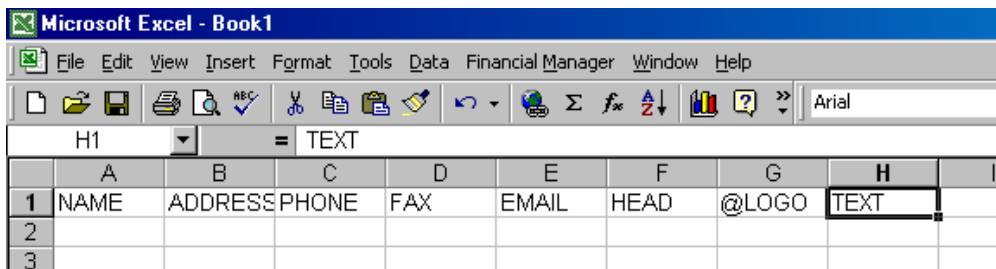


Handling ad bookings with PageMaker's Data Merge plug-in

Did you know you already have an ad-taking database on your computer? Well, provided you have a spreadsheet program such as Excel, and we are not talking of hundreds of ads on dozens of pages, that and PageMaker 7 can combine to produce an efficient ad maintenance system.

Here it is, in 10 steps:



The screenshot shows the Microsoft Excel interface. The title bar reads "Microsoft Excel - Book1". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Financial Manager, Window, and Help. The toolbar contains various icons for file operations and editing. The formula bar shows "H1" and "= TEXT". The spreadsheet grid has columns labeled A through I and rows 1 through 3. The data in the spreadsheet is as follows:

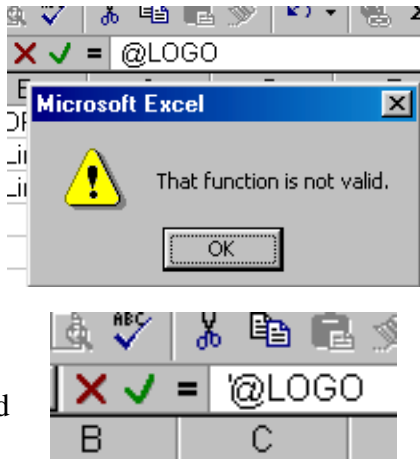
	A	B	C	D	E	F	G	H	I
1	NAME	ADDRESS	PHONE	FAX	EMAIL	HEAD	@LOGO	TEXT	
2									
3									

Within Excel

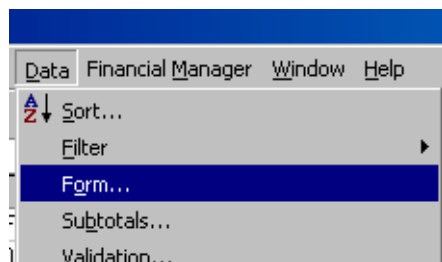
STEP 1: Create a new file in Excel and name the top row with the names for the various items of information. We've chosen NAME for the company name, and then the more or less self-explanatory ADDRESS, PHONE, FAX, EMAIL, plus HEAD for the headline to the ad, TEXT for the body copy, maybe PRICE if they are ads selling individual items, and LOGO for, well, the logo or maybe for a photo. Any of these can be duplicated such as ADDRESS 2 if you prefer to handle that in two parts (perhaps useful if you want to use the database for mailings as well, and perhaps CONTACT for the name of the person who booked the ad, even though you won't want this info to go in the ad.

Now here's the tricky part (well not really, but it is the bit likely to catch out anyone who isn't working from this cheat sheet). That LOGO tag will contain the filename (and maybe the path) of the logo or pic, so we have to

include a hint for PageMaker that this is a filename and you don't want an entry with lots of slashes and colons to go into the ad as text. To do this you need to put a strudel (that's the @ sign, or "commercial at" to be formal) in front of the tag name – and, here's the catch, Excel will want to treat this as a formula, so you put a single straight quote mark in front of that to tell Excel this is all text. (Yes that's right — the @ is there to tell PageMaker it isn't text, and the quote, ', is there to tell Excel that it is!)

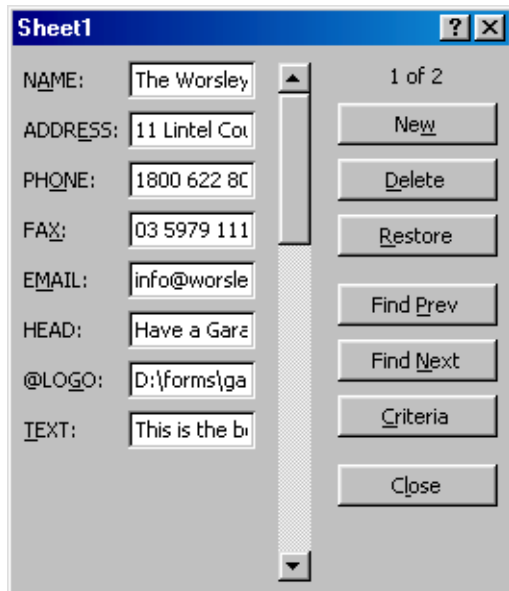


STEP 2: Go to the menu item Data and select FORM. Up will pop a data entry form with entry boxes for each column in the spreadsheet and buttons to select New Entries as well as others to enable you to go through the records one by one and a "Criteria" button.

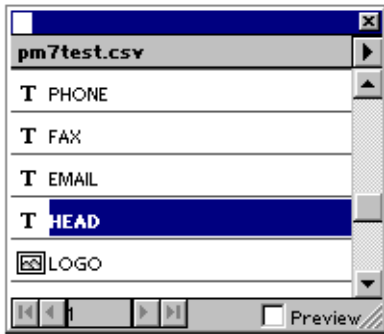


After clicking on the latter you can enter a word or partial word etc to Find. The entry boxes aren't the best for long entries such as the ad text, but, after all this is costing nothing — and we will suggest ways to improve it.

STEP 3: Save the file as a CSV (comma delimited file). You may get some strange messages warning about losing features but you haven't used anything special so there is nothing to lose by saving in .csv format. Once you have this file, if you open that, rather than an original .xls file, you will get just one warning box, to which you answer "Yes".



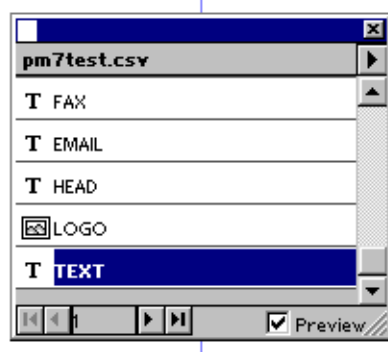
little flyout menu arrow on the right hand side just under the title bar. Clicking on this will give a menu with four items, the top one being Select Data Source... Clicking on this brings you to the common file open dialog, but labelled "Select Data Source". Navigate to the CSV file you saved in Step 3, and double click on this (or click once and select Open). The name of the csv file will appear below the title bar, and, in the main palette window will be your list of tags, with a "T" in front for those which are Text, and a little picture icon for those which are pictures, such as our LOGO tag.



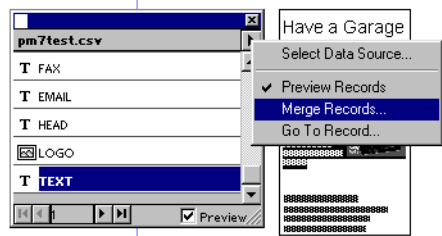
<<HEAD>>

STEP 7: In one of your ad boxes, click and drag the text cursor to indicate where you want the headline, and, back to the palette, click on HEAD. Where you left your text cursor, there will appear the name of the tag surrounded by double angle brackets: <<HEAD>>. Repeat this to place all the other tags you need. When you click on the [picture tag you will get a little pictureholder icon, looking very like a frame with a diagonal cross in it. Resize this as you like.

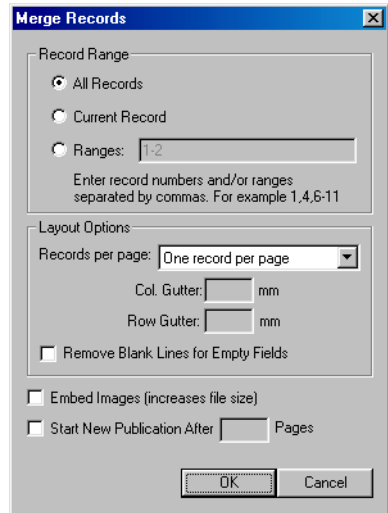
This whole process can be repeated with a second or third ad if you would like to see different options for the layout of each of your ads. Now allocate styles from the Style palette to the tags in the ads. For example, click in the <<HEAD>> tag on the page, and select the style Head1 in one ad and Head2 in the other. Repeat this allocating of styles to all the tags.



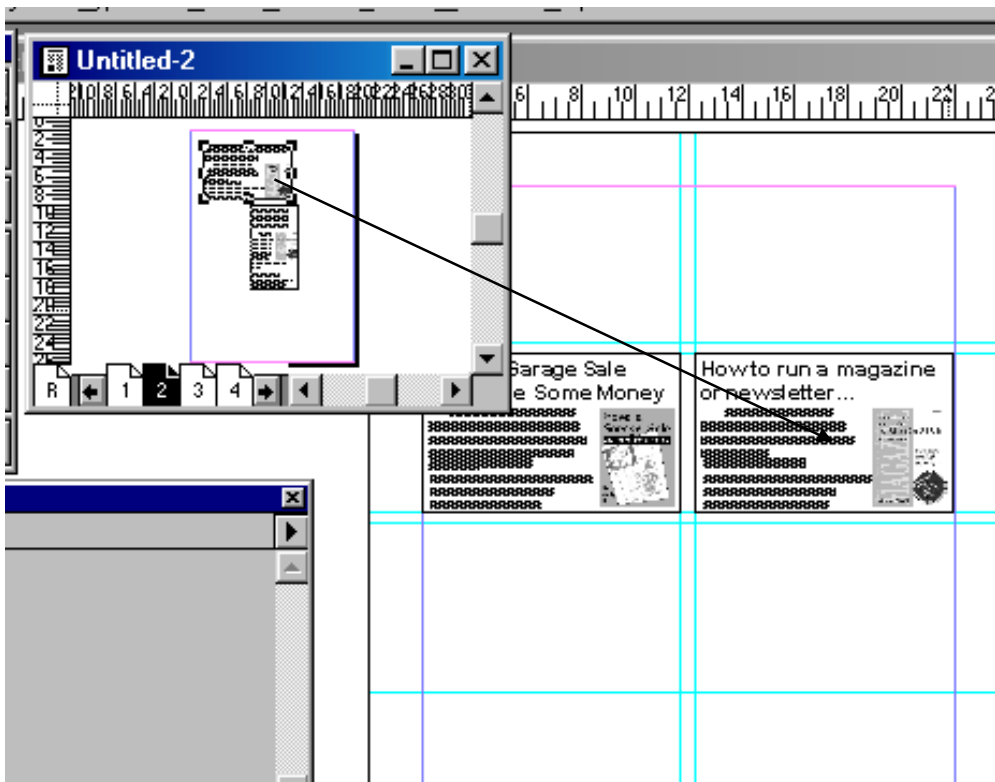
STEP 8: Click on the little preview box in the bottom of the Data Merge palette, or from the flyout menu select Preview Records. Now the actual entries for your first entry in the spreadsheet will appear. Click on the two way arrows at the bottom of the palette and you can preview each ad in turn, seeing each in several orientations within the page.



STEP 9: Select Merge Records... from the flyout menu and you will create a new file of multiple pages with each ad (or choice of ads) on a separate page.



STEP 10: Using this as if it was a library palette, resize the open window so you can see this and your ultimate destination page at the same time, and drag the selected ads one at a time from each page to their final placement on your page of trader ads, where



they will click into place against the rules you prepared earlier. Note that if only certain ads have to be replaced, you can select just a few records in the dialog box which opens when you select Merge Records.

You will need to make sure that the style definitions are the same in the file you create the datamerge from, and that which you drag the completed ads to.

As we said at the beginning, this is not the equivalent of multi-thousand-dollar ad systems, but it may well be sufficient for the smaller publication, maybe even for a smaller weekly newspaper.

If your original data file included ad pricing columns you could prepare another PageMaker file as an invoice and Data Merge to that once your publication is printed.

The next step

A next step in such a system would be to create a better entry screen in Excel (using Visual Basic for Applications, which is built into Excel), or to perhaps create a data entry system in Access or FileMaker. A macro could ensure that entries in the database are locked or protected for rows other than those for the entry via the entry form.

I'd welcome suggestions of other possibilities as I'm sure there are many that I haven't yet seen.

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This information will form the basis of a supplement to be issued for Newspaper Production using PageMaker 6.5 and will form the basis of a new chapter in Newspaper and Newsletter Production using PageMaker 7, to be published by The Worsley Press in late 2001. For details see The Worsley