

Start a Presentation/Project

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

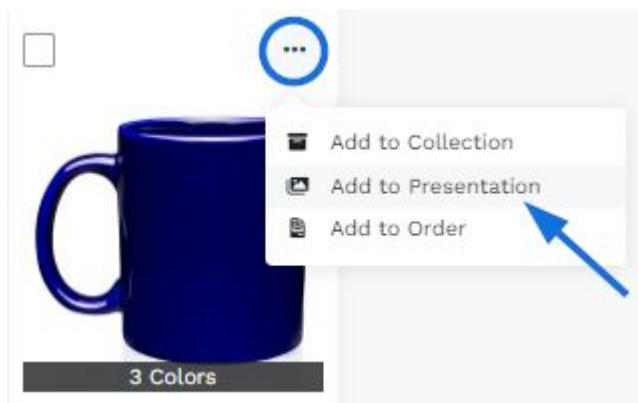
Projects are the central hub for all aspects of an event and contains all related information, such as the customer, presentations, and order documents, as well as the event type, important dates, budget, and number of attendees. Creating a presentation means that you are creating a component of the Project, so they are added simultaneously.

How would you like to start your presentation?

From the Product Search

Individual Item

To create a presentation using a single product from the general search results, click on the "meatball" (three dots in the upper right corner of the product listing) and choose "Add to Presentation".



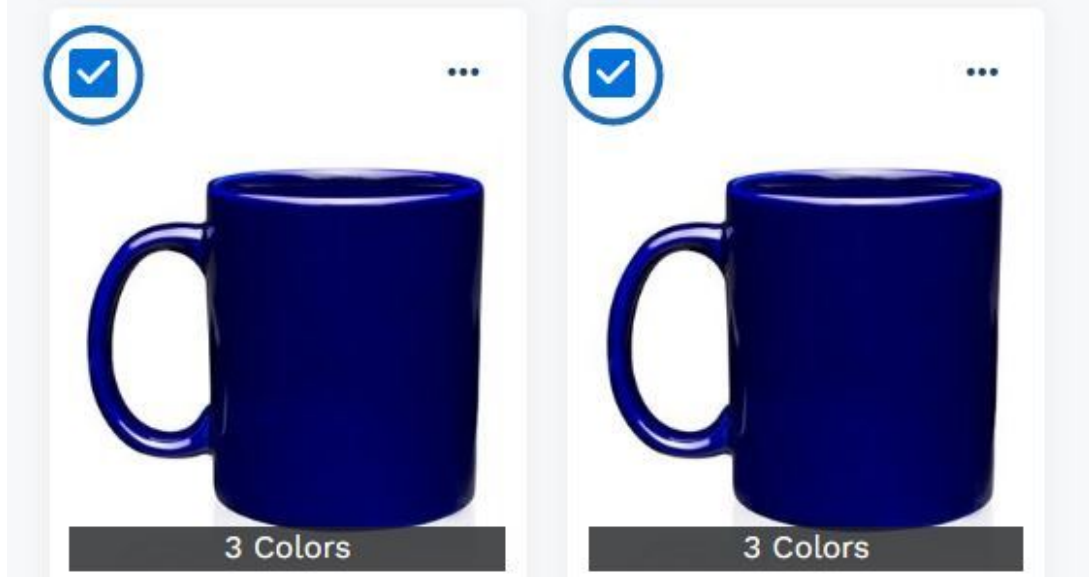
You can then begin to [configure the project details](#).

Several Items

If you would like to use multiple items from a search in a presentation, mark the products by clicking the checkbox in the upper left corner of the product listing. Mark all the items you would like to use.

Note: If you would like to create a presentation using items from multiple searches, you can create a collection and then begin the presentation from the collection.

"mugs" 1-2 of 2 products from 1 suppliers (0.514 seconds)



Once you've marked items, click on the "Add to Presentation" button shown on the toolbar at the bottom.

☒ 2 Products Selected

Add to Collection

Add to Presentation

Add to Order

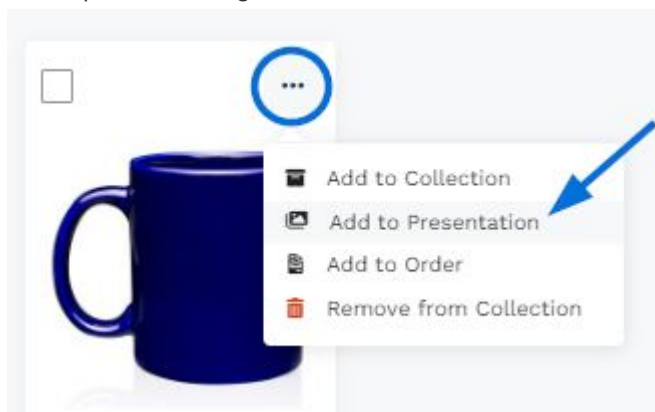
You can then begin to [configure the project details](#).

From a Collection

If you have items in a collection, there are three ways to move the product(s) into a presentation:

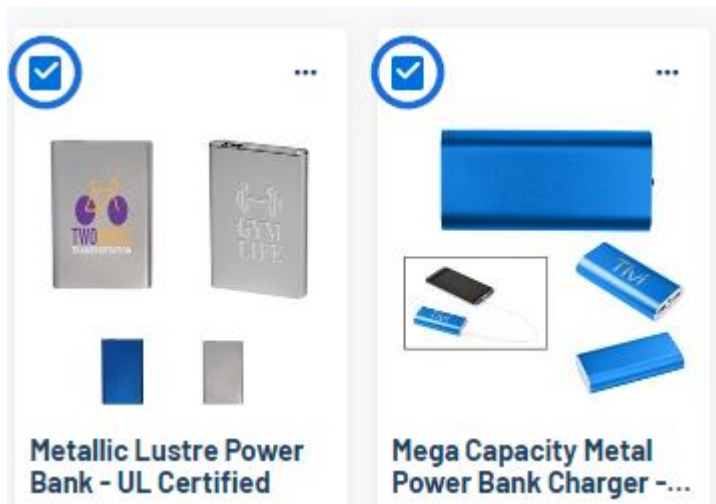
Add a Single Item

Locate the product you would like to use and then click on the icon in the upper right corner of the product listing. Then, select "Add to Presentation".

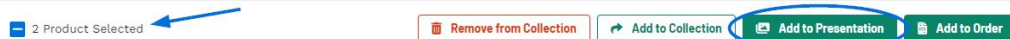


Add Specific Items

To select specific items from a collection to use in a presentation, mark the items using the checkbox.

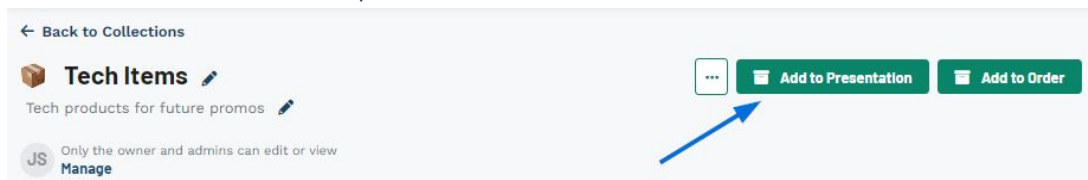


A toolbar will appear at the bottom. Click on the "Add to Presentation" option.



Add All Items

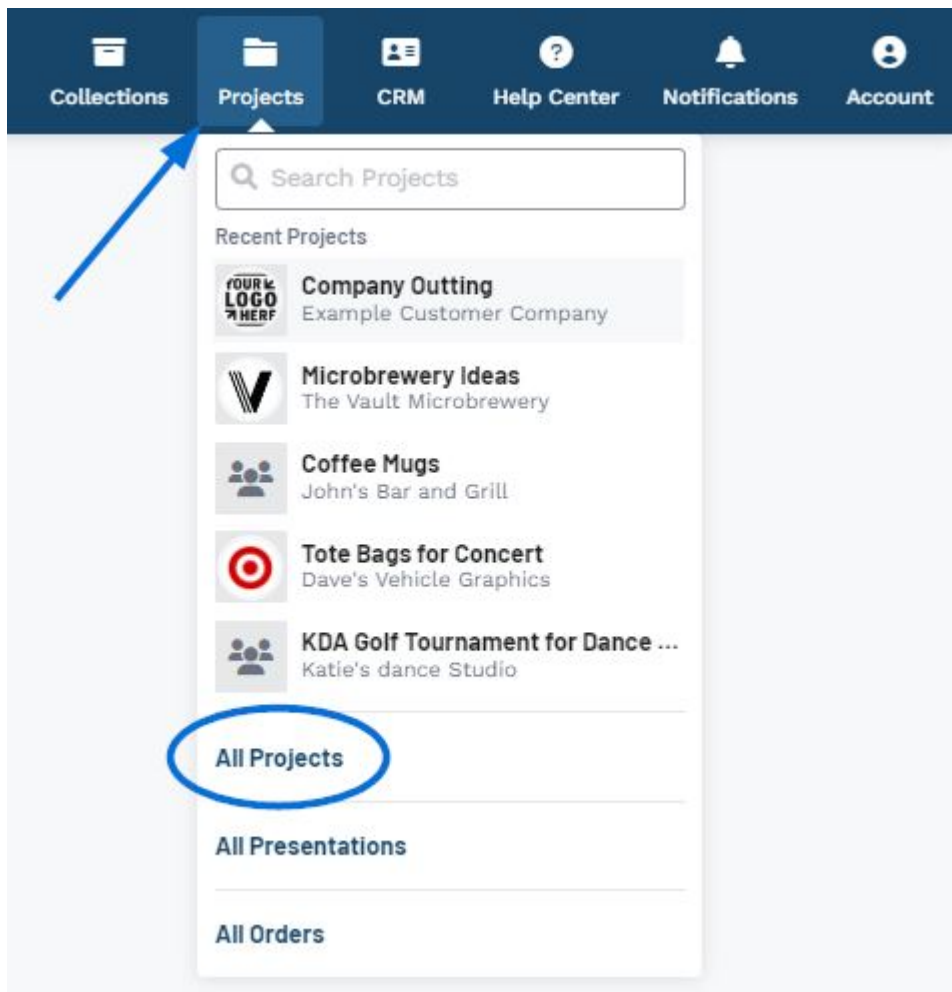
To use all items within a collection to create a presentation, click on the "Add to Presentation" button at the top.



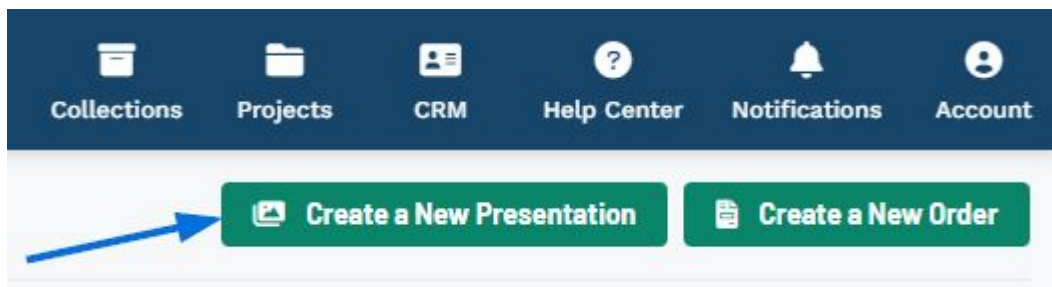
You can then begin to [configure the project details](#).

From the Projects Area

From the main toolbar, click on the Project button and then select either "All Projects".



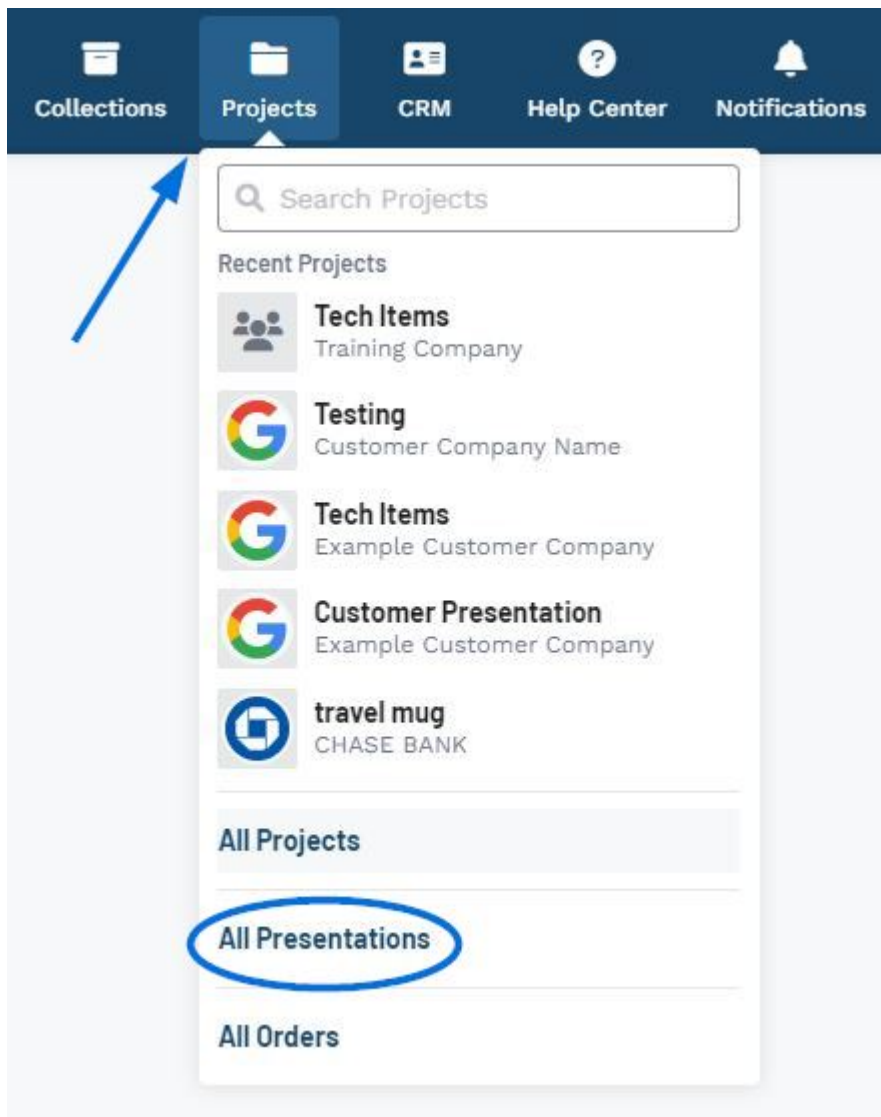
Next, click on the "Create a New Presentation" button.



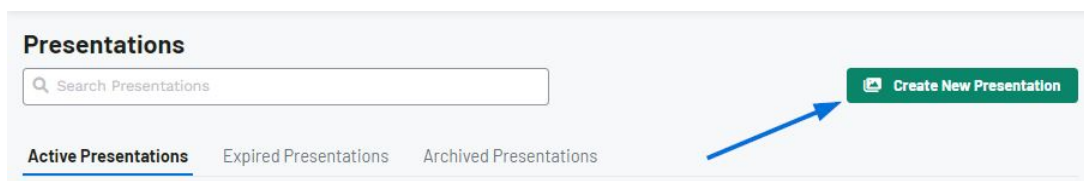
You can then begin to [configure the project details](#).

From the Presentations Area

Use the Projects dropdown to select All Presentations.



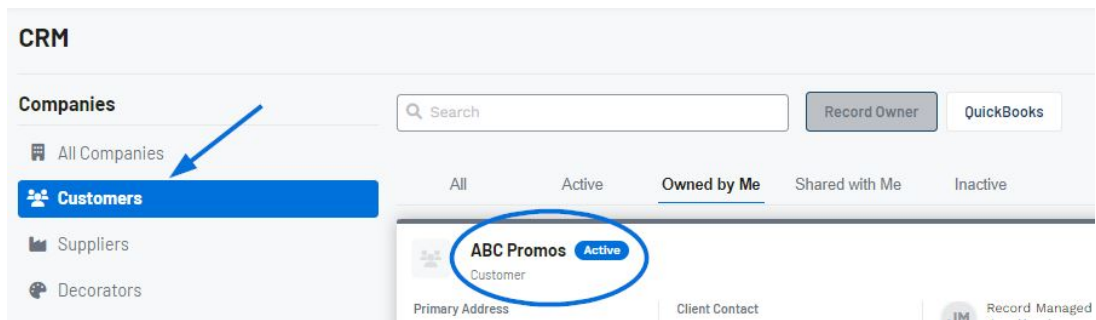
Then, click on the Create a New Presentation button.



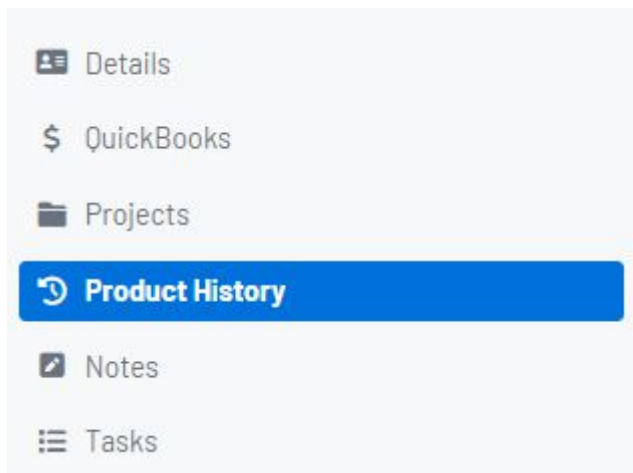
You can then begin to [configure the project details](#).

From CRM

Within a company record in CRM there is a section for Product History. To open a company record, click on CRM from the main toolbar, locate the company, and click on the company's name to open the record.



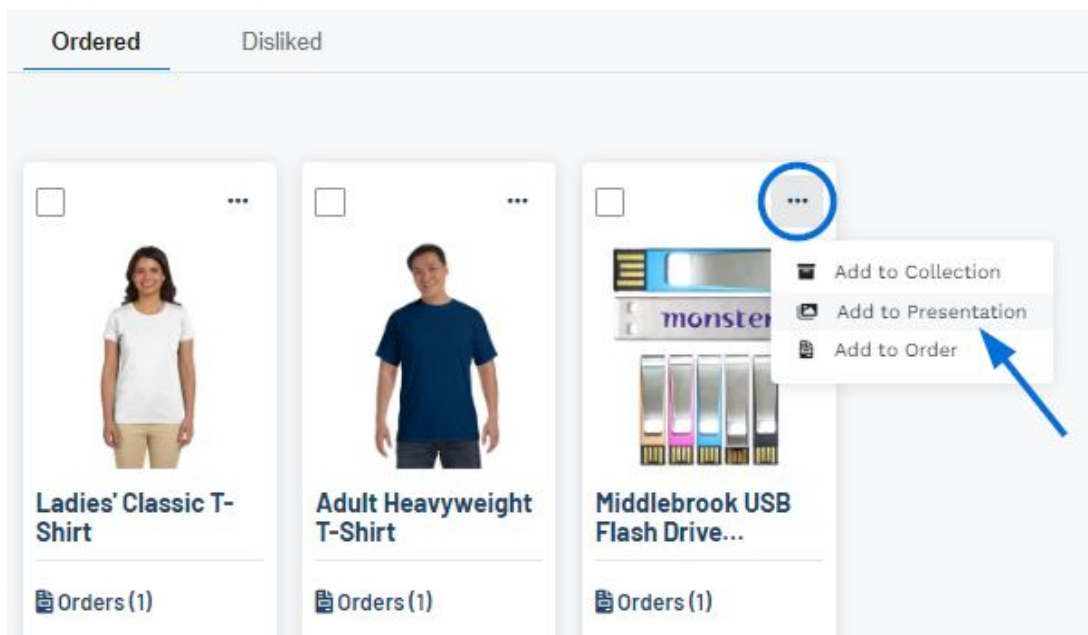
Then, click on Product History from the available options.



This section contains information on items previously presented to the customer and organizes them accordingly using tabs. From any tab, you can add one or more products to a presentation.

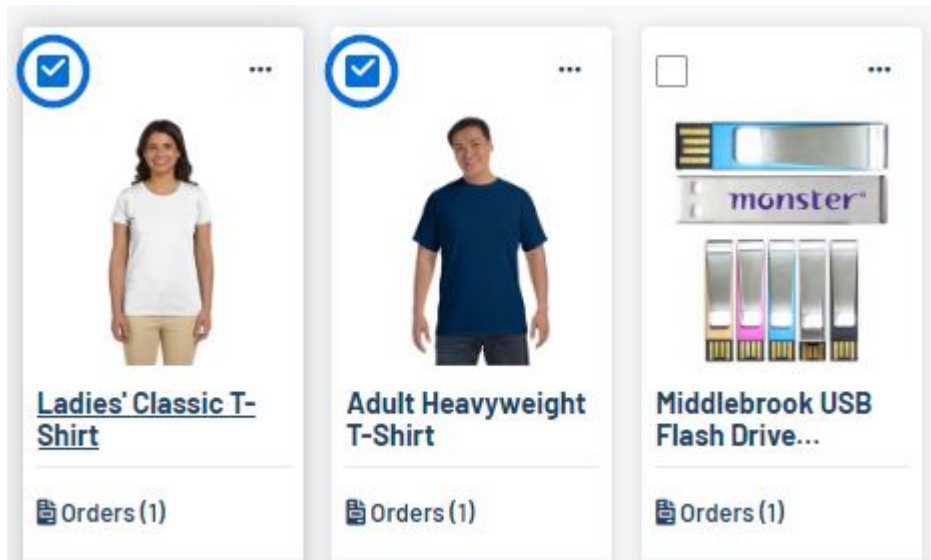
Add a Single Item

Locate the product you would like to use and then click on the three dot icon in the upper right corner of the product listing. Then, select "Add to Presentation".



Use Specific Items

To select specific items from the product history to use in a presentation, mark the items using the checkbox.



A toolbar will appear at the bottom. Click on the "Add to Presentation" option.

2 Products Selected

Add to Collection

Add to Presentation

Add to Order

Related Content

- [The Main Toolbar](#)
- [Presentation Settings](#)
- [Presentation Product Order and Visibility](#)
- [Configure a New Presentation](#)
- [Project Versus Presentation](#)