

Sample Business Proposals



Proposal Pack & Quosal Sample #2

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 Cost Summary) out of the entire collection of **over 400 templates included in the Proposal Pack Food #1**.

There are [over 150 Proposal Pack graphic skins](#) to choose from. This example illustrates just one of them (Proposal Pack Food #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 9 pages of content including a Cover Letter, Title Page, Client Summary, Cost Summary, Samples, Services Provided and Testimonials. 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 Food #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.

Riche Cuisine, Inc.
13562 W. Knight Blvd.
Ferndale, WA 98248

(PH) 555-500-1205
(FX) 555-500-1206
www.richecuisineinc.com



Food Services and Event Catering

10/23/20XX

Prepared for: Raquel Alvarez
Production Manager

Prepared by: Allana Riche
Owner



We would be happy to cater your company party!

Riche Cuisine, Inc. is well known in the area for providing creative and delicious meals for special occasions. We offer a variety of menus from which SeaStar Film Productions can choose for the occasion.

Proposal Number: SSFP5



Please select from the following menu items. We will present you with the final invoice two weeks before your event.

Appetizers

<i>Qty</i>	<i>Description</i>	<i>Price</i>	<i>Ext. Price</i>	<i>Item Notes</i>
25	Bacon-wrapped Prawns	\$0.00	\$124.75	
25	Savory Puff Cheese Pastry	\$0.00	\$99.75	
25	Bruschetta with Mozzarella, Tomato and Basil	\$0.00	\$99.75	
Total:			\$324.25	

Salads

<i>Qty</i>	<i>Description</i>	<i>Price</i>	<i>Ext. Price</i>	<i>Item Notes</i>
14	Spinach Salad	\$0.00	\$55.86	<i>Fresh spinach, dried cranberries, walnuts, and gorgonzola in cranberry-walnut vinaigrette</i>
20	Garden Salad	\$0.00	\$59.80	<i>Fresh baby greens, cherry tomatoes, carrots and cucumbers in a creamy buttermilk dressing</i>
13	Caesar Salad	\$0.00	\$38.87	<i>Fresh romaine leaves in a classic Caesar dressing</i>
Total:			\$154.53	



Main Courses

<i>Qty</i>	<i>Description</i>	<i>Price</i>	<i>Ext. Price</i>	<i>Item Notes</i>
20	The Californian	\$0.00	\$479.80	<i>Herbed chicken breast, wild rice pilaf, steamed vegetable medley</i>
10	The Vegan	\$0.00	\$219.90	<i>Pasta in olive oil garlic sauce with spring mushrooms, steamed vegetable medley</i>
17	The Italian	\$0.00	\$373.83	<i>Fresh manicotti with ricotta in herbed tomato sauce, steamed vegetable medley</i>
Total:			\$1,073.53	

Desserts

<i>Qty</i>	<i>Description</i>	<i>Price</i>	<i>Ext. Price</i>	<i>Item Notes</i>
15	Fruit tart with crème fraiche	\$0.00	\$59.85	
15	Poached pears in Marsala sauce	\$0.00	\$44.85	
17	Chocolate cake in raspberry sauce	\$0.00	\$67.83	
Total:			\$172.53	

Open Bar

<i>Qty</i>	<i>Description</i>	<i>Price</i>	<i>Ext. Price</i>	<i>Item Notes</i>
47	Wine, beer, rum, vodka and tequila mixes	\$0.00	\$375.53	
Total:			\$375.53	



Event Services

<i>Qty</i>	<i>Description</i>	<i>Price</i>	<i>Ext. Price</i>	<i>Item Notes</i>
3	Bartender for 6 hours	\$0.00	\$525.00	<i>One bartender per 12 guests suggested</i>
1	Event Logistics	\$0.00	\$495.00	<i>Delivery, setup, and removal of all necessary furniture and tableware, food, and decorations, including trash removal for 6-hour event for 25-50 guests</i>
Total:			\$1,020.00	

Total Estimate for Event: \$3,120.37

Standard Disclaimer: The numbers represented above are to be used as an estimate for the projects discussed. The above Cost Summary 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



Food Services Catering Sample Proposal Notes

The Food Services Catering Proposal is an example of a proposal using Proposal Pack to pitch food service and catering 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 contract 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 Pack – Food #1, Microsoft Word, Quosal V1.3 and Adobe Acrobat.

How the Entire Food Services Catering Proposal was created:

Step 1:

- The first step is creating the proposal framework with Proposal Pack Wizard and Proposal Pack.
- This sample assumes the Proposal Pack Wizard, Proposal Pack Food #1 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 Food #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.
 - Click OK to save your settings.
- 📌 In the Wizard Proposal Styles screen, select The [“Proposal Pack – Food #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 Estimate 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 “Estimate”.
 - Click the “Pick Documents” button and select the following templates: Cover Letter, Title Page, Client Summary, Cost Summary, Services Provided, Samples and Testimonials.
 - 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 for the company.
 - Also enter the Job Title as “Owner”. 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.
 - 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.
 - 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

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, Samples, Services Provide and Testimonials 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 Client Summary 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.
- First the entire table in the Cost Summary 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 food services catering company we will be creating a Cost Summary with multiple sections. Each section will have multiple line items. So we create a header for each section called Appetizers, Salads, etc., then under each header we create a tag to match such as <<Appetizers>>, <<Salads>>, etc. 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 Cost Summary 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 Samples and Testimonials 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 Cost Summary.

- 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 Cost Summary 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 “Appetizers” by highlighting the tab name and retying it.
 - Then click the New Tab button once each to add the rest of the tabs and title them “Salads”, “Main Courses”, “Desserts”, “Open Bar” and “Event Services”. At this point you will have 6 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 Cost Summary. For example, we made up a tag called <<Appetizers>> so we must title the tab in Quosal as Appetizers to match. Each tag in the Cost Summary 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 “Appetizers” tab we will enter the following:
 - Short Description = “Bacon-wrapped Prawns”
 - Price = \$4.99
 - Qty = 25
 - 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 Cost Summary.

- 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:
 - Qty, Short Description, Base Price, Extended Price, Item Notes Plain
 - Rename the descriptions to the following:
 - Qty, Description, Price, Ext. Price, Item Notes
 - Set the Pixel Width of each field to the following:
 - Qty = 50
 - Description = 185
 - Price = 60
 - Ext. Price = 60
 - Item Notes = 100
- Make sure the Automatic Column Widths checkbox is unchecked.
- In our example we set the Header Font to “Adobe Garamond Pro” Font Size 12 and Body Font to “Adobe Garamond Pro” Font Size 12. Your system may not have the same fonts available so start with the default font and change it as you see fit.
- 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.
 - A couple line breaks were added to the Cost Summary page to clean up the formatting.
- 📌 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.