



Custom PDF exports

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Use Custom PDFs to create PDFs with the categories and articles you want. Custom PDFs are stored and can be regenerated on demand. They're great if you want to create a curated collection of some of your content, such as for new employee or new user onboarding, quick start guides, and so on.

Custom PDFs can only include articles with a Published or Needs Review status.

Sample Custom PDFs page with two custom pdfs created

Custom PDFs include many of the same options of the Standard PDF:

- Customizable cover page
- Specify A4 vs. US Letter page size
- Add a watermark and/or a password
- Edit the title of the table of contents
- Add a custom footer

There are four overall steps to generating a new Custom PDF:

1. Create the PDF.
2. Configure the PDF.
3. Select the content.
4. Save and generate the PDF.

We cover each in more detail below.

Create a Custom PDF

1. In the left navigation, go to Tools > Exports. The Exports page opens to the Standard PDF tab.
2. Select the Custom PDFs tab.
3. Select + Create New Custom PDF.

□

Configure the Custom PDF

Now that you've created the initial custom PDF, Use the **Custom PDF Options** page to customize the layout of your PDF:

1. Choose whether to **Include a cover page** using the **Content options** checkbox (defaults to no cover page).
2. Enter a **PDF Name**. This name is displayed in the Custom PDF tab and is used as the file name when the PDF is downloaded.
3. Select a **Page Size**. Options are A4 (default) and US Letter.
4. *Optional:* Add the text you'd like used as a watermark in **Watermark Text**. This text will be displayed diagonally across the page of the PDF.
5. *Optional:* If you'd like to password-protect this PDF, add a **Password**. Anyone opening the PDF will have to enter the password before they can see the content.
6. All Custom PDFs generate with a Table of Contents, titled "Table of Contents." Change the page heading by editing the **Table of Contents Title**.
7. If you've included a cover page using the **Content options** checkbox at the top, edit the **Cover Page Title** to display the title you'd like. It will default to "[your knowledge base's name] Knowledge Base PDF". You can then include this wherever you'd like in the cover page by adding `[pdf("cover-title")]` into the Custom Cover Page Content.
8. If you've included a cover page using the **Content options** checkbox at the top, you can also add additional **Custom Cover Page Content** in the box provided. This will take standard HTML.
9. If you'd like anything displayed in the left section of the PDF footer, edit the **Content Footer Left** section.
10. If you'd like anything displayed in the center section of the PDF footer, edit the **Content Footer Center** section.
11. If you'd like anything displayed in the right section of the PDF footer, edit the **Content Footer Right** section.



For the Content Footer sections or the Custom Cover Page content, several merge codes can help you quickly add certain text, like the knowledge base title or page numbers. Refer to [PDF Merge Codes](#) for a list of available merge codes and what they do.

Select your Custom PDF's content

Once you've configured the Custom PDF Options, use the checkboxes in the **Included Content** section to select the categories or articles you'd like include. Checking the box for a category will automatically check the boxes for all subcategories or articles it contains. Unlike Standard PDFs, Custom PDFs will include restricted content if it's checked.



Deep content hierarchy display bug

The Included Content section tries to display the content hierarchy in your knowledge base, but it has some limitations. Once you hit the third layer of categories, content will not properly indent underneath subsequent categories. So, for example, in this screenshot, all of the articles listed at the same level as **Create a category** are actually inside it, not at the same level:

Save and Generate your Custom PDF

Once you've finished your selections, scroll to the very bottom of the page and select **Save and Generate PDF**.

Once you select this option, you'll be returned to the Custom PDFs tab. A progress bar displays under your custom PDF. Once that progress bar disappears, the PDF is available for download and you'll see a different display. Refer to Use a Custom PDF below for more info!

Use a Custom PDF

Once you've generated at least one Custom PDF, you can see all of your Custom PDFs in **Tools > Exports > Custom PDFs**.

Each Custom PDF appears in its own card. Here's the layout of a custom PDF card:

1. The top of the card displays the title. This pulls directly from the **PDF Name** field in the Custom PDF configuration.
2. If you select the **View PDF Download Embed Code** link, we'll display the HTML needed to embed this PDF somewhere in your knowledge base. Click anywhere in the code box that displays, right-click, and select **Copy**. You can then paste this code in wherever you'd like to use it (such as in **Settings > Style** in one of the Custom HTML templates, or within the Code View of an individual article or category).

Sample PDF Download Embed Code

3. We'll show the date and timestamp that the PDF was **Last generated**, so you know how up-to-date it is.
4. Use the **Download** link to download the PDF to your computer.
5. If you don't need to change the PDF's settings and just want to regenerate it to be sure it has the latest content, select **Regenerate**.
6. If you'd like to open the Custom PDF to edit its configuration, name, layout, or the content it contains, select the **gear icon** in the upper right.
7. If you'd like to delete the PDF completely, select the **trashcan icon** in the upper right.

Regenerate a Custom PDF

Custom PDFs are a snapshot of your articles at the date and time your PDF is generated. If your articles change, you will want to regenerate your PDFs to update the content.

To regenerate a custom PDF:

1. In the left navigation, go to **Tools > Exports**. The **Exports** page opens to the **Standard PDF** tab.
2. Select the **Custom PDFs** tab.
3. Find the card for the custom PDF you'd like to regenerate.
4. Select **Regenerate**.
5. A progress bar displays to show you the regeneration's progress. Once it's complete, the **Last generated** statement will reappear with a new Download link. If you have embedded the PDF in your knowledge base, regenerating it will also update the PDF located at the embed code.

If you'd like to make edits to a PDF or view the content it contains before you regenerate, use the **gear icon** in the upper right of the custom PDF card instead!
