

Knowledgebase > ESP Web > Presentations and Projects > Projects in ESP Web

Projects in ESP Web

Tamika C - 2019-09-10 - Presentations and Projects

The Projects area is where you store customer folders, presentations and products. Click on Projects from the ESP Web toolbar.

@esp	ESP -	ESP Websites Admin 👻		
Searches -	Top Sellers -	Projects	Presentations -	
			1	

Create a Project

To add a folder to the My Projects area, click on the Create Project button. In the Create Project window, type the name of your project. If you want to add the new project to an existing folder, check the Nest Under box and then slect the folder from the dropdown. Click on OK.

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Q Search for	Products		Products 👻 P	rice	Qua	antity	Search

2

Managing Projects

To additional information to your project, such as Customer Name, Project Due Date and Notes, click on the Client name, enter the details and then click on OK.

To create a project subfolder, follow the same process as adding a new folder. Click on the Create Project button, check the Nest Under box and select he location wher eyou would like to add the folder from the dropdown.

To delete a folder, select the folder from the left navigation and then click on the Delete button. Deleting a folder will delete its entire contents; including all products, presentations and subfolders.

BC Company		@ Edit	
Presentations (1)	Saved Products (2)		
Search for Presentations	s Search	Sort By:	Newest 🔻

Managing Presentations

Hover on a presentation listing to view management options: Download, Edit, Copy or Send.

	ESP Presentation	4888			Delete 🗙
Presentation Name Client Name	Customer: ABC Company				
	Last Updated: 9/10/19		~		
	Created By: ESP User				
		Download	Edit	Сору	Share

- Edit: Edit the presentation in your ESP.
- Copy: Create a version of the presentation in your projects that you can rename, modify or save as your own.
- Send: Send the presentation.

Shared Presentations

After creating a presentation, you have the option to share the presentation with other users within your company. To access presentations which have been shared by other users in your company, click on the Shared Presentations link.

Hover on a shared presentation listing to view the Download and Copy options.

Search for Presentations and Products

• Search For Presentations

In the Presentations tab, you have the ability to search for presentations by typing keywords in the "Search for Presentations" bar and then clicking on the Search button. You are able to sort search results using the Sort By dropdown.

ABC Company		P Edit	X Delete 🔒 Print
Presentations (1)	Saved Products (2)		4
Search for Presentations	s Search	Sort By:	Newest •

• Search For Products

In the Saved Products tab, you have the ability to search for saved products by typing keywords in the "Search for Products" bar and then clicking on the Search button.

ABC Company		Sedit X Delete BPrint
Presentations (2)	Saved Products (2)	\sim
		mug Search