# User Guide

Follow these step-by-step instructions for customizing the Pivot marketing materials. All templates and files are created in Microsoft PowerPoint or Microsoft Word, allowing you to create co-branded assets with customized language from any desktop computer.

1. Download the Pivot template
2. Open the file in Microsoft PowerPoint or Microsoft Word
3. Delete the placeholder logo box

 

 Replace the red placeholder box with your organization’s logo and size appropriately. It is recommended to use a high-res .jpeg or .png logo file.

 4. Replace placeholder **[CODE]** field with the access code provided by your Client Success Manager. This will be the code needed by your employees to register for Pivot on the website.

 5. Replace placeholder **[Customizable copy for employee eligibility language]** field with the appropriate message. Craft your own or choose from any of the common variations below:

* Pivot is available FREE for all [Company Name] employees
* Pivot is available at no charge for all [Company Name] employees and spouses
* Pivot is available FREE for [Company Name] medically enrolled employees
* As part of your benefits, Pivot is available at no charge for all [Company Name] employees and spouses ages 18+

 6. Once complete, convert the PowerPoint template to a PDF file by selecting <Export> under the <File> menu.