



Creating a Cobranded PDF

What is the purpose of cobranded PDFs?

Co-branded PDFs are an excellent addition to your partner marketing center toolkit. Like uploaded files, co-branded PDFs provide deeper education about your products and services. However, with co-branded pdfs, you add merge fields that allow your partners to incorporate their information directly into the document.

(**Note:** you must obtain a license to Adobe Acrobat Pro DC before creating co-branded pdfs.)

How do I create them?

A co-branded pdf is a PDF document that includes the marketing asset you set up within Program Manager. (This step was completed during [Block 1: Preparing the Platform](#)).

To create a co-branded PDF, follow these steps:

1. Open your PDF within Adobe Acrobat Pro DC.
2. Using the tools provided in Adobe Acrobat, place the merge field code (for example, [MarketAsset11503]) directly into your PDF document.
3. Upload the PDF into StructuredWeb.

What will I do in this lesson?

By the end of this lesson, you will be able to do the following:

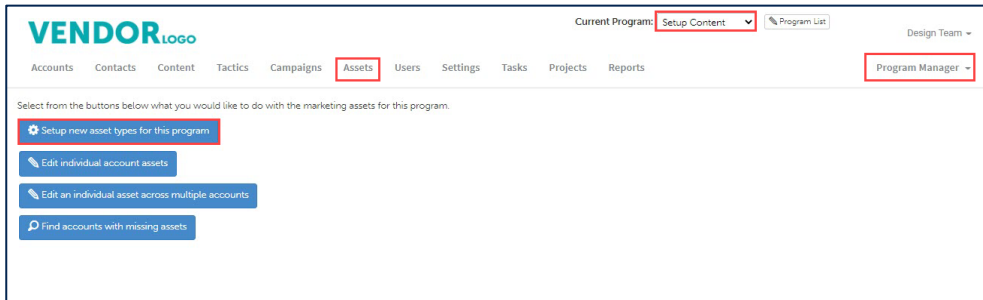
- [Select marketing assets](#)
- [Add marketing assets to PDF](#)
- [Edit form fields](#)
- [Create cobranded PDF settings](#)
- [Upload a cobranded PDF](#)
- [Publish cobranded PDFs](#) (This step is for **reference only**. Publish files for partner use. **Do not publish practice content created during this onboarding program.**)

To complete this lesson, you must download the assets located within the [Building your Content](#) Block. Once downloaded, save each item to your local drive.

Steps

SELECT MARKETING ASSETS

- 1 In **Program Manager**, from **Current Program**, select **Setup Content**.
- 2 From the header, select **Assets**. Then select **Setup new asset types for this program**.



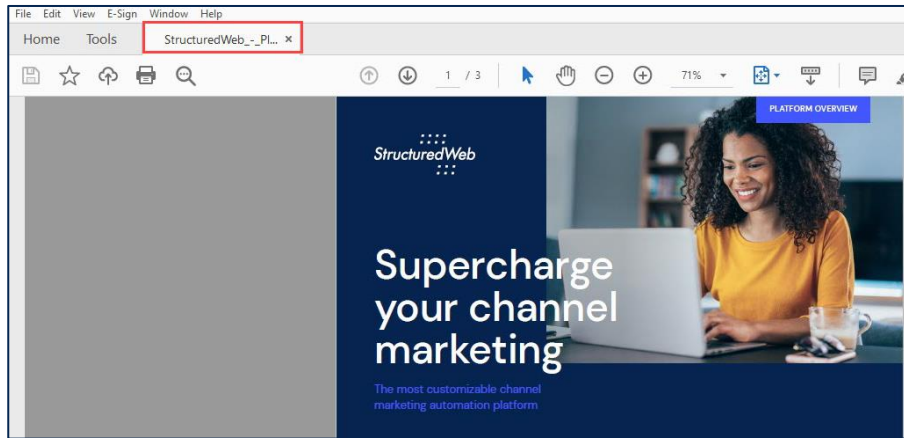
- 3 In the **Merge Field** column, copy and paste the following **Merge Field codes** into a note pad. (Note: Be sure to include brackets)
 - **Company Logo**
 - **Company Name**

The screenshot shows the 'Marketing Assets' table. The 'Merge Field' column contains the following codes, with 'Company Logo' and 'Company Name' highlighted in red boxes:

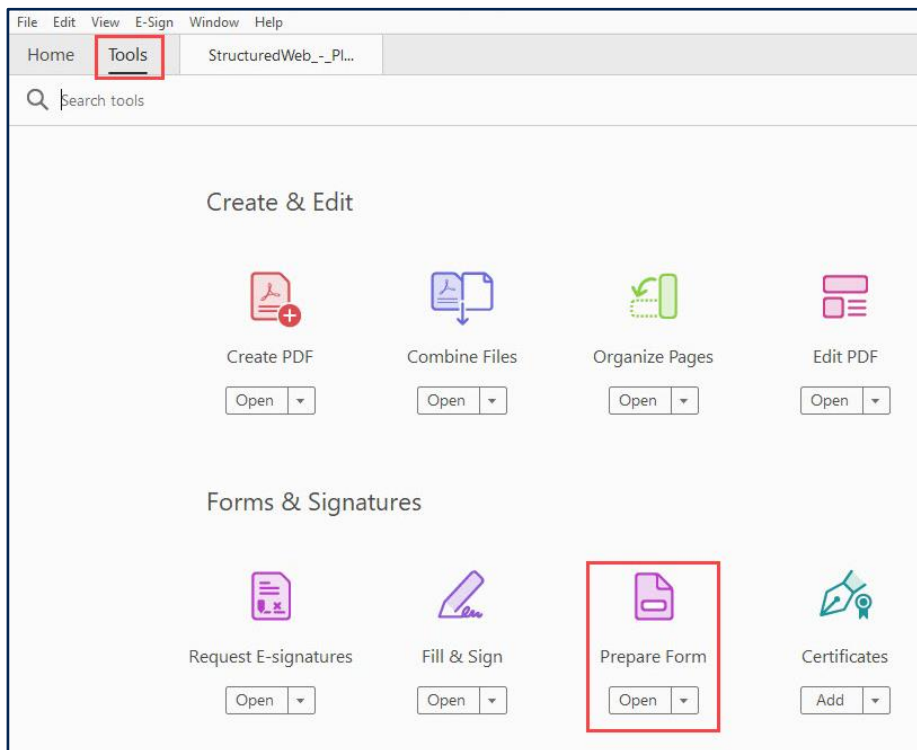
Asset	Translation -	Select Language	Type	Merge Field	Used in Campaigns
<input type="checkbox"/> Company Email Company Email			String	[MarketAsset11503]	Yes
<input type="checkbox"/> * Company Logo Recommended size: 170px x 40 px			Image	[MarketAsset12321]	Yes
<input type="checkbox"/> * Company Name e.g. ABC Company			String	[MarketAsset11502]	Yes
<input type="checkbox"/> Contact Email Address Email address of contact person for tactic marketing leads			String	[MarketAsset11691]	Yes
<input type="checkbox"/> Contact Name Name of contact person for tactic marketing leads			String	[MarketAsset11581]	Yes
<input type="checkbox"/> Phone Number Phone Number			String	[MarketAsset11504]	Yes
<input type="checkbox"/> * Website Address Do NOT include http:// or https://			String	[MarketAsset11505]	Yes

ADD MARKETING ASSETS TO PDF

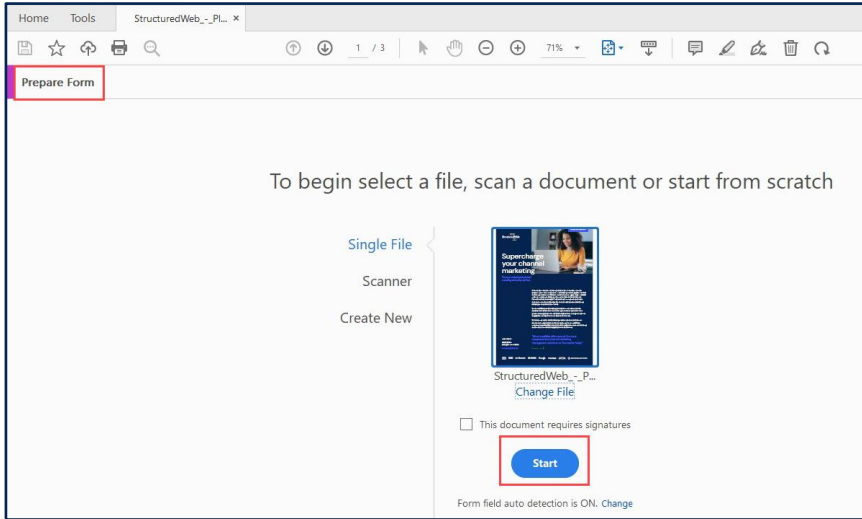
- 1 Open **Adobe Acrobat Pro DC**. Then, open the **Co-branded File** (Note: this file is included in your download package.)



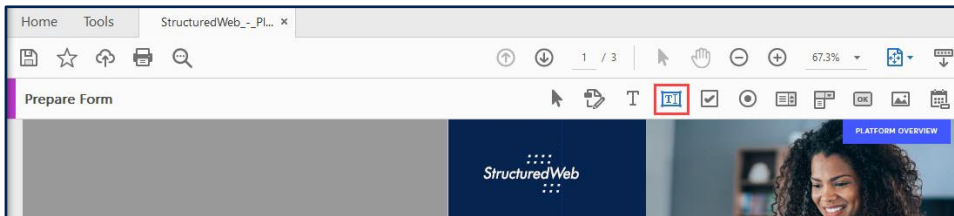
- 2 From the header, select **Tools**.
- 3 In **Forms & Signatures**, click **Prepare Form**. The label changes to **open**.



4 In **Prepare Forms**, click **Start**.



5 On the **Prepare Form** toolbar, click the **Add a text field** icon, and drag it to the **bottom** of the page.



6 From the **Note Pad**, copy the **Company Name** merge field code.

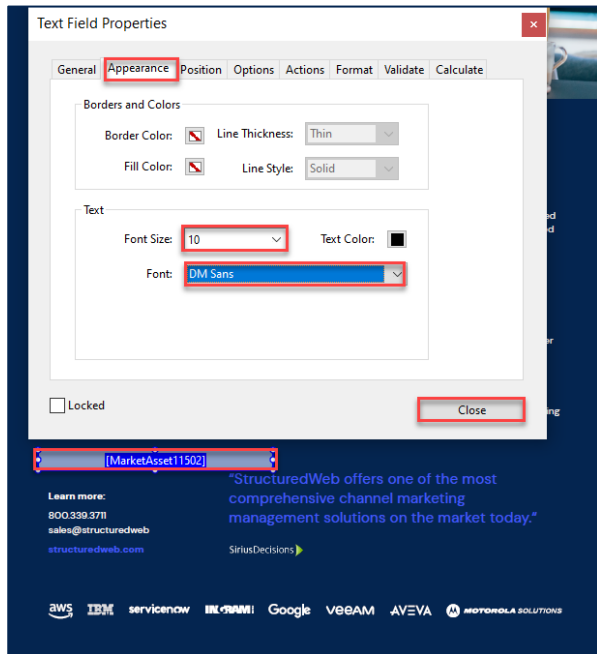
7 In the **Field Name**, paste the merge code.



8 Repeat **steps 3 through 6** to add the **logo** merge field code. Leave the document open.

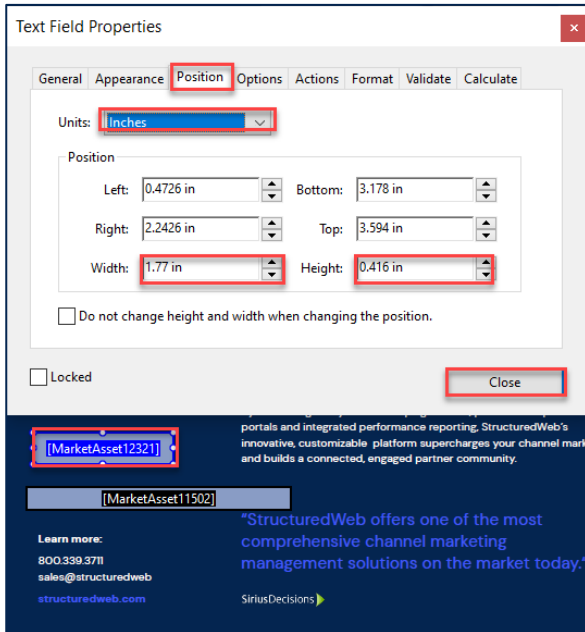
EDIT FORM FIELDS

- 1 Double click the **Company Name** merge field code. The Field properties box opens.
- 2 From the **Appearance** tab, from the **Text** area, from the **Font Size drop-down** menu, select **10**.
- 3 From the **Font** drop-down menu, select **DM Sans**.



- 4 Click **Close**.

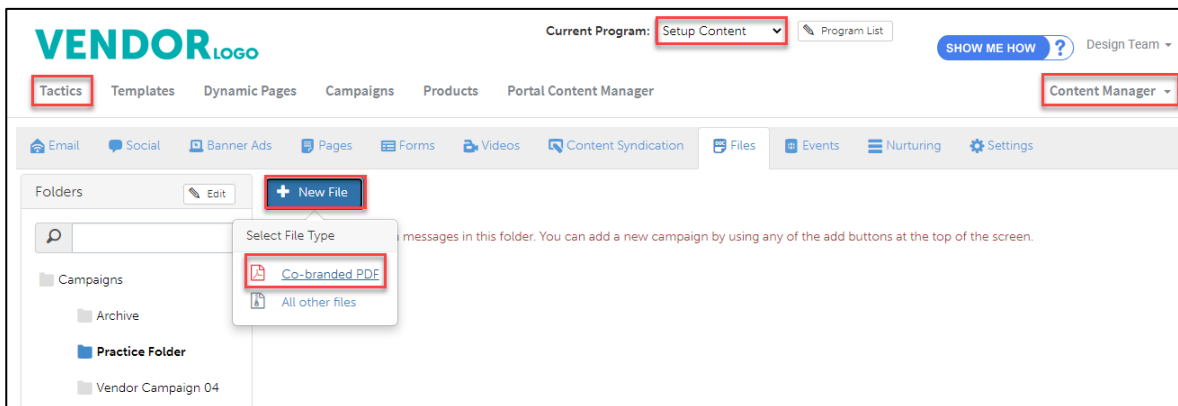
- 5 Double click on the **Logo** merge field drop-down menu. The Field Properties box opens.
- 6 From the **Position** tab, from the **Units** drop-down menu, select **Inches**.
- 7 From the **Position** area, in the **width** field type **1.77**. Then in the **height** field, type **0.416**. (Note: these parameters match the recommended logo size)



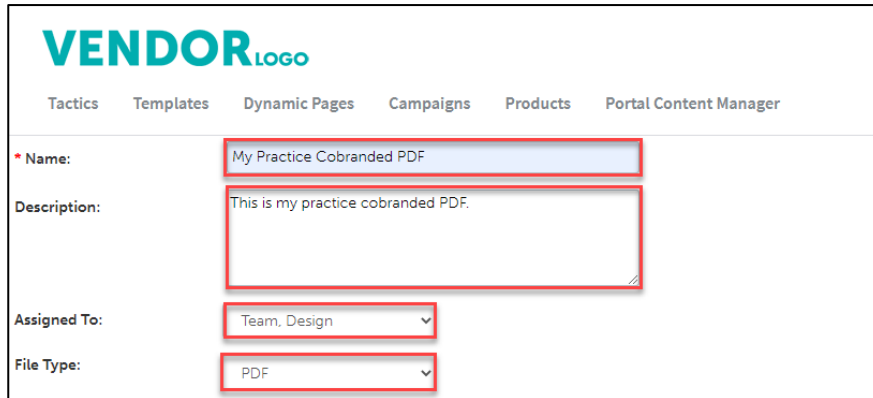
- 8 Click **Close**. Then save the file to your local drive.

CREATE COBRANDED PDF SETTINGS

- 1 In **Content Manager**, from **Current Program**, select **Setup Content**.
- 2 From the toolbar, select **Tactics > Files**.
- 3 Click **New File > Co-branded PDF**.



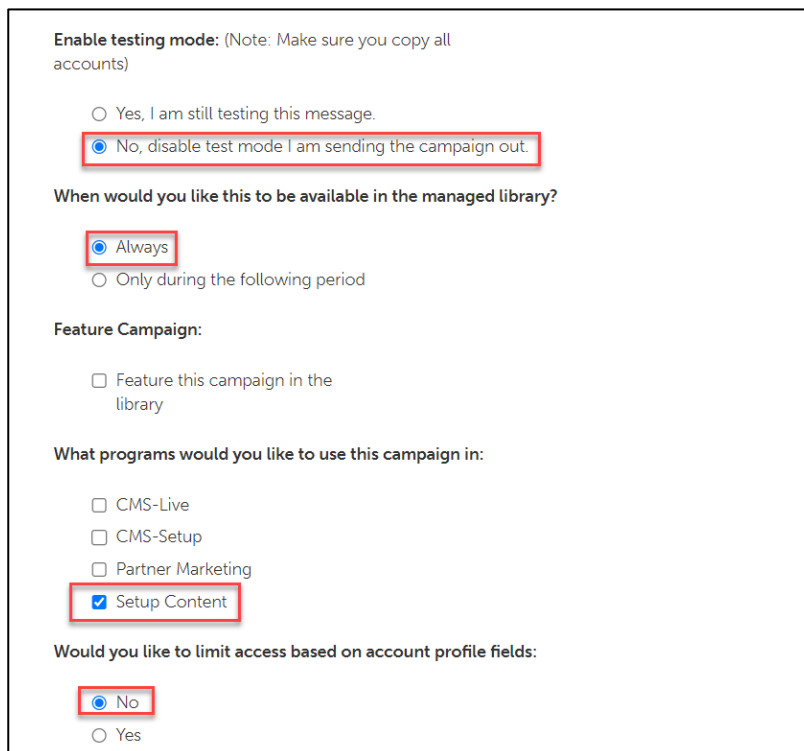
- In the **Name** text field, type **My Practice Co-branded PDF**.
- In the **Description** field, type **This is my practice co-branded PDF**.
- In the **Assigned to** field, select your **name**.
- In the **File type** field, select **PDF**.



The screenshot shows the Vendor Logo interface with the following fields and values:

- Name:** My Practice Cobranded PDF
- Description:** This is my practice cobranded PDF.
- Assigned To:** Team, Design
- File Type:** PDF

- In **Enable testing mode**, click **No, disable testing mode, I am sending out this campaign**.
- In **When would you like this to be available in the managed library**, click **Always**.
- In **What program would you like to use the campaign in?**, click **Setup Content**.
- In **Would you like to limit access based on account profile fields**, click **No**.



The screenshot shows the following options and selections:

- Enable testing mode:** (Note: Make sure you copy all accounts)
 - Yes, I am still testing this message.
 - No, disable test mode I am sending the campaign out.
- When would you like this to be available in the managed library?**
 - Always
 - Only during the following period
- Feature Campaign:**
 - Feature this campaign in the library
- What programs would you like to use this campaign in:**
 - CMS-Live
 - CMS-Setup
 - Partner Marketing
 - Setup Content
- Would you like to limit access based on account profile fields:**
 - No
 - Yes

12 In **What attributes would you like to set for this asset?**, select **all attributes**.

What attributes would you like to set for this asset:

*** Languages**

All

English (United States)

English (United Kingdom)

Spanish

*** Marketing Focus**

All

Prospects

Existing Customers

Enterprise

SMB

13 Click **Save**.**UPLOAD A COBRANDED PDF**

- 1 From the **Content** tab, in the **Upload** area, click **Drop files here or click to upload**. Then select the **CoBrand** file. (Note: this file is included in your download package.) The file opens.
- 2 In the Name field, type **My Practice Cobranded File**.

The screenshot shows the Vendor Content Manager interface. The 'Content' tab is selected. The 'Step 1: Upload' section is active, displaying a large red-bordered box with the text 'Drop files here or click to upload.' Below this box is a table with columns for 'Type', 'Name', and 'Size'. A file named 'My Practice Cobranded File' is listed with a size of 1.05 MB. The 'Name' field of this file is highlighted with a red box.

Type	Name	Size
<input type="checkbox"/>	My Practice Cobranded File	1.05 MB

- In the **Review** area, validate that the **merge field codes** are correct.
- In the **Preview** area, click to **download** the cobranded pdf. Then open and review that the Marketing Assets appear correctly.
- In the **Image** area, click **Choose File**. Then select the **CobrandThumbnail.png** file (Note: this image is included in your download package.)

Step 2: Review
Review the form fields mapped to marketing assets.

Marketing Assets	Type	Form Field
Company Logo	Image	[MarketAsset12321]
Company Name	String	[MarketAsset11502]

Step 3: Preview
Preview the sample file.

[CLICK HERE](#) to download sample file.

Step 4: Image
Upload an image(ideal size 600x450px) for the preview and thumbnail image.

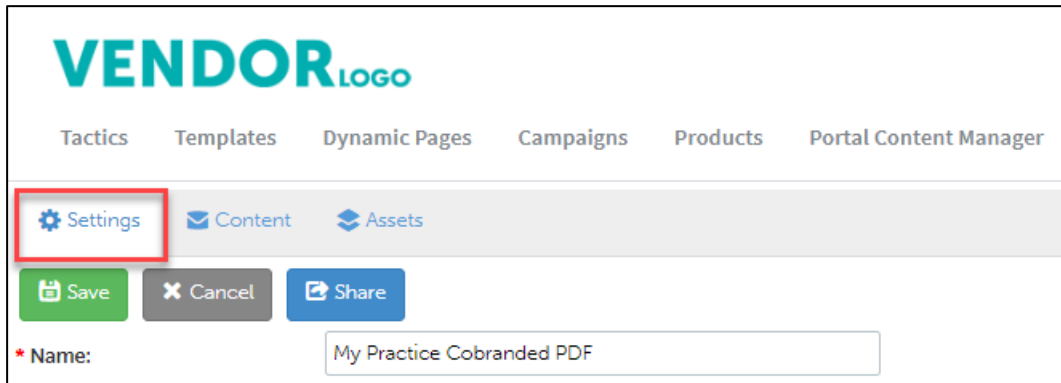
CoBrandThumbnail.png (File must be in the following format: jpg, jpeg, gif, png)

- Click **Save**.

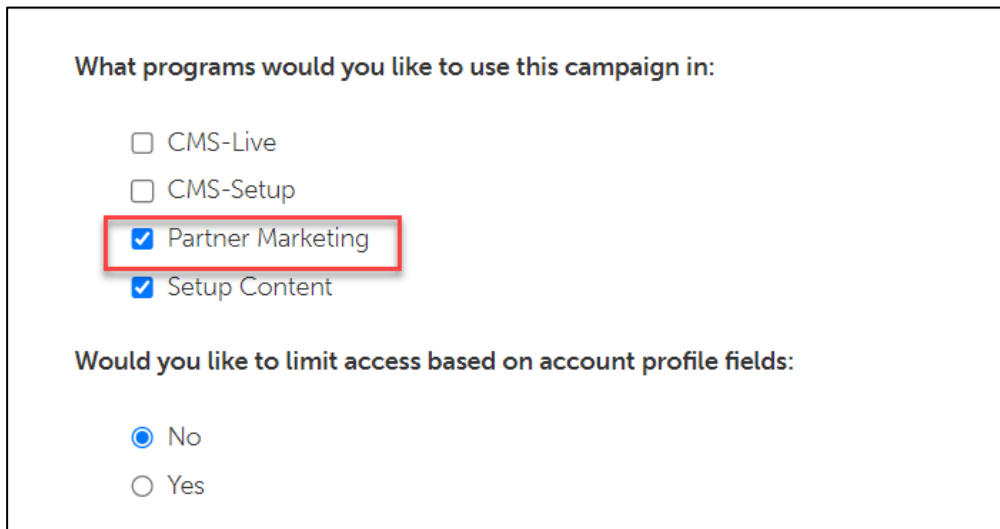
PUBLISH COBRANDED PDFs (THIS STEP IS FOR REFERENCE ONLY)

1 Return to **Content Manager > Tactic > Email > My Practice Email**.

2 From the **Email** toolbar, click **Settings**.



3 From **What programs would you like to use this campaign in**, select the **appropriate program**. (in most cases, this will be Partner Marketing).

A screenshot of a form titled 'What programs would you like to use this campaign in:'. It contains four checkboxes: 'CMS-Live', 'CMS-Setup', 'Partner Marketing', and 'Setup Content'. The 'Partner Marketing' checkbox is checked and highlighted with a red rectangular box. Below this section is another section titled 'Would you like to limit access based on account profile fields:'. It contains two radio buttons: 'No' (selected) and 'Yes'.

4 Click **Save**.