Creating PDF Markups

Including a PDF Markup with your submission is a required part of the custom content creation process. It increases efficiency and time to market by clarifying the intended functionality of your custom design and decreasing unnecessary back and forth communication. While a packaged InDesign file (or AdobeXD for email) will tell our developers what they need to know about layout, an effective PDF markup should explain how the fields in the asset would work for the end user and for the admin. Below are some tips and tricks on what to include.

What to Include:

- Editable Fields: identify which sections the end user can modify
- Dynamic Field Sources: Indicate where in the user profile dynamic fields should pull from. While name/email/address are straightforward, specify any nonstandard fields, hyperlinks, or icons.
- Collapsing Fields: Describe how dynamic fields should adjust if the corresponding field in the user profile is empty. For example, if there's no profile headshot, our standard would be to have the contact info shift to occupy that space.
- Dynamic Branding: identify which fields are tied to your established branding logic and which should be hardcoded. For example, a colored dividing line could be set as the color in the design or it could dynamically pull the primary/secondary color from branding.
- Text Fill: Total Expert developers can add a feature called text fill to static, dynamic text fields. This feature automatically adjusts the font size of longer text values to fit within the designed space. Please provide a minimum and maximum font size if requested (recommended for websites/email addresses)

What NOT to Include

- Information already present in the packaged InDesign File, such as font style/size, image size/positioning, and general layout. There is no need to replicate this information in a PDF markup.
- Text Fill and Editability are print/social functionality and cannot be built into email signatures

Examples and Resources:

- Flyer, Email Signature, Data Integrated Asset examples:
  https://totalexpert.freshdesk.com/support/solutions/articles/22000279785-content-marked-up-pdf-examples
- What to include in a PDF markup based on request type
  - Template
    - Nonstandard fields, hyperlinks, or icons
    - Collapsibility and Text Fill
    - Editable fields (standard is to set comarketer as editable)
    - Fields connected to branding profile (colors, logos, disclaimers)
  - Assets:
    - Editable and dynamic fields
    - Fields connected to branding profile (colors, logos, disclaimers)
  - Data Integrated Assets
    - Editable and dynamic fields

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- Rate table calculations
  - For example, indicate what values a Total Payment field should add up. Please refer to the data integrated asset pdf markup example for more information
- Fields connected to branding profile (colors, logos, disclaimers)