

Sample Business Proposals



Proposal Pack & Quosal Sample #1

No matter how small or large your proposal must be, Proposal Packs include all you need to assemble your proposal in one affordable and convenient package. Proposal Packs cover all types of proposals and all types of businesses.

This sample PDF file shows you 2 templates (Title Page and Estimate) out of the entire collection of **over 400 templates included in the Proposal Pack Networks #1**.

There are [over 150 Proposal Pack graphic skins](#) to choose from. This example illustrates just one of them (Proposal Pack Networks #1).

[90 complete sample proposals](#) (over 1000 pages of material) are also included with each Proposal Pack to illustrate how to assemble and write your own custom proposal.

The complete Network Cabling sample includes 10 pages of content including a Cover Letter, Title Page, Table of Contents, Client Summary, Estimate, Installation Schedule, Permits and Licenses, Qualifications, References and Contract and Terms. This extra content is included with the purchase of any retail Proposal Pack template collection.

The sample pages below illustrate how a proposal can be created using the following three products:

[Proposal Pack Networks #1](#)

The Proposal Pack template collections contain all of the proposal content, formatting, graphics and layout. This is just 1 of over 150 design themes.

[Proposal Pack Wizard](#)

The Proposal Pack Wizard is used to assemble your proposal and uses mail merge features to incorporate your data into the proposal. In this example the Proposal Pack Wizard was also used to setup the proposal documents to be used by Quosal.

[Quosal](#)

The Quosal application is used to manage the products and services database and output the estimate, pricing and calculations into the proposal. It can also be used to tie into your CRM system to merge your client information into the proposal.

Northwest Computer Cabling, Inc.
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QUOTE

Network Cabling Design and Installation

10/27/20XX

Prepared for: Daniel Singh
CEO

Prepared by: Greg Neilson
Lead Designer



DESCRIPTION

Thank you for the opportunity to bid on designing and installing your computer network at your new corporate headquarters.

Northwest Computer Cabling, Inc. is located in Portland, but we travel throughout the state of Oregon and into southwestern Washington State to install computer networks. We have designed and installed networks for more than 300 companies of all sizes.

Proposal Number: PN-3



ESTIMATE

Services

<i>Description</i>	<i>Qty</i>	<i>Price</i>	<i>Ext. Price</i>
Permits and Licenses	1	\$200.00	\$200.00
Network Design	1	\$3,000.00	\$3,000.00
24x7 Priority Support (12 months)	1	\$8,000.00	\$8,000.00
Network Installation	1	\$16,000.00	\$16,000.00

Hardware

<i>Description</i>	<i>Qty</i>	<i>Price</i>	<i>Ext. Price</i>
LANWork 5000 F22 Switch	2	\$900.00	\$1,800.00
LANWork 6000 F16 Hub	1	\$2,500.00	\$2,500.00
Fiberoptic Cable	1	\$1,000.00	\$1,000.00
Firewall	1	\$900.00	\$900.00
Telecommunications Closet	1	\$8,000.00	\$8,000.00
Wall Plates and Connections	80	\$6.00	\$480.00
CAT-6 Cable	1	\$1,000.00	\$1,000.00
LanWork 8000 Modems	3	\$600.00	\$1,800.00

Total Estimate for Project: \$44,680.00

Standard Disclaimer: The numbers represented above are to be used as an estimate for the projects discussed. The above Estimate does in no way constitute a warranty of final price. Estimates are subject to change if project specifications are changed or costs for outsourced services change before being locked in by a binding contract.



S A M P L E

This sample has been truncated to only show the first few pages. The complete version of this sample is included with any Proposal Kit or Proposal Pack at:

<http://www.proposalkit.com/htm/products.htm>

Sample Business Proposals



Network Cabling Sample Proposal Notes

The Network Cabling Design and Installation Proposal is an example of a proposal using Proposal Pack to pitch networking and cabling design and installation services to another company. This example shows how our Proposal Packs can be used for virtually any type of proposal.

This sample illustrates how a more complex proposal is created using Proposal Kit and Quosal products together. The framework for the proposal and the contract are created with Proposal Kit products, and then Quosal is used to create the quoting and pricing information and merge the contact information.

IMPORTANT: There are countless ways to configure your workflow with Proposal Kit and Quosal products. This is only intended as a basic sample showing how the products can be integrated. Once you understand how the products work, then you can configure them as you see fit. This sample does not address things such as pulling contact data from a CRM system or hooking Quosal into an external product database. The internal Quosal database is used for this example and does not rely on any other systems attached to it.

The entire proposal was created using Proposal Pack Wizard V4.1, Proposal Kit Professional, Proposal Pack – Networks #1, Microsoft Word, Quosal 1.3 and Adobe Acrobat.

How the Entire Network Cabling Design and Installation Proposal was created:

Step 1:

- The first step is creating the proposal framework with Proposal Pack Wizard, Proposal Pack and Proposal Kit Professional.
- This sample assumes the Proposal Pack Wizard, Proposal Pack Networks #1, Proposal Kit Professional and Quosal are all installed on the computer.
- Note that ANY Proposal Pack skin can be used to create the sample below, all steps are the same regardless of what skin is used. This sample only uses Networks #1 for the accent graphics.

- Run the Proposal Pack Wizard and make the following configuration changes in the Preferences:
 - Make sure you are in Expert Mode, check the box in the General Settings tab and click OK.
 - In the “Labels and Mail Merge Tags” tab, click “Remap Mail Merge Tags”, then check the box “Turn on mail merge remapping”. This will remap Proposal Pack mail merge tags to Quosal tags. This is done because we will be using Quosal to do the mail merging of the contact information.
 - In the “Files and Folders” tab change the Default Project Folder to the folder where your Quosal documents are stored. By default this should be something like c:\Users\[User Name]\Documents\Quosal\Reports”. This is an optional step to make it more efficient to locate your proposal templates later in Quosal.
 - In the Tools tab, click “Configure Proposal Files”, select “Contract and Terms” from the drop down list then click “Edit the Selected Document”. Select the last document in the list of Section 8 files to move the Contract and Terms after. This is only done for this sample because we want to put the Contract and Terms document as the last page of the proposal.
 - In the “3rd Party” tab click “Show 3rd Party #1”. Make sure it is enabled and set to Contract Pack documents. This is only required for this sample because we will be incorporating a Contract Pack document from Proposal Kit Professional into the proposal.
 - In the “3rd Party” tab click “Show 3rd Party #2”. If this is set to the Quosal application, UNCHECK the Enabled button. This is because we will be using Quosal to finish the proposal. You only would need the Quosal 3rd Party setting enabled if you were creating an estimate document in Quosal first, then inserting into the proposal, which is not the workflow we are using for this sample.
 - Click OK to save your settings.
- In the Wizard Proposal Styles screen, select The [“Proposal Pack – Networks #1”](#) style, then click OK.
- In the Wizard Proposal Projects screen, click the “Add New Project” button.
 - Enter a Project Name of your choice.
 - Select the Quote title page graphic from the drop down list titled “Select graphic for Title Page”. This does not have any effect on the proposal being generated other than changing the logo in the Title Page from “Project” to “Quote”.
 - Click the “Pick Documents” button and select the following templates: Cover Letter, Title Page, Table of Contents, Client Summary Estimate, Installation Schedule, Permits and Licenses, Qualifications, References and Contract and Terms.
 - When selecting the Contract and Terms, the Wizard will ask you to pick a specific contract. Select the Computer Hardware and

Networking contract (check the first 2 boxes to use the document header and document formatting and uncheck the 3rd box as we want the contract inserted into the proposal).

- Enter the following data to be merged with the Proposal. This is data that Quosal does not have tags for that we can fill in with Proposal Pack Wizard. This shows how you can merge some data with the Wizard and some with Quosal.
 - In the “Company Data” screen enter a URL www.nwcabbling.com
 - Also enter the Job Title as “Lead Designer”. Since the Job Title for the company contact information is not a Quosal supported mail merge tag we will be merging it in step 1.
 - In the “Client Data” screen enter the Proposal Title “Network Cabling Design and Installation”
 - Because we want to use Quosal to replace the commonly changing data in this proposal framework, set the Proposal Number and CurrentDate to blank fields.
 - In the “Other Data” screen in the “Contract Data 11-20” tab, set the Delivery Date, Current Month, Current Year, Current Day to blank fields.
- Click OK to return to the main Wizard screen.

- 📌 In the main Wizard screen click the “Create Your Proposal” button.
- 📌 Now your proposal framework is complete and ready to be edited.
- 📌 In the main Wizard screen click the “Edit Your Proposal” button. Then click the buttons to “Edit Cover Letter” and “Edit Combined Proposal”.
- 📌 An example of the proposal documents in this stage are included titled CoverLetter_Step1.pdf and FullProposal_Step1.pdf
- 📌 For illustration purposes most of the content of the contract have been removed from this sample.

Step 2:

- 📌 At this point, the work of the Proposal Kit products is complete, the proposal framework you will be creating multiple proposals from in Quosal is complete.
- 📌 Now edit these two files (CoverLetter and FullProposal) and insert all of the information related to your company that will not change from one proposal to the next for each new client. This is basic word processing using Word. You will not be using either Proposal Kit or Quosal products in this step. The creative editing for the Cover Letter, Title Page, Client Summary, Installation Schedule, Permits and Licenses, Qualifications and References are filled in now.

- Leave all of the mail merge tags alone that will change from proposal to proposal such as contact information and dates.
- The next part of this step is to complete the addition of Quosal merge tags for use in Step 3 below.
- The Title Page and Estimate are a combination of standard boilerplate text and mail merge tags. <<QuoteToAccount>> has been added to make the proposals when merged more tailored to each individual client in various pages.
- First the entire table in the Estimate will be deleted and replaced with a series of tags. Since this process is very specific to everyone it might take some back and forth work using Quosal and modifying your template to get your system setup just the way you want. For purposes of this sample we already know exactly what tags we will be creating in Quosal.

So for this sample for a network cabling company we will be creating an Estimate with multiple sections. Each section will have multiple line items. So we create a header for each section called Services and another called Hardware, then under each header we create a tag to match such as <<Services>> and <<Hardware>>. Later when we use the Quosal application, each of these tags will be replaced with a formatted table containing all of the items, prices, quantities, etc. At this point these are tags we are making up, they do not yet exist in the Quosal database.


We finish the Estimate by adding a line for the total and a tag <<NetTotal>> which will become the net total of all items in all of the tables above it. This <<NetTotal>> tag is a standard Quosal tag, not one we are making up.

- Notice that the Permits and Licenses and References pages do not include any tags and are examples of templates that usually do not change from one proposal to the next. This example shows how some templates are always the same, some are mostly the same with just some contact information tags, and some are completely customized per proposal such as the Estimate.
- An example of the proposal documents in this stage are included titled CoverLetter_Step2.pdf and FullProposal_Step2.pdf

Step 3:

- At this point the proposal framework is ready to be used by Quosal to replace the mail merge tags and insert the pricing and quoting information into the Estimate page.
- Run Quosal and login
- In the Options screen click the Company Info tab and the User Info tab and enter your company data for the proposal.
- In the Customers screen enter the Account, Contact and Address information and click the “Use This Customer” button and click the “Set Quote To” button.
- This is the most involved setup of this Quosal example. Setting up the Workspace items.
 - First we change the name of “Tab 1” to “Services” by highlighting the tab name and retying it.
 - Then click the New Tab button to add the 2nd tab and title it “Hardware”. At this point you will have 2 tabs across the top of your Quosal workspace.
 - **IMPORTANT:** Each of these tab names must exactly match the tags we made up when creating the Estimate. For example, we made up a tag called <<Services>> so we must title the tab in Quosal as Services to match. Each tag in the Estimate will have a matching tab name in the Quosal Workspace screen.
 - Now we enter a few line items into each tab using the New Item button for each new line item. Enter a description, price, quantity and item notes. For example the first line item for the “Services” tab we will enter the following:
 - Short Description = “Permits and Licenses”
 - Price = \$200
 - Qty = 1
 - The rest of the items we entered can be found in the completed sample FullProposal.pdf.
- Now all of the data has been entered and we are ready to merge the database with the proposal templates.
- At this stage we need to create the table layout for the Estimate.
 - Click the Publish and Deliver Screen
 - Check the radio box next to one of the “Proposal (Word) Templates”.
 - Click the Edit Table button
 - Pick the New Template option and name it “My Template” and click “Create Template”
 - Select the “Table Classic 1” table style

- Drag the following columns from the “Available Quote Column” list in the following order:
 - Short Description, Qty, Base Price, Extended Price
 - Rename the descriptions to the following:
 - Description, Qty, Price, Ext. Price
 - Set the Pixel Width of each field to the following:
 - Description = 185
 - Qty = 50
 - Price = 60
 - Ext. Price = 60
- Make sure the Automatic Column Widths checkbox is unchecked.
- In our example we set the Header Font to “Garamond” Font Size 12 and Body Font to “Garamond” Font Size 11. Your system may not have the same fonts available so start with the default font and change it as you see fit.
- Uncheck the “Show Section Totals” box.
- Click the Accept button
- Click the Options button on the bottom left corner of the screen
- Click the Report Setup tab
- Select “My Template” that was just created as the default Word template.

 Now we need to copy your Proposal Pack generated templates to the Quosal Reports folder.

- In the Publish and Deliver screen click the radio button next to “Copy Word Template” then click “Edit Template”.
- Browse to your Proposal Pack projects folder where you saved your proposal template and select the CoverLetter.doc. You will see the document open in Word and you will see it added to the list of templates in the Quosal list “Proposal (Word) Templates. Close the opened Word document.
- In the Publish and Deliver screen click the radio button next to “Copy Word Template” then click “Edit Template”.
- Browse to your Proposal Pack projects folder where you saved your proposal template and select the FullProposal.doc. You will see the document open in Word and you will see it added to the list of templates in the Quosal list “Proposal (Word) Templates. Close the opened Word document.
- If you did the optional Wizard Preferences change in Step 1 above to locate your Wizard projects in the Quosal report folder, this is an easy step. Your templates will be found in a subfolder you will see when you click “Copy Word Template” then click “Edit Template”.

- If you have Quosal and Proposal Pack products integrated there is also an option to “Import Proposal Pack Template” which can be used to copy your templates.
- ➦ In the Publish and Deliver screen click the radio button next to the CoverLetter template then click the “Merge to Template” button.
- ➦ Then click the radio button next to the FullProposal template then click the “Merge to Template” button.
- ➦ There is still some minor manual cleanup work to be done on the final merged documents. This is basic word processing at this point.
 - For illustration purposes dates have been blanked out of the final edited documents.
 - Dates for the Installation Schedule and Contract and Terms were then manually entered.
- ➦ Now the final proposal is complete and ready for delivery. You can now either print the document for hand delivery or convert to a PDF document to be sent by email.
- ➦ The templates can now be reused for new clients by changing the data in the Quosal database and remerging the data.
- ➦ An example of the proposal documents in this completed stage are included titled CoverLetter.pdf and FullProposal.pdf. Note that for illustration purposes the original editable Word documents are not included. You can recreate them yourself using the PDF samples as guides.