record, then the actions associated with that criteria are performed. The actions that are available for selection depend upon the Rule’s type (Link, Frame, or Page), as described earlier.

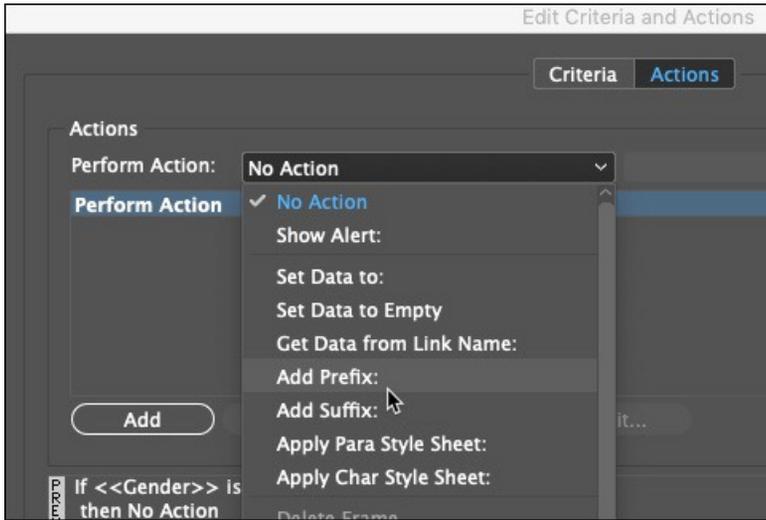
To set the actions for this statement to add “Mr.” as a prefix, do the following:

**1) On the Edit Criteria and Actions window, click the Actions tab.**

Click the **Actions** tab to edit the actions for the statement, as shown below:

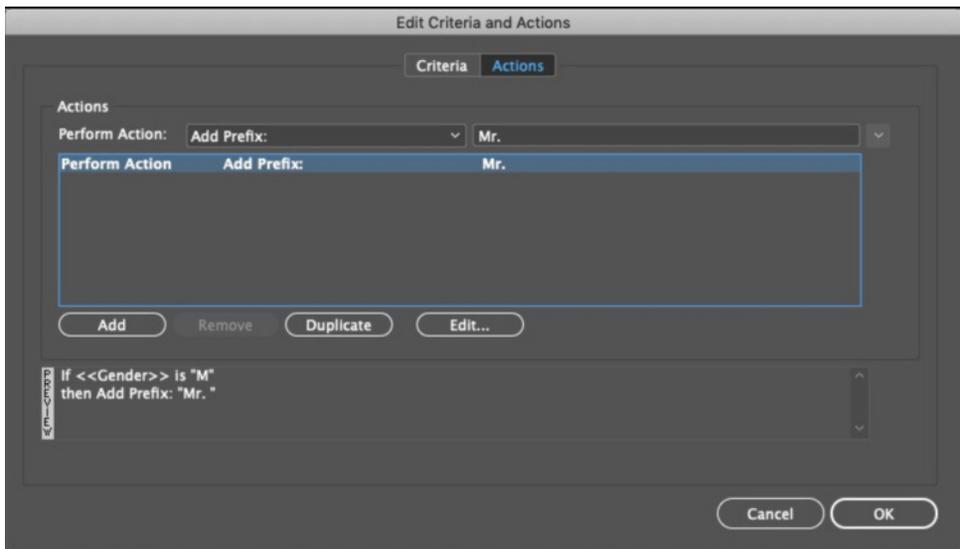


2) Select **Add Prefix** from the **Perform Action** popup menu.



3) Enter "Mr. " in its corresponding frame.

Remember to enter one word space after the period in "Mr." so there will be a single space inserted between the salutation "Mr." and the merged Link's data. The **Actions** window should now look like this:



**4) Click the OK button.**

This returns you to the **Rules** window where you will set up the second statement for this Rule in the following set of steps.

## Add a Statement to Insert "Ms." as a Prefix

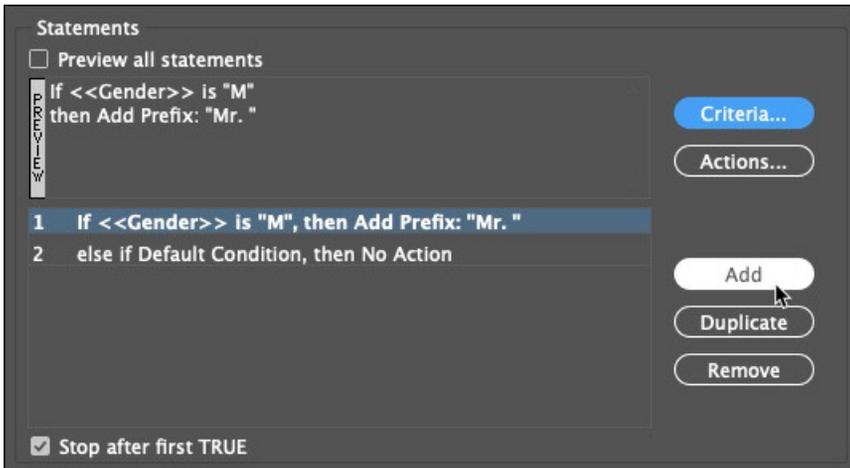
Now you will add a statement to insert the prefix "Ms." when the "Gender" data is "F", as shown below:

```
else if <<Gender>> is "F", then Add Prefix: "Ms. "
```

To add this new statement, do the following:

**1) On the Rules window, click the Add button.**

The new statement will be displayed in the **Statements** list, as shown below:

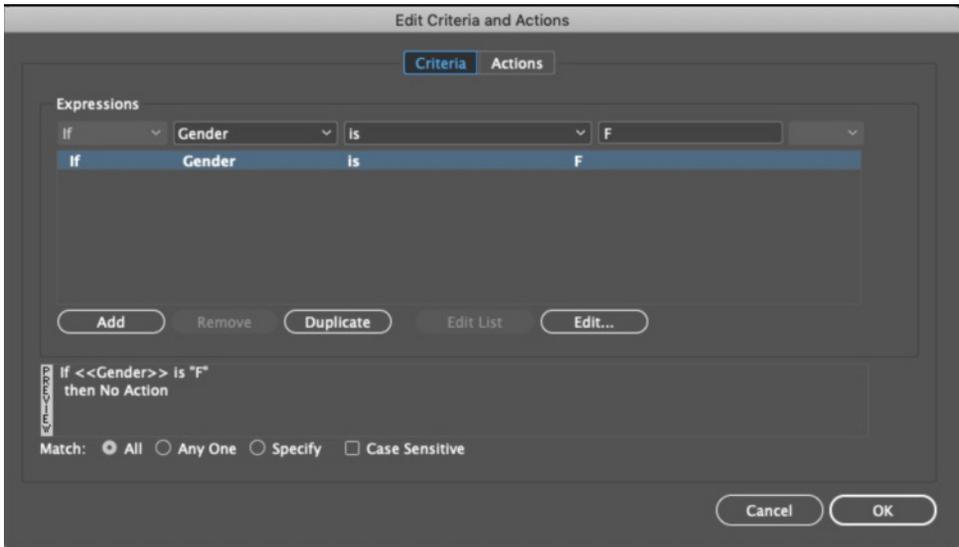


**2) Highlight the new statement and click the Criteria button.**

**3) Select Gender from the Variable Link popup menu.**

4) Select **is** from the **Qualifier** popup menu and enter **"F"**.

The **Edit Criteria and Actions** window should now look like this:

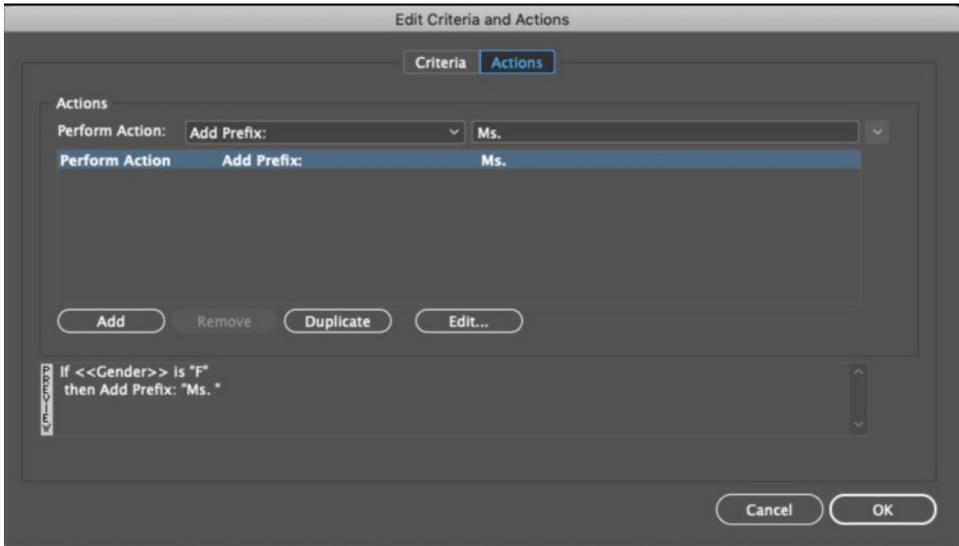


5) Click the **Actions** button.

6) Select **Add Prefix** from the **Perform Action** popup menu and enter **"Ms. "**.

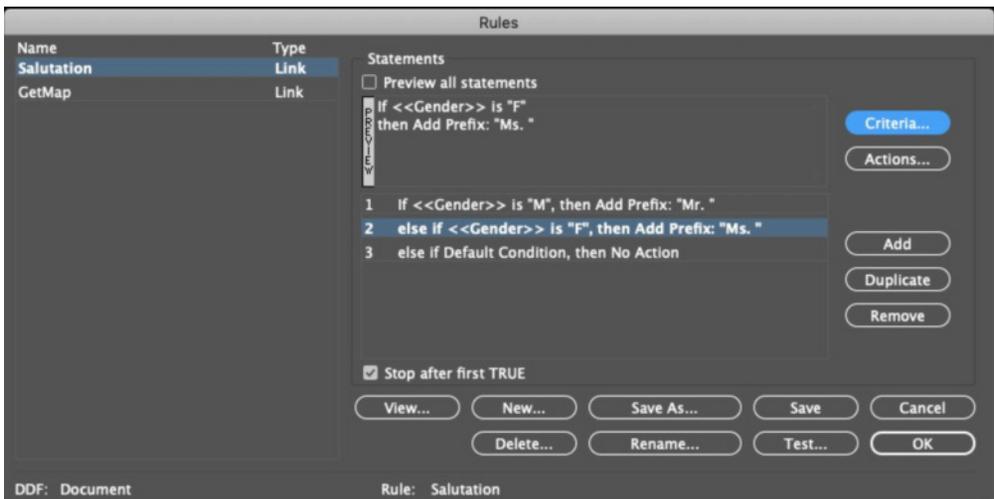
Remember to enter one word space after the period in "Ms." so there will be a single space inserted between the salutation "Ms." and the merged Link's data.

The **Actions** window should now look like this:



7) Click the **OK** button.

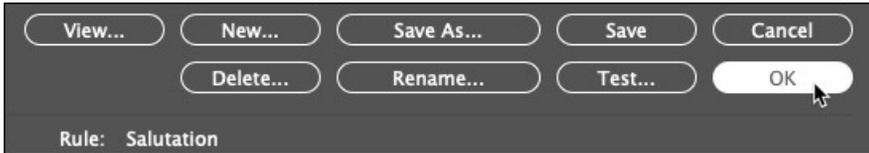
This returns you to the **Rules** window. With the “Salutation” Link Rule highlighted in the list, the **Rules** window should now look like this:



## Save the New Set of Rules

You have finished setting up the “Salutation” Link Rule and are ready to save these changes to the DDF. To save the new set of Rules, do the following:

- 1) Click the **OK** button to save the changes and close the **Rules** window.



- 2) Select **Save** from the **File** menu to save the changes in this document.

This stores the modified DDF in the document. Next, you will assign the “Salutation” Link Rule to the “Name” Link in the document.

## Assign the “Salutation” Rule to the “Name” Link

You can use the **AccurioPro** panel to assign a Link Rule to a Link.

**1) If the **AccurioPro** panel is not showing, open it.**

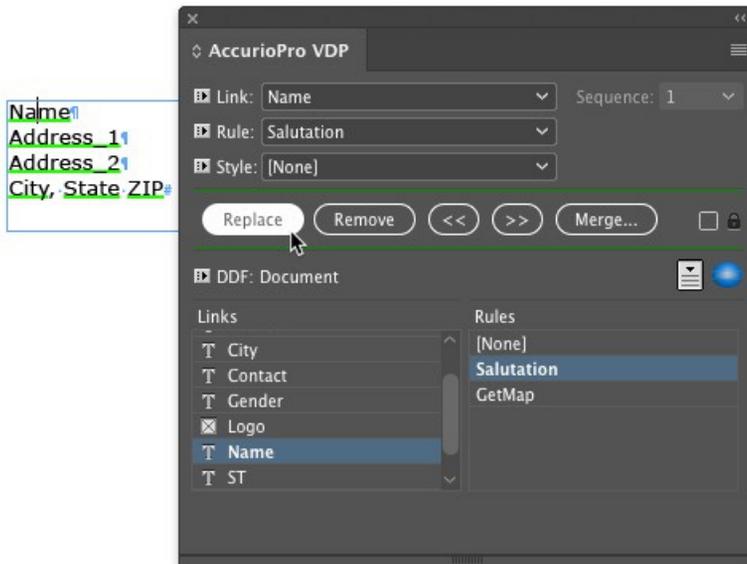
To open the panel, select **View** ⇒ **AccurioPro Panel** from the **AccurioPro** menu.

**2) Use the **InDesign Type T** tool to click once in the middle of the “Name” Link that is already in the document.**



**3) Select “Salutation” from the **Rule** popup menu on the **AccurioPro** panel.**

The panel should now look like this:



**4) Click the **Replace** button on the panel.**

Clicking **Replace** replaces the existing link with a new one that has **both** the “Name” Link and also the “Salutation” Rule assigned to it. Now that you’ve seen how to assign a Link Rule to a Text Link, you will next assign a Link Rule to a Picture Link.

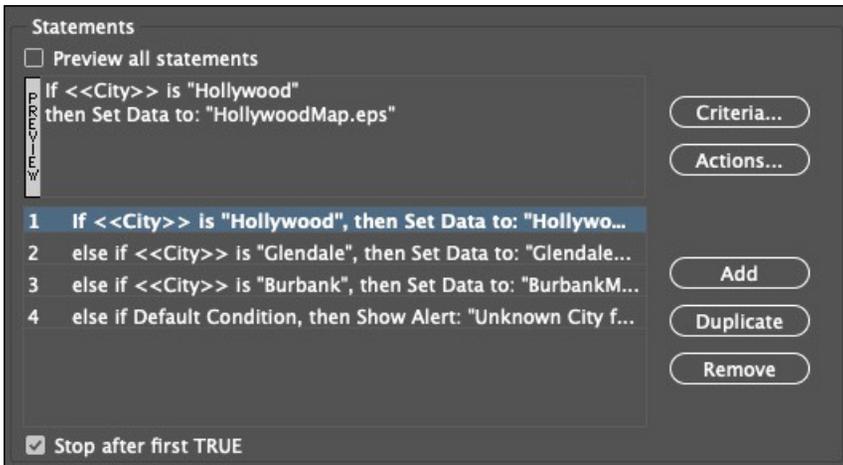
## Using a Link Rule for a Picture Link

As mentioned earlier, this tutorial's DDF has some Rules that were already created for it. One of these Rules is a Link Rule called "GetMap". The "GetMap" Rule will determine which map is merged into the document by evaluating the "City" that is being merged. The Rule will examine the name of the City and then specify the name of a map image file to use for the merge. You can see the "GetMap" Rule (and others) on the **Rules** window, which provides several views of a Rule and also provides the ability to test a Rule before merging.

### View the "GetMap" Link Rule

To view the "GetMap" Link Rule, do the following:

- 1) From the **AccurioPro** menu, select **Setup** ⇨ **Rules** to open the **Rules** window.
- 2) Click on **GetMap** in the list to display its statements in the **Statements** list.

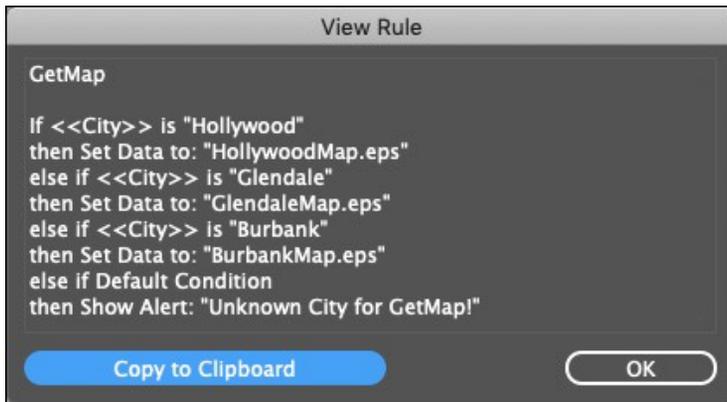


Check the **Preview all statements** option to see **all** of the Rule's statements in the **Preview** box on the **Rules** window. If unchecked, the **Preview** box displays the currently-selected statement by itself.

3) Click the **View** button.



4) The **View** window displays all of the Rule's statements in a larger window.



5) When done, click the **OK** button to close the **View** window.

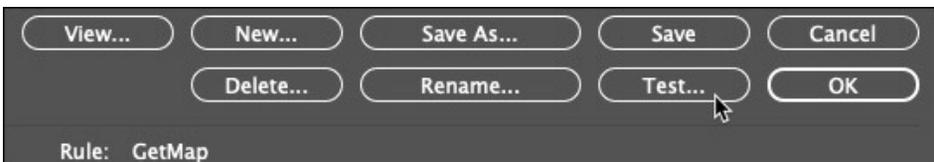
This returns you to the **Rules** window.

## Test the “GetMap” Link Rule

You can test a Rule against your “live data” to see how AccurioPro will evaluate the Rule when merging. It can be very helpful to test a Rule before merging to determine if it will return the results you expected.

To test the “GetMap” Link Rule, follow the steps below:

1) Click on **GetMap** in the list to select it, and then click the **Test** button.

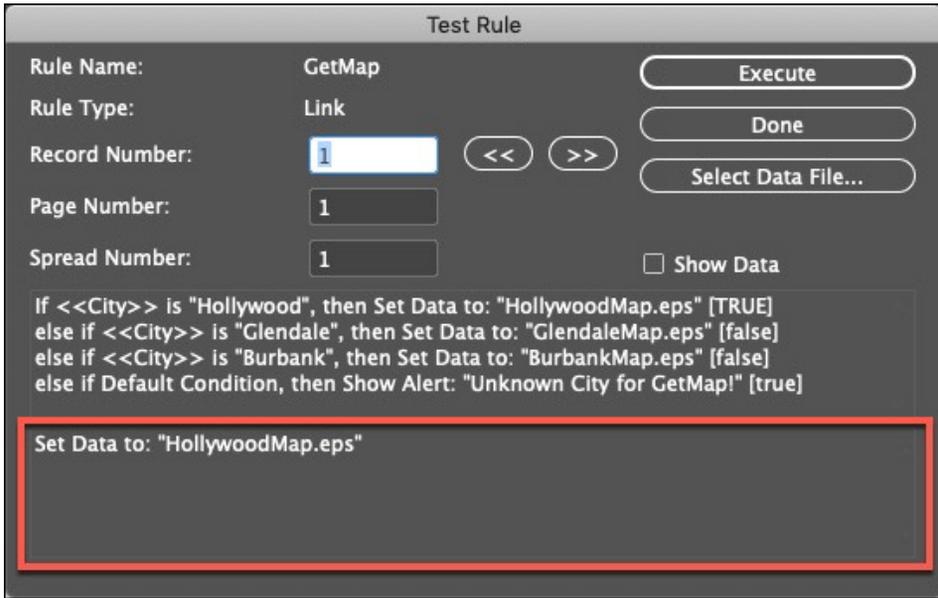


**2) If prompted for the data file, select “Form Letter.txt”.**

The “Form Letter.txt” data file exists in the “1) Form Letter” Tutorial Files folder, as described in **Tutorial #1a**.

**3) Examine the test results for the first record.**

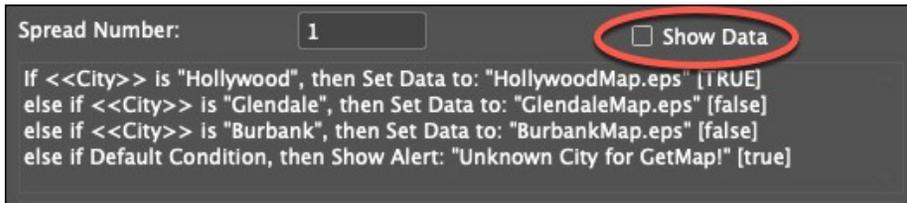
The **Test Rule** window first displays results for the first record, as shown below:



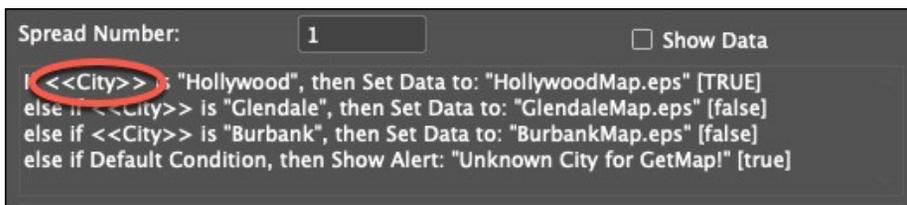
The top of the **Test Rule** window shows the number of the Record that the Rule is testing. There is also a Preview area on the bottom of the **Test Rule** window. Its top scroll box previews the Rule with the current data. If you see a statement that has “[**TRUE**]” at the end of it, this means that the statement evaluates to True and will apply the actions associated with it. If a statement evaluates to True but will not apply its actions, you will see the word “[**true**]” in lower case. Otherwise you will see the word “[**false**]”. The bottom scroll box in the Preview area shows the Action that this Rule will perform (if any) on the current data.

For example, let’s look at the test results for the first record in the picture above. The data for the “City” Variable Link for the first record is “**Hollywood**”. Therefore, the first statement in this Rule that evaluates to True is the statement whose criteria is: If <<City>> is “Hollywood”. Since this statement’s criteria evaluate to True, the Rule will perform its actions: the Rule will set the data for a Link to the file name “HollywoodMap.eps”. This Rule has been set to stop processing statements after the first True statement, so this is the only statement that the Rule will process. If this Rule is assigned to a Picture Link, this Link will display the “HollywoodMap.eps” picture when merged with data from the first record.

4) Check the **Show data** option, shown circled in the picture below.



When **Show data** is not checked, the **Test Rule** window displays the name of the Variable Link that the Rule is testing, as shown below:



When **Show data** is checked, the **Test Rule** window displays the actual data that the Rule is testing, as shown below:



5) **Scroll through the records.**

You can click the  ("Forward") and  ("Backward") buttons to test the "GetMap" Link Rule against other records in the data file. Additionally, to evaluate a particular record, enter its **Record Number** in the corresponding box and click the **Execute** button. For example, looking at the test results for the second record, the data in the "City" Variable Link is "**Glendale**", so the "GetMap" Link Rule will set the data to the file name "GlendaleMap.eps".



To evaluate a particular **Record Number**, **Page Number** or **Spread Number**, enter the number in the corresponding box and click the **Execute** button.

**6) Click the Done button to close the Test Rules window.**

When finished testing, click the **Done** button to return to the **Rules** window. You will assign the “GetMap” Link Rule to a Picture Link in the next set of steps.

**7) Click the OK button to close the Rules window and return to the document.**

## Assign the “GetMap” Rule to a Picture Link

Follow the steps below to assign a Variable Link with the “GetMap” Link Rule to a picture frame in the document:

**1) If the AccurioPro panel is not showing, open it.**

To open the panel, select **View** ⇒ **AccurioPro Panel** from the **AccurioPro** menu.

**2) Use the InDesign Selection  tool to click on the “Map” picture in the document.**

The “Map” picture frame is in the bottom right corner of the page.



**3) Select City from the Link popup menu on the AccurioPro panel.**

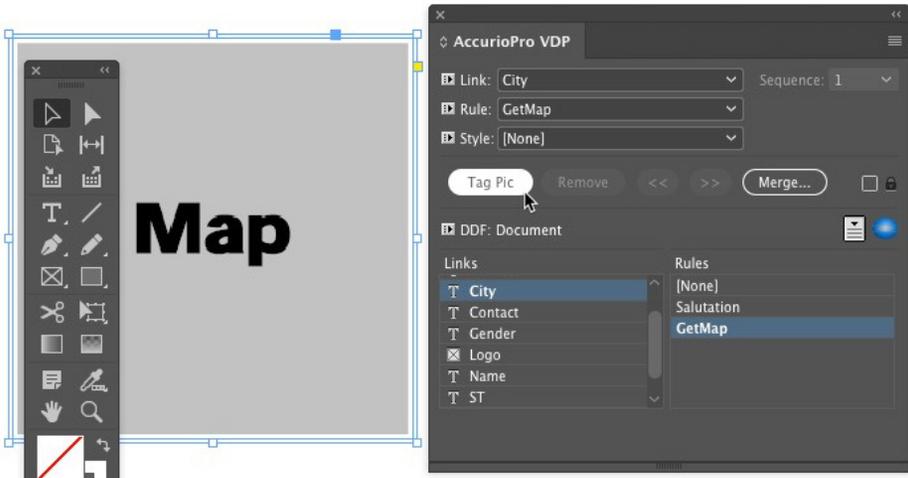
Note that you can assign any Variable Link to this picture frame — it doesn’t matter because it is the “GetMap” Link Rule that will determine which data the Link will receive — the data from the data field for the Variable Link will actually be ignored (or technically, replaced) by the Rule.

Optionally, if you prefer, you can instead add a new Variable Link to the list of Variable Links that are available in this document’s DDF. To do this, open the **Variable Links** window (**AccurioPro** ⇒ **Setup** ⇒ **Variable Links**). Click the **New** button on the bottom right area of the **Variable Links** window. Enter a name (for example, “map”) for the new **Variable Link** and click **OK**. The name of your new Variable Link will now be in the list of Variable Links on the left side of the **Variable Links** window. Select this new “map” Variable Link in the list to access its settings on the right side of the window, where you can, for example, select **City** for its **Field** and set its **Link Type** to **Picture**. When ready, click **OK** to close the Variable Links window. You can now select your new “map” Variable Link from the **Link** popup menu on the **AccurioPro** panel.

**4) Select GetMap from the Rule popup menu on the panel.**

5) Click the **Tag Pic** button on the panel.

Click **Tag Pic** to assign the “City” Variable Link and the “GetMap” Link Rule to the “Map” picture frame, as shown below:



## Previewing Data with Rules

As described in **Tutorial #1a**, you can run **Data Preview** to preview merge results. The preview will include the results from any Rule assignments.

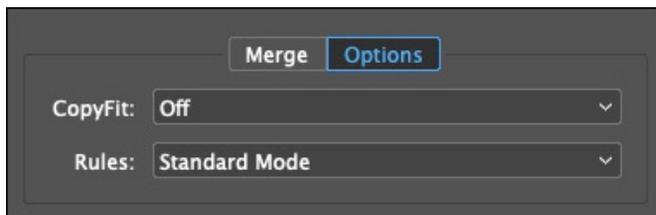
### Preview Data with Rules

To preview data, do the following:

- 1) **Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).**  
This opens the **AccurioPro** window.
- 2) **For the Records, select All, check Skip Header Row, and select Step by: 1.**  
The **Step by** option should be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.
- 3) **For the Merge Action, select Data Preview.**  
This determines how AccurioPro will process the records.
- 4) **Show the merge options on the window.**  
To see options for this merge session, click the **Options** button.
- 5) **For the Options, select Off for CopyFit, and select Standard Mode for Rules.**  
Since this VDP job does not need to apply **CopyFit**, you can select **Off**, the default setting which allows for fastest performance.

Next, this VDP job does need to process Rules, so leave **Rules** set to **Standard Mode** (its default setting). This mode will allow for fastest performance when Rules are being processed. This tutorial will introduce the other mode, **Interactive Mode**, in a later set of steps.

Your settings for **Options** should look like those in the picture below:

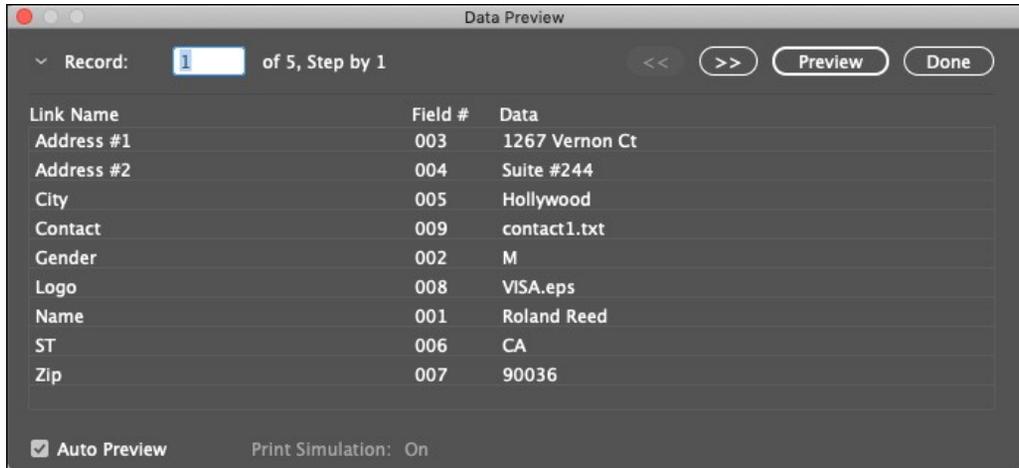


**6) Click the Start button and, if prompted for the data file, select “Form Letter. txt”.**

The “Form Letter.txt” file exists in the “1) Form Letter” Tutorial Files folder, as described in **Tutorial #1a**.

**7) Examine the preview.**

For a **Data Preview**, AccurioPro opens a **Data Preview** window. As described in **Tutorial #1a**, the **Data Preview** window lets you view the data in the fields assigned to Variable Links in the DDF, as shown below for this tutorial:



The **Data Preview** window displays the data in its original state — as the data would appear before Rules-processing and merging. To preview the data in the document after Rules-processing and merging, click the **Preview** button (or check the **Auto Preview** option in the lower/left corner before stepping to another record). This merges the record into the document so you can preview the result.

**8) Check the Rules that you created.**

As you step through the records, the document preview will automatically be updated. You should notice the following effects of the Link Rules you have assigned:

- The “GetMap” Link Rule (assigned to the “City” Link in the “Map” picture frame) imports the map that corresponds to the city where the recipient lives.
- The “Salutation” Link Rule (assigned to the “Name” Link in the Inside Address frame) inserts the appropriate salutation for each recipient.

## Form Letter Tutorial — Part Two — Using Rules

For example, see the preview of the first record below, which has added the salutation “Mr. ” to the Name link and set the map graphic to “HollywoodMap.eps”

The image shows a preview of a credit card application letter. At the top left is the Los Angeles Metropolitan Bank logo. The header includes the bank name and address: "Los Angeles Metropolitan Bank", "117 8th St. On-Site Bankwest Hollywood Center 90028". A "VISA" logo is on the right. The recipient's name and address are: "Mr. Roland Reed", "1827 - Person - CH", "Suite #2148", "Hollywood, CA 90028". The letter body contains a greeting, a thank you, and details about the credit card approval, including an interest rate of 9.9% and a 12% A.P.R. A signature and the "LAMB Bank Cards Department" name are present. The contact information for Mr. Steven James is listed. A map graphic of Hollywood, CA, with a red star at the "Hollywood Branch" location, is circled in red.

And here is the preview of the second record, which has added the salutation “Ms. ” to the Name link and set the map graphic to “GlendaleMap.eps”

The image shows a preview of a credit card application letter. At the top left is the Los Angeles Metropolitan Bank logo. The header includes the bank name and address: "Los Angeles Metropolitan Bank", "117 8th St. On-Site Bankwest Hollywood Center 90028". A "Master Card" logo is on the right. The recipient's name and address are: "Ms. Cindy Gleed", "8272 - Branch - CH", "2148 - Branch - CH", "Glendale, CA 91216". The letter body contains a greeting, a thank you, and details about the credit card approval, including an interest rate of 9.9% and a 12% A.P.R. A signature and the "LAMB Bank Cards Department" name are present. The contact information for Ms. Annie Wesley is listed. A map graphic of Glendale, CA, with a red star at the "Glendale Branch" location, is circled in red.

9) When ready, click the **OK** button to close the **Data Preview** window.

## Test Rules Using “Interactive Mode”

AccurioPro provides a special “Interactive Mode” that you can use to test the Rules you have assigned. When merging in Rules Interactive Mode, AccurioPro will interrupt the merge session each time it encounters a Rule to display a preview of that Rule.

To test merging in Rules Interactive Mode, follow the steps below:

- 1) **Select Save from the File menu if you have not already done so.**

This will allow you to revert the document if you wish to do so after testing.

- 2) **Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).**

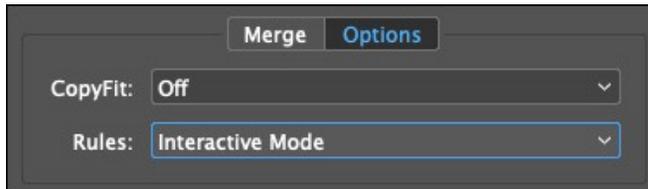
- 3) **For the Records, select All, check Skip Header Row, and select Step by: 1.**

The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

- 4) **For the Merge Action, select Data Preview.**

- 5) **For the Options, select Off for CopyFit, and select Interactive Mode for Rules.**

To see options for this merge session, click the **Options** button. Your settings for **Options** should look like those in the picture below:



- 6) **Click the Start button and, if prompted for the data file, select “Form Letter. txt”.**

This starts the merge session. When merging in Rules Interactive Mode, AccurioPro will interrupt the session each time a Rule is encountered to preview the Rule.

**7) Examine the preview of the Rule on the Test Rule (Interactive Mode) window.**

When you are using Rules in Interactive Mode, each time a Rule is about to be processed, a window will be presented with a preview of the Rule that is being processed. This window is the same as the window described earlier, when we initially created the Rules.

The **Test Rule** window will show you exactly how AccurioPro will evaluate the Rule that is being processed. For example, when merging the sample document in this tutorial, you will first see the preview for the “GetMap” Rule for the first record, as shown below:

If you want to see the actual data values that are being examined by the Rule, check the **Show Data** option that is to the right above the Statements List box on this window. You will note that each Link reference will change into an actual data value. As an example, with the Show Data option enabled for the first record, the value for “<<City>>” will be shown as “Hollywood”. This is because the value for the City field for the first record is the text “Hollywood”.

If a Rule statement ends with the text “[TRUE]” in all capital letters, that statement will be the one that is executed for the current record. Whatever “Action” has been assigned to that statement will be shown in the box at the bottom of the window. In the example above, the statement (If <<City>> is “Hollywood”, then Set Data to: “HollywoodMap.eps”) is the one that is TRUE, so the Action to be taken is that the data to be merged is set to the filename “HollywoodMap.eps” by the Rule. AccurioPro will then merge this graphic.



You can turn off the Interactive Mode by unchecking the **Interactive Mode** option before clicking **Execute**. Clicking **Cancel** will merge the data without executing the Rule, while **Cancel Session** will cancel the current merge session and return you to your document.

**8) Click the Execute button to apply the Rule and continue merging.**

When you click the **Execute** button, the Rule that is being displayed will be executed, and any resulting Action will be applied to the document. In the previous example, clicking the **Execute** button will cause the graphic image “HollywoodMap.eps” to be merged into the picture frame to which the Rule had been applied.

**9) Continue previewing and executing Rules until all have been processed.**

As the **Data Preview** continues, each Rule will present the **Test Rule** window before it is processed. Continue to click the **Execute** button to execute each of the Rules. Once all of the Rules for a given record have been processed, the document will display the data from the first record, as shown below:



Notice the following results of the Rules assigned in this tutorial:

- The “GetMap” Link Rule imported the map for the Hollywood Branch.
- The “Salutation” Link Rule has added the salutation “Mr.” to the name in the Inside Address text frame.

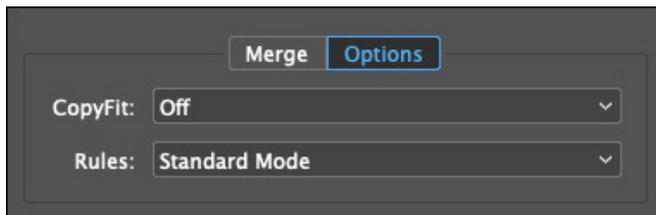
**10) Continue previewing additional records.**

When you advance to the next record in **Data Preview**, the Rules will continue to be displayed before they are executed. To turn off Interactive Mode (and return to Standard Mode), uncheck the **Interactive Mode** option on the **Test Rules** window.

**11) When ready, click the Done button to close the Data Preview window.**

## Return to “Standard Mode” Rules Processing

Generally speaking, you will only need to use Interactive Mode for your Rules if you are testing them or trying to diagnose a problem. When you want to return to Standard Mode (which does not display the **Test Rule** window for each Rule), simply select **Standard Mode** from the **Rules** dropdown menu the next time you start up a Merge session, as shown in the picture below (you will be doing this in the next set of steps in this tutorial):



## View Link Rule Assignments

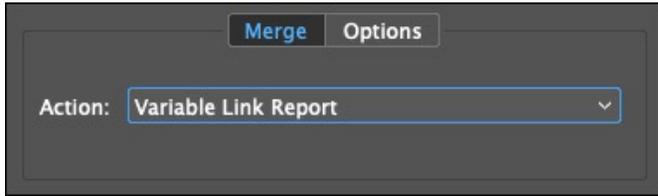
If you would like to see which Link Rules have been used in your document, you can run a Variable Link Report which was introduced in Tutorial #1a. Follow the steps below to run a report on this tutorial:

**1) Select Merge from the AccurioPro menu (or click Merge on the AccurioPro panel).**

**2) For the Records, select All, check Skip Header Row, and select Step by: 1.**

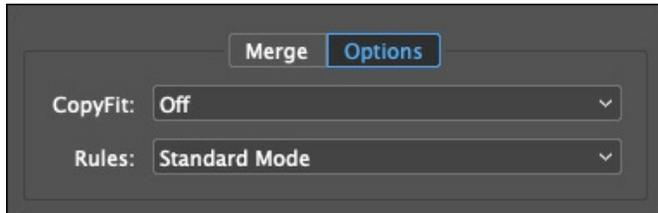
The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.

3) For the **Merge Action**, select **Variable Link Report**.



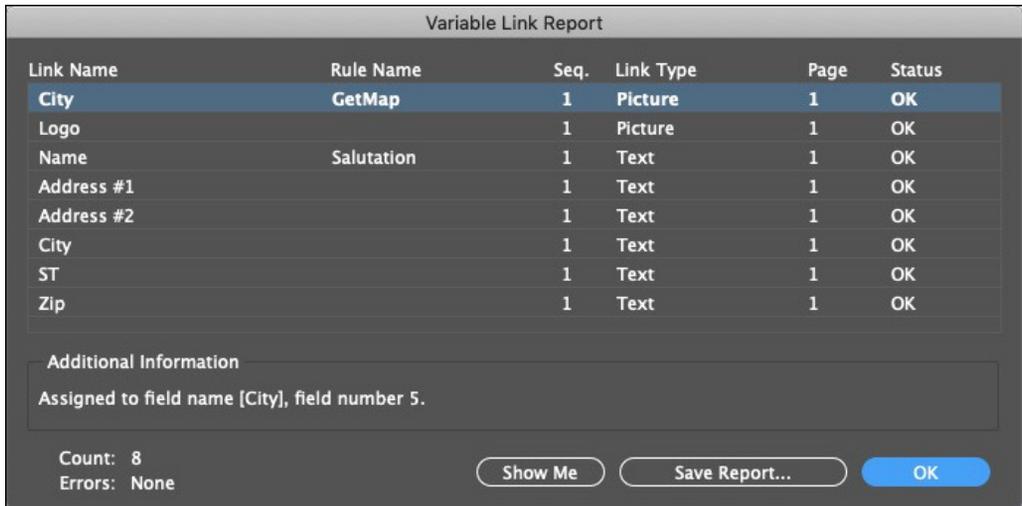
4) For the **Options**, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

To see options for this merge session, click the **Options** button. Select **Standard Mode** for Rules if you have not already done so. The settings for the **Options** should now look like the settings in the picture below:



5) Click the **Start** button.

AccurioPro opens the **Variable Link Report** window, which displays information about each Link in the document, including the name of any Rule that has been assigned to it, as shown below:



Link Name	Rule Name	Seq.	Link Type	Page	Status
City	GetMap	1	Picture	1	OK
Logo		1	Picture	1	OK
Name	Salutation	1	Text	1	OK
Address #1		1	Text	1	OK
Address #2		1	Text	1	OK
City		1	Text	1	OK
ST		1	Text	1	OK
Zip		1	Text	1	OK

Additional Information  
Assigned to field name [City], field number 5.

Count: 8  
Errors: None

Show Me Save Report... OK

6) When ready, click the **OK** button to close the **Variable Link Report** window.



To find a particular Link in the document, highlight the Link in the list and then click the **Show Me** button. This will show you where that Link is in the document.



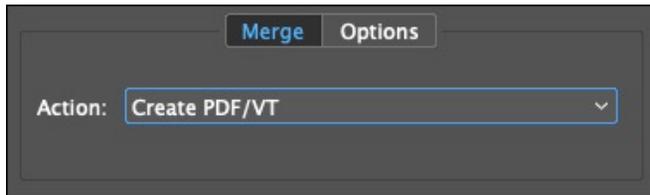
To save the Variable Link Report, click the **Save Report** button.

## Produce Variable PDF Output

You are done creating and testing all of your Links and Rules for this job, so now all that is left is to produce some type of output. This section describes the steps necessary to produce a multiple page PDF file, where each page of the PDF document contains the variable data output for a single record of data.

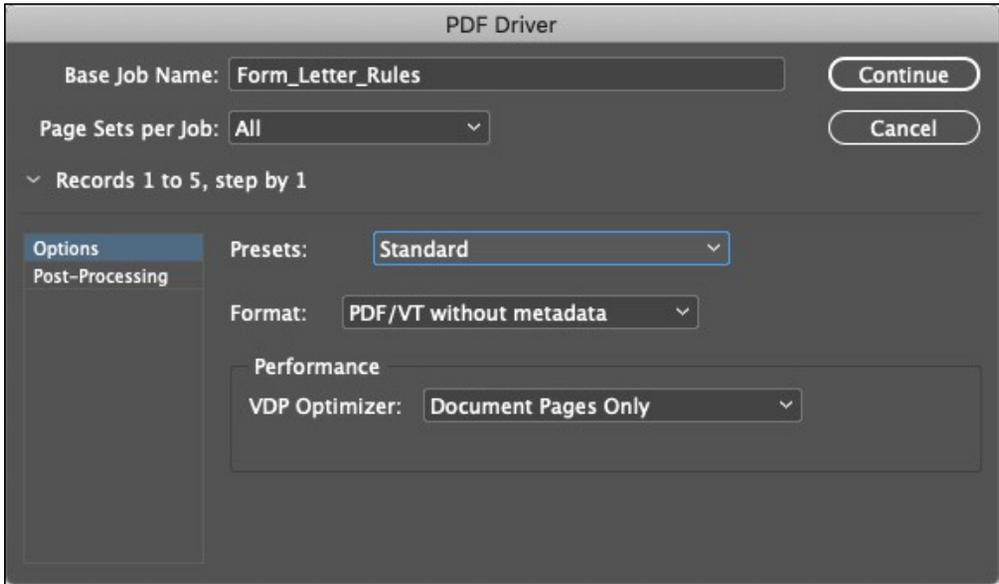
Follow the steps below to print merged output in PDF format:

- 1) Select **Merge** from the **AccurioPro** menu (or click **Merge** on the panel).
- 2) For the **Records**, select **All**, check **Skip Header Row**, and select **Step by: 1**.  
The **Step by** option should still be set automatically to the number 1 for this tutorial. If the default number is not the number 1, see **Tutorial #3** or start over with this tutorial.
- 3) For the **Merge Action**, select **Create PDF/VT**.



- 4) For the **Options**, use the same settings as before.  
To see options for this merge session, click the **Options** button. For this merge session, select **Off** for **CopyFit**, and select **Standard Mode** for **Rules**.

- 5) Click the **Start** button and, if prompted for the data file, select “Form Letter.txt”. This opens the **PDF Driver** window, as shown below:



- 6) Enter a **Base job name**.

This is the base for the file name(s) of the PDF output. By default, the **Base Job Name** is the name of the document, as described in Tutorial #1a. Keeping this default setting, the file name for this tutorial will be “Form\_Letter\_Rules\_1-5.pdf”. For information about output file naming preferences, see the **AccurioPro VDP Preferences** manual, available in PDF format in the “Supplemental Documentation” folder in AccurioPro VDP Documentation.

- 7) Specify “**All**” for the **Pages per job / Page Sets per Job**.

This feature allows you to control the number of jobs for the printer (in this case, PDF files) that will be created by this merge session. Selecting **All** will create one file that contains all of the merged pages. If you are running a Premium edition of the software, you may prefer to select **Specify** and enter a maximum number of page sets to “chunk” your output into multiple files to create jobs of a more manageable size.

- 8) Select **Standard** from the **Presets** popup menu.

The **Standard** Preset is provided for generic PDF/VT output and works for most digital printers and PDF applications. This selects settings on all of the panels on the **PDF Driver** window, whether a panel is visible or hidden at the time the Preset was selected.

**9) Click the Continue button and select printing options.**

After clicking **Continue**, the standard **Export Adobe PDF** window prompts you to select options for the PDF output. After you select an available **Preset**, choose the **PDF/X-4:2010 Standard** (this is required to ensure conforming PDF/VT output) and then choose any other options you normally would to produce a PDF of this document. When ready, click the **Export** button.

**10) Select a destination folder for the output and then click Save.**

This launches the merge session.

## Track the Merge Progress for PDF Output

During the merge process, you see a progress bar. You may click the **Cancel** button at any time to stop the merge session (or press **Command-Period** as you would to cancel a normal printing routine). Please note that it may take some time for AccurioPro to respond to a Cancel request as some of the printing processes cannot be interrupted.

## Review the Summary Report for PDF Output

When the merge session is finished, the original document returns and AccurioPro opens a window to display a summary report, which details all of the documents that were printed.

## The Final PDF

If successful, you should now have a PDF file called “Form\_Letter\_Rules\_1-5.pdf”. This PDF file will contain a total of 5 pages. Each page will contain the variable data for the corresponding record, and the Rules should have been applied to those pages as well. If correct, the PDF file may now be submitted to your digital press for printing.



*For detailed information on all of the features of the PDF Driver, see the **PDF Driver** manual, which is available in PDF format in the “Supplemental Documentation” folder in AccurioPro VDP Documentation.*

## Coming Up

That's it for the "Form Letter, Part Two" tutorial, which has covered setting up Rules to apply conditional processing a document when merging. You have seen how to create and assign the Link Rules. You have also reviewed how to test and preview Rules as well as how to merge data into a document with assigned Rules. For complete details, see the **AccurioPro Rules** manual, which is available in PDF format in the "Supplemental Documentation" folder in AccurioPro VDP Documentation.

### **AccurioPro VDP Premium Users**

The next tutorial, **Tutorial #1c**, covers three features that are available only in the **AccurioPro VDP Premium Edition**: Frame Rules, Page Rules, and Article Links. An Article Link merges the entire contents of a text file as a variable element. Frame and Page Rules apply condition logic processing to modify frames and entire pages while merging.

### **AccurioPro VDP Essential Users**

If you do not have a Premium version of the software installed, you may continue on to **Tutorial #2**, which discusses how to perform "Longest Line" testing to avoid an overflow in variable text frames in merged results and how to use the CopyFit module with AccurioPro to automatically fit text that is too long to fit within the designated space (a very common problem in Variable Data applications). You will also learn how to create a Variable Intelligent Mail Bar Code Link.