



DESIGN GUIDELINES *for* CUSTOM PDF TEMPLATES

RW Elephant is inventory and order management software for specialty event rental businesses. With RW, your client creates rental orders that then become customer-facing PDFs with pricing info, images of their items, delivery details, and all the important info for the order.

We currently offer a variety of styles for our clients to choose from as well as modification options. However, sometimes, clients want to create a specific branded look that goes beyond the standard change options we offer.

Enter the Custom PDF (and you!).

We've created this guide for you (the designer) to have everything you need to create a Custom PDF for your client.

This document provides basic information and guidelines that you'll need in order to design a styled PDF mockup to submit for your client using RW Elephant.

Behind the scenes, we are using a mix of web-based technologies to build out the structure before generating the final PDF, so there are some rules (and limitations) in place. If you have experience with web design, particularly front-end development, you may be familiar with some of concepts we rely on and rules we have in place.

There are also some CSS functionalities that are restrictive for PDFs. However if you have any questions along the way, please feel free to reach out to us at help@rwelephant.com.

There are five customizable template types: Wishlist, Proposal, Confirmed, Sale, and Cancelled. An RW Elephant client may want to customize only one or all of these PDFs.

For each different type, you'll want to have a consistent and cohesive design but keep in mind that each type displays different information.

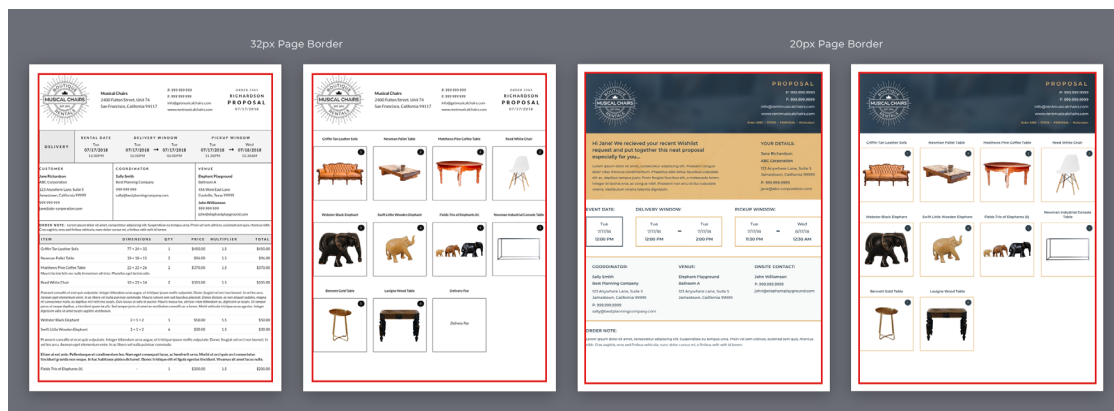
Let's start with some basics about all of your templates.



LAYOUT

All pages in the document must have a fixed border on all 4 edges of each page. We generally advise allowing 36px as a good fit but you must have at least 20px at a minimum. This border can be different on one or all edges if required, but cannot contain information (or be printed on) once set (ie. it becomes part of the no-print region).

Examples:



- 32 px Border Example
- 20 px Border Example

SECTIONS

Your PDFs can contain several different sections. The first page of each section may have a header. Pages within a section (second, third, etc.) will not have a header. No pages in the PDF can have a footer.

Here are some examples of the sections you may include:

- Title/About Page(s)
- Event Info
- Line Items
- Picture Pages
- Terms & Conditions (Wishlists, Proposals, and Confirmed only)
- Final Page(s)



DESIGN GUIDANCE

We want to encourage you to be creative when designing these templates but please be aware that there are limitations when transferring a design into a coded PDF document. Each finalized template will contain all source files that are used to build the PDF at the time of generation, so a large number of files mean more to process, leading to slower generation times. Try to limit the number of fonts and images/background-textures/graphics needed for templates.

Limitations:

1. **Be aware of Dynamic Content** (content that will contain a variable amount of data, e.g. the amount of characters/spacing required for different addresses) that will be returned from the RW Elephant application. The name "Smith" may work well in your designed example, but have you considered how it will work if the name is "Matthews" or something even longer?
2. **Dynamic content also includes areas that will grow or shrink vertically** within the document. e.g. 14 items in the Line Item listing or Image listing, will look very different than 231 items. Be aware of how this data will flow if it continues on to a new page.
3. Specify Section breaks that would be required, e.g. if you wanted to have a header with some repeatable content per section, like the "Modern" template set.

Specifications and other recommendations:

1. Page dimensions Standard Letter size (612px x 792px), if you are including high quality images in your PDF design please use a 2x (1224px by 1584px) or 3x (1836px by 2376px) artboard. Don't forget to use some guides for page borders.
2. Item image size - The API provides a 320px by 320px item image for Images of each Item. We recommend displaying images at no larger than the original size, but feel free to make them smaller in your design if you wish.
3. Using two fonts maximum in your design is recommended. We can include any font from Google Web Fonts.
4. If you have any further questions please ask. You can reach us at help@rwelephant.com.

REPEATABLE PAGE REGIONS

You may design static regions on your PDFs anywhere you'd like on the page.

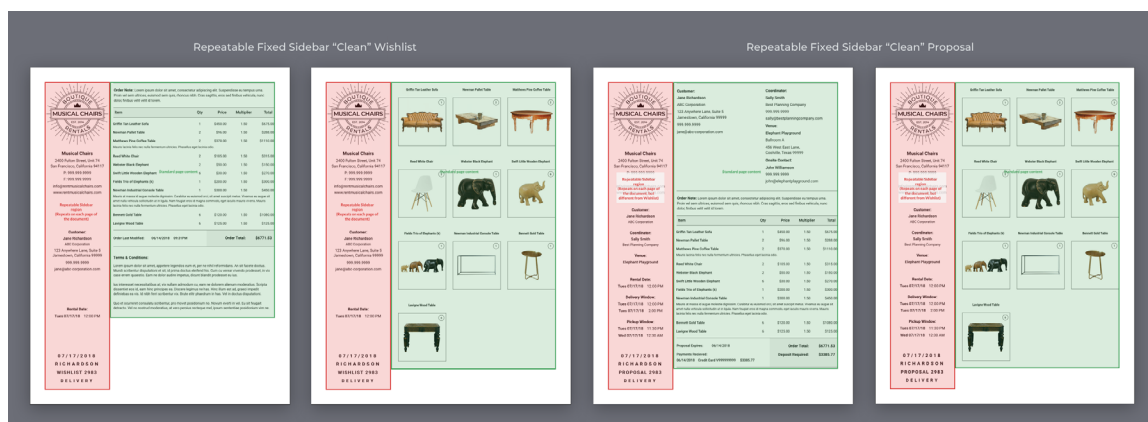
Pages may also contain one or more repeatable regions (regions that generate dynamic content from RW Elephant on an order-by-order basis, for instance Order Number, Client Name, Event Date, etc.). Keep in mind, however that a repeatable region will ALWAYS repeat on every page of the document. Repeatable regions cannot contain different information from page to page



Different template types (a Proposal and a Wishlist, for instance), however, can have similar repeatable regions that contain different information from one another because they are separate templates.

Unfortunately we are unable to add repeatable regions to the top or bottom of a page. We can add a fixed repeatable sidebar, however please bear in mind the above conditions for repeatable regions.

Examples:



- Clean Proposal Sidebar Example
- Clean Wishlist Sidebar Example

TEMPLATE SET VARIATIONS

The current PDF template set allows for design to be applied to the Wishlist, Proposal, Confirmed, Sale & Cancelled PDF types.

Each template will have slight variations where they contain more or less information, and in some cases different information will be displayed depending on the context. We have designed our "Modern" template set to be the most extensive, and it contains the full range of information available from the RW Elephant application.

We recommend checking out the differences between template types (Proposal, Wishlist, Confirmed, etc.) using the "Modern" style as your basis for what each template in a set should contain.

We also recommend having a uniform set of templates that are as consistent as possible, to cut down on the amount of time required to generate the full set. If each template is very different,



- [Modern Wishlist Example](#)
- [Modern Proposal Example](#)
- [Modern Confirmed Example](#)
- [Modern Sale Example](#)
- [Modern Cancelled Example](#)

Proposal Component View

We've provided an example of the information that can be used in your custom template. This is not a required layout or format. Labels, text content, order of the information and styling is totally up to you, but the data sent out by the API to your template will remain fixed (can't change). E.g. a date provided by the API is sent to the template in the "DD/MM/YYYY" format, so you can't change "10/01/2019" to "October 1st 2019", it must remain as "10/01/2019".

- [Proposal Component Views](#)

DESIGN SOURCE FILES

Please submit all design source files in either Figma (.fig), Sketchapp (.sketch), Adobe Illustrator (.ai) format or a Plain PDF may also be acceptable. If there are additional sources (graphics, images, etc...) please also provide these in high quality PNG or Vector formats.

You can submit a separate design file (*.fig, *.sketch, *.ai, or *.pdf) for each template variation, or alternatively one file with a separate art board for each template variation (Wishlist, Proposal, Confirmed, Sale & Cancelled).

Other Assets Required

Fonts - Google Web Fonts is a great resource for freely available web fonts that we can use without licensing restrictions. Please provide a list of fonts used in the design (including bold and italic versions), you can also provide a direct link to fonts on the Google Web Font library.

Images - If the PDF designs contain background images or images/graphics used for the general style, please provide these in high resolution. Please also ensure you have the relevant licences and permissions to use graphics or images before submitting.

Ready to Submit your Designs?

Email us at help@rwelephant.com with "Custom PDF Source Files" in your subject line. We'll get you rolling right away!