

Setup of Designer Proposals

Designer proposals are produced from PGM Anywhere. That's all the user needs to know. However, setting up a user to produce designer proposals requires configuration work in PGM Anywhere, GiftCalcs, and a MS website.

The configurations in PGM Anywhere and GiftCalcs are connected via the Org ID from Sugar and in GiftCalcs and a MS website are connected via the App ID assigned by GiftCalcs.

A. GiftCalcs configuration

1. Organization Profile tab: enter ORGID = Org ID from Sugar, then click Save at bottom of tab.

The screenshot shows the 'Organization Profile' tab selected. The 'ORGID' field is highlighted in yellow and contains the value '1234'. Other fields include 'Organization Name' (Tester 2 Foundation), 'Organization Nickname' (Tester 2), 'Organization Nickname for Diagram Labels' (T2 Foundation), and 'Contact Name' (Tester 2).

2. Designer Proposals tab
 - a. Enter Marketing Site URL. End the URL with a "/". Click Save at the bottom of the tab.

The screenshot shows the 'Designer Proposals' tab selected. The 'Marketing Site URL' field is highlighted in yellow and contains the value 'https://plannedgiving.fenway.dev.pgdonors.org/'. Below the URL field, there is a list of proposal types on the left and a configuration area on the right. The configuration area includes a 'Proposal Abbreviation' field (1E) and a 'PROPOSAL PATH' field (proposals/1e-bequest). There are also buttons for 'Add page' and 'Remove proposal type'.

- b. The Proposal Abbreviation and Proposal Path fields for the 1-page, 2-page, and 4-page standard designer proposals have been pre-populated for existing MS websites and are populated automatically when new MS websites are created.

These fields should be populated as follows: for each gift type for which GiftCalcs performs calculations (bequest, CGA, DGA, CRUT, Flip CRUT, CRAT, PIF, PIF 2-5, RLE, CLAT, CLUT, bargain sale), a Proposal Abbreviation for the 1-page, 2-page, and 4-page standard designer proposals (1E, 2DE, and 4DE) should be entered. In addition, a Proposal Path (e.g., proposals/1e-bequest) should be entered for each designer proposal page.

B. PGM Anywhere configuration

Configuration can be applied in System App (by PG Calc staff) or in PGM Anywhere (by client).

PGMA System Application

1. Search for the client's PGMA account by Clientname or Sugar Org ID. When found, click the Clientname in the search list.

Select	Client ID	Clientname	Client Full Name	
<input type="radio"/>	9794	BillTest	Bill Laskin Test Account	Reset Password Edit Primary Show Users

2. Client Information screen: enter the Sugar Org ID and mark the Designer Proposals box (Module must be Standard)

Client Identification

Clientname: BillTest Primary Email: blaskin@pgcalc.com Client ID: 9794

Client Full Name: Bill Laskin Test Account

Sugar Org ID: 1234 Client Account 2:

DB: 1 PGM
App: 3 https://pgm.pgcalc.com/PGMAAnywhere/WebService/PGMAApplication.svc

Client Type

☒ Non Profit ☐ Service Provider

Module

☐ GAM ☐ Mini ☒ Standard ☒ Designer Proposal

3. Designer Proposals tab

Unless you are adding a custom designer proposal or editing the source text for a standard designer proposal, you won't need to visit this tab.

- a. The Designer proposal name (e.g., One-Page Example), Abbreviation (e.g. 1E), and Designer proposal source text (defines variable text and values, asks follow-up questions) is set up here for each designer proposal.
- b. Information for 1-page, 2-page, and 4-page standard proposals is pre-populated.
- c. You can add info for a custom proposal here.

Designer Proposal Name	Abbreviation
One-Page Example	1E
Two-Page Description and Example	2DE
Four-Page Description and Example	4DE

Records: 3


Add Designer Proposal

Designer proposal name: Abbreviation:

Designer proposal source text:

Done Cancel

4. Images tab

- a. Click  next to the organization for which you want to choose colors, upload images, and enter default text for custom paragraphs. The client must first set up the organization in PGMA under Customize > Organizations for it to appear in the Organization List.

Organization Name	Short Name
Fenway School Fund	FSP
STATE UNIVERSITY	State University
Claremont McKenna College	CMC
THE NATURE CONSERVANCY PLANNED GIVING PROGRAM	The Nature Conservancy
PGMA 2 Test Fund	PGMA2

- b. Select the highlight color (ruled lines and headings) and background color (contact us box).

Edit Fenway School Fund

Highlight color: #007aa5

Background color: #007aa5

Charity image for headings: + -

Charity icon for diagrams: + -

Picture 1: + -

- c. Add images for headings and diagrams, as needed. These images are used elsewhere in PGMA, as well as in designer proposals, and should be already entered. In PGMA's standard designer proposals, the charity image for headings appears at the top of the first page and the charity icon for diagrams appears at the top of subsequent pages and in the example diagram.

Edit Fenway School Fund

Highlight color: #007aa5

Background color: #007aa5

Charity image for headings: + -

Charity icon for diagrams: + -



Picture 1: + -









- d. Upload images for use in designer proposals. Pictures 1-6 are used in the standard designer proposals; Pictures 7-8 are reserved for custom designer proposals and can be left empty.



Edit Fenway School Fund








Highlight color: #007aa5



Background color: #007aa5




Charity image for headings:  

Charity icon for diagrams:  

Picture 1:  

The table below shows the ideal size and aspect ratio for the images used in each picture position in PGMA's standard designer proposals. PGMA crops and resizes images, as needed, to match the space allocated for each picture. Avoid uploading large images (over 300KB-400KB), as they will make the System App run slow.

Key: 1E = One-Page Example, 2DE = Two-Page Description and Example, 4DE = Four-Page Description and Example



Picture number	Location in standard designer proposals	Size in pixels	Approx. aspect ratio (width:height)
Picture 1	top of 1E	380x500	3:4
Picture 2	top of p.1 of 2DE, top of p.2 of 4DE	1850x800	7:3
Picture 3	bottom of p.1 of 2DE, bottom of p.2 of 4DE	880x1310	2:3
Picture 4	top of p.2 of 2DE, top of p.3 of 4DE	1150x1130	1:1
Picture 5	cover page of 4DE	1660x1700	1:1
Picture 6	bottom of p.4 of 4DE	1850x950	2:1
Picture 7	unknown	unknown	determined by custom designer proposal
Picture 8	unknown	unknown	determined by custom designer proposal









- e. After adding all images for one of the pictures, such as Picture 1, click the image you want to be the default selection. A gray frame will enclose the image.



Edit Fenway School Fund








Highlight color: #007aa5



Background color: #007aa5




Charity image for headings:  

Charity icon for diagrams:  

Picture 1:  

- f. Enter/edit the default text for the custom paragraphs that can be included in designer proposals. This default text appears when a field for entering the paragraph appears in the designer proposal's follow-up window.

Mission paragraph default text: The generosity of donors like you have made it possible for the Fenway School of Psychology to provide students with a one-of-a-kind academic experience noted for hands-on

Purpose paragraph default text: Funding a charitable gift annuity would be a great way for you to add to the John Q. Donor Scholarship Fund at FSP. Alternatively, you might consider using your gift to support

Thank-you paragraph default text: Thank you for considering a gift to support FSP. Our success depends on the generosity of donors like you.

Other paragraph default text:

Save Cancel

The paragraphs are used as follows:

Name	Context
Mission paragraph	first paragraph in the "Consider Support" section of all standard designer proposals
Purpose paragraph	last paragraph in the "Consider Support" section of the Two-Page Example and Description and Four-Page Example and Description designer proposals
Thank-you paragraph	last paragraph on the last page of the Four-Page Example and Description designer proposal. It appears below a "Thank you!" heading
Other paragraph	does not appear in any standard designer proposal. It is available for use in custom designer proposals

- g. Click Save at the bottom of the tab.

C. PGM Anywhere application

Two settings used in PGMA's standard designer proposals must be configured by the user in PGMA (under Customize > Organizations). Otherwise, settings that the user can configure in PGMA can also be configured by PG Calc in the System App.

1. Settings the user must configure in PGMA

- a. Enter the narrative name for the charity in Customize > Organizations > Charity Names in Narratives > Narrative name. This name appears the first time the charity's name is mentioned in a PGMA standard designer proposal. It also appears in narratives.

Edit Fenway School Fund

Charity Names In Narratives

Narrative name: FSP

Legal name for use in documents: The Fenway Fund

Legal name continuation (if needed):

- b. Enter the short name for the charity in Customize > Organizations > General > Short name. This name appears throughout PGMA standard designer proposals after the narrative name appears once. The short name also appears in chart and diagram labels.

Edit Fenway School Fund

General

Heading line 1: Fenway School Fund

Heading line 2: line 2 line

Display heading lines on charts and graphs? Yes

Charity image for headings:

Charity icon for diagrams:

Short name: FSP

Color of arrows in diagrams: #babcb6

2. Settings also configurable in the System App.

- a. Customize > Organizations > General: add, delete, and select default images for headings and diagrams. The steps are the same as described for the System App > Designer Proposals tab (Section B.3).
- b. Customize > Designer Proposals: add a custom designer proposal or revise the source text for a PGMA standard designer proposal. The steps are the same as described for the System App > Designer Proposals tab (Section B.3).
- c. Customize > Organizations > Designer Proposals: add images and select default images for Pictures 1-8 and enter default text for custom paragraphs. The steps are the same as described for the System App > Images tab (Section B.4).

D. MS Website configuration

The content pages for designer proposals are set up as part of the client's Marketing Services website. If the client doesn't have a MS website and purchases the Designer Proposals module, a stub MS website must be created for the client.

1. Provision an MS website if the client doesn't already have one. This site will remain on the stage server unless the client opts to purchase a full site. If the client has a site, navigate to content and choose the content type 'Designer Proposals' to locate the pages.
2. Add "How Your Gift Helps" images and copy to page 4 of all 4-page standard proposals. If the client has an MS website that includes a "How Your Gift Helps" section, copy the images and text from there. Otherwise, request photos and copy from the client or use stock imagery and default text. If the client does not want to include a "How Your Gift Helps" section in the 4-page standard proposals, hide this section by commenting out the code highlighted below.

Home » 4de - RLE - Page 4

Edit Designer Proposals 4de - RLE - Page 4

VIEW EDIT CLONE

Title *

4de - RLE - Page 4

Body (Edit summary)

Source

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<div class="pgc-proposal-top-banner" style="background-color:[pgm_highlightcolor];"><div class="pgc-proposal-wrapper four-page page-4" style="font-family:[pgm_font];"><div class="pgc-proposal-header"><div class="pgc-proposal-header-shortlogo"></div><div class="pgc-proposal-row"><div class="pgc-proposal-content-detail" style="font-size:[pgm_fontsize];"><div class="pgc-proposal-title" style="color:[pgm_highlightcolor];">How Your Gift Helps</div><p>Your gifts to Fenway School of Psychology help to educate the whole person through creative and rigorous scholarship in a collaborative residential community. It will provide Fenway with the resources to help</p><div class="pgc-proposal-how-your-gift-helps"><div class="pgc-proposal-hygh row-1"><div class="pgc-proposal-hygh-text">Provide scholarships for student financial assistance</div><div class="pgc-proposal-hygh row-2"><div class="pgc-proposal-hygh-text">Help shape the campus with improved facilities</div><div class="pgc-proposal-hygh row-3"><div class="pgc-proposal-hygh-text">Provide funds to support programs on campus</div></div><div style="clear:both;"><div></div><div class="pgc-proposal-row"><div class="pgc-proposal-content-detail" style="font-size:[pgm_fontsize];"><div class="pgc-proposal-title" style="color:[pgm_highlightcolor];">Thank You!</div><p><pgm_thankyouparagraph></p></div><div class="pgc-proposals-footer-text-four-page" style="background:[pgm_backgroundcolor];"><div class="pgc-proposal-footer-content" style="color:[pgm_highlightcolor];"><div class="pgc-proposal-title" style="color:[pgm_highlightcolor];">Please Contact Us Anytime!</div><div class="pgc-proposal-footer-content pgc-proposal-content-detail" style="color:[pgm_highlightcolor]; font-size:[pgm_fontsize];">If you would like to learn more about a retained life estate or any of the many other ways you can support [pgm_charmed], please contact [pgm_contactus].</div><div class="pgc-footer-image"></div><div class="pgc-proposal-footer-content author" style="color:[pgm_highlightcolor];text-align: right;"><em>Created [pgm_date]</em></div></div></div>
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3. Make edits to designer proposal content requested by user, if any.