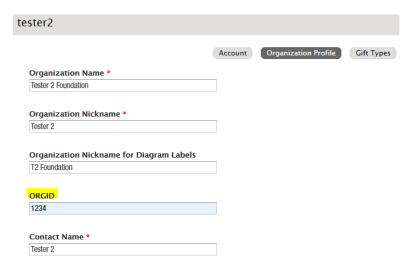
Setup of Designer Proposals

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.

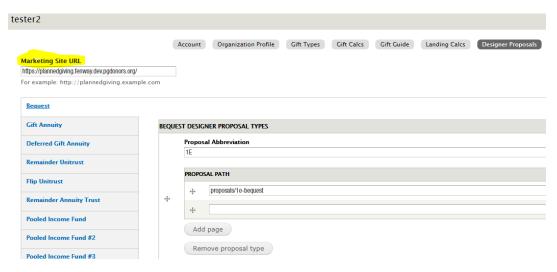
A. GiftCalcs configuration

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



2. Designer Proposals tab

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



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.

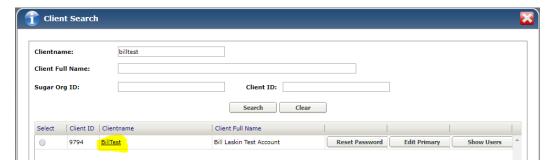
These fields should be populated as follows: for each gift type for which GiftCalcs performs calculations (bequest, CGA, DGA, CRUT, Flip CRUT, CRAT, PIF, PIF 2-5, RLE, CLAT, CLUT, bargain sale), a Proposal Abbreviation for the 1-page, 2-page, and 4-page standard designer proposals (1E, 2DE, and 4DE)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

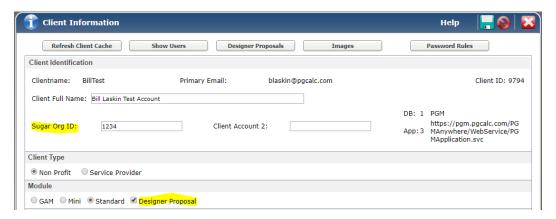
Configuration can be applied in System App (by PG Calc staff) or in PGM Anywhere (by client).

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.



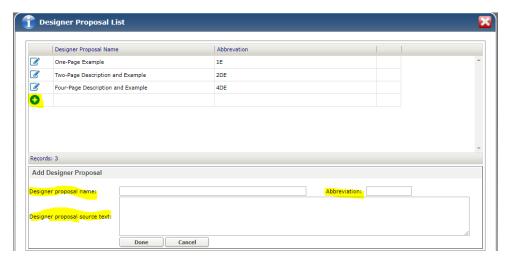
2. Client Information screen: enter the Sugar Org ID and mark the Designer Proposals box (Module must be Standard)



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.

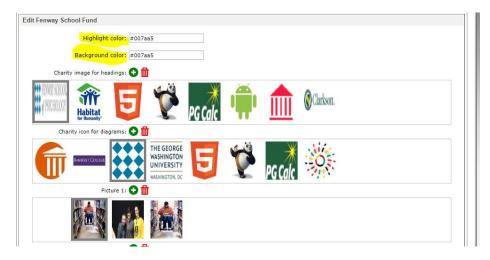


4. Images tab

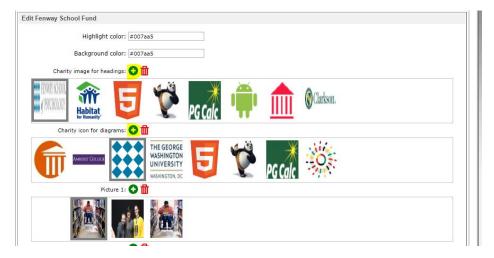
a. Click next to the organization for which you want to choose colors, upload images, and enter default text for custom paragraphs. The client must first set up the organization in PGMA under Customize > Organizations for it to appear in the Organization List.



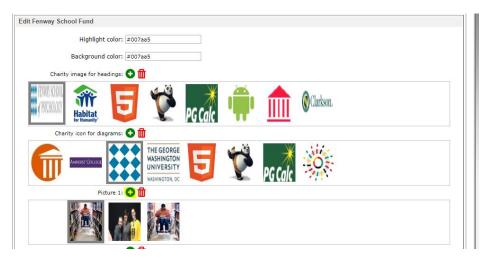
b. Select the highlight color (ruled lines and headings) and background color (contact us box).



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.



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.

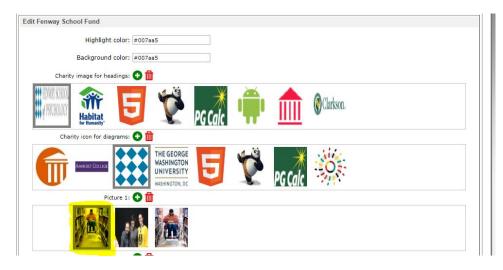


The table below shows the ideal size and aspect ratio for the images used in each picture position in PGMA's standard designer proposals. PGMA crops and resizes images, as needed, to match the space allocated for each picture. Avoid uploading large images (over 300KB-400KB), as they will make the System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

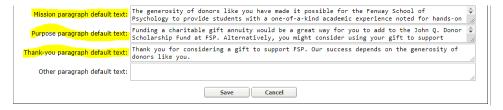
Key: 1E = One-Page Example, 2DE = Two-Page Description and Example, 4DE = Four-Page Description and Example

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.



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.



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 use in custom designer proposals	

g. Click Save at the bottom of the tab.

C. PGM Anywhere application

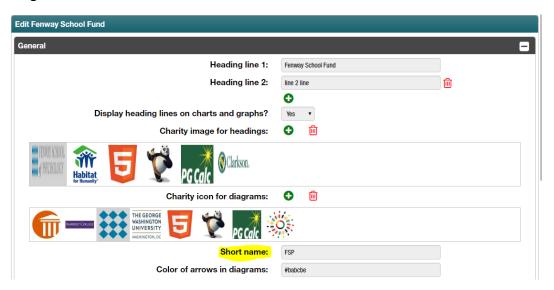
Two settings used in PGMA's standard designer proposals must be configured by the user in PGMA (under Customize > Organizations). Otherwise, settings that the user can configure in PGMA can also be configured by PG Calc in the System App.

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.



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.

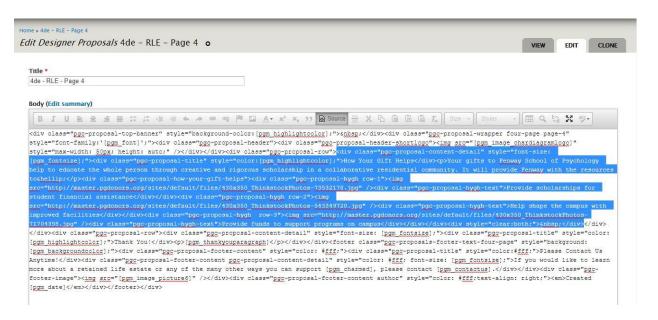


- 2. Settings also configurable in the System App.
 - a. Customize > Organizations > General: add, delete, and select default images for headings and diagrams. The steps are the same as described for the System App > Designer Proposals tab (Section B.3).
 - b. Customize > Designer Proposals: add a custom 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.



3. Make edits to designer proposal content requested by user, if any.