
Insights app how-to

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When you find a slide, video, or an insight that you would like to add to a folder, simply tap the Add To My Collections option on the screen. Then simply tap or drag and drop content to any folder you choose. You can put it in a new folder or even add it to an existing folder.

To edit a folder's name or contents, simply tap Edit to begin. Rename a folder by tapping the title and typing. Then tap Done. Hold your finger on any slide and drag to reorganize the order of slides.

If you want to copy a slide and place it in another folder, simply drag to another folder. Tap the X on the slide's thumbnail to delete. Tap Done when you are finished editing.

Create a custom guide to the markets PDF presentation from selected slides by clicking the PDF icon. Organize the order of the slides by holding down on the three bars and dragging to reorder. Uncheck unwanted slides and tap Create. Your custom PDF presentation is now available for you to email.

To present a folders guide to the market slides, select the full screen button to showcase a multimedia presentation to clients, including products, access to audio, or related insights. Now you can create and organize collections. Use this to elevate client presentations and customized content for meaningful meetings.

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