

## ESP Presentations

Jennifer M - 2020-07-16 - Presentations and Projects

The ESP Presentation tool allows you to quickly and easily build sales presentations that are professional, customizable and shareable. Think of presentations as your tool for closing more sales. How you present a product can make a remarkable difference in your client's eyes.

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### **Ready to get started?**

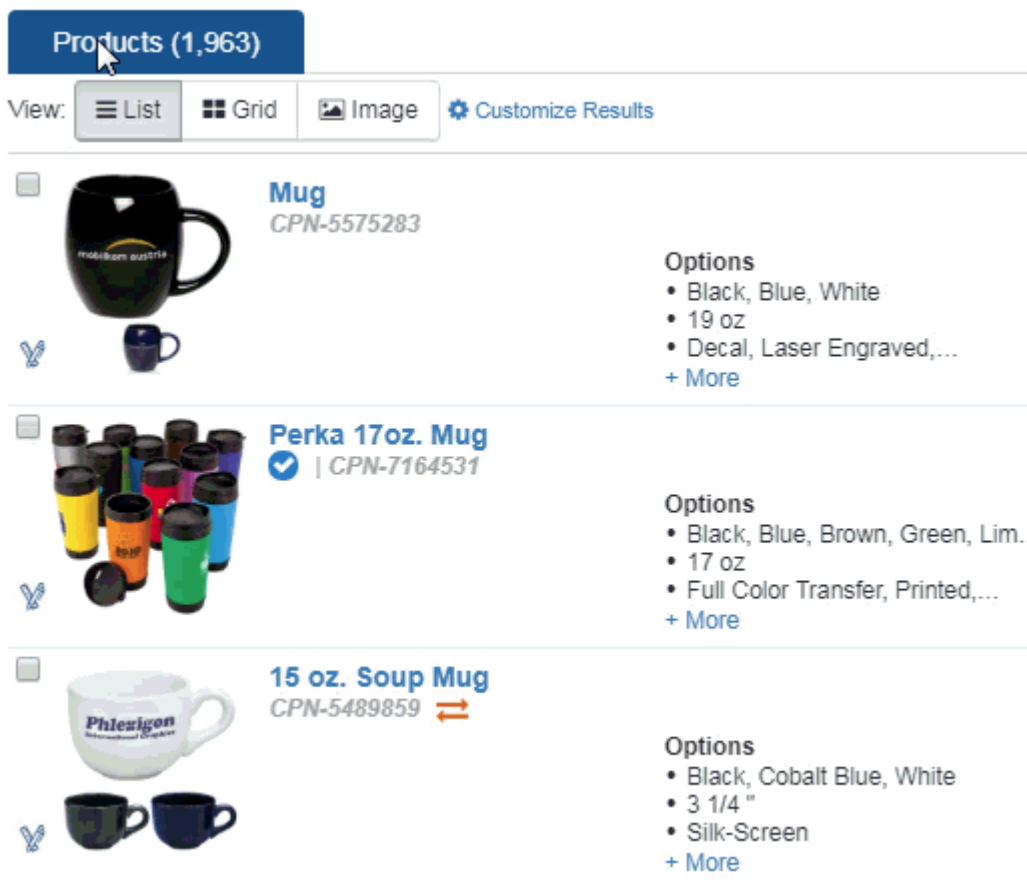
Great! ASI is here to help you! What would you like to do?

### **Create a New Presentation**

There are several ways to begin a presentation. Where are you starting from?

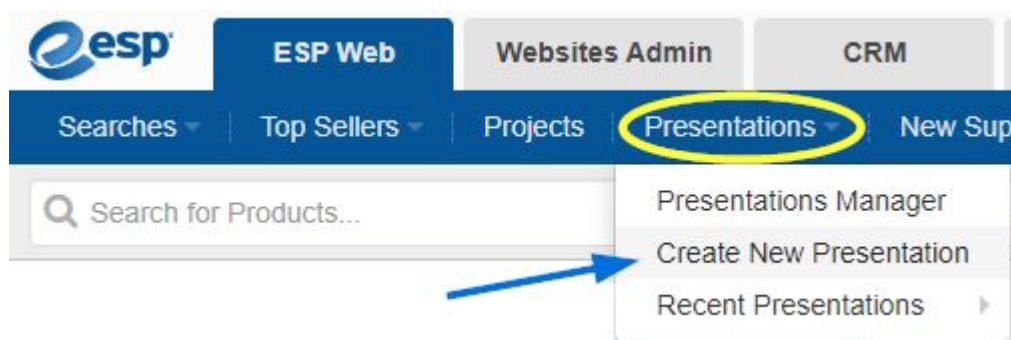
### **I'm a search results page**

After marking a product, a toolbar will appear which will enable you to manage the product. Click on the Create Presentation option. If you need to create a presentation with products from multiple searches, save the products to the Clipboard first. To save products to the Clipboard from a product search, mark the products, hover on the Copy To option on the toolbar and select Clipboard.



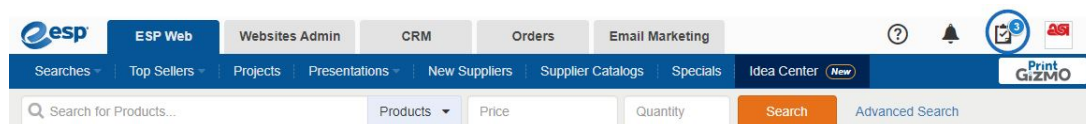
### I'm on the ESP Homepage

To create a presentation from the ESP Homepage, click on Presentations from the ESP Web toolbar and select Create a New Presentation.

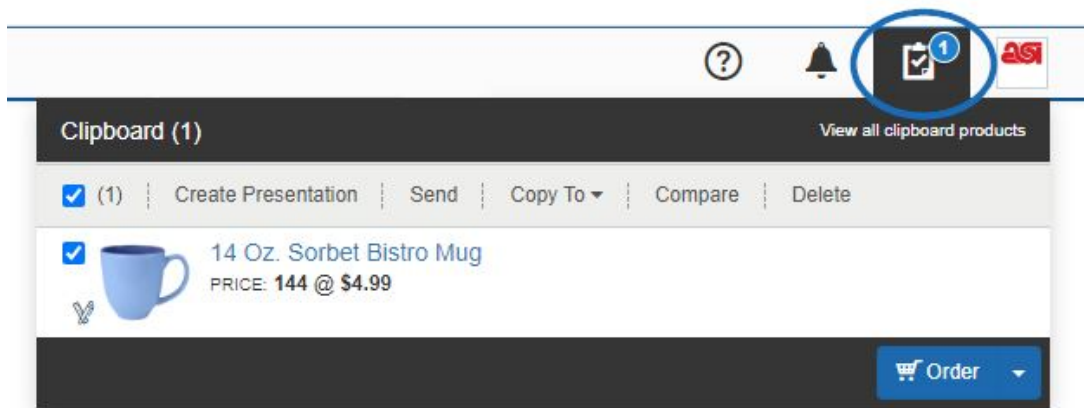


### I'm in the Clipboard

To create a presentation with items saved to the Clipboard, click on the Clipboard icon.

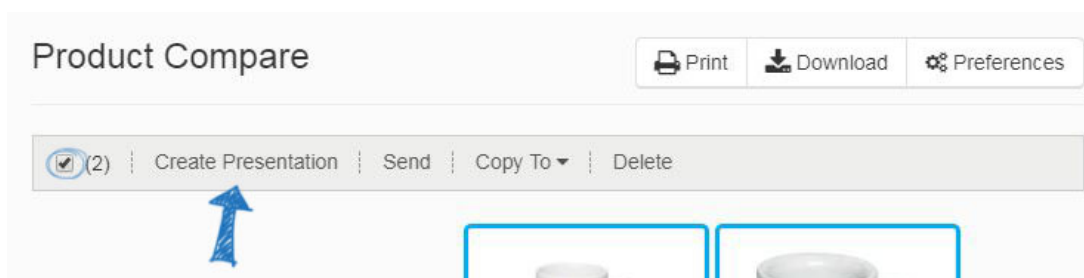


You can mark one item, check specific products, or check the top checkbox to select all. Once you have products selected, click on the Create Presentation option.



### I'm in the Product Compare

From the Product Compare, mark the product(s) you would like to include in the presentation. Then, click on the Add button. You can use the Create New Presentation option to begin a presentation with the item(s) you selected.

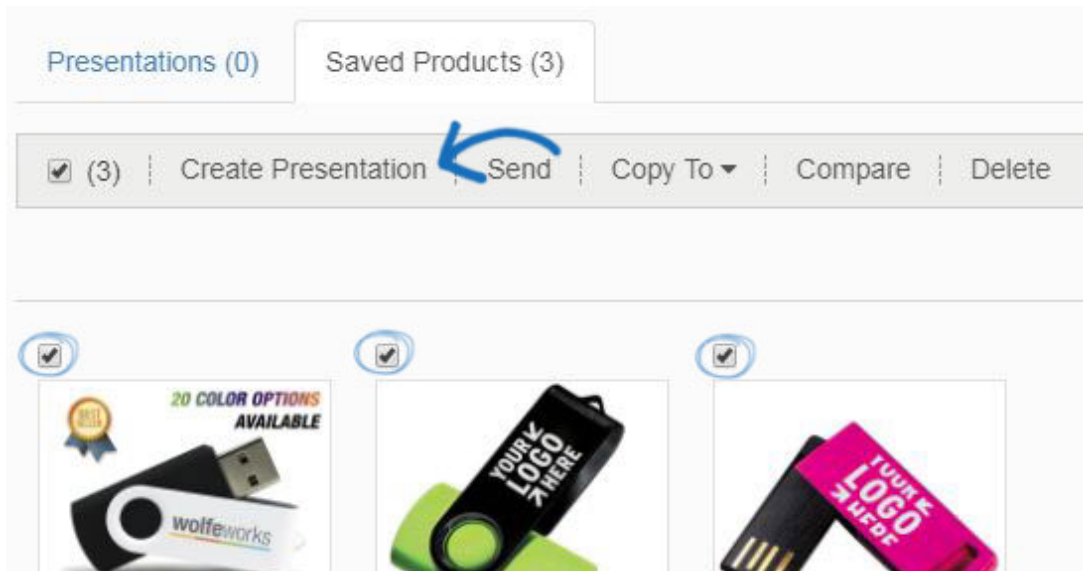


### I saved the Products in a Project Folder

Click on the Projects option from the main toolbar.



Locate the project folder where the products have been saved. Then, click on the Saved Products tab. Mark the item(s) you would like to include in the presentation and then click on the Create Presentation option from the available toolbar.

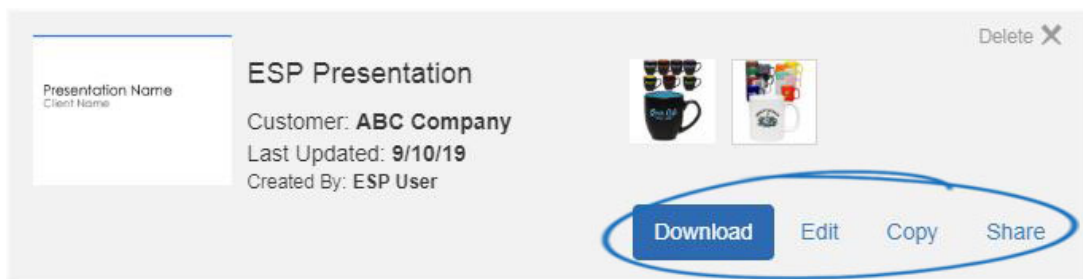


### I want to Create a New Version of an Existing Presentation

If you want to copy a presentation, you will need to do so in the Projects area. Click on the Projects option from the main toolbar.



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



Before you can begin customizing the product information, you will need to name and assign the presentation. Type the Presentation Name, then assign it to a Customer and Project Folder. By designating a customer, a copy of the presentation (including products) will be saved in the CRM under that customer listing. In addition, select a Project Folder, which will act as an online filing cabinet for all your presentations.

**Note:** If you want to add this presentation to a new project or customer, click on the Create New link beneath Projects or New Customer to create them on the fly.

If you would like to share this presentation with other users within your company, use the Visible to options to select:

- Everyone: This presentation will be available for editing by all users within your company.

- Only the Record Creator: Only the user who created the presentation will be able to view and/or edit this presentation.
- Teams or Individuals: Select a sales team or designate specific individuals within your company with whom you would like to share this presentation.

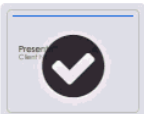
After entering this information, click on the Create button.

### Create a New Presentation ✕

Fill out the information to begin your new Presentation.

**Presentation Name \***

**Customer** Select a Presentation Template [\(Learn more about templates\)](#)



My Template

**Visible to**

Everyone

Only the Record Creator ?

Teams or Individuals ?

**Project Folder \***

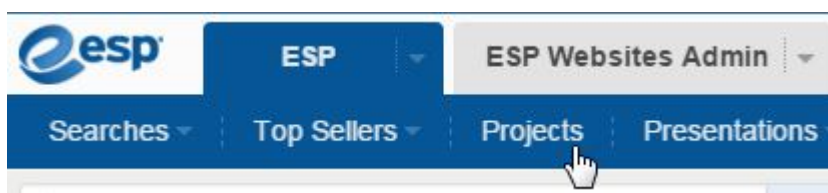
My Projects
  ABC Company
  Custom Shaped Mugs
  My Projects/A Plus Company

[Create New](#) | [Manage Projects](#)

## Edit an Existing Presentation

### Edit the Presentation Details, Download, Share, Delete, or Send

Click on the Projects option from the main toolbar.




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

Presentation Name  
Client Name

**ESP Presentation**

Customer: **ABC Company**  
Last Updated: **9/10/19**  
Created By: **ESP User**

Delete X



**Download** Edit Copy Share

### Edit the Product Information within the Presentation

Click on the CRM tab and then click on the Customers tab.

esp

ESP Web Websites Admin **CRM** Orders

Companies Contacts Emails Notes Tasks Appointments Designs

## Companies

All Companies Customers Suppliers Decorators Prospects

Search for address, phone, etc...

Locate the customer listing and click on their name.

A

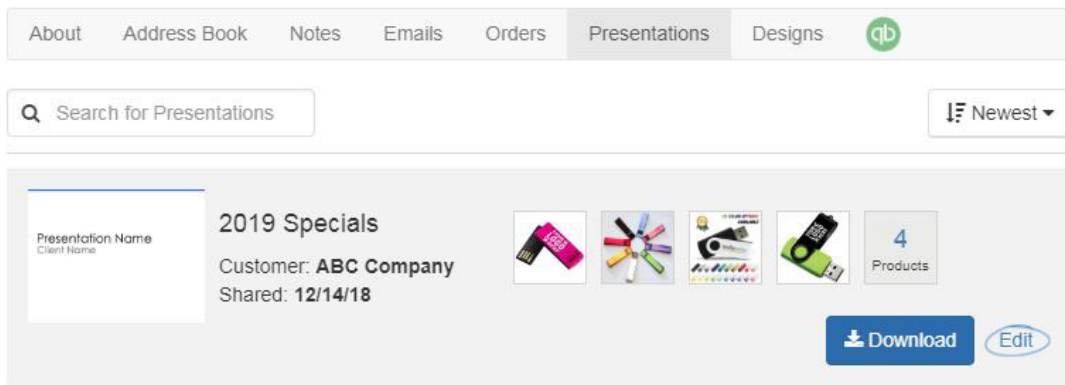
ABC Company 4800 Street Rd  
Feasterville-Treose PA, 19053  
United States

Click on Presentations from the customer toolbar.

ABC Company  
Customer  
Record Owner: ESP User Created By: ESP User

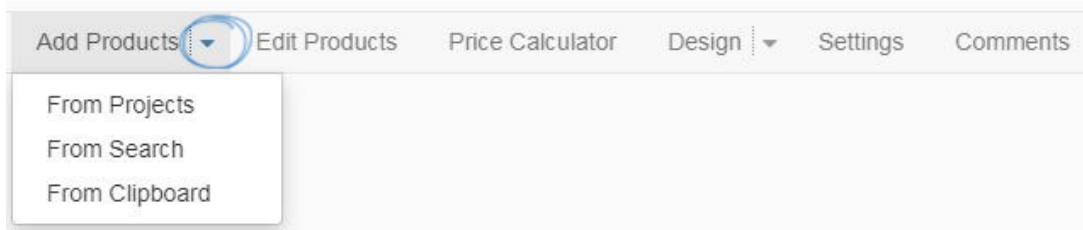
About Address Book Notes Emails Orders **Presentations** Designs qb

Hover on the the presentation you would like to modify and then click on the Edit link.



## Add Products to a Presentation

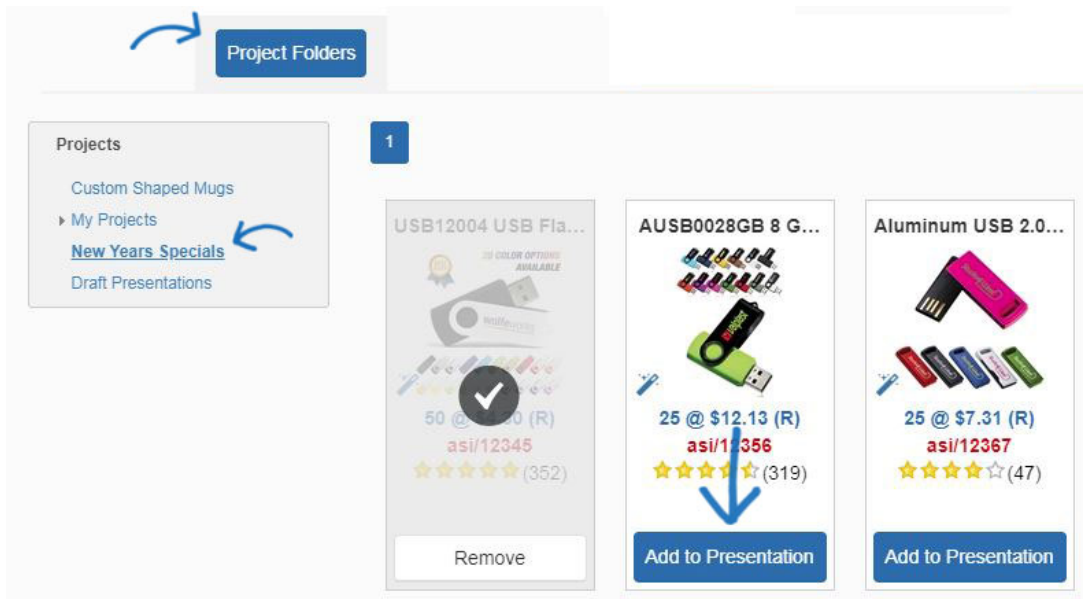
If you created a presentation, you can click on the Add Products option or use the dropdown arrow to add products. The only difference is that the dropdown arrow will bring you directly into the option you selected.



There are three ways to add new products:

### From a Project Folder

Click on the Projects folder option. All of the available project folders will be displayed below the folder icon. Select the project where the items you would like to include in the presentation have been saved. Then, click on the Add to Presentation button on the product listing.



### From a Product Search

Click on the Projects folder option. Enter the search term(s) in the white box below the

magnifying glass icon. When you click into the box, a price range search will also be displayed. After entering your search keyword(s), click on the Go button. Use the guided navigation to narrow the results by clicking a link in any of the available fields. Use the Sort By dropdown to view the product results in a different order. After you have located the product(s) you would like to include, click on the Add to Presentation button on the product listing.

The screenshot shows a search interface for 'flash drive'. At the top, there is a search bar containing the text 'flash drive' and a green 'Go' button with a blue arrow pointing to it. Below the search bar, the results are displayed in a grid. On the left side, there is a sidebar with the following information:

- 14,788** results from 557 Suppliers
- Search Terms:** flash drive (with a 'Clear All' link)
- Category:**
  - USB/FLASH DRIVES (12196)
  - COMPUTER ACCESSO... (8989)
  - LANYARDS (570)
  - KEY CHAINS (533)
  - MOBILE ACCESSORIES (514)(with a '+ See More' link)
- Supplier:** (dropdown menu)
- Specials:** (dropdown menu)

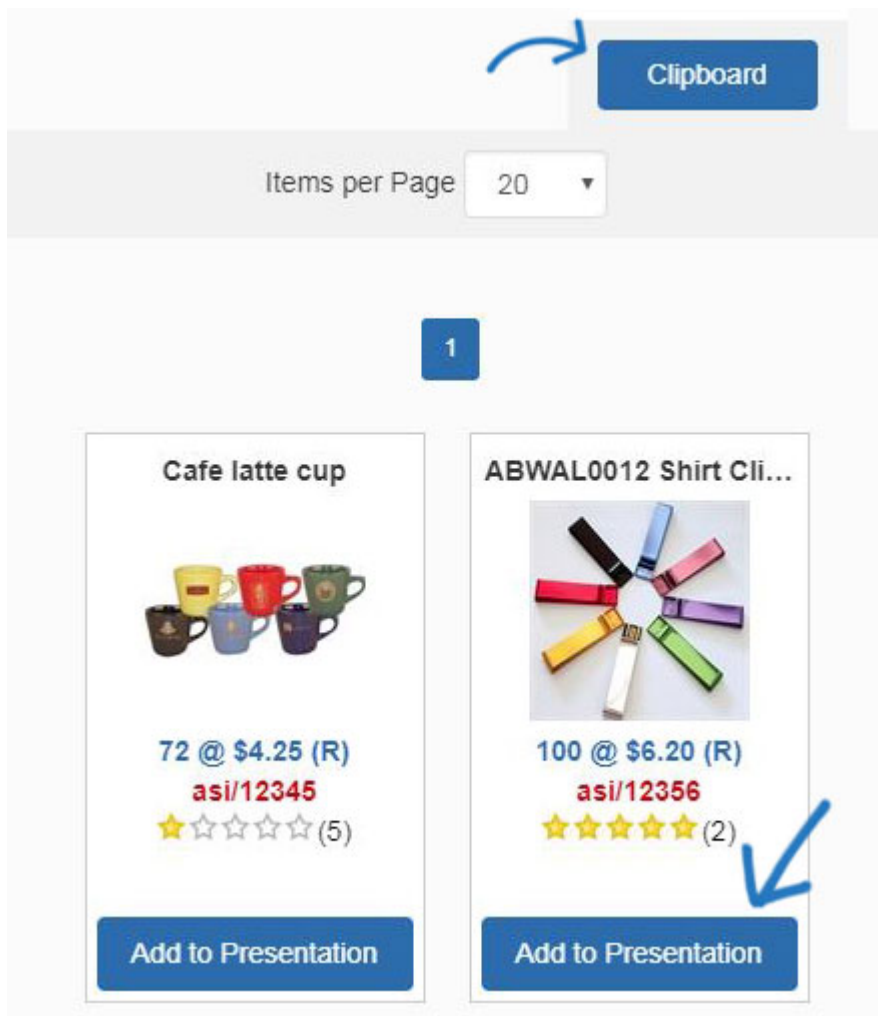
The main product grid shows four items:

- USB039 Chrome K...:** LASER ETCH AVAILABLE, 50 @ \$4.92 (R), asi/12345, 5 stars (352), Add to Presentation button.
- USB12004 USB Fla...:** 25 COLOR OPTIONS AVAILABLE, 50 @ \$4.30 (R), asi/12345, 5 stars (352), Remove button.
- FD-036 Italia Leath...:** 50 @ \$4.62 (S), asi/12356, 5 stars (14), Add to Presentation button (with a blue arrow pointing to it).
- PMG-17-SWUSB Cu...:** 25 @ \$4.83 (R), asi/12356, 5 stars (137), Add to Presentation button, MOST POPULAR badge.

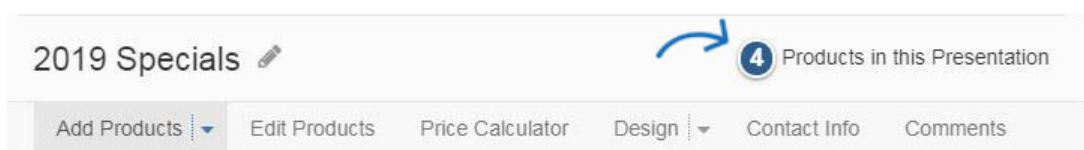
## From the Clipboard

Click on the Clipboard option. All of the available items which have been saved onto the clipboard will be displayed. Click on the item(s) you would like to include in the presentation. After you have located the product(s) you would like to include, click on the Add to Presentation button on the product listing.





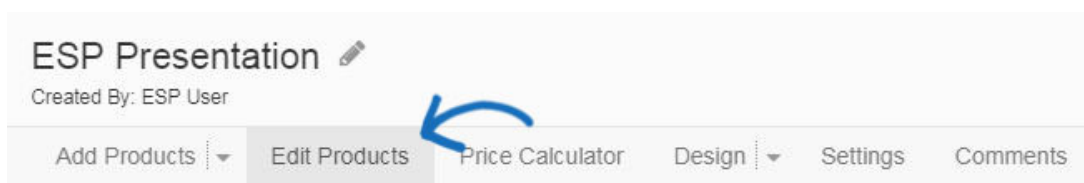
No matter where you added the products from (Project Folder, Search, or Clipboard), clicking on the Add to Presentation button product will update the product listing to show with a check mark and a remove button. A count of how many products are in the presentation will be displayed above the presentations toolbar.



When you are finished adding products, you can use the Edit Products, Price Calculator, Design, and Contact Info areas to customize your presentation.

### Edit the Product Information

You are able to completely modify the product information for all items within a presentation by clicking on Edit Products.

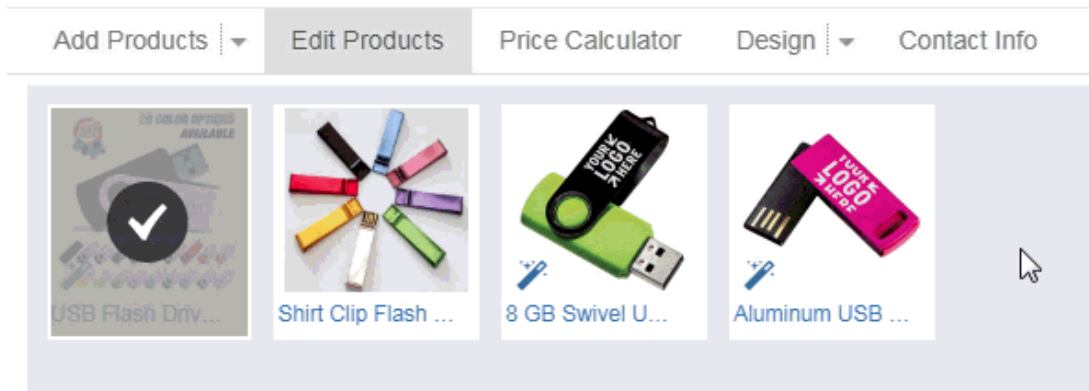


A thumbnail for each product in the presentation will be displayed below the Edit Products options. The current product you are editing will show with a checkmark and all the product information for that item will be shown below. If the presentation contains a lot of items, you may need to use a horizontal scroll bar to view them all.

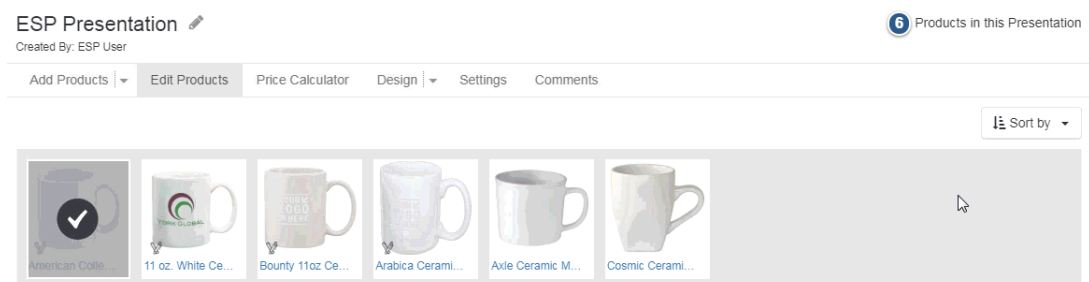
How would you like to modify the product information?

### Change the order of the products

The order of the product thumbnails is the order of the products in the presentation. To change the order, drag and drop the thumbnails to the order you would like.

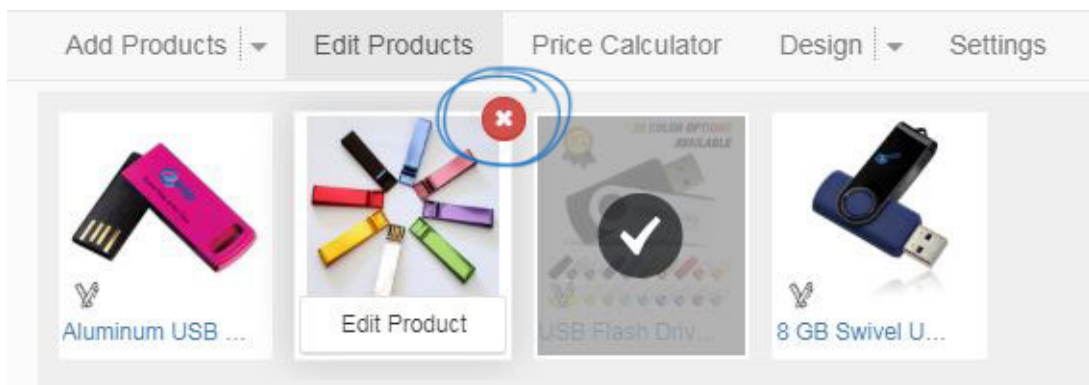


You can also use the Sort By dropdown to sort the products within the presentation.



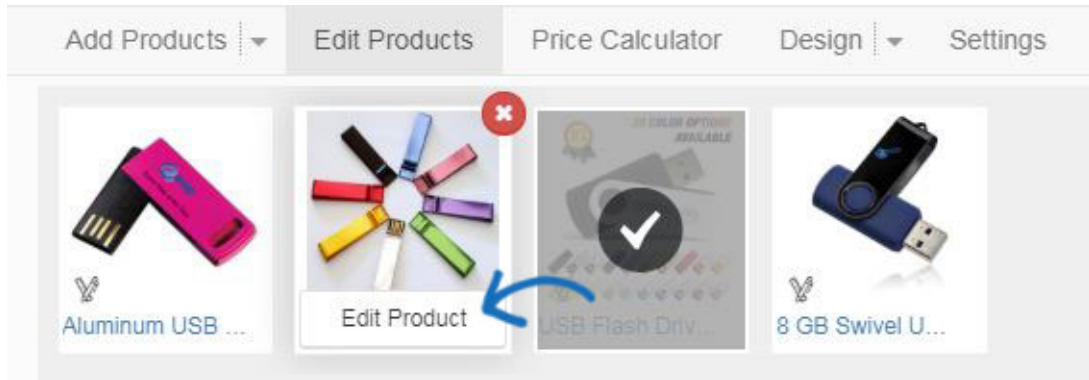
### Remove a product from the presentation

To remove a product from the presentation, hover on the thumbnail image. Then, click on the red circle with the white "X" icon.



## Modify the information in a field

Hover on the product thumbnail to see the Edit Product button. Click on the Edit Product to open the item in an editable state.

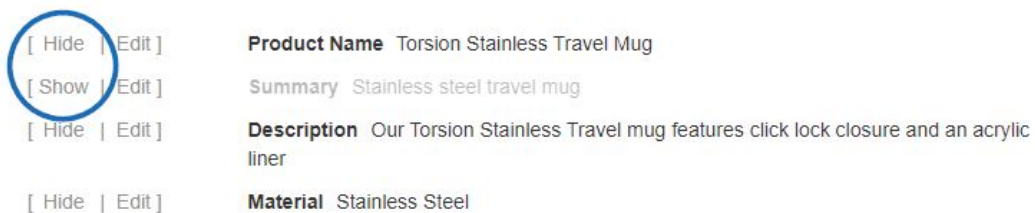


Then, click on the Edit link for the field where you would like update the information. Type the new information in the Edit Product Detail field. You are also able to update the field label for this product. If you would like to update the field label for all the products within the presentation, you can do so in the Layout & Fields section of the Design area.

Click on the Save button when you are finished updating the information.

## Change which fields are visible


The Show/Hide links in this area will apply to the individual product only.



You are able to show or hide fields for all of the products in the presentation within the Design section. You are also able to save a template with specific visible or hidden fields by selecting the fields in the Design area and then clicking on the Save as Template option. For more information on how to do this, please review the Design section.

You can also hide price columns within an individual price grid using the checkbox above the price break.

Product Option: C Handle, D Handle Size: 12 oz

Hide	C Handle, D Handle, 12 oz										Edit
	Show All Columns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Quantity	12	24	36								
Price \$	5.000	4.500	4.000								
Net Cost \$ *	7.500	6.750	6.000								

\* Net Cost Required

[ Hide | Edit ] **Price Includes** One color imprint, one location

Clear All Columns | Show Current Price | Update to Current Price **Save** **Order**

## Use a different product image

If the supplier has provided multiple images for the product, a thumbnail for each additional image will be displayed below the main product image. Use the arrow to scroll horizontally through available images.



The available options for image replacement will vary depending on the item, however, you can always upload an image from your computer to use in the presentation. Click on the Upload a New Product Image link, browse your computer, locate the image file and then click on Open.



If the supplier has enabled the image for virtual samples, hover over the image to make your selection:

- *Show Catalog Image*: Will display the default, standard image for the product from the supplier's catalog
- *Show Blank Image*: Will clear any existing logo from the image and show as blank
- *Show Virtual Sample Image*: Will display the virtual sample logo image uploaded in the [Virtual Samples section of the Preferences](#) area.



After clicking on an option, a prompt will appear asking if you would like to replace the current image with your selection for all virtual sample enabled images within the presentation.

Would you like to replace all products that are Virtual Sample enabled with the Supplier Catalog image?

No Yes

### Show my customer's logo on the product

You will be able to display your customer's logo on all virtual sample enabled images. Virtual sampled enabled images will display with a wand icon.



When editing the product, you will see the Create a Virtual Sample button below the image.

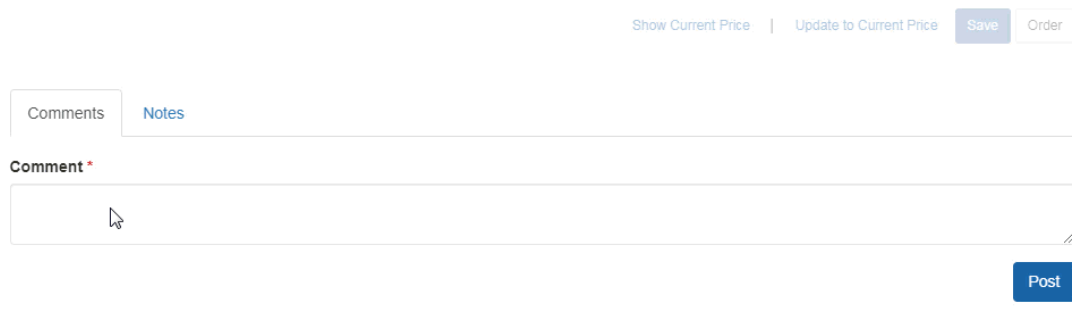
Click on that button to get started.

**Note:** If the image has the wand icon, but you do not see the Create a Virtual Sample button below the image, it may be because the main product image for the product is not virtual sample enabled. Scroll click on the thumbnail images to get to the virtual sample enabled one(s).

For more information on creating virtual samples, please review the [Virtual Samples in ESP](#) article.

## Include Comments

At the bottom of the product listing, you have the option to enter comments about this product. Comments can be viewed by the end user and you have the option to enable end users to enter their own comments on the presentation.

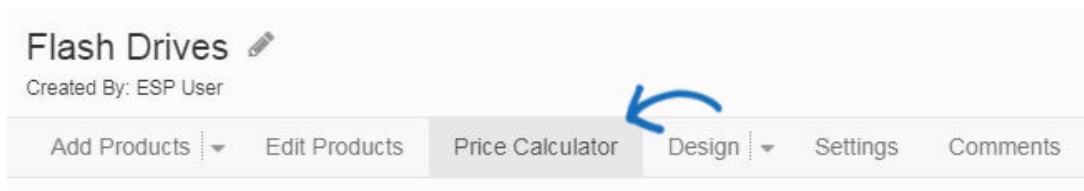


The screenshot shows a product listing interface. At the top right, there are buttons for "Show Current Price", "Update to Current Price", "Save", and "Order". Below these, there are two tabs: "Comments" and "Notes". Under the "Comments" tab, there is a "Comment \*" label and a large text input field. A mouse cursor is visible over the input field. To the right of the input field is a blue "Post" button.

For more information on using comments, please review the Comments section.

## Modify the Pricing

To modify the pricing for multiple products in a presentation, use the Price Calculator section. You also have the option to display the price grids in reverse (descending) order. This option is available in the Settings tab.



How would you like to adjust the pricing?

## Use a Profit Margin

A profit margin is essentially the percentage of profit. To set the items to a profit margin, select the "Adjust Prices based on Profit Margin" option and enter a numeric value in the percentage box. Do not include the percentage symbol (%). Click on the Apply button to make your changes apply to all or selected products.

Updates will be applied to  All Prices  Selected Prices Only [Manage Currency](#)

Adjust Prices based on  % Profit Margin

OR

Add  Fixed Amount  \$ To  Price From  Price

Subtract  Percentage  %  Net Cost  Net Cost

Round up to 2 decimal places

### Add or Subtract a Fixed Amount or Percentage

You can add or subtract - a percentage or a fixed amount - to or from the list price or the net cost. Select the boxes for the action you would like to take and enter a numeric value in the Fixed Amount or Percentage area. You can also choose to have the prices round up to two decimal places instead of three. When you are finished, click on the Apply button to make your changes apply to all or selected products.

Updates will be applied to  All Prices  Selected Prices Only [Manage Currency](#)

Adjust Prices based on  % Profit Margin

OR

Add  Fixed Amount  \$ To  Price From  Price

Subtract  Percentage  %  Net Cost  Net Cost

Round up to 2 decimal places

### I'm not sure. How is using a profit margin different than adding a percentage?

If you're not sure whether to use a profit margin or add a percentage markup, it can be a little confusing. Essentially, the profit margin is percentage of profit, whereas a markup is how much of a percentage should be added to the list price.

So, how do profit margin and percentage markups differ in terms of determining the list prices for the item(s)? In general, here is the difference:

- **Profit Margin:**

$$\text{Net Cost} / (1.00 - \text{Profit Margin}) = \text{New List Price}$$

- **Percentage Markup:**

$$\text{List Price from supplier} * \text{Percentage} = \text{Amount to be Added to Current List Price}$$

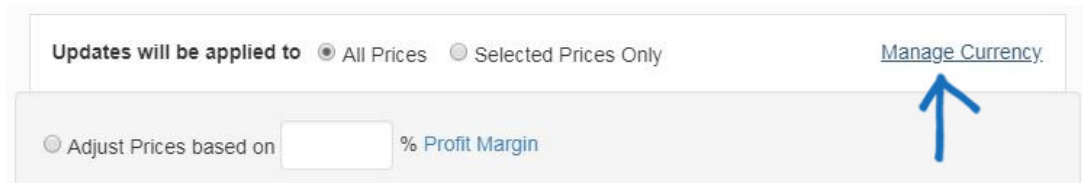


List Price from supplier + Amount to be Added to Current List Price =  
New List Price

For more information, please review the [Profit Margin versus Percentage Increase Reference Guide](#).

## Convert the Currency

Pricing for all products in a presentation can be converted from US dollars (USD) to Canadian dollars (CAD) and vice versa. To convert pricing, click on the Manage Currency link.




Updates will be applied to  All Prices  Selected Prices Only [Manage Currency](#)

Adjust Prices based on  % Profit Margin

A blue arrow points to the [Manage Currency](#) link.

Use the dropdown to select which currency should be displayed on the presentation. Then, use the conversion box to enter the exchange rate. Then, click on the Save button.



Manage Currency

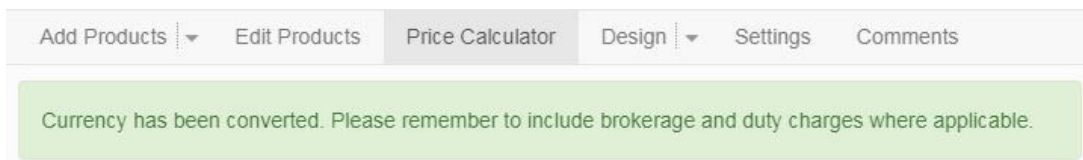
Show Prices In:  
Canadian Dollar (CAD)

Use an exchange rate of  
1 US Dollar (USD) To 1.3100 Canadian Dollar (CAD)

Cancel Save

A blue arrow points to the 'Show Prices In' dropdown, and another blue arrow points to the 'Save' button.

You will see a notification that the pricing has been updated in the presentation.



Add Products Edit Products Price Calculator Design Settings Comments

Currency has been converted. Please remember to include brokerage and duty charges where applicable.

## I just want to edit the pricing for one product

To update the quantities and pricing for a product, locate the price grid for that item. Use the individual boxes for quantities, list prices, and net cost. Type the new quantities and pricing you would like to use and then click on the Save button. If you wanted to reset the products to the supplier's list price, click on the Update All Products to Current ESP Price link.



Product Option: C Handle, D Handle Size: 12 oz

<input checked="" type="checkbox"/>	C Handle, D Handle, 12 oz
-------------------------------------	---------------------------



Quantity	12	24	36	
Price \$	5.000	4.500	4.000	
Net Cost \$ *	7.500	6.750	6.000	

\* Net Cost Required

Show Current Price | Update to Current Price

## Design the Presentation

The Design dropdown contains two options: Themes and Layouts & Fields.

ESP Presentation

Created By: ESP User

Add Products | Edit Products | Price Calculator | Design | Settings | Comments

Theme  
Layout & Fields

In the **Themes** section, you are able to:

### Select the Orientation of the Presentation

Click to select the orientation of the presentation: portrait or landscape.

ESP Presentation

Created By: ESP User

Add Products | Edit Products | Price Calculator | Design | Settings | Comments

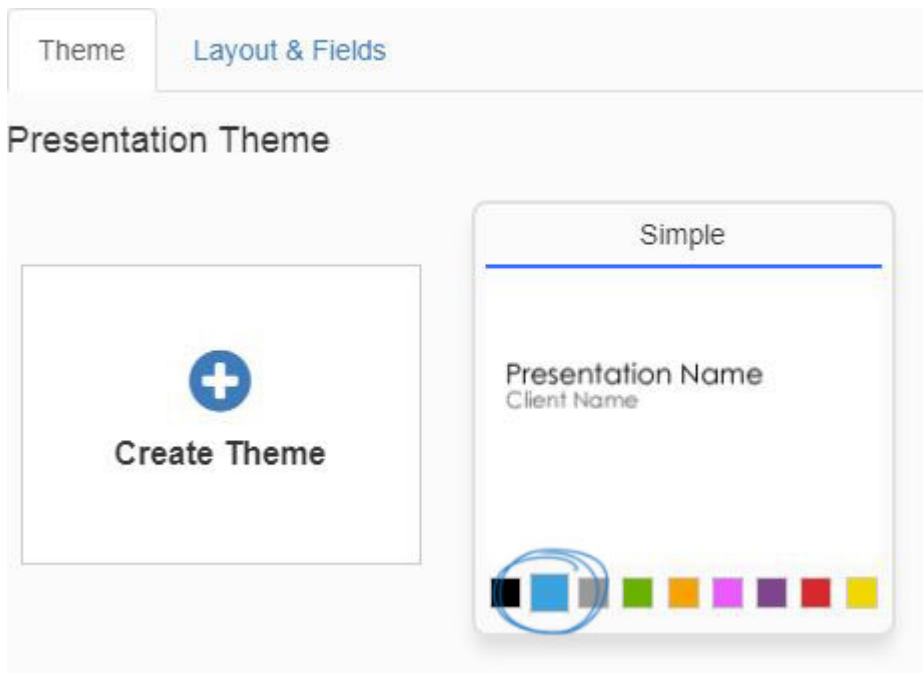
Theme | Layout & Fields

Presentation Theme

Orientation: **Portrait** | Landscape

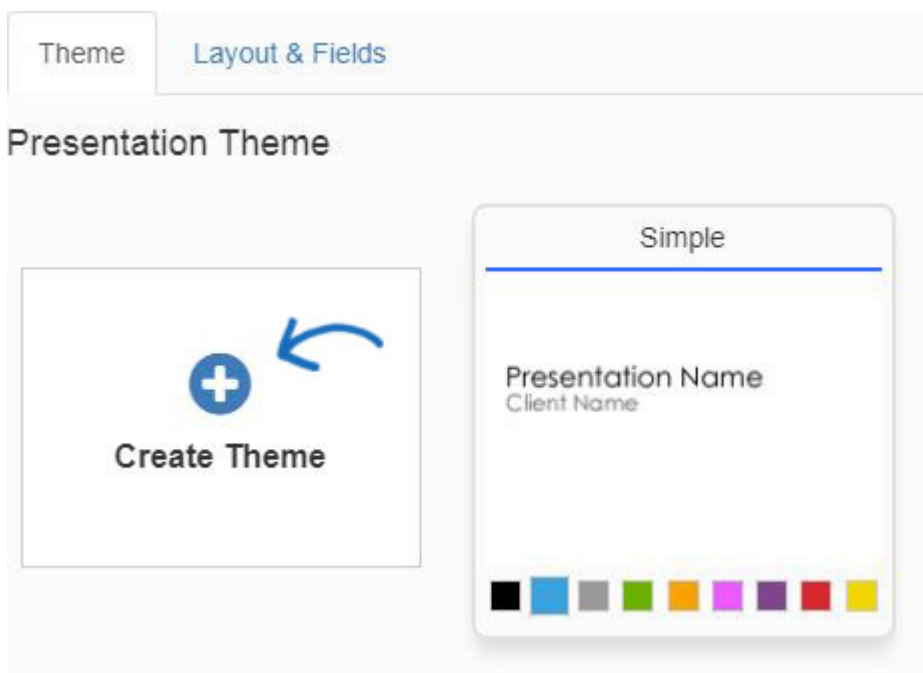
### Choose a Theme and Color Scheme

Choose an available theme by clicking on the color swatch to use the theme in the selected color scheme.



### Create a Custom Theme

Click on the Create Theme option to upload a custom background image for a presentation.



You can upload your own backgrounds for presentations in a portrait (1600 pixels by 1200 pixels) or landscape (1200 pixels by 1600 pixels) orientation. Uploaded files must meet the exact pixel dimensions. Name the theme and use the dropdown to select the font. To change the text color, click on the color swatch and then select the color you would like to use. Multiple background images can be applied to a single theme and assigned to specific pages within the presentation, however, all files within the same theme must be the same orientation. Click on Save when you are finished.

Create Theme ×

---

**Name \*** ←

Custom Theme


**Font** Helvetica

**Text Color**  

---

**Manage Images**

Please upload and assign an image to a page layout.



Remove Image

- Cover Page
- Introduction Page
- Product Page
- Contact Page
- Closing Page

+

Add Image

---

**Landscape (1600px By 1200px)**

**Visible to**

Everyone

Only the Record Creator ?

Teams or Individuals ?

Cancel
Save
←


## Configure the Header

In the Header layout, you can incorporate your logo into the header of the presentation by clicking on the use the Select from Image Library to choose a logo from the Media Manager or upload a new image. You can use the Layout dropdown to select how you would like your logo and contact information to be displayed.

**Header Layout**

↶
Layout
Logo Left, Contact Right
▼

Select from Image Library
Remove Logo

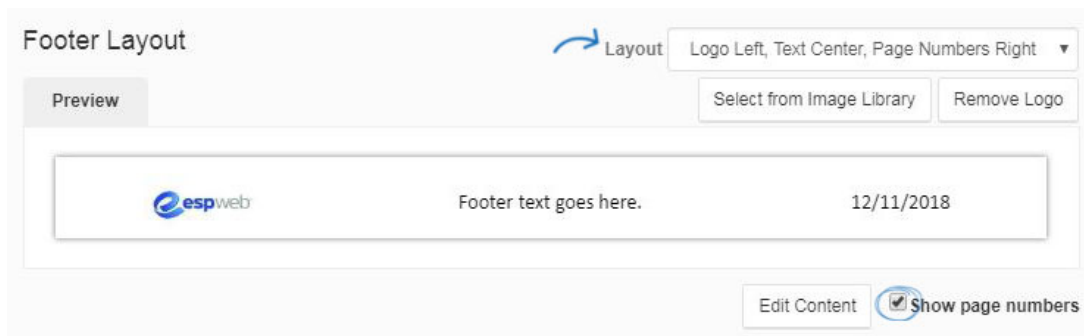


Jennifer Doe  
jdoe@asi.com  
800-546-1350

**Note:** To change the contact information on the header, go to the Settings section.

## Configure the Footer

In the Footer layout section, you can incorporate your logo into the footer of the presentation. Use the Select from Image Library to choose a logo from the Media Manager or upload a new image. You can use the Layout dropdown to select how you would like the footer to be displayed. Use the Edit Content button to customize the footer to display text such as your web address. Check the Show page numbers box to add page numbers to your presentation.



In the **Layouts & Fields** section, you are able to:

### Choose How Many Products per Page

Hover on the arrows to the left and right of the product layout thumbnails to scroll through the available options:

- 1 product per page with a large image
- 1 product per page with more details
- 2 products per page
- 3 products per page
- 4 products per page
- 6 products per page
- 12 products per page



The data fields that are the standard for each template are denoted with the eye icon in the Product Fields section below.

### Manage Product Fields

You are able to select which fields are displayed on the presentation using the Visible checkbox. The standard fields for each template will automatically be marked and denoted by the eye icon to the far right. You are able to uncheck the visible checkbox to not display a field for any products in the presentation. When determining the amount of fields to display, be mindful of the amount of standard fields for the template because adding more than the default number of fields may cause formatting issues. For example, if you are working with the 12 products per page layout, there is only space for a few fields. However, if you are working with the one product per page layout, you can show much more information for each item.

Here is the number of default fields for each layout:

- 1 product per page: Image, Price Grid with Price Includes Statement and 12

additional fields

- 1 large product per page: Image, Price Grid with Price Includes Statement and 7 additional fields
- 2 products per page: Image, Price Grid with Price Includes Statement and 7 additional fields
- 3 products per page: Image, Price Grid with Price Includes Statement and 7 additional fields
- 4 products per page: Image, Price Grid with Price Includes Statement and 7 additional fields
- 6 products per page: Image, Price Grid and 3 additional fields
- 12 products per page: Image, Price Grid and 3 additional fields

Each product field within a layout will be displayed with a customize label name box. Click into the box and type the new field label. If you would like to save these labels and layout for future presentations, use the Save as Template link.


You can also change the order of the Product Fields by clicking on the three vertical dots to the left of the order number, then dragging and dropping the field to a new location. The numbers will change automatically to reflect the new order of the product fields.

In the example below, the Description is made visible, while the Summary is hidden. Then, the Description is moved to the top spot and the Product Number is relocated to the third spot before being renamed to "Reference Number".

#### Product Fields

Order	Visible	Field Label	Customize Label Name
1	<input checked="" type="checkbox"/>	Product Name	Product Name
2	<input checked="" type="checkbox"/>	Summary	Summary
3	<input type="checkbox"/>	Description	Description
4	<input type="checkbox"/>	Tradename	Tradename
5	<input checked="" type="checkbox"/>	Material	Material
6	<input type="checkbox"/>	Shape	Shape
7	<input type="checkbox"/>	Product Number	Product Number

## Settings

ESP Presentation 

Created By: ESP User

Add Products Edit Products Price Calculator Design **Settings** Comments

In the Contact Info section, use the Presentation Details section to edit the presentation title, customer name, and your contact information. If you have chosen to use a header, editing information in this section will automatically update the header.

If you would like to share this presentation with other users in your company, you can use the Visibility settings to share it with Everyone (all ESP users within your company) or Teams or Individuals within your company. If you select the Everyone or Teams or Individuals, a checkbox will appear enabling you to select if you would like to allow other users to copy the presentation.

The Price Grid Sorting option enables you to check the Reverse Price Grid Columns box to have the quantities in the price grid displayed in a descending order. It is important to keep in mind that checking this box will not change the price grids within the presentation builder, but will be shown on output documents.

Click on the Save Presentations Details button when you are finished.


### Presentation Details



This information will appear on the first and last page of your Presentation

<b>Presentation Title</b>	<b>Customer Name</b>
<input type="text" value="Flash Drives"/>	<input type="text" value="ABC Company"/>

<b>Your Contact Information</b>	<b>Name</b>	
<b>COMPANY</b>	<input type="text" value="John Doe"/>	
<input type="text" value="Advertising Specialty Institute"/>		
<b>Email</b>	<b>Website</b>	
<input type="text" value="support@asicentral.com"/>	<input type="text" value="www.asicentral.com"/>	
<b>Phone</b>	<b>Date</b>	<b>Expiration Date</b>
<input type="text" value="800-546-1350"/>	<input type="text" value="09/05/2019"/>	<input type="text"/>


**Visible to** 

Everyone  
 Only the Record Creator   
 Teams or Individuals 

Allow users to copy presentation

**Price Grid Sorting**  
Display the price grid columns in reverse order on presentations that are previewed, downloaded, or shared.

Reverse Price Grid Columns



Also in this section, you are able to choose if you would like to use a Cover Page, Contact Page, Introduction Page, and/or Closing Page. You can add images to these pages by clicking on the Select from Image Library button. If you do not wish to include these pages within your presentation, uncheck the Show Cover Page and Show Contact Page checkboxes.


You can select an introduction page and closing page by using the dropdown. You can edit this information by clicking on the edit button below the available preview boxes. You can also create a new one using the Add New button. If you do not want an Introduction or

Closing page, use Select Introduction Page and Select Closing Page from the drop down menus.

## Manage Comments

Presentation comments enable you to communicate directly through the presentation with the end-buyer. Comments will be included with the product information on the presentation and (if you have enabled this function) the end-buyer can enter reply comments.

Jennifer Doe  
jdoe@asi.com  
800-546-1350




**Product Name** 11 oz. Economy Ceramic Mug - Coffee mugs, corporate gifts  
**Summary** Basic coffee mug with C-handle, 11 oz.  
**Material** Ceramic  
**CPN** 552551915  
**Color** Black, Blue, Green, Almond, Brown, Cobalt Blue, Gray, Lavender, Lime, Maroon, Ocean, Pink, Purple, Yellow  
**Size** 11 oz

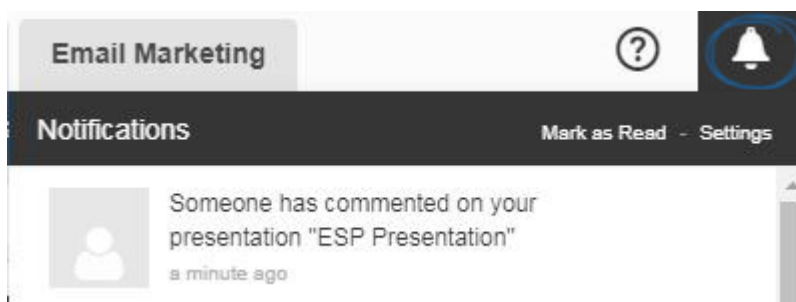
**Imprint Method** Silkscreen, Pad Print, Decal, Unimprinted. Set-up Charge: Full Color Setup Charge - \$50.00, Set-up Charge: Setup Charge - \$40.00, Run Charge: Additional Location - \$0.55

7-8 Business days Production						
Quantity	36	72	144	288	576	1008
Price	\$3.23	\$2.81	\$2.22	\$2.17	\$2.11	\$2.06


**Price Includes** One Color, One Location Imprint

 2 Comments

If a customer enters comments on an ESP Presentation, a notification will appear in-app, as well as be emailed to you.


Email Marketing ? 



**Notifications** Mark as Read - Settings



Someone has commented on your presentation "ESP Presentation"  
a minute ago


To manage all comments for a presentation, click on the Comments option from the toolbar. In this section, you will be able to view any comments entered by users within your company, as well as those provided by end-buyers. To disable end-buyer comments, uncheck the "Allow end-buyer comments" box.


ESP Presentation  1 Products in this Presentation


Add Products  Edit Products Price Calculator Design  Settings **Comments**

Comments  Allow end-buyer comments

11 oz. Economy Ceramic Mug - Coffee mugs, corporate gifts

**ESP User** 37 minutes ago   
Type comment text here.

**Customer** 7 minutes ago   
Customers can enter a reply here.



Comment 

**Post**

Click on the "X" to remove a comment.

## Send and/or Share

There are several sending and sharing options on the Presentations Toolbar.

 Copy  Save as Template  Share  Download  Preview  Send

## Copy

Click this option to create a duplicate of this presentation. Type the Presentation Name, then assign it to a Customer and Project Folder. By designating a customer, a copy of the presentation (including products) will be saved in the CRM under that customer listing. In addition, select a Project Folder, which will act as an online filing cabinet for all your presentations.

**Note:** If you want to add this presentation to a new project or customer, click on the Create New link beneath Projects or New Customer to create them on the fly.

After entering this information, click on the Create button.



## Copy Presentation

✕

### Presentation Name

Copy - 2019 Specials

### Customer

ABC Company

✕

[Add New Customer](#)

### Project Folder

- My Projects
- Custom Shaped Mugs
- My Projects/Adamsville Construction
- My Projects/Alan
- My Projects/Alan/Hand Sanitizers

[Create New](#) | [Manage Projects](#)

Cancel

Create

## Save As Template

Save the current template as a custom template for use on future presentation. Enter a name in the Template Name box. Click on Save. Your custom template will now be saved in the ESP Presentation Manager and able to be used for all future presentations

## Save Template

✕

Save these settings and create a Template you can use at any time

### Template Name

Custom Template

**Theme** Custom Theme

**Products Per Page** 2

**Header Layout**

Contact right

**Field Labels** 10

**Footer Layout**

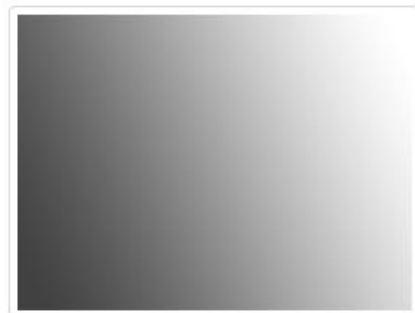
Logo left, Text Center, Page Numbers Right

**Cover Page:** On

**Contact Page:** On

**Introduction Page:** Our Conversation Introduction

**Closer Page:** My Closer Page



Cancel

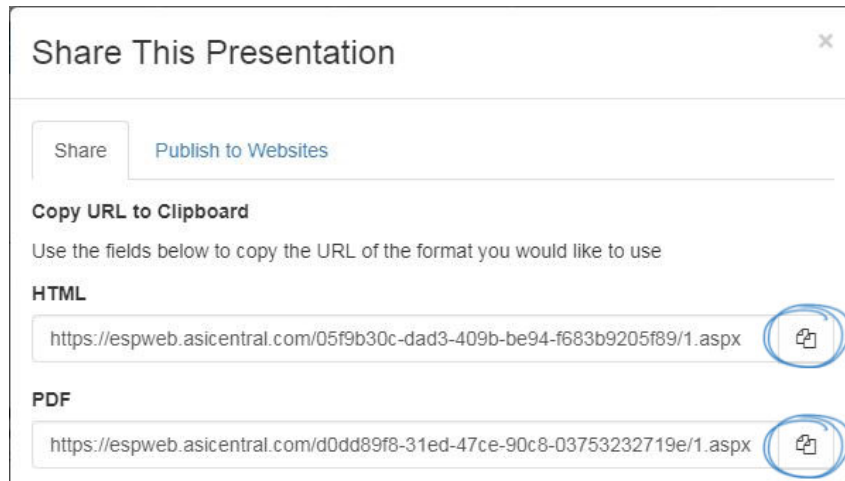
Save

## Share

The options for sharing presentations are:

- **Copy Links:**

Click on the copy icon at the end of the HTML or PDF link to share a direct link to the presentation in the format you would like.



- **Export to Microsoft PowerPoint:**

Export to PowerPoint offers you the ability to completely personalize your presentation. To include hidden field from the presentation in the Notes section of the PowerPoint presentation, check the Include hidden product fields in notes box and then click on the Export to PowerPoint button. Any fields you have hidden in the presentation will now be added to the Notes section of the PowerPoint presentation.



The following versions of PowerPoint are supported by ESP Presentations:

Windows:

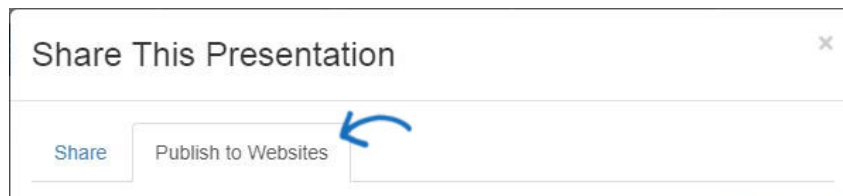
- PowerPoint 2007
- PowerPoint 2010
- PowerPoint 2013

Mac OS X:

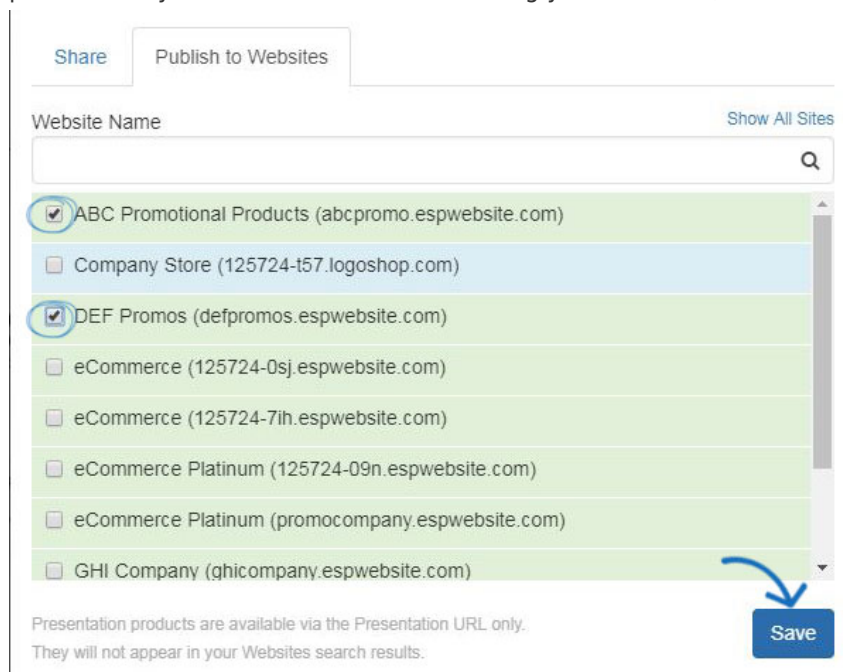
- PowerPoint for Mac 2011 14.2.0
- PowerPoint for Mac 2011 14.3.2

- **Publish to ESP Websites:**

You can also publish this presentation to your ESP Website or Company Store. Click on the Publish to Websites tab.



In this tab, check the box that corresponds with the site(s) to which you would like to publish this presentation. Send the link to your customer so they can view the presentation on your website and order the products they are interested in. After making your selection, click Save.



## Download

Click on the Download link to save the presentation as a PDF on your computer.

## Preview

Open the presentation in a new tab so you can look it over before sending and sharing it. Close the tab when you are finished previewing.

## Send

To email the presentation, click on the Send button. Begin typing your customer's email address in the Send Presentation window. Then, you are able to customize the email subject line and message. Use the Preview to open the presentation in a new tab so you can look it over before sending. Close the tab to return to the sending page. You can also save a copy of the presentation in a PDF format to your computer by clicking on the Download button. Click on Print to print the presentation.

Once you are finished, click on the Send Presentation button.

Send Presentation
✕

**To:**  ✕

**Cc:**  ✕  ✕ Bcc

**Reply-To:**

**Subject:**

**Message:**

ESP User  
ASI Corporate  
  
4800 Street Road

Preview
Download
Print

Jennifer Doe  
jdoe@asi.com  
800-546-1350

**Product Name** Solar Powered Dancing Duck

**Description** Go squeakers over this solar powered dancing duck! Add a little excitement to your desk with this item that is powered by natural light, allowing it to move and dance all day. Standing 4" tall, this fun promotional product is sure to stand out on your clients' desks. Hand out this custom imprinted item at trade shows, conventions, top stores, conventions, and much more. Make your brand soar above the competition with this bold and bright giveaway!

CPN 551184763  
Color YELLOW

Size 4"

Imprint Method Pad-Print. Re-order Charge: Reorder Charge Pad-Print - \$25.00, Set-up Charge: Setup Charge Pad-Print - \$40.00

Imprint Color(s) Athletic Gold, Black, Brown, Burgundy, Forest Green, Gold, Gray, Kelly Green, Light Blue, Lime Green, Maroon, Navy Blue, Orange, Pink, Process Blue, Purple, Red, Royal Blue, Silver, Tan, Teal

Imprint Size 2" x 3/8"

Quantity	100	250	500	1000	2500
Price	4.81	4.15	3.64	3.16	2.75

Cancel
✉ Send Presentation

When you are finished editing, updating, and sending/sharing your presentation, it will be saved in the [Projects](#) area. If you selected a customer, the presentation will also be stored in the Customer record in CRM.