**PowerPoint Add-in Framework → To surface checker UI and run validations inside decks.**

**Corporate Template Repository / Master Slide Library → Source of approved layouts and slide masters.**

**Dictionary / Glossary Service → For spell, grammar, and abbreviation audits.**

**Branding Guidelines Repository → Approved colors, logos, and client vs RBC branding toggles.**

**Team/Vertical Rules Database → Mapping of bankers → verticals → formatting standards.**

**Admin Controls Service → For creating/editing team templates (restricted access).**

## Business Requirements

* **Bankers can save their current formatting preferences (content, numbers, fonts, alignment, case, branding) as a personal template.**
* **Templates must always inherit vertical-specific defaults (e.g., Technology, FinTech, AI), so that personal edits don’t drift away from the source of truth.**
* **Bankers should be able to name and manage their saved templates (e.g., “Tech IPO Pack,” “QBR Style”).**
* **Dropdown must clearly distinguish between:**
  + **Vertical Templates (official source of truth, admin-controlled)**
  + **User Templates (personal, banker-created, reusable).**
* **Admins retain control of vertical templates and cannot be overridden by user templates.**
* **User templates must work across desktop and web PowerPoint add-in.**

## Acceptance Criteria

* **Given I select formatting preferences, when I choose “Save as Template,” then a dialog prompts me to name my template.**
* **Given I save a template, when I open the Format Dropdown, then I see it listed under a “My Templates” section, separate from official vertical templates.**
* **Given I switch from a user template back to a vertical template, when I re-run the checker, then the official rules apply again.**
* **Given I attempt to edit a vertical template, then I am blocked and notified that only admins can make changes.**
* **Given I delete or update a personal template, then the dropdown updates instantly.**
* **When I apply a saved template, then all preferences (content, numbers, alignment, fonts, case, branding) update automatically in the checker.**

## Definition of Done (DoD)

* **Bankers can successfully create, name, and save personal templates.**
* **Templates inherit and remain consistent with vertical-specific rules.**
* **“My Templates” section appears distinct from “Official Templates.”**
* **Switching between templates works without errors.**
* **Admin-only restriction on vertical templates is enforced.**
* **Functionality works in both desktop and Office 365 PowerPoint add-in.**
* **QA validates templates apply consistently across multiple decks.**
* **Documentation / tooltip explains difference between user templates and vertical templates.**

## Dependencies

* **Vertical Template Repository → Source of truth for official formatting rules.**
* **User Profile Service → To store and retrieve banker-created templates.**
* **Template Management UI → For saving, naming, and listing templates in the dropdown.**
* **Permissions Service → To enforce admin-only control over vertical templates.**
* **PowerPoint Add-in Framework → To persist and apply formatting preferences across decks.**