

How to Personalize Assets

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1. Empower sales reps to personalize assets and keep your messaging intact.
2. Create content with editable components so sellers can customize and add personal touches to specific sections to help them build deeper relationships with their customers.
3. By eliminating the creation of rogue decks and documents, marketing messaging and content performance insights are protected.

Instructions for Content Owners

Upload the asset to which you wish to add editable elements. For complete instructions on how to upload content in ClearSlide, click [here](#).

Tip: Before you upload the content, ensure all the places where you wish to add editable elements are free of text and/or image boxes.

1. Open the asset and click 'Edit'

You can do this from the top navigation or by finding the slide or page you wish to add elements to and click the edit icon.

2. Add editable text or image elements to your asset

For text:

- A. Click the text icon in the top navigation.
- B. Click on the text element and set the text font, style, and size. Sellers will not be able to change your selection giving you additional control over the asset's appearance.
- C. Optionally, set the element as "Required" to enforce customization by the seller.

For Images:

- A. Click the image icon in the top navigation to insert an element.
- B. Click on the element to move it around or adjust its size.
- C. Optionally, set the image element as "Required" to enforce customization by the seller.

3. Click 'Save'



Instructions for Content Users:

In the content library, items with editable elements are indicated by an edit icon in the top left corner.

1. Open the Asset and Click 'Personalize'

This takes you to the Personalize dashboard. If an asset does not contain editable elements, the 'Personalize' button is disabled.

Slides or pages that have editable elements are indicated in the top left corner of the preview thumbnail. Red indicates an element with required input, blue indicates an element is optional. Clicking these icons will open the slide or page in the editing tool.

2. Customize Elements in the Editing Tool

Use the 'Next' and 'Previous' arrows to quickly navigate through the editable elements and enter text or images where appropriate. Select an image from your desktop by clicking the image icon in the middle of the image element. Click 'Preview' to see what your personalized asset will look like.

3. Save to Your Content and Share via Email or Meeting

Click 'Add to My Content' to save your personalized asset to your library or share it immediately through email or a live meeting by clicking 'Create Linke' or 'Start Meeting' respectively. If personalized assets aren't saved, they won't be available for use later.



