

## Presentation Settings

Jennifer M - 2023-10-04 - Projects & Presentation

The Presentation Settings will apply to all products within the presentation. Product information can also be edited on individually, meaning a field can be hidden using the slider but shown for a specific product.

### Presentation Settings

The sliders available in the Presentation Settings include:

#### Presentation Settings ⓘ

Hide these product details on all items in your presentation.

##### Product Details

- ☒ Product CPN ⓘ
- ☒ Product Color
- ☒ Product Size
- ☒ Product Shape
- ☒ Product Material
- ☒ Price Range
- ☒ Pricing
- ☒ Additional Charges
- ☒ Client Discount
- ☒ Imprint Options ⓘ

### Product CPN

The Product CPN represents the coded product number. Coded product numbers are distinct call numbers for products which are unique to your company that are different from the supplier's product number. Coded product numbers only correspond to products in your ESP and the ESP of all users in your company. This means that every user under your ASI number will have the same coded product number for an item.

### Product Color, Size, Shape, and/or Material

These fields indicate the descriptive information about the item.

### Price Range and Pricing

Select whether to have pricing and/or a price range displayed. The price range will display

the lowest and highest prices for the item, regardless of quantity.

### **Additional Charges**

Enables a section for additional charge information, for example, product and imprinting upcharges.

### **Client Discount**

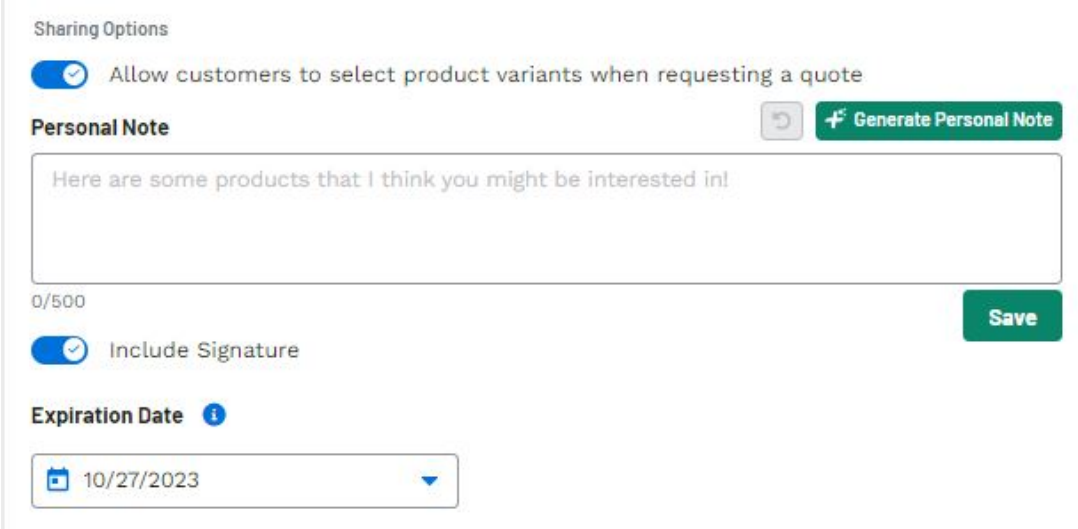
This option will show an indicator message that a discount has been applied to this presentation.

### **Imprint Options**

If the supplier provides imprinting, this section will indicate the available decoration items.

### **Sharing Options**

Below the sliders are the Sharing Options which include:



The screenshot shows a 'Sharing Options' form. At the top, there is a toggle switch labeled 'Allow customers to select product variants when requesting a quote' which is currently turned on. Below this is a 'Personal Note' section with a text area containing the placeholder text 'Here are some products that I think you might be interested in!'. To the right of the text area is a 'Generate Personal Note' button with a plus icon. Below the text area is a character count '0/500' and a 'Save' button. Under the 'Personal Note' section is another toggle switch labeled 'Include Signature' which is also turned on. At the bottom is an 'Expiration Date' section with a calendar icon and a date selector showing '10/27/2023'.

#### **Allow customers to select product variants when requesting a quote**

Moving the slider to yes will enable customers to select the product variants (colors, sizes, materials, shapes, etc.) when they are requesting a quote for an item.

#### **Personal Note/Generate Personal Note**

The personal note will be displayed on the main landing page of the presentation. Type a message in the available box or use the Generate Personal Note button to have AI compose a message. You can click on the General Personal Note button as many times as needed, as well as cycle back through previously generated messages using the back button.

#### **Include Signature**

The signature is generated using the Contact Information for the company provided in the Account - Settings area. Use the slider to indicate whether a signature should be included on the main landing page.

#### **Expiration Date**

The expiration date will make the presentation unavailable after a designated date.

## Related Content

- [Start a Presentation/Project](#)
- [Presentation Product Order and Visibility](#)
- [Configure a New Presentation](#)
- [Edit Product Information](#)
- [Share Presentation with Customer](#)