

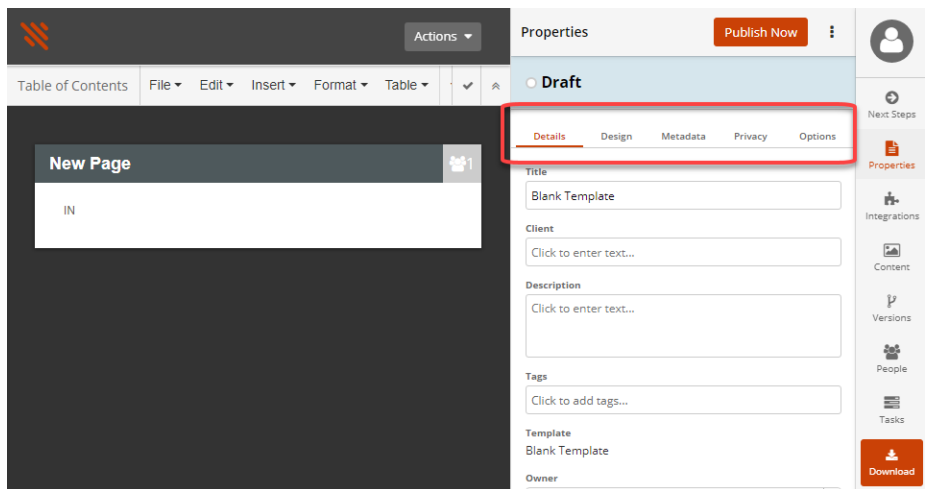
## ProposalBuilder: User Interface and Document Build Updates; Signing a Proposal

# ProposalBuilder™

Several changes were made to the ProposalBuilder User Interface and Document Build features, including:

### Tabs within the Properties Menu

Along the right-hand side of ProposalBuilder documents is the document panel, as shown to the right.

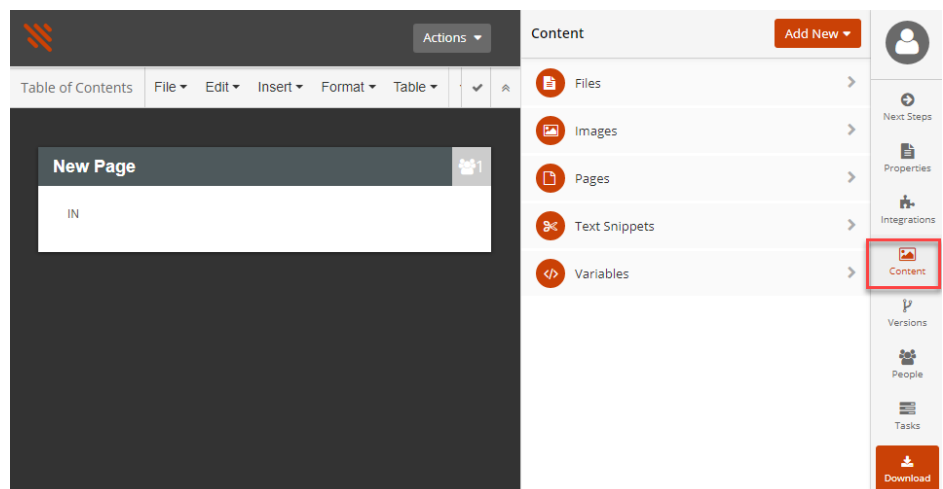


In an effort to shorten the length of this panel and reduce the need for users to scroll down to find important options, several tabs were added to the Properties menu, including:

- *The Details tab*, which is a place for the document owner to edit information about a document. It allows editing of the Title, Client, Description, Tags, Template, Owner, Value, Expiration Date, and any Document Relationships.
- *The Design tab*, which allows users to access any themes to apply to proposals to help meet their company's brand preferences. Applying a brand-specific style to proposals is one of the main benefits of building documents in ProposalBuilder, and this feature can now be accessed using the Design tab's drop-down menu to apply a theme.
- *The Privacy tab* allows users to control privacy settings quickly and easily, allowing users to enable document access codes, share documents with specific workgroups, or make it public or private.

### Content Menu

The Content Menu, previously named Assets, allows users to access Files, Images, Pages, Text Snippets, and Variables to add into their document, as shown to the right.



The term Assets is changed to Content in all other aspects of ProposalBuilder as well to allow for a more intuitive user experience.

Content Pages have also been simplified to Pages throughout the application. The Content menu also allows users to add new content with the Add New button at the top of this menu.

### Version Menu

ProposalBuilder allows users to create multiple versions of documents, and the Versions menu was updated to make this process easier.

The New Version button is readily available at the top of the Version Menu, along with a drop-down menu to see other versions of the document. This is also a place to double check if you are working on the most current version of a document.

### Download Button

The Download Button moved from the Table of Contents to the bottom of the right-side Document Panel, making this functionality more accessible and intuitive.

### Signing a Proposal

When it's time to sign a proposal, sales representatives need to publish their proposal by selecting *Publish Now*, as shown to the right.

Once the proposal is published, the next action will be selecting the *Add People* button to add people who are able to view the proposal.

When adding people, a first and last name, and email address must be provided. Each person must also be designated as a signer, as shown on the next page.

Proposal Date	Proposal Number	Agreement
September 14, 2018	No Value	No Value

BY AND BETWEEN:

ABM Franchising Group  
501 Technology Dr  
Canonsburg, Pa 15317  
hereinafter CONTRACTOR

AND

Tim's Furniture Gallery  
5092 Sherwood Rd  
Pittsburgh Pa 15102  
hereinafter CUSTOMER

SERVICES WILL BE PROVIDED AT THE FOLLOWING LOCATION(S):

Contractor will provide the services described in the maintenance program indicated below, which are attached hereto and made a part of this Agreement, in accordance with the terms and conditions set forth on the following maintenance program pages.

**MAINTENANCE PROGRAM**      **Guaranteed Lifetime Protection**  
and associated Terms and Conditions

AGREEMENT coverage will commence on No Value. The AGREEMENT price is \$0.00 per year, payable No Value per No Value in advance beginning on the effective date of No Value.

IN WARRANTY ONLY: During the warranty, the AGREEMENT price will be No Value per No Value.

It is understood that the warranty expires on No Value (date).

Actions

1. Finalize Content
2. Review Action Buttons
3. Review proposal properties

**Publish Now**

More Actions ▾

2 Not Yet Published

3 Pending Acceptance

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Actions

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**Publish Now**

More Actions ▾

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3 Pending Acceptance

When adding people, the sales representative should be added first, followed by the prospect, and, finally, the appropriate manager.

Once the appropriate people are added to the proposal, select *Send Email Now* to obtain signatures.

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

Want more TEGG news and announcements? Stay up-to-date with TEGG Mobile by visiting [TEGG.com/news](http://TEGG.com/news) from your computer or mobile device.

### Add People

First Name	<input type="text" value="Kevin"/>	Last Name	<input type="text" value="Burke"/>
Email Address		<input type="text" value="kevin.burke@abm.com"/>	
Signer?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Signer Order	<input type="text"/>
ADVANCED PERMISSIONS >			
<input type="button" value="Add Another Recipient"/>			
<input type="button" value="Cancel"/>		<input type="button" value="Next"/>	