

ProposalBuilder Update: The Benefits of Sending Documents through ProposalBuilder

Taking your documents from ProposalBuilder and attaching it to an email not only effects the recipients' viewing experience, it also limits ProposalBuilder's analytical benefits.

Let's examine the experience of viewing ProposalBuilder documents from the perspective of a sales representative and a recipient.

For sales representatives, ProposalBuilder lets you know when a document is delivered and viewed, who is viewing it, and provides insight into what content they are viewing, and how much time they are spending on it. It also provides sales representatives with instant notifications through text, email or a Salesforce post. These valuable insights give sales representatives the opportunity to have timely follow-ups with clients, and gives them the ability to leverage online document workflows and automation.

For a recipient, they are able to open and view documents on any device, with a fully-responsive layout, and eSignature capabilities.

Easing clients through the transition from a paper and wet signature approach to the fast, easy eSignature process is essential to creating a fantastic recipient experience.

The language in the sample letter to the right is helpful for giving recipients a quick rundown of what they'll do after they receive access to your documents. You may find that including this verbiage, or something similar, will answer all of your clients' questions about the new process before it even begins.

You can get started with ProposalBuilder today by signing up [here](#), or by contacting your AVP.

If you have ProposalBuilder questions, please contact ABM Franchising Group Support at bus.sys.support@abm.com or 724-873-2977. View the TEGG Technology Update Library [here](#).

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ProposalBuilder™

Dear [CLIENT NAME],

I've created a [QUOTE / PROPOSAL / CONTRACT] for your review in [MY COMPANY NAME]'s secure online document management system. Click the link I provide to log into the document, review terms and pricing, ask questions and submit your electronic acceptance of the agreement.

A few notes for your convenience:

In the upper right corner of the screen you'll see buttons labeled [List Call to Actions]

An authorized signer may click [Accept] to submit a legally binding electronic signature for the pricing and terms described in the document.

Click [Ask a Question] to submit a note to me, and I'll follow up with you shortly.

If you need to review this document offline, click the button labeled Download at the bottom of the left-hand menu to produce a PDF copy.

Thanks for your consideration and please let me know if you have any questions.

Best Regards,

[SIGNATURE]