

# DATA TO PDF VISUAL GUIDE

Visual user guide for Excel/CSV to personalised PDF generation

## What this website does

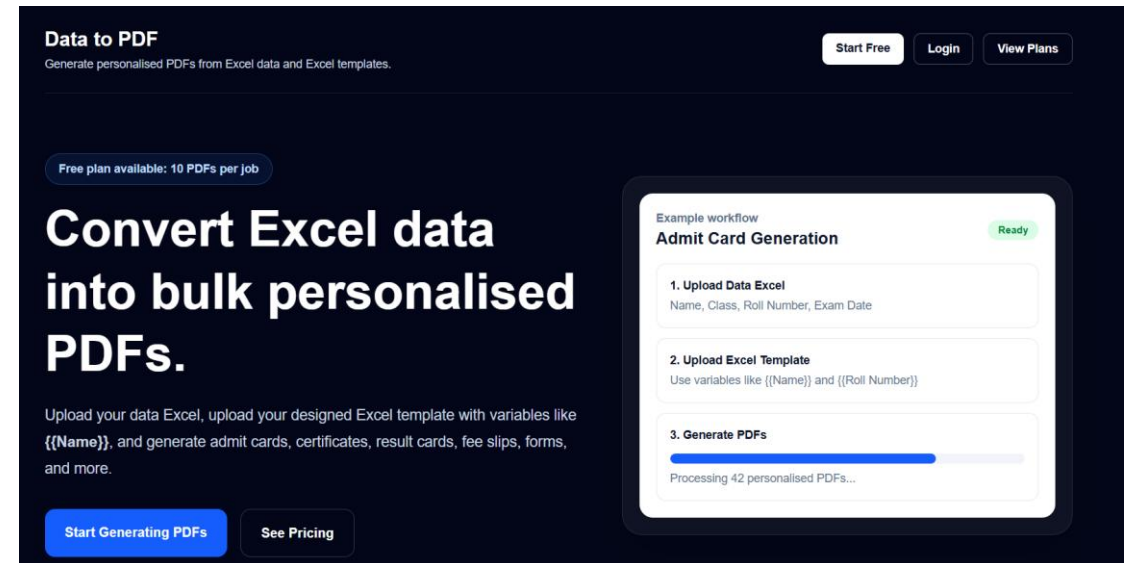
Upload a data file and a template file. The website creates separate PDFs for each row and gives a ZIP download.

## Accepted data formats

CSV and XLSX. The first row should contain clean column headers.

## Screenshot note

Screens are clean mock screenshots based on current flow. Replace with live screenshots after final UI lock.



# 1. Website flow in simple words

The website creates personalised PDFs from a data file and a template.

| Input         | Meaning                                             | Example                          |
|---------------|-----------------------------------------------------|----------------------------------|
| Data file     | CSV/XLSX containing rows of students or recipients. | Name, Roll No, Class, Physics    |
| Template file | Excel layout containing placeholders.               | {{Name}}, {{Roll No}}, {{Total}} |
| Output        | One PDF for each row, downloaded as a ZIP.          | 101_Aarav_Sharma.pdf             |

## Basic working

- Prepare data in CSV or XLSX.
- Prepare a template with variables like {{Name}} and {{Roll No}}.
- Upload both files.
- Website checks variable-column matching.
- Preview one row.
- Generate PDFs and download ZIP.

**Important:** This is not a normal Excel-to-PDF converter. It creates separate personalised PDFs from data rows.

## 2. What is a template?

A template is the final PDF design - result card, admit card, certificate, receipt or report.

The screenshot shows the SheetPot Studio dashboard with a URL bar at the top. The main content area is titled "Template Example" and contains a section "What is a template?" with a definition: "A template is the final PDF layout. Text inside double curly brackets is replaced using your Excel/CSV data." Below this are three numbered steps: 1. Design once (Use your logo, coaching name, result layout, certificate layout or admit-card layout), 2. Add variables (Write placeholders like {{Name}}, {{Roll No}}, {{Physics}} where data should appear), and 3. Generate many PDFs (Each row in the data file becomes one personalised PDF from the same template). A blue arrow labeled "data fills layout" points from the text to a sample result card. The sample card is titled "Sample\_Result\_Template.xlsx" and features a header "ABC Coaching Institute Student Result Report" with a logo placeholder. Below the header are fields for Name, Roll No, and Class, each with a double curly bracket placeholder. At the bottom is a table with columns Subject, Marks, Max, and Grade, containing rows for Physics, Chemistry, Maths, and a Total row, all with placeholders for data.

**What is a template?**  
A template is the final PDF layout. Text inside double curly brackets is replaced using your Excel/CSV data.

- 1 Design once**  
Use your logo, coaching name, result layout, certificate layout or admit-card layout.
- 2 Add variables**  
Write placeholders like {{Name}}, {{Roll No}}, {{Physics}} where data should appear.
- 3 Generate many PDFs**  
Each row in the data file becomes one personalised PDF from the same template.

data fills layout

**Sample\_Result\_Template.xlsx**

LOGO **ABC Coaching Institute**  
Student Result Report

**Name:** {{Name}}  
**Roll No:** {{Roll No}}  
**Class:** {{Class}}

| Subject   | Marks         | Max | Grade      |
|-----------|---------------|-----|------------|
| Physics   | {{Physics}}   | 80  | {{Grade}}  |
| Chemistry | {{Chemistry}} | 80  | {{Grade}}  |
| Maths     | {{Maths}}     | 80  | {{Grade}}  |
| Total     | {{Total}}     | 240 | {{Result}} |

### Template rules

- Take an blank excel sheet and make a template in it
- Add your logo, institute name and design once.
- Use fixed text for content that remains same.
- Use variables like {{Name}}, {{Roll No}}, {{Class}}.
- Keep enough space for long student names and remarks.
- Each data row will fill this same layout.

### 3. How should the data file be prepared?

Upload CSV or XLSX. First row must be column headers. Each row becomes one PDF.

https://sheetpdfstudio.com/dashboard/upload

Data File Example

#### How should the data file be prepared?

Upload CSV or XLSX. The first row must contain column names. These column names should match the variables in the template.

Sample\_Result\_Data.xlsx / Sample\_Result\_Data.csv

| Roll No | Name         | Class | Physics | Chemistry | Maths | Total | Grade | Result         |
|---------|--------------|-------|---------|-----------|-------|-------|-------|----------------|
| 101     | Aarav Sharma | 8     | 70      | 68        | 75    | 213   | A     | Qualified      |
| 102     | Meera Gupta  | 9     | 62      | 71        | 69    | 202   | B     | Qualified      |
| 103     | Kabir Singh  | 10    | 78      | 73        | 76    | 227   | A+    | Top Performer  |
| 104     | Ananya Verma | 8     | 59      | 66        | 63    | 188   | B     | Needs Practice |

A

**Headers must match template variables**  
Example: {{Name}} needs a Name column.

B

**One row = one PDF**  
100 rows can generate 100 PDFs.

Avoid merged cells, blank headers, duplicate roll numbers and spelling differences like RollNo vs Roll No.

#### Data file rules

- First row = column names.
- One student/recipient per row.
- Headers should match template variables exactly.
- Avoid merged cells and blank headers.
- Keep one unique column for file naming.

Example: If template has {{Name}}, your data should have a column named Name.

## 4. Matching template variables with data columns

Curly brackets are used in the template only, not in the data header.

| Template variable | Data column header | Correct?                  |
|-------------------|--------------------|---------------------------|
| {{Name}}          | Name               | Yes                       |
| {{Roll No}}       | Roll No            | Yes                       |
| {{Roll No}}       | RollNo             | No - spacing is different |
| {{Physics}}       | Physics Marks      | No - name is different    |
| {{Total}}         | Total              | Yes                       |

### Recommended naming format

| Use this | Avoid this                                |
|----------|-------------------------------------------|
| Roll No  | RollNo / Roll_Number / Roll no            |
| Name     | Student Name if template has {{Name}}     |
| Class    | Class Name if template has {{Class}}      |
| Physics  | Physics Marks if template has {{Physics}} |

**Tip:** Decide final column names first, then use the exact same names in the template.

## 5.1 UPLOAD THE DATA FILE IN UPLOAD SECTION

Go to Upload section. Upload the data file first, then the template file.

### Data to PDF

Upload your data Excel and your designed Excel template. Use variables like **{{Name}}** inside the template.

Current Plan

**Pro**

Best for coaching centres.

Credits Left

**1,618**

Out of 2,000 monthly credits

Per Job Limit

**2,000**

Maximum PDFs in one generation

[Need bigger files?](#)

Upgrade to Mini, Pro, or Business pack for larger Excel files.

[View Plans](#)

#### Job Details

Job name

Example: Admit Cards Class 8

This name will appear in your Downloads section after generation.

#### 1. Upload Data Excel

[Choose Data Excel](#)

### Actions

- Give a name to your Job so as to remember in future.
- Upload data File where all the data that need to process is stored.
- Data file can be csv or xlsx.



## 5.2 UPLOAD THE TEMPLATE IN UPLOAD SECTION

Go to Upload section. Upload the data file first, then the template file.

### 3. Choose PDF File Name Format

Select variables in the order you want the generated PDF files to be named. Example: Name + Class + Roll Number.

☒ presentClass

☒ name

☒ STUDENT\_LAST\_NAME

☐ Roll No

☐ city

☐ state

☐ centerStatePreference1

Current file name format:

{{presentClass}}\_{{name}}\_{{STUDENT\_LAST\_NAME}}

Preview: 10\_rahini\_bhardwaj.pdf

### 4. Data Columns Available for Template

Use these column names inside your Excel template in double braces.

{{presentClass}}

{{name}}

{{STUDENT\_LAST\_NAME}}

{{Roll No}}

{{city}}

{{state}}

{{centerStatePreference1}}

### 5. Upload Excel Template

Save the template as .xlsx. Wherever student data is needed, write placeholders like {{Name}}, {{Roll Number}}, etc.

Choose Template Excel

### Actions

- You need to select what should be the name of your PDF File based on the variable.  
*For instance, I want the file to be downloaded as Roll Number followed by name of student, in that case, select roll number first and then Name. If name should come first, select name and then roll number.*
- Upload the template File in which you want the PDF to be converted.
- After adding the logo, Row and column, make sure you are keeping the width and height of page under 1 Page though Page layout.  
*Whatever layout you design in template, the variables from data sheet will be added in same format, size and alignment.*

## 6. Step 2 - Preview and check mapping

This is the most important checking stage before final generation.

### 6. Template Validation

Variables found

6

Valid variables

6

Missing variables

0

Cells containing variables: 6

| Variable in Template       | Matching Data Column   | Status | Suggestion |
|----------------------------|------------------------|--------|------------|
| {{Roll No}}                | Roll No                | Found  | -          |
| {{name}}                   | name                   | Found  | -          |
| {{presentClass}}           | presentClass           | Found  | -          |
| {{state}}                  | state                  | Found  | -          |
| {{city}}                   | city                   | Found  | -          |
| {{centerStatePreference1}} | centerStatePreference1 | Found  | -          |

Template is ready. All variables match your data columns.

Generate Preview Excel

Generate Preview PDF

Generate All PDFs as ZIP (124)

First test Excel output. Then test PDF output. If PDF alignment is wrong, adjust print area/page layout in the template Excel.

### Check before continuing

- Every variable should have a green match.
- Fix missing columns before generation.
- Preview one or two rows.
- Check spelling, marks and layout.
- Continue only when preview looks correct.



## 7. Step 3 - Generate PDFs

After preview is correct, start generation. Each row becomes a separate PDF.

Cells containing variables: 6

Your PDF job has been added. Please go to Downloads to check status and download the ZIP when it is ready.  
OK

| Variable in Template       |                        | Status | Suggestion |
|----------------------------|------------------------|--------|------------|
| {{Roll No}}                |                        | Found  | -          |
| {{name}}                   | name                   | Found  | -          |
| {{presentClass}}           | presentClass           | Found  | -          |
| {{state}}                  | state                  | Found  | -          |
| {{city}}                   | city                   | Found  | -          |
| {{centerStatePreference1}} | centerStatePreference1 | Found  | -          |

Template is ready. All variables match your data columns.

Generate Preview Excel

Generate Preview PDF

Generating 124 PDFs...

First test Excel output. Then test PDF output. If PDF alignment is wrong, adjust print area/page layout in the template Excel.

Submitting your job...

10%

You can leave this page after submission. Check the Downloads section for job status.

### Generation rules

- After checking the Preview of the PDF File, Click Generate PDFs
- Do not refresh while uploading is in progress.
- Once data is uploaded, you will get a confirmation message that your job has been added and you can go to Download section to check the progress of the task.
- Time to convert the file is directly proportional to the number of files added. Kindly be patient if more files are added.

## 8. Step 4 - Download the ZIP

The ZIP contains all generated PDFs in one folder.

### Downloads

Track job status here. This page auto-refreshes while files are being prepared.

[Refresh](#)[Upload New Job](#)

### Recent Jobs

| Job Name                       | Files | Size    | Created               | Status    | Progress                    | Action                       |
|--------------------------------|-------|---------|-----------------------|-----------|-----------------------------|------------------------------|
| template<br>template.zip       | 124   | 46.0 MB | 13 Jun 2026, 09:59 am | completed | <div><div></div></div> 100% | <a href="#">Download ZIP</a> |
| Admit Cards<br>admit_cards.zip | 124   | 46.0 MB | 13 Jun 2026, 09:58 am | completed | <div><div></div></div> 100% | <a href="#">Download ZIP</a> |
| Test<br>test.zip               | 124   | 46.0 MB | 12 Jun 2026, 08:49 pm | completed | <div><div></div></div> 100% | <a href="#">Download ZIP</a> |

### Download steps

- Click ZIP or Download ZIP.
- Extract the ZIP on your computer.
- Open 2-3 PDFs and check output.
- Then share PDFs with students/parents.
- Use Downloads section for old jobs if plan allows history.

## 9. Free plan and paid credits

Free users can test small files. Paid users get PDF credits.

Have a coupon code?

FILL YOUR COUPON HERE

Mini Pack

Apply

Clear

Select a pack, enter coupon code, and click Apply to preview discount.

Free

Start here

For testing small Excel files.

Free

30 days validity

PDF credits

100

✓ 10 PDFs per job

✓ 100 PDFs per month

✓ Basic ZIP download

✓ Good for testing templates

Included on Signup

Mini

Low cost

For teachers and small batches.

₹199

30 days validity

PDF credits

500

✓ 500 PDF credits

✓ Valid for 30 days

✓ Saved download history

✓ No watermark

Buy Mini Pack

Payment through Razorpay Checkout.

Pro

Most popular

Best for coaching centres.

₹499

30 days validity

PDF credits

2,000

✓ 2,000 PDF credits

✓ Valid for 30 days

✓ Saved download history

✓ Priority processing

Buy Pro Again

Payment through Razorpay Checkout.

Business

High volume

For schools and large institutes.

₹1,499

30 days validity

PDF credits

10,000

✓ 10,000 PDF credits

✓ Valid for 30 days

✓ Large Excel support

✓ Priority processing

Buy Business Pack

Payment through Razorpay Checkout.

### Plan summary

- Free: small trial usage, for example up to 10 rows/files per run.
- Mini: 500 PDF credits for 1 month.
- Pro: 2000 PDF credits for 1 month.
- Business: 10000 PDF credits for 1 month.
- Deduct credits only after successful generation.

Show free limit clearly before generation so users know whether they can proceed or need to upgrade.

## 10. Common mistakes and fixes

Use this page when a PDF is not generated correctly.

| Problem                | Likely reason                        | Fix                                        |
|------------------------|--------------------------------------|--------------------------------------------|
| {{Name}} still showing | Data column does not match variable. | Use template {{Name}} and header Name.     |
| Some PDFs missing      | Blank or invalid rows.               | Remove blank rows and check unique ID.     |
| Duplicate file names   | Duplicate Roll No or naming field.   | Use Roll No or Student ID as unique field. |
| Layout broken          | Long values do not fit.              | Increase space or shorten remarks.         |
| Upload fails           | Wrong file type or corrupted file.   | Use clean CSV/XLSX and re-upload.          |
| Free limit reached     | Rows exceed free limit.              | Split file or upgrade plan.                |

### Final checking rule

- Always preview before generating.
- Open 2-3 PDFs before sharing.
- Keep original data file safe for corrections.
- Use clear file names like RollNo\_Name.pdf.

# 11. Upload checklist

Check this list before every upload.

| Check                                                              | Done? |
|--------------------------------------------------------------------|-------|
| Template contains variables like {{Name}}, {{Roll No}}, {{Total}}. | [ ]   |
| Data file first row has clean column headers.                      | [ ]   |
| Column headers match template variables exactly.                   | [ ]   |
| There is one row per student/recipient.                            | [ ]   |
| Roll No or Student ID column is unique.                            | [ ]   |
| No merged cells in data file.                                      | [ ]   |
| No blank rows in between data.                                     | [ ]   |
| Preview is checked before final generation.                        | [ ]   |

## Sample files included with this guide

- Sample\_Result\_Data.csv
- Sample\_Result\_Data.xlsx
- Sample\_Result\_Template.xlsx

**These are sample files only. Replace names, variables, logo and marks as per your actual use case.**