

Styling PDFs

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Introduction

With our new PDF features, we have also included the ability to define at the account or admin levels, custom headers and footers for your generated PDFs by using HTML and CSS. When defined, these will display on every page of the PDF export regardless of where the PDF is generated.

Requirements

These features are available on Premier, Enterprise, and Compliance Cloud plans.

Setup

Note:

- Only a single set of style tags is able to be used at this time, though inline styles are also supported.
- External style sheets are not supported.
- Our Support Team does not support the writing or editing of custom code, such as HTML and CSS.

Advanced Branding for a Single User

If you would like to add branding to all of the forms on one user account, you'll find the Branding feature in the **General Settings** page. Click the **Define a header and footer for your forms** link to open the Branding Editor:

Account Branding

PAGE HEADER

Inherit default page header. Uncheck this box to customize the header HTML.

The page header is displayed above your forms and on every page related to form processing (i.e. the submission confirmation page, the thank-you page, etc.). You may use this space to add your logo, navigation links, etc.. Please enter valid HTML.

PAGE FOOTER

Inherit default page footer. Uncheck this box to customize the footer HTML.

The page footer is displayed below your forms and on every page related to form processing (i.e. the submission confirmation page, the thank-you page, etc.). You may use this space to add **legal mentions**, navigation links, etc. Please enter valid HTML.

<HEAD> HTML

Inherit default HTML <HEAD>. Uncheck this box to customize the <HEAD> element HTML.

Use this space to load custom css, javascript, or add your own meta tags. This space is **not** for adding content, text, or images to the page. Please enter valid HTML.

PDF HEADER

Inherit default PDF header. Uncheck this box to customize the PDF header HTML.

The PDF header is displayed on every page of the PDF export. You may use this space to add your logo, text, etc. Please enter valid HTML and CSS only. Note style sheets are not supported.

PDF FOOTER

Inherit default PDF footer. Uncheck this box to customize the PDF footer HTML.

The PDF footer is displayed on every PDF export. You may use this space to add your legal mentions, disclaimers, etc. Please enter valid HTML and CSS only. Note stylesheets are not supported.

Save

Next, uncheck the "inherit" option for PDF Header and/or PDF Footer. Insert your custom HTML and CSS and click "Save". Here is an example setup:

PDF HEADER

Inherit default PDF header. Uncheck this box to customize the PDF header HTML.

```
4 font-family: Arial;
5 margin: 0;
6 }
7
8 /* Header/Logo Title */
9 header {
```

The PDF header is displayed on every page of the PDF export. You may use this space to add your logo, text, etc. Please enter valid HTML and CSS only. Note style sheets are not supported.

PDF FOOTER

Inherit default PDF footer. Uncheck this box to customize the PDF footer HTML.

```
1 <style>
2 /* Style the body */
3 body {
4 font-family: Arial;
5 margin: 0;
```

The PDF footer is displayed on every PDF export. You may use this space to add your legal mentions, disclaimers, etc. Please enter valid HTML and CSS only. Note stylesheets are not supported.

Export a PDF to view the branding.

Advanced Branding for your Instance (Administrator Settings)

If you are an admin who would like to set the branding for all PDFs generated by all users in your Enterprise or Compliance Cloud instance, you can do so from the Admin Dashboard. In the Dashboard, browse to Forms > Form Header & Footer or use the following URL:

<https://YOUR-INSTANCE.net/admin/brandings/edit>

Under Default PDF Header or Default PDF Footer, insert your custom HTML and CSS and click "Save".

Note: All users will need to set their own branding to "Inherit" in order to inherit this default branding.

Custom Code Examples

Note: The examples listed below are common examples. You may need to edit these examples to fit your forms' needs. Our support team does not provide custom code and cannot help edit, write, or design custom

code for your forms.

The following code can be added to your Account Branding as described in the "Setup" section above.

Hide the PDF Metadata

```
<style>
  .metadata-div {
    display: none;
  }
</style>
```

Hide the File List

```
<style>
  .file-list-div {
    display: none;
  }
</style>
```

Hide Both the Metadata and the File List

```
<style>
  .metadata-div {
    display: none;
  }
  .file-list-div {
    display: none;
  }
</style>
```
