Templates + Formatting 2.0

We will begin in a few minutes.

September 20, 2023

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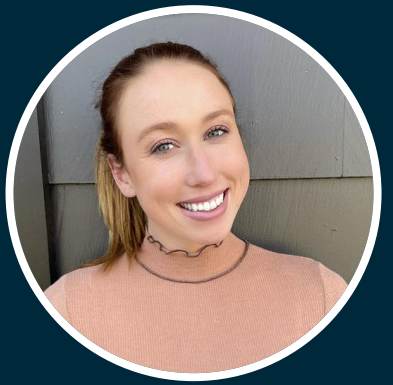
Meet the team

Al Lepow
Sr. Customer Success Manager

Tara Kolinksy
Sr. Customer Success Manager



Helene Halliday
Sr. Customer Success Manager

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First, a little house keeping

- This session is being **recorded**
  - Recording and slides will be distributed
- We want this to be an open discussion
  - Please use the **Q&A** feature to ask your questions
    - This helps us follow up with you post webinar
  - Click **raise hand** to participate in the discussion and we will unmute you
  - Contribute to the discussion in the **chat**

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SUMMIT23

The virtual conference for strategic response management

- October 19, 2023
- 10:00 a.m. – 1:00 p.m. ET
- Free to attend
- responsive.io/summit

Agenda

- Character Styles
- List Styles
- Tables

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Character Styles

Character styles can be used to apply formatting to single words or several words within a paragraph

- Paragraph styles allow you to apply consistent formatting to an entire paragraph or paragraphs.
- Character styles allow you to apply formatting to just specific characters or words within a paragraph. Bold, underline, italic, etc. are all commonly used character styles.
- Within Responsive, bold, italic, and underline will retain in export. Character styles can be used to apply other character level formatting such as font color or highlight.

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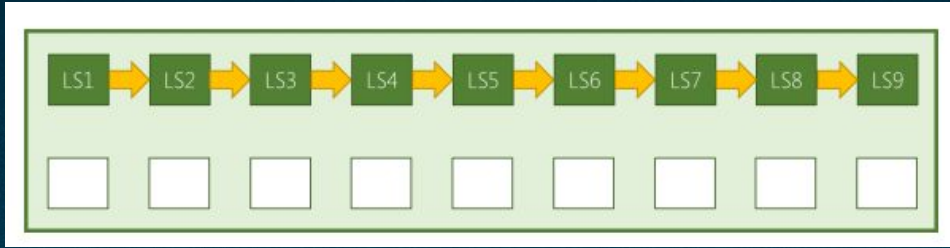
List Styles

List Styles allow the user to apply predefined formatting to lists within a document

- There are three types of lists in Word – bulleted list, numbered list, and multi-level list.
- All of these are actually ‘list styles’.
- A list style can consist of up to 9 paragraph styles.
- Each paragraph styles is assigned to a ‘slot’ within the list hierarchy.



- Responsive allows you to map one list style in the system.

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Table Styles

Table Styles can be used to control the look and feel of tables within a Word document

- In Responsive, table styles are used to control the look and feel of a table when the entire section is exported to a table.
- Table styles can impact tables within an answer field, but can be inconsistent.
- Paragraph styles can be used to format text within tables.
- Generally, table styles are not needed to achieve desired formatting of tables within answers.

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Table Styles

When should I use a table style?

- Table styles are NOT needed to create unique tables within answer fields.
  - This can be accomplished by creating the tables in an external source such as Word.
  - Borders and shading should be applied to the table in Word
  - Paragraph styles should be used to format text in the table (remember those styles must also be in your template!)
  - This can also be accomplished when creating tables in Responsive, so long as a table style is not mapped in the template.
- Use table styles IF:
  - You are exporting ENTIRE SECTION(S) to a table and would like standardized formatting of those sections
  - You would like all tables in your answers to have the EXACT same formatting and are creating your tables in Responsive.

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Questions?

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Upcoming Training and Events

- **September 21:** Live Workshop - Project Management at 10:00 AM PT (45m)
- **September 27**: Proactive Proposals in Action | Coffee Chat at 9:30 AM PT (45m)
- **October 4:** September '23 Release Webinar | 9:30 AM PT (1hr)
- **October 5:** Live Workshop - Content Management | 10:00 AM PT (45m)
- **October 11:** Mastering Project Organization Settings | 9:30 AM PT (45m)
- **October 19:** Live Workshop - Project Management | 10:00 AM PT (45m)
- **October 25:** Project Import Best Practices | 9:30 AM PT (45m)

✅ **All events** are posted on the events page in the community. Register to receive the recording

✅ Past Coffee Chats & Release Webinars

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Additional Resources

Customer Success Team

Need a strategy or an in-depth session? Contact your Customer Success Manager. Not sure who your contact is? Reach out to the Customer Success Team.

Responsive Community

Collaborate and celebrate with other Responsive Users in the Community! You can also sign up for upcoming events via Events.

Submit Product Ideas

We want to hear from our Customers!

Account Management Team

Questions on your renewal or an add-on feature? Contact your Account Manager. Not sure who your contact is? Reach out to the Account Management Team

24/5 live Support

Get help with technical questions , utilize the in-app chat, or call 971-470-3112
Subscribe to status.rfpio.com

Responsive Blogs

The Responsive blog is full of insights and best practices, giving you the tools you'll need to streamline your process and respond with confidence.

Help Center

Discover best practices, helpful guides for using RFPIO, and release notes.

Responsive University

Expand your knowledge and onboard new users. You can sign up for **Live Trainings** or review previously recorded events, like Coffee Chats and Release Webinars.

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Thank you!

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