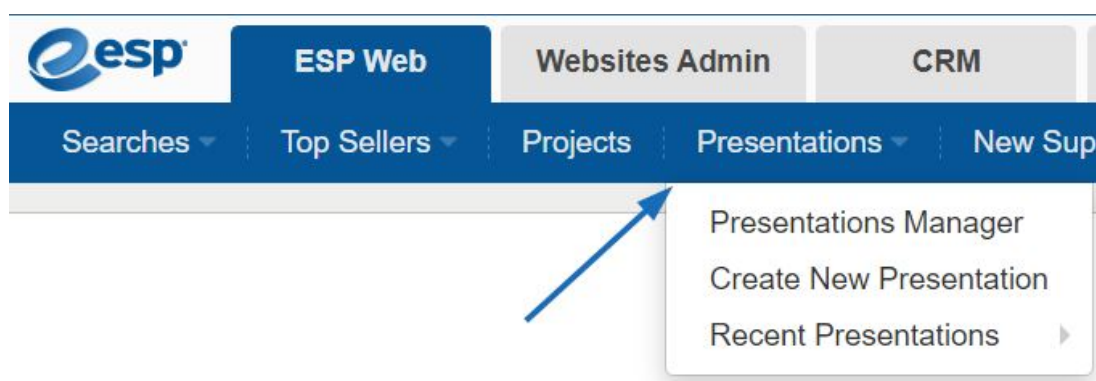




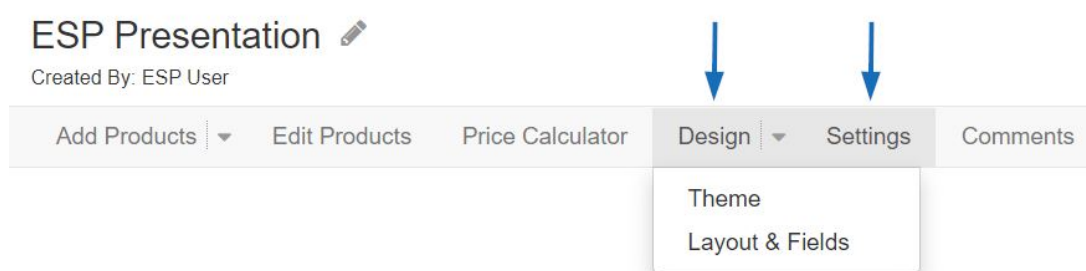
ESP Quick Tip #38: Create a Template for ESP Presentations

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

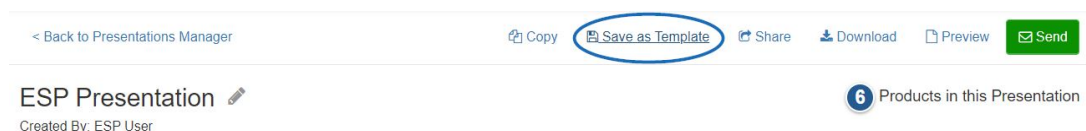
If you've customized a presentation and would like to save the modifications for future use or would just like establish a default for your presentations, you can create a template. To save a presentation's customization as a template, log into ESP and click into any presentation or create a new one.



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.



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

Save Template

×

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

Template Name

Custom Template

Theme Simple

Products Per Page 1

Header Layout
Contact right

Field Labels 15

Footer Layout
Logo left, Text Center, Page Numbers Right

Presentation Name
Client Name

Cancel

Save

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.

Presentation Name *

Presentation Name

Customer

Enter or Select Company

Visible to

☒ Everyone

☐ Only the Record Creator ?

☐ Teams or Individuals ?

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

Presentation Name
Client Name

My Template

Presentation Name
Client Name

No comme...

Presentation Name
Client Name

Custom Te...