

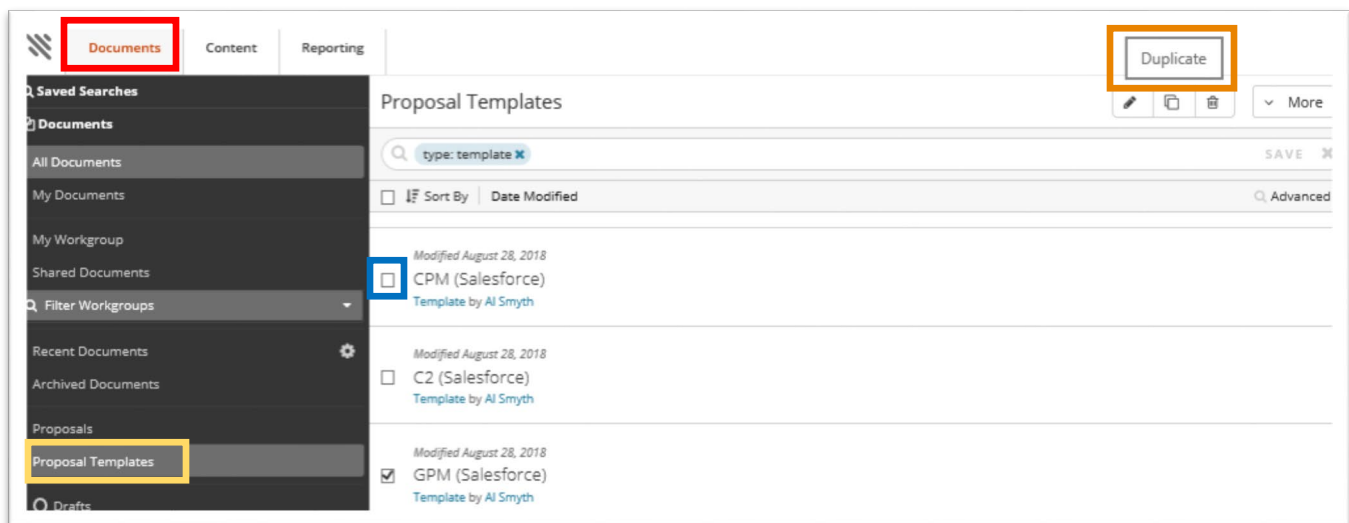
ProposalBuilder Update: Customizing Templates

ProposalBuilder™

ProposalBuilder allows users to create customized templates to best meet their client and business' needs.

When customizing a template, users must take the following steps:

1. Select the Documents Tab, which is shown in the red box below
2. Select the Proposal Templates option, which is shown in the yellow box below
3. Select the Template to be customized by checking the corresponding box, shown in the blue box below
4. Select Duplicate in the upper-right portion of the screen, shown in the orange box below
5. Open the duplicated copy, which will feature a filename starting with "Copy of"
6. Open the file in Template mode and make the necessary customizations, before renaming and saving it



Once completed, the user will have the original template, as well as the new, customized template. If desired, templates can be deleted as needed after a copy is made.

It is important to note, users must have administrator credentials to perform this process. For more information on acquiring administrative rights, contact the [ABM Franchising Group Support Center](#).

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

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