

What's New > ESP Quick Tips > ESP Quick Tip #38: Create a Template for ESP Presentations

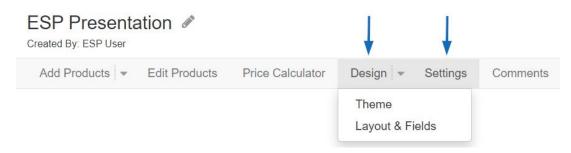
ESP Quick Tip #38: Create a Template for ESP Presentations

2022-06-16 - Jennifer S - ESP Quick Tips

If you've customized a presentation and would like to save the modifications for future use or would just like establish a default for your presentations, you can create a template. To save a presentation's customization as a template, log into ESP and click into any presentation or create a new one.

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Use the options in the Design and Settings sections to customize the presentation.



Once you've finished making modifications, click Save as Template option from the Presentations toolbar.

< Back to Presentations Manager	원 Copy 🖹 Save as Template @	t Share	A Download	Preview	Send Send
ESP Presentation 🖋			6 Proc	lucts in this F	Presentation
Created By: ESP User					

Enter a name for the template and then click on the Save button.

Save Template	×
Save these settings and create a Template you can Template Name Custom Template	use at any time
Theme Simple Products Per Page 1 Header Layout Contact right Field Labels 15	Presentation Name Client Name
Footer Layout Logo left, Text Center, Page Numbers Right	
	Cancel

The template will now be available to apply for all future presentations. When creating a new presentation, click on the thumbnail for the presentation template.

Create a New Presentation			
Fill out the information to begin your new Presentation	n.		
Presentation Name *			
Presentation Name			
Customer	Select a Presentati	ion Template (Learn more	e about templates)
Customer Enter or Select Company	Select a Presentati	ion Template (Learn more	e about templates)
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Customer Enter or Select Company Visible to © Everyone O Only the Record Creator @	Presentation Name	Presentation Name	