

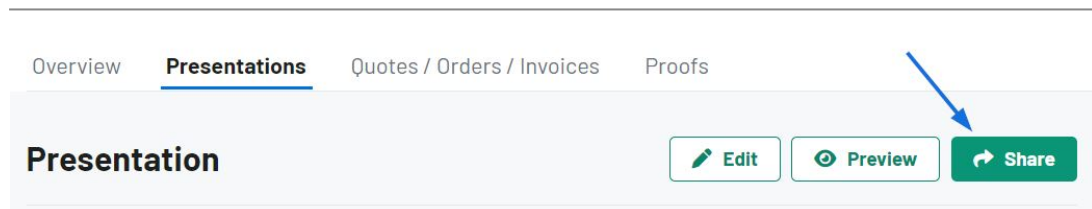
Share Presentation with Customer

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

Once you have finished [selecting the settings](#) and [updating the product information](#) for a presentation, you can share it with your customer via email or link. In the Presentations tab of the project, there is a "Share" button.

Can I download the presentation as a PDF? (click for answer)

Not at the current time.



Within the share button there are two options:

Share via Email

When sharing a presentation with a customer via email, the address in the customer's CRM record will be displayed. If no email address exists for this customer or you'd like to send to a different email, you can enter one in the Recipients box. The Subject Line and Message can be customized in the Email and Message Templates section of the Account.

Share with Customer

Send email or copy link to share on your own.

Share via Email

Share via Link

Recipients *

Enter a new email address or start typing to find a saved email address

jdoe@examplecompany.com x

New Recipient...

Subject Line *

Your Pens Presentation is Ready To View

Message



Generate Message

Hey, Example Customer Company!

Thank you for considering our promotional products for your upcoming project. We've carefully crafted a proposal that we think would be a great fit for your company's needs. Our team has worked with clients in

336/500

Presentation Settings:

Signature and Expiration Date only apply to your presentation settings and not your email.



Include Signature

Expiration date



01/01/2024



Preview Presentation



Share with Customer

The Presentation Settings section at the bottom is where you can enable a signature and set the expiration date.

You can click on the Preview Presentation button to view the customer's portal and once you're ready, click on the Share with Customer button.

Share via Link

The Presentation Settings section at the bottom is where you can enable a signature and set the expiration date.

Share with Customer

Send email or copy link to share on your own.

Share via Email

Share via Link

Presentation Settings:

Signature and Expiration Date only apply to your presentation settings and not your email.



Include Signature

Expiration date



01/01/2024



Preview Presentation



Copy Link

You can click on the Preview Presentation button to view the customer's portal and once you're ready, click on the Copy Link button.

Both share options will enable the customer to view the presentation via the [Client Portal](#).

Related Content

- [What is the Client Portal?](#)
- [Presentation Settings](#)
- [Edit Product Information](#)