



— HOW-TO GUIDE • PROPOSALS

BUILD IT YOUR WAY. GET IT SIGNED.

Set your brand kit, build a template for each scope you quote, lay out the page your way, attach your documents and send it as a link your client can accept and sign.

BUILD

A template for every scope

LAYOUT

Your page, your way

SIGN

Accepted online

HOW IT WORKS

Proposals live on the bid in **Bid Manager**. Set up your templates once, then every quote starts from one and goes out looking the same, with your logo and your terms.

1 Open your proposals

2 Start a new proposal

3 Your templates

4 Set your brand kit

5 The builder

6 Add blocks

7 Your layout, your way

8 Edit a block

9 Attach your documents

10 Save and send

11 Your client signs

12 Notes come back

01

OPEN YOUR PROPOSALS

BID MANAGER

ADMIN

Proposals live on the bid, under the Estimating tab.

01 Open the bid in **Bid Manager**.

02 Click the **Estimating** tab.

03 Every proposal for the bid is listed under **Proposals** with its number, date and price.

04 **Takeoff** and **Estimate** sit beside it. Both are coming soon.

The screenshot shows a web application interface for managing bids. At the top, a breadcrumb trail reads 'Field Operations > Bid Manager > Riverbend Medical Clinic'. The main header for the bid is 'Riverbend Medical Clinic' with a sub-header 'Northline Construction · Dana Whitford · BID-2026-031'. To the right, the 'BID VALUE' is '\$48,620'. Below this, there are four buttons: 'Estimating' (highlighted in blue), 'Edit', 'Mark as Awarded', and 'Mark as Lost'. A tab bar below the buttons shows 'Overview', 'Drawings', 'Estimating' (with a '1' badge), 'Vendors', and 'Follow-ups'. Below the tabs, there are three sections: 'Takeoff' (with a 'SOON' badge and 'Not available yet'), 'Estimate' (with a 'SOON' badge and 'Not available yet'), and 'Proposal' (with a '1 draft' badge). At the bottom, a 'Proposals' section shows a list of proposals. The first proposal is 'Q-2026-0031' with a 'Selected' badge, dated 'Oct 14, 2026' by 'Marco Silva'. To the right of the list is a '+ New proposal' button and a summary row showing '\$48,620' with a right arrow and a trash icon.

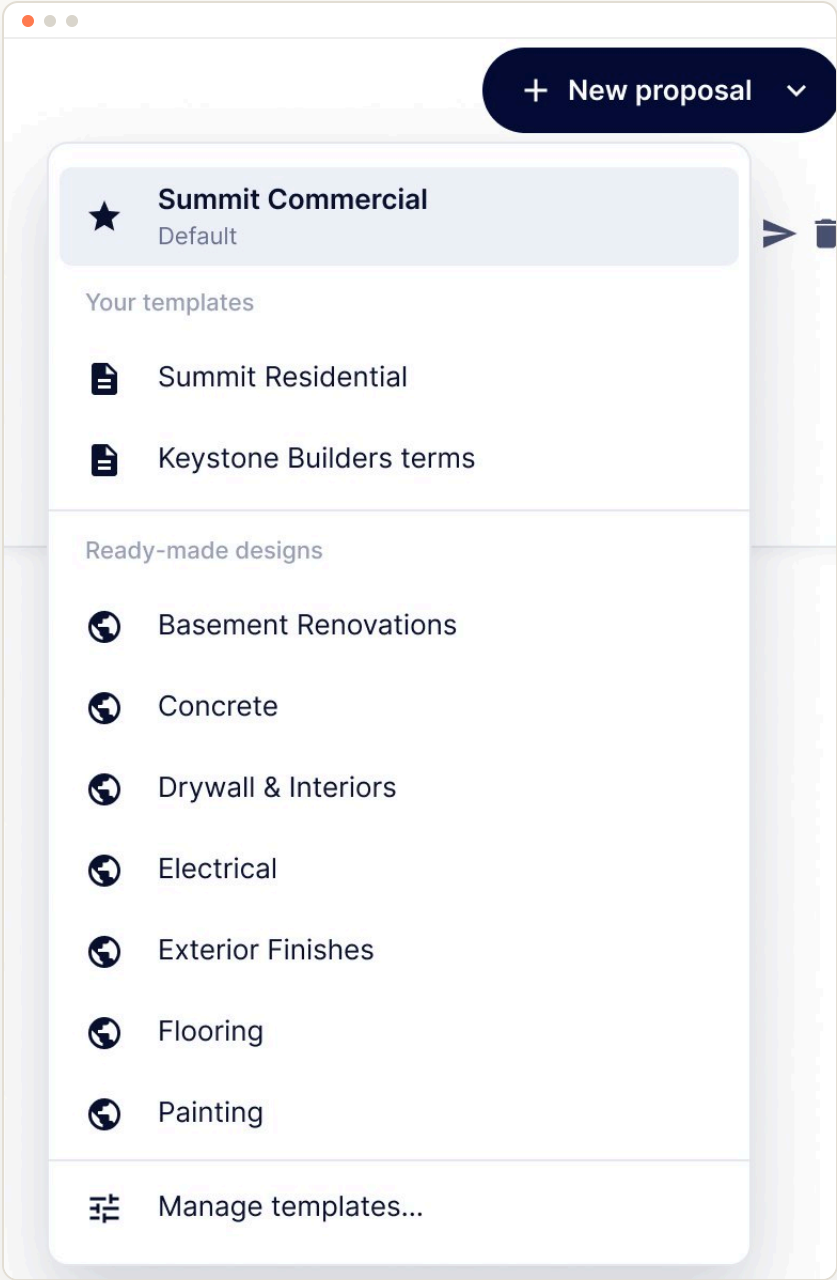
02

START A NEW PROPOSAL

NEW PROPOSAL ADMIN

One click, then pick where it starts from.

- 01 Click **New proposal**.
- 02 Your **default** template sits at the top.
- 03 **Your templates** are under it.
- 04 Then the **Ready-made designs**, one per trade.
- 05 **Manage templates** at the bottom sets them all up.



03

YOUR TEMPLATES

MANAGE TEMPLATES

ADMIN

Build one template for each scope you quote.

01 **New template** starts one clean.

02 **Make default** sets your go-to.

03 **Edit, Rename or Duplicate** any template.

04 Under **Ready-made designs**, pick your trade and click **Use this design**.

TIP

Start from a ready-made design, then swap in your own photos.

PROPOSAL TEMPLATES

Keep a template for each kind of job, with different terms, wording or colours for commercial, residential or a particular GC. "New proposal" starts from the default unless you pick another. Changing a template never changes proposals already made.

TEMPLATE	LAST CHANGED	
Summit Commercial	Oct 14, 2026	Edit Rename Duplicate Delete
Summit Residential	Oct 9, 2026	Edit Rename Duplicate Make default Delete
Keystone Builders terms	Sep 30, 2026	Edit Rename Duplicate Make default Delete

READY-MADE DESIGNS

A designed cover and pages for your trade. Start a template from one, then make it yours. Swap in your own photos in the builder. Shown in your brand kit's colours and fonts.

YOUR BASEMENT, START TO FINISH

Summit Interiors

CONCRETE PROPOSAL

Printed, proofed and finished by our team.

INTERIOR CONSTRUCTION PROPOSAL

Prepared for the project and client on the next page.

ELECTRICAL PROPOSAL

Prepared for the project and client on the next page.

EXTERIOR FINISHES

Printed, proofed and finished by our team.

FLOORING PROPOSAL

Printed, proofed and finished by our team.

SUBTRADE • PROPOSALS

05

04

SET YOUR BRAND KIT

BRAND KIT

ADMIN

Set it once. Every proposal and template uses it.

- 01 Click **Brand kit** up top.
- 02 Pick your **main colour** and your **accent**.
- 03 Save **more of your colours** to use anywhere.
- 04 Choose your **heading** and **body** fonts.
- 05 Hit **Save brand kit**.

Brand kit

Set once: every quotation and template uses these wherever it has no colour or font of its own. The logo is your company's own, from the company settings.

MAIN COLOUR

headings, a cover's panels

ACCENT

rules, labels, bands, highlights

MORE OF YOUR COLOURS

first in every colour picker - up to 8

+

FONTS

Headings

Montserrat - Bold

Words

Inter - Clean

Proposal for Riverbend Medical Clinic

Supply and install drywall, tape and finish to Level 4, as the drawings show.

Cancel

Save brand kit

SUBTRADE • PROPOSALS

06

05

THE BUILDER

BUILDER

ADMIN

Click a template to open it in the builder.

01 **Blocks** on the left, page by page.

02 Your **live page** in the middle.

03 **Settings** for the block you picked on the right.

04 **Save quote, Export PDF** and **Send** sit up top.

The screenshot shows the 'THE BUILDER' software interface. At the top, a breadcrumb trail reads: Field Operations > Bid Manager > Riverbend Medical Clinic > Q-2026-0031. Below this, a header bar for 'Riverbend Medical Clinic' includes the address 'Northline Construction · Dana Whitford · BID-2026-031' and a 'BID VALUE' of '\$48,620' with an 'Estimating' button. A toolbar contains buttons for 'Q-2026-0031', 'Summit Commercial', 'Save quote', 'Export PDF', and 'Send'. On the left, a 'Hide blocks' section allows adding blocks to 'PAGE 1' (Picture, Shape, Shape, Text, Text) and 'PAGE 2' (Cover, Stat tiles, Picture, Text, Team). The central workspace displays a large image of a modern office interior with large windows overlooking a city skyline. On the right, a 'Layers on page 1' panel shows a list of elements: 'Text - Interior construction proposal', 'Text - Drywall, framing and interior...', 'Shape', 'Shape', and 'Picture'. Below this is a 'Colours, footer & terms' section with a 'SHAPE' turn slider set to 0°, a 'Colour' palette, and a 'Fades into' palette. At the bottom of the right panel, there are 'Straight across' and 'From the middle' options.

06

ADD BLOCKS

BUILDER

ADMIN

Add only what the job needs.

01 Click **Add a block** and pick one.

02 **Cover, Scope of work, Inclusions, Exclusions, Price, Options, Unit rates, Terms, Acceptance** and more.

03 The **Saved** tab keeps blocks you reuse.

04 Drag a block to move it on the page or between pages.

New block | Saved (2)

Cover
Title, logo, job, client and date

Quote details
Estimate and drawing dates, validity

Text
Paragraphs, bold, italic, bullets

Scope of work
The price list's sections, with their words

Inclusions
What is included, as a list

Exclusions
What is not included, as a list

Included / Not included
Both lists, checks and crosses

Price
The price, as a lump sum or by section

Pricing table
The price list line by line, with the total

Options
The price list's options, add or deduct

Unit rates
Rates for extra work

1. Steel stud framing
Walls and bulkheads, 3-5/8" 20 ga at 16" o.c., backing where shown.

2. Drywall board and tape
Board, tape and finish to Level 4, corner bead and control joints.

3. Acoustic ceilings
2x4 T-bar grid and tile, aligned with the reflected ceiling plan.

WHAT IS IN THE PRICE

Included	Not included
✓ Supply and install drywall to the levels shown	✗ GST
✓ Taping, mudding and sanding ready for paint	✗ Permits, inspections and engineering
✓ Steel stud framing and bulkheads where shown	✗ Fire stopping unless listed above
✓ Insulation and vapour barrier where shown	✗ Access panels supply
✓ Corner bead, trims and control joints	✗ Painting and primer
✓ Acoustic ceilings where shown	✗ Heat, hoarding, temporary power and lighting
✓ Our own scaffolding and lifts for our work	✗ Work outside regular hours unless agreed
✓ Daily clean-up of our debris to a bin by others	✗ Repairs to damage by other trades

HOW THE JOB RUNS

Framing | Insulation | Board | Tape & finish | Ready for paint

07

YOUR LAYOUT, YOUR WAY

FREE LAYOUT

ADMIN

The whole page is yours.

01 Drop in **pictures, shapes, text, stat tiles** or a **photo gallery**.

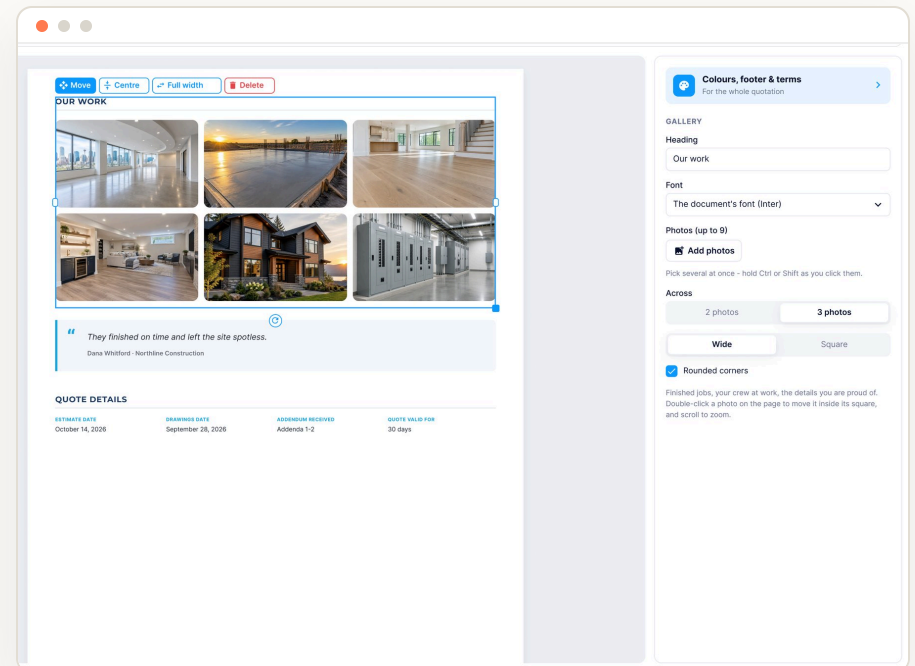
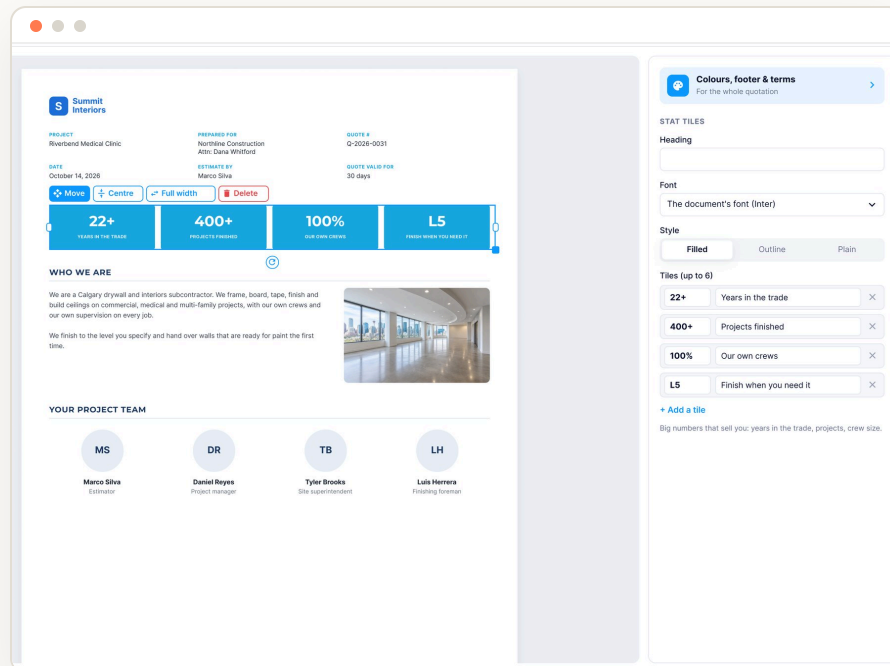
02 Drag them anywhere on the page.

03 Resize and layer them. Send them **to front** or **to back**.

04 Use **Move, Centre** and **Full width** on the item you picked.

TIP

Build the proposal the way your company works.



08

EDIT A BLOCK

COVER

ADMIN

Click any block and edit it on the right.

01 For the cover, set the **title** and **subtitle**.

02 Tick what shows: **company logo**, **project and address**, **client** and **date**.

03 Add the **estimator** and the **drawings / specs date**.

The screenshot displays the Subtrade Proposals software interface. At the top, there's a navigation bar with buttons for 'quote', 'Export PDF', and 'Send'. To the right of these are zoom controls (99%), a 'Fit' button, and buttons for 'Price list', '7 pages', and 'Preview'. The main workspace is split into two panels. The left panel shows a large image of a modern office interior with large windows overlooking a city skyline. The right panel is the 'Layers on page 2' editor, which lists various elements: 'Text · Riverbend Medical Clinic', 'Stat tiles', 'Cover' (which is currently selected and highlighted in blue), 'Picture', and 'Team'. Below this list is a section titled 'Colours, footer & terms' with a right-pointing arrow. Further down, under the 'COVER' section, there are settings for 'Font' (set to 'The document's font (Montserrat)'), 'Turn' (set to 0° with a slider), and 'Title'.

09

ATTACH YOUR DOCUMENTS

ATTACHMENTS

ADMIN

Contract, insurance, WCB letter, site photos.

01 Add an **Attachments** block. It always sits on the closing page.

02 Click **Attach PDFs or photos**.

03 Your client gets every file at the back of their PDF.

TIP

Attachments go into the PDF your client downloads from their link, not into Export PDF.

The screenshot displays the Subtrade Proposals interface. At the top, there's a navigation bar with 'quote', 'Export PDF', and 'Send' buttons. The main content area is titled 'ATTACHMENTS' and contains a list of documents and photos attached to the proposal. On the right, there's a sidebar with settings for 'Colours, footer & terms', 'Attachments', 'Font', and 'Files'.

quote **Export PDF** **Send** **Price list** **7 pages** **Preview**

ATTACHMENTS

The documents listed below are attached to this proposal and printed after its last page. They form part of our quote: please read them together with the scope, price and terms above.

1. **Riverbend_Contract_Terms.pdf** PDF
2. **Insurance_Certificate.pdf** PDF
3. **WCB_Clearance_Letter.pdf** PDF
4. **Acoustic_Ceiling_Product_Sheet.pdf** PDF
5. **Lobby_Ceiling_Photo.jpg** PHOTO
6. **Level_2_Corridor_Photo.jpg** PHOTO

Colours, footer & terms
For the whole quotation

ATTACHMENTS

Heading
Attachments

Font
The document's font (Montserrat)

Type the words on the page. The files go with the quotation as links, in the email and on the client's link, in this order.

Files

	Riverbend_Contract_Terms.pdf	412 KB	×
	Insurance_Certificate.pdf	236 KB	×
	WCB_Clearance_Letter.pdf	118 KB	×
	Acoustic_Ceiling_Product_Sheet.pdf	1.4 MB	×
	Lobby_Ceiling_Photo.jpg	2.1 MB	×
	Level_2_Corridor_Photo.jpg	1.8 MB	×

10

SAVE AND SEND

SEND

ADMIN

The email is written for you.

- 01 Click **Save quote**, then **Send**.
- 02 Pick a contact from the bid or type any address.
- 03 Check the **subject** and **message**.
- 04 Hit **Send quotation**. The PDF goes with it.

The screenshot shows a 'Send quotation' modal window. It has a title bar with a close button (X). The form contains the following fields and content:

- To:** A text input field containing 'estimating@northlineconstruction.ca' with a dropdown arrow on the right.
- Subject:** A text input field containing 'Quotation Q-2026-0031 - Riverbend Medical Clinic'.
- Message:** A large text area containing the following text:

Hi Dana,

Please find our quotation for Riverbend Medical Clinic attached.

This quotation is valid for 30 days.

If anything needs clarifying or the scope has moved, let us know and we will revise it.

Thanks,
Marco Silva
Summit Interiors

Below the message field, there is a small note: 'The quotation PDF is generated and attached when you send. Sending also makes this the quotation the bid's value comes from.'

At the bottom right, there are two buttons: 'Cancel' and 'Send quotation' (which is highlighted with a dark blue background and a white right-pointing arrow).

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YOUR CLIENT SIGNS

CLIENT LINK

ADMIN

Your client gets a link, no login.

01 They see the price and your **attached files**.

02 **Download the PDF** with every attachment at the back.

03 **Accept and sign**: name, title, email and signature.

04 **Or Decline this proposal**.

YOUR PRICE

Base price \$48,620.00

Total before tax **\$48,620.00**

Accept and sign

Download the PDF

Decline this proposal

ATTACHED FILES

- Riverbend_Contract_Terms.pdf
- Insurance_Certificate.pdf
- WCB_Clearance_Letter.pdf
- Acoustic_Ceiling_Product_Sheet.pdf
- Lobby_Ceiling_Photo.jpg
- Level_2_Corridor_Photo.jpg

NOTES

Dana Whitford Oct 15, 9:12 a.m.
Can you break out the lobby ceiling as its own price?

Summit Interiors Oct 15, 9:40 a.m.
Sure. Lobby ceiling is \$2,140. Revision coming today.

Dana Whitford

Write a note...

Accept proposal Q-2026-0031

You are accepting \$48,620.00, before tax, as set out in the proposal.

Your full name
Dana Whitford

Title
Project Manager

Email
dana@northlineconstruction.ca

Sign below

Clear

Sign here with your finger, a pen or the mouse

☒ I am authorized to accept proposal Q-2026-0031, and I accept its scope, price and terms.

Cancel Accept and sign

12

NOTES COME BACK

CLIENT LINK

ADMIN

Questions land on the bid, not in your inbox.

YOUR PRICE

Base price \$48,620.00

Total before tax **\$48,620.00**

✓ Accepted by Dana Whitford on October 15, 2026
Project Manager



Download the PDF

NOTES

Dana Whitford Oct 15, 9:12 a.m.
Can you break out the lobby ceiling as its own price?

Summit Interiors Oct 15, 9:40 a.m.
Sure. Lobby ceiling is \$2,140. Revision coming today.

01 Your client leaves a note under **Notes**.

02 It shows on the bid under **Client link**.

03 Reply right there.

04 See who accepted and when.

TIP

Need to change the price after it is sent? **Create revision**. The version your client received stays as it was.

This quotation has been sent. Create a revision to change the price. The version the contractor received stays as it was.

Client link  Opened 2 times, last on October 15, 2026
<https://portal.subtradesoftware.com/plpqr87v...Xk2>  Copy link  Open client view

✓ Accepted by Dana Whitford on October 15, 2026
Project Manager - Northline Construction



NOTES

Dana Whitford Oct 15, 9:12 a.m.
Can you break out the lobby ceiling as its own price?

Sure. Lobby ceiling is \$2,140 of the acoustic ceilings section. Revision coming today.

Send

— PROPOSALS

NEED A HAND? WE'VE GOT YOU.

Want help setting up your first template or brand kit? Send us an email and our team will get back to you.

support@subtradesoftware.com



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