



COMPASS

PDF Export & Copy-for-Email

Two ways to share guides outside the web: branded PDF downloads, or paste-into-Gmail-with-formatting via Copy-for-Email.

Prepared by Terrance Bortell · May 16, 2026

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Compass turns guides into shareable artifacts beyond the web — **PDF exports** (with your branding) and **Copy-for-Email** (paste a guide directly into Gmail, Outlook, or Apple Mail with formatting intact).

PDF Export

Every guide has a built-in PDF export. The PDF is rendered server-side with proper page breaks, your agency branding, and a polished social-splash cover.

Exporting a PDF

- **From the editor** — top-right menu → **Download PDF**. Generates and downloads in a few seconds.
- **From the public site** — every public/client guide has a **Download PDF** button
- **Programmatic** — any guide URL with /pdf appended (/guide/your-slug/pdf) downloads the PDF directly. Useful for embedding "Download" buttons in emails or other sites.

What's Included in the PDF

- A branded cover page with the guide title, your agency name, and your brand colors
- The full guide body with proper page breaks
- A footer with your agency name, the guide URL, and the export date
- Page numbers

PDF Caveats

- YouTube and Vimeo embeds render as a poster image with a "Watch on YouTube" caption (PDFs can't play video)
- HTML blocks render however the HTML renders — keep PDF-friendliness in mind for raw HTML

- The PDF reflects your guide's current published state — if you edit while a customer has the PDF, they have an older version. The footer shows the export date.

Copy-for-Email

Copy-for-Email turns any guide into HTML that you can paste directly into Gmail's compose window, Outlook, or Apple Mail — with all your formatting (headings, lists, callouts, tables, images) intact. The recipient sees the guide as a beautifully-formatted email, not a link.

When to Use Copy-for-Email

- Sending a custom destination guide to a specific client
- Following up after a consultation with a curated "next steps" guide
- Sharing an FAQ-style answer with a prospect who asked a question
- Any time you want the content to land **in the email body**, not behind a link

How to Use It

1. Open the guide in the editor
2. Top-right menu → **Copy for Email**
3. Compass copies the rendered HTML to your clipboard
4. Open Gmail/Outlook/Apple Mail → start a new email
5. Paste with `Ctrl/Cmd + V` (NOT paste-as-plain-text)
6. The guide appears in the compose window with formatting
7. Add a subject, recipient, your personal note, and send

Email Client Compatibility

- **Gmail (web)** — works perfectly
- **Apple Mail (macOS, iOS)** — works perfectly
- **Outlook (web)** — works perfectly
- **Outlook (desktop, Windows)** — works but some custom callout styling is simplified (Outlook desktop has weaker HTML support)
- **ProtonMail, FastMail, etc.** — generally works; results vary by version

PDF vs. Copy-for-Email — Which to Use

- **PDF** — for content you want as a downloadable attachment, archive-able, printable, or that should look identical regardless of where it's read
- **Copy-for-Email** — for content you want to land directly in the inbox, no "open this attachment" step required

Many advisors do both — paste the guide into the email body with Copy-for-Email AND attach the PDF version, so the recipient can read it inline or save it for later.