

An Introduction to Data Merge

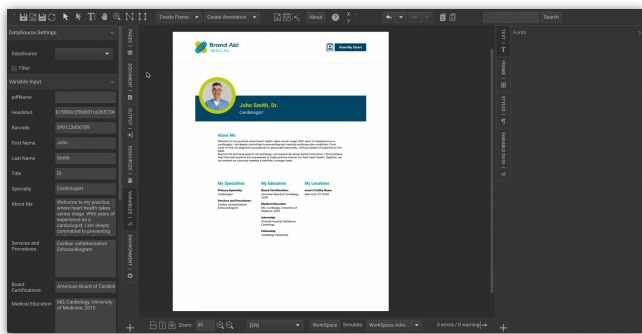
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Creative teams are regularly asked to create a barrage of deliverables from a single template, and the template might contain all kinds of variable data — like layout size, layout orientation, images, logos, brand colors, prices, CTAs, recipient names, languages, coupon codes, QR codes, and barcodes. Usually, spreadsheets house the data combinations that need to be applied to the template.

Tempo's Data Merge imports data from these spreadsheets to auto-populate a Smart Template's variable fields, so users can mass produce customized assets without needing designers to adapt the original concept one deliverable at a time.

Enable Data Merge in Your CHILI Document

Once you have finalized your artwork and assigned all of your required variables, enabling Data Merge is quick and easy! Navigate to the left-side panel and select the "Variables" tab. In the DataSource drop down at the top of the menu, select the "Data Merge" option.

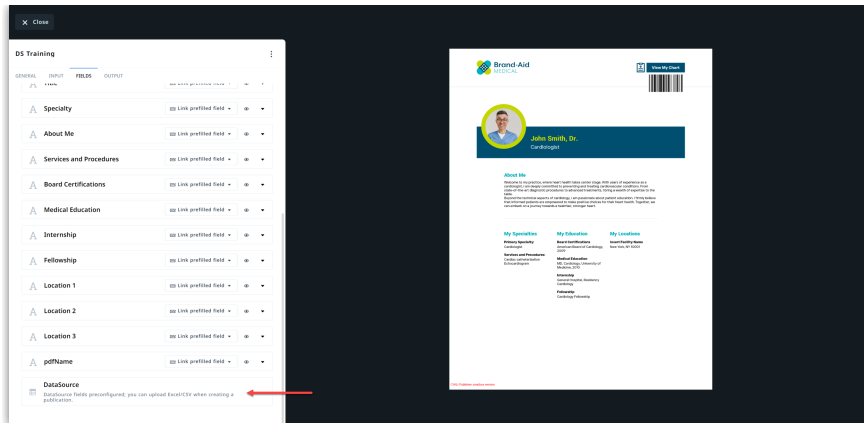


Once you have selected "Data Merge" from your dropdown, you will be presented with the option to upload a file. If you would like to preview your data source, you can do so by uploading your file. However, you will want to remove this preview prior to bringing your document into Tempo.

Configure Data Merge in Your Tempo Smart Template

Now that you have enabled Data Merge in CHILI, you are ready to configure your Smart Template in Tempo. You will take the usual steps to create your Smart Template; however, there are two main differences to note.

The first difference for your Smart Templates with Data Merge configured is the indicator at the bottom of the "Fields" section indicating DataSource has been enabled.

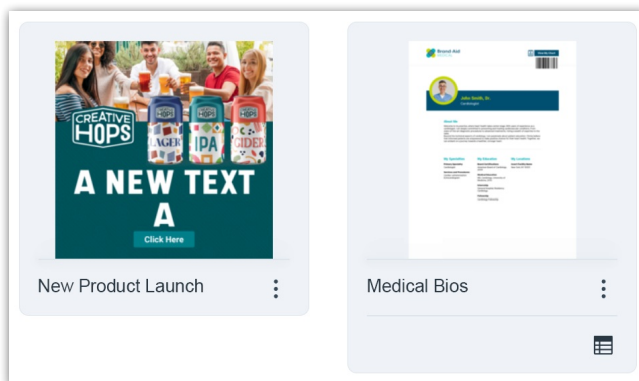


The second difference is in your “Output” section when choosing a PDF output. In this section, you will notice the only options here are PDF options that support Data Merge. If you notice a lack of options in the “PDF Export Settings” dropdown, it is because you will need to set up [Data Merge specific PDF Export Settings](https://guide.lytho.com/help/creating-a-data-merge-pdf-export-setting) (<https://guide.lytho.com/help/creating-a-data-merge-pdf-export-setting>) in your CHILI Back Office.

Once you have finalized your General, Input, Fields, and Output selections, you are ready to publish your Smart Template!

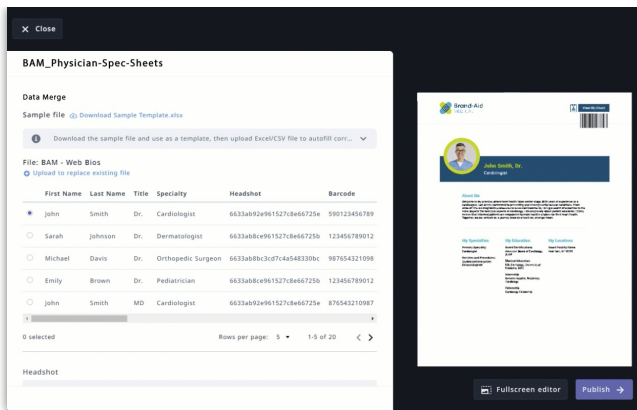
Apply a Data Merge Spreadsheet to Your Smart Template

When your end users are ready to create a publication from your Smart Template, they will easily be able to determine which templates have Data Merge enabled by the spreadsheet icon in the bottom right of the thumbnail.



Your end user will now create their publication by selecting the kabob menu above the spreadsheet icon and selecting “Create Publication.” Once the Smart Template is open for the end user to edit, they will be able to upload their Data Merge spreadsheet. If your end user is unsure which variables they will need to complete this publication, they can click the “Download Sample Template.xlsx” link, and Tempo will provide them a spreadsheet with columns specific to the Smart Template they are working on.

They can then fill out the spreadsheet, save it as an Excel file or CSV file, and click the “Upload file” button in the Smart Template. They will now see all the data they need to output from this file. They can go through each row to make sure all data is configured and showing correctly.



Once your end user has verified all information is correct, they are ready to hit Publish and choose their output settings, send for approval, or share this publication per your team's best practices.

NOTE: While the end user can type in to the variable fields on the left, it will NOT override the information coming in from the Data Merge spreadsheet. They would need to update the spreadsheet and re-upload the file.



Your data spreadsheet can have no more than 1001 rows: 1 title row and up to 1000 rows with data records.



All publication renders will start batching in sets of 50 after the first 50 renders. For example, if you have a publication with 50 pages or less, each page will generate a render. If you have a publication with 100 pages, it will generate 51 renders. A publication with 150 pages will generate 52 renders and so on.

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