



# PROPOSAL PACK WIZARD

## 5 MINUTE QUICK START

IF YOU NEED ASSISTANCE AFTER FOLLOWING  
THE SETUP INSTRUCTIONS AND VIDEO [CONTACT US](#)



Watch a video of these getting started instructions at:

<https://www.ProposalKit.com/htm/videos-wizard-quick-start.htm>

Additional setup tutorials are available online at:

<https://www.ProposalKit.com/htm/wizard-setup-tutorials.htm>

The Proposal Pack Wizard is a Microsoft Word Add-In. This means it is not a stand-alone program. The Wizard runs within Microsoft Word and only within our Proposal Pack Wizard's word document.

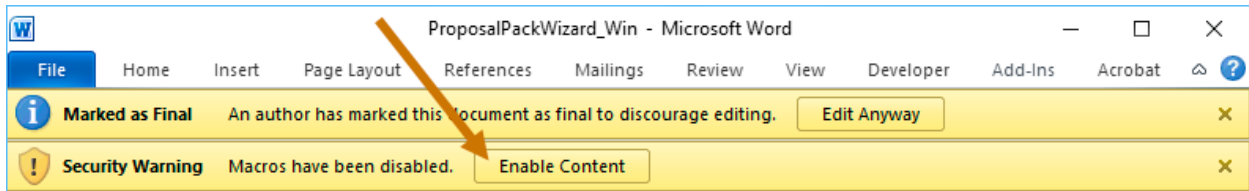
Enable the macros as soon as you first open the Wizard document which happens during the Wizard installation. Look in the Word toolbar for **Add-Ins**, click that toolbar, then click the **RunWizard** button. 3 button clicks are all it takes to get the Wizard running.

A

### STEP A: ENABLE THE MACROS

Follow the instructions in the first page of the Wizard Word document for how to enable the macros. The Wizard program will not run if you do not enable the macros.

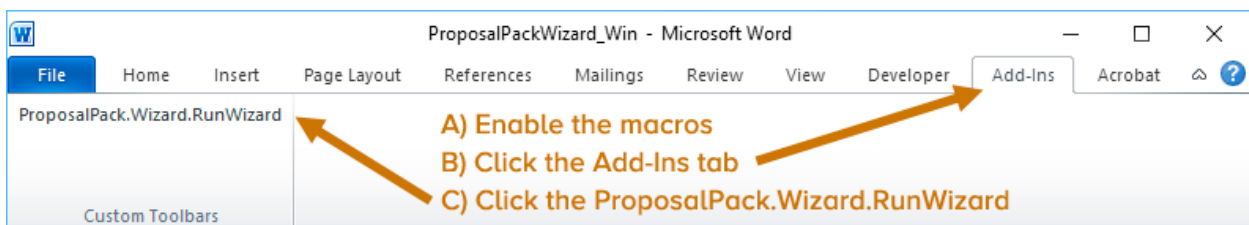
For **Microsoft Word 2010 and greater** you must click the **Enable Content** button in the yellow bar next to the Macros are disabled warning message which looks like this:



If running **Windows in S Mode** you may also have to right click the Wizard's document in the install folder, click the General properties tab then click the Unblock box or Unblock button.


## **B** STEP B: RUN THE WIZARD

Once the macros are enabled you can run the Wizard. Your Wizard's Word toolbar will look like this screenshot. Locate these buttons on your Wizard document's toolbar.








## STEP C: FOLLOW THESE STEPS TO CREATE YOUR FIRST DOCUMENT:


 **First** - Install your Proposal Kit Professional, Proposal Pack, Title Page Pack and/or Contract Pack product before running the Proposal Pack Wizard. The Wizard will search for these products, so they must be installed first. Proposal Packs, Title Page Packs, Contract Packs and Proposal Kit Professional are each downloaded and installed separately. We have hundreds of template packages which plug in to the Wizard. Install whichever product(s) you installed.



The Wizard does come with a very limited collection of plain templates; however, it is meant to be used with one or more of our other template products. Access to the complete range of templates requires a template product.

 If you purchased and installed **Proposal Kit Professional**, you will also see a blue icon on your desktop.

 If you purchased and installed a **Proposal Pack** template product you will also see a red icon on your desktop.

 If you purchased and installed a **Contract Pack** template product you will also see a purple box icon on your desktop.

 If you purchased and installed a **Title Page Pack** template product you will also see a magenta icon on your desktop.

 **Second** - Run the Wizard by double clicking the  **Run Proposal Pack Wizard** icon on your Windows start menu or on your Windows desktop. The icon looks like our logo with a green background.

Different editions of Microsoft Word have slightly different methods of enabling macros such as our Proposal Pack Wizard.

Refer to the instructions in the Wizard document for the specific version of Word you are using. Enabling the Wizard macros is a security step that is managed by and required by your Microsoft Word software. This is a one-time only step you have to do before you will be able to run the Wizard software.


**IF YOU DO NOT ENABLE THE MACROS ACCORDING TO THE INSTRUCTIONS, THE WIZARD SOFTWARE WILL NOT RUN, AND YOU WILL NOT SEE THE WIZARD INTERFACE SCREEN.**

**IF YOU DISABLED THE MACROS BEFORE READING THE INSTRUCTIONS, RE-READ THE INSTRUCTIONS FOR YOUR VERSION OF WORD IN THE WIZARD DOCUMENT. THE INSTRUCTIONS WILL SHOW YOU HOW TO GET THE WIZARD SECURITY ENABLED.**


If you see a message about **Trusting Content** or **Trusting Macros** from this publisher, you must check the box.

If you see a message about **Enabling Content** or **Enabling Macros** you must click the enable option.

If you see an **Options** button during this process you must click to get to the enable options.

The first time the Wizard document is opened you will have to perform the macro security enabling steps. The Wizard will not automatically run and show you the interface screen this first time. Once you have enabled the macros, close the Wizard document. Then double click the  **Run Proposal Pack Wizard** icon on your desktop.

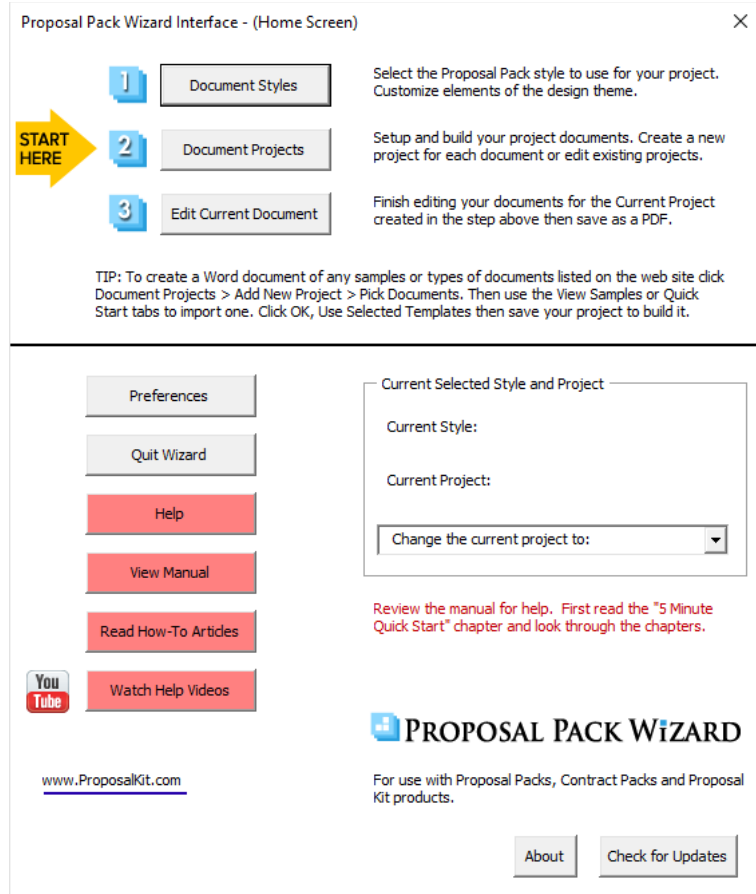
From then on, the Wizard software will automatically run each time you double click the icon, and you will see the Wizard interface.


 **Third** - The first time the Wizard is run, after the macros are enabled, you will be prompted to enter some information about you and your company and how you intend to write your documents. The Wizard will start in Novice mode which disables the more advanced features of the Wizard.

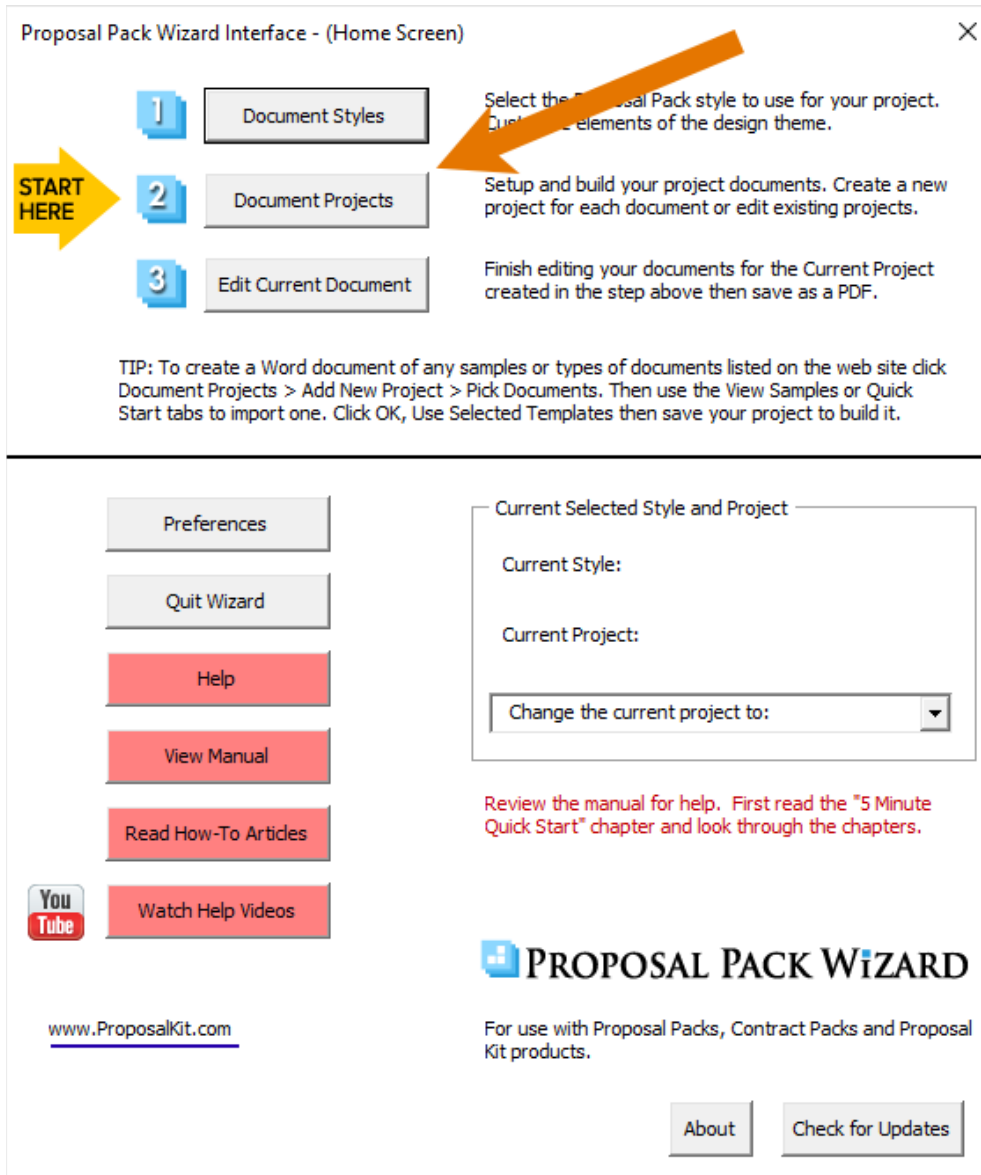
This will make it easier for first time users to quickly create a document without being confused by the more advanced features. Once you have created your first document in Novice Mode the Wizard will automatically enable Expert Mode (if you purchased the Expert version of the Wizard) and all the Wizard configuration features will be unlocked.

Each time the Wizard is run it will search for any newly installed template packs. You only need to install the Wizard once regardless of how many template packs you purchased and installed.

Once you have completed the initial set up, the Proposal Pack Wizard interface opens, and you are now ready to start creating your first document. When the Wizard is run, you will see the main interface screen that looks like this:



Click the button  Document **Styles**, pick the style you want to use for this project. This will usually be the style you purchased or if you purchased the Proposal Kit Professional, you will have the choice of four or five assorted styles. Once you have selected the style click OK. A default style will already have been selected for you, so this step is not required to get started. You can also purchase additional add-on template packs at a discount from this screen.



**Fourth** - Add a new project by clicking the button **2 Document Projects**. We use the term “proposal” in many places when referring to the document being created – however you can create any type of business document including business plans, manuals, reports, studies, proposals, contracts, RFP responses, estimates, etc.

Then click the button **Add New Project**

Pick Proposal Pack Project

Show projects in status:

Pick Project:

**START HERE** →

Use this screen to start a new project, edit an existing project and manage the status of each project. Each new proposal, business plan, contract, report or other business document you create requires a new document project to be added first. Start a batch creating multiple projects and documents.

Adding a new project involves selecting topics that will become the pages of your document and entering the name and address contact information to be merged into the document. Once you have setup a project, go back to the Wizard home screen to create the documents for the project and do your final edits.

You can also make a duplicate copy of an existing project (either just cloning the project settings or also cloning a past project's documents). This makes it more efficient to make either a new document for an existing customer, or reuse a past document by making a copy you can then manually edit for a new client.

Gold arrows in the Wizard interface point at what you should be doing next.



Now you are on the main project screen. Enter a Project Name. This will be used for your reference and for the folder name that all this project's documents will be saved in.

Click the **Pick Documents** button to start selecting the chapters that will make up your document (i.e. a Cover Letter, Title Page, Table of Contents, and so on). This will take you to the Pick Documents screen.

The Wizard will pre-populate your first project with a few common templates to help get you started.

Enter Project Data

Project Name:

Save To Folder:

Document Configuration Options

Merge Company and Client Data with templates

Combine templates into single master document

Turn on Page Numbering

Select what type of project to create.

Select Title Page graphic. This replaces the 'Proposal' header with the alternate wording or logo.

**START HERE** → 1  4

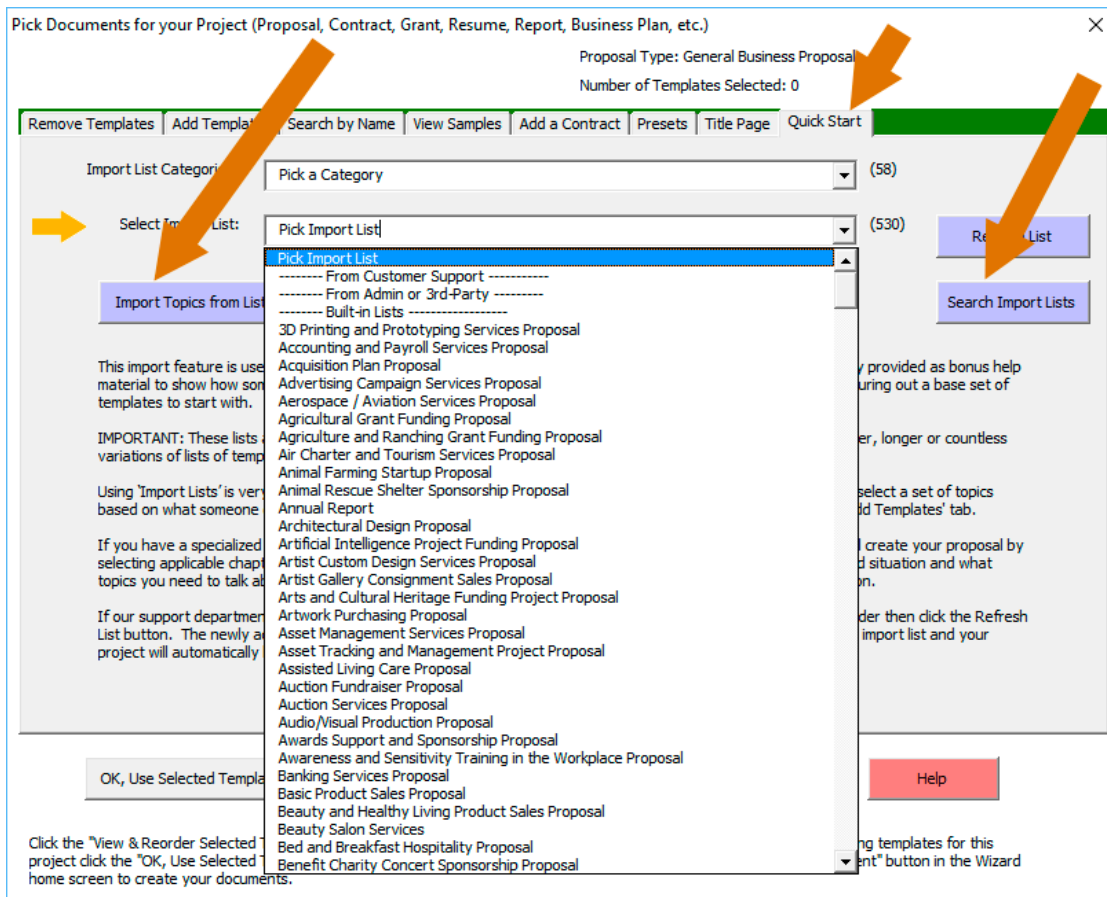
2  5

→ 3  6

The best way to get started is to use the **Quick Start** tab in the Pick Documents screen. There are hundreds of premade lists for all types of documents and all types of businesses.

Click the **Search Import Lists** button and type in a single word that is related to what you are doing (i.e. investing, grant, education, training, electrical, lawncare, medical, security, wedding, catering, fashion, software, etc.) Pick any of those from the list then click the **Import Topics from List** button.

Your project will now be loaded with a set of chapters. You can now customize that list as needed by adding new chapters and removing unneeded chapters based on your exact situation.



Use the **Remove Templates** tab to remove chapters that you do not want in your final document. Highlight one or more entries then click the **Remove Template(s)** button. This only removes them from your list of selected chapters for this project - no files are ever deleted.

Pick Documents for your project (Proposal, Contract, Grant, Resume, Report, Business Plan, etc.)

Proposal Type: General Business Proposal  
Number of Templates Selected: 13

Remove Templates | Add Templates | Search by Name | View Samples | Add a Contract | Presets | Title Page | Quick Start

(13) Introduction -----  
Cover Letter  
Title Page  
Table of Contents  
----- Summary -----  
Executive Summary  
Benefits  
Accounting  
Payroll  
Taxes  
Fee Structure  
----- Qualifications -----  
Company History  
References  
Qualifications  
----- Appendices -----  
Back Page

Once you have added templates to your project you can remove selections by clicking the Remove Template(s) button.

To remove more than one template at a time click multiple templates so they are each highlighted in the list, then click the Remove Template(s) button.

Removing templates DOES NOT delete any files, it only removes the templates from the list of templates you have already selected to be included in the current project.

**TIP**

You first add templates to your project using the other tabs in this screen (Add Templates, Search by Name, Add Templates based on Samples, Auto Recommendations, Add a Contract and Presets). If you need to remove any templates from your list of selected templates use this tab.

Once you have finalized your list of selected templates, click the OK, Use Selected Templates button then click the "Create Document" button back on the Wizard home interface screen after saving your project.

Remove Template(s) | Select All | Unselect All

OK, Use Selected Templates | Cancel | View & Reorder Selected Templates | Help

Click the "View & Reorder Selected Templates" button for a list of all currently selected templates. When you are done selecting templates for this project click the "OK, Use Selected Templates" button, then click the "OK, Save Project" button, then click the "Create Document" button in the Wizard home screen to create your documents.

If you are not sure about needing a chapter leave it in your project. It is easier to remove an unneeded page than trying to add a new page once you have started editing your document. The Wizard can add a new template you may have forgotten into an assembled document you have started editing.

Use the **Add Templates** tab to add templates to your project.

This screen gives you access to every chapter template available. The most commonly used ones are on the first screen of checkboxes you see (Cover Letter, Title Page, Table of Contents, etc.)

To find lists of chapters grouped by distinct types of businesses and writing situations click the drop-down box and select from the list. You can check off chapters from multiple screens.

Pick Documents for your Project (Proposal, Contract, Grant, Resume, Report, Business Plan, etc.)

Proposal Type: General Business Proposal  
Number of Templates Selected: 0

Remove Templates | **Add Templates** | Search by Name | View Samples | Add a Contract | Presets | Title Page | Quick Start

**NEXT** →

Top 40 Most Common Topics (159)

Show All Templates Click the Show All Templates button to show and edit all 2018 available templates.

- Cover Letter
- Title Page
- Table of Contents
- Non-Disclosure Form
- Introduction
- What You Can Expect
- Executive Summary
- Cost Summary
- Estimate
- Needs Assessment
- Opportunities
- Market and Audience
- Goals and Objectives
- Statement of Work
- Expected Results

----- Favorites -----  
----- Custom Lists -----  
----- Business Speciality -----  
Web/IT/Software/Hardware/Technical (Page 1 of 4)  
Web/IT/Software/Hardware/Technical (Page 2 of 4)  
Web/IT/Software/Hardware/Technical (Page 3 of 4)  
Web/IT/Software/Hardware/Technical (Page 4 of 4)  
Automation/Manufacturing/Fabrication (Page 1 of 3)  
Automation/Manufacturing/Fabrication (Page 2 of 3)  
Automation/Manufacturing/Fabrication (Page 3 of 3)  
Aerospace  
Media/Graphics/Design (Page 1 of 2)  
Media/Graphics/Design (Page 2 of 2)  
Advertising/Marketing/Sponsorship (Page 1 of 4)  
Advertising/Marketing/Sponsorship (Page 2 of 4)  
Advertising/Marketing/Sponsorship (Page 3 of 4)  
Advertising/Marketing/Sponsorship (Page 4 of 4)  
Environmental/Green/Nature (Page 1 of 3)  
Environmental/Green/Nature (Page 2 of 3)  
Environmental/Green/Nature (Page 3 of 3)  
Real Estate (Page 1 of 3)  
Real Estate (Page 2 of 3)  
Real Estate (Page 3 of 3)  
Construction/Contracting (Page 1 of 3)  
Construction/Contracting (Page 2 of 3)  
Construction/Contracting (Page 3 of 3)  
Home Services  
Medical/Healthcare/Wellness/Fitness (Page 1 of 3)  
Medical/Healthcare/Wellness/Fitness (Page 2 of 3)  
Medical/Healthcare/Wellness/Fitness (Page 3 of 3)  
Sports/Fitness  
Personal Care Services (Page 1 of 2)  
Personal Care Services (Page 2 of 2)  
Finance/Insurance/Legal (Page 1 of 4)

Project Summary  
 Capabilities  
 Qualifications  
 Company History  
 Services Provided  
 Products  
 Comparison Chart  
 Company Operations  
 References  
 Back Page

The Top 40 most commonly used templates are shown here in one easy tab. The rest of the tabs in this Pick Documents screen give you additional ways to find and add more templates to your project from the whole library of templates.

OK, Use Selected Templates & Reorder Selected Templates Help

Click the "View & Reorder Selected Templates" button for a list of all currently selected templates. When you are done selecting templates for this project click the "OK, Use Selected Templates" button, then click the "OK, Save Project" button, then click the "Create Document" button in the Wizard home screen to create your documents.

Use the **Search by Name** tab to add templates to your project. This tab is useful if you want to search the library of available chapters for a specific chapter instead of looking for it in the **Add Templates** tab.

For example, say you want to find a budget template. Search for the word: budget

Select whatever match is most appropriate and add it to your project.

Pick Documents for your Project (Proposal, Contract, Grant, Estimate, Report, Business Plan, etc.)

Proposal Type: General Business Proposal  
Number of Templates Selected: 13

Remove Templates | Add Templates | **Search by Name** | View Samples | Add a Contract | Presets | Title Page | Quick Start

Search for a specific single template or list of templates to add to your project. There is a library of 2018 proposal templates and 184 contract templates to search.

For example, to search for all of the cost summary templates AND the funding related templates. Enter (without the quotes) "cost" into the first field, "summary" into the second field, "fund" into the third field, click the "Or" button then click the "Do Search" button. To locate the Mission Statement template enter "mission" into one of the fields and click the "Do Search" button.

If you have purchased contracts you can search by a descriptive word. For example, type "graphic" to locate a graphic design contract, "software" to find a software development contract, "policy" to find a policy template (depending on the Contract Pack purchased and installed).

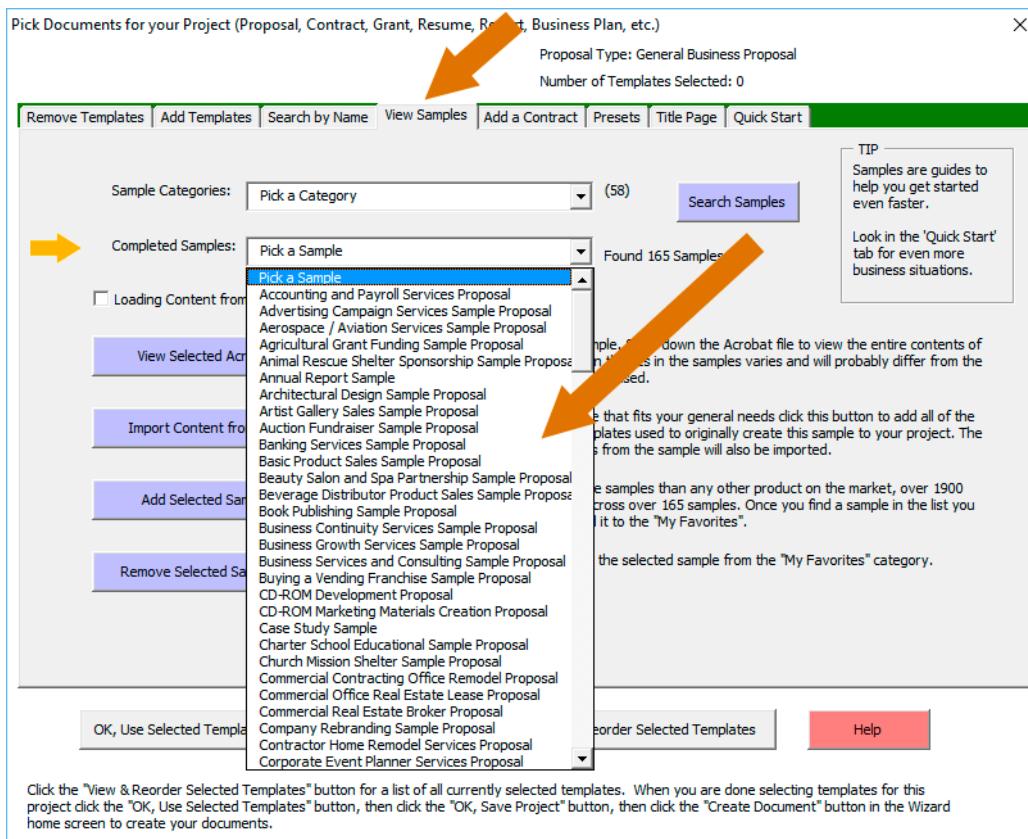
Search Titles  
 Search Descriptions  
 Search Contract Pack Templates  
 Also Show Related Templates  
 Also Show Alternate Templates

And  Or  Case Sensitive

Click the "View & Reorder Selected Templates" button for a list of all currently selected templates. When you are done selecting templates for this project click the "OK, Use Selected Templates" button, then click the "OK, Save Project" button, then click the "Create Document" button in the Wizard home screen to create your documents.

Another way to quickly select a collection of templates is to use the **View Samples** tab and select a sample related to your situation. This option will add the templates and import the content used to create the selected sample to your project by clicking the **Import Content from Selected Sample** button.

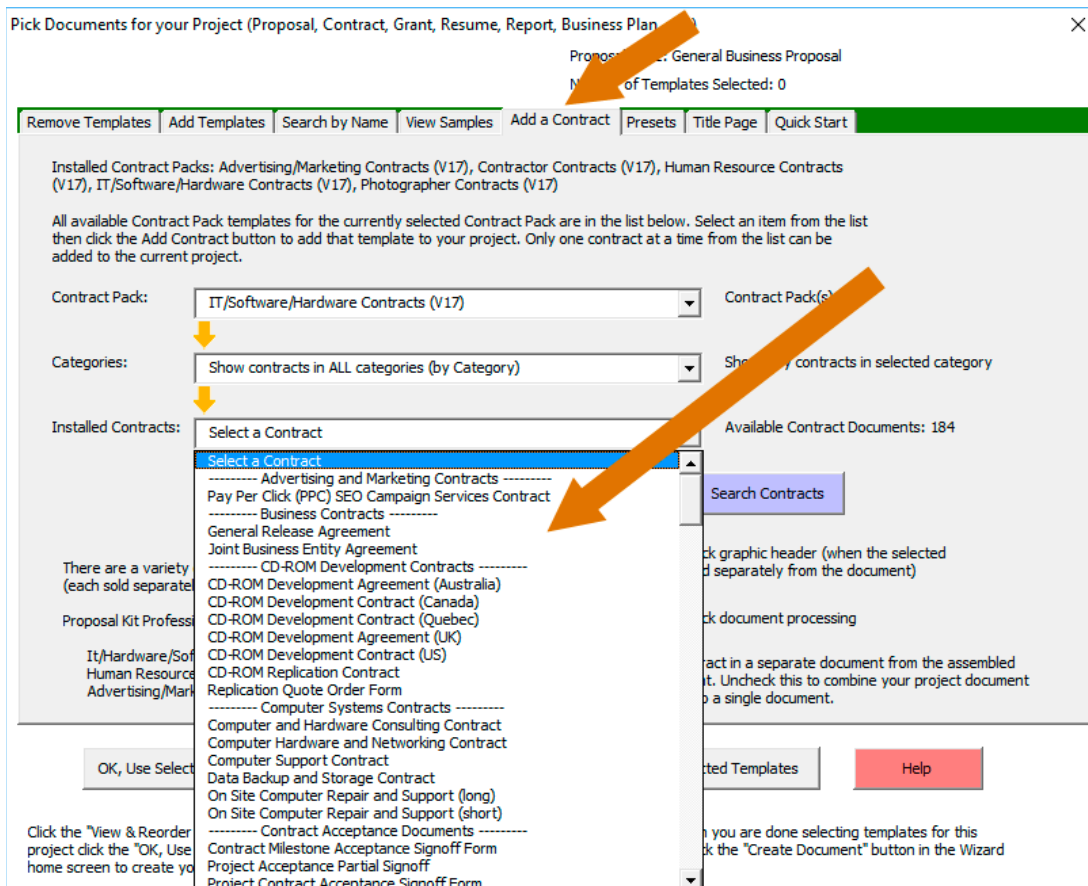
While we have a very large selection of samples, samples are only meant as general guides to show you how other people have assembled and filled in their documents. Millions of business documents like these are written every year so the samples are not intended to exactly fit your situation page for page. However, we have collected samples across a wide range of businesses and types of writing situations that will give you a good idea of how they are structured for similar situations.



Use the **Add a Contract** tab to add a legal contract template from either Proposal Kit Professional or one of the Contract Pack products to your project. You must have purchased a template product that includes contracts.

If you are only using a Proposal Pack product you will find a handful of basic work orders and service contract templates in the **Add Templates** and **Search by Name** tabs.

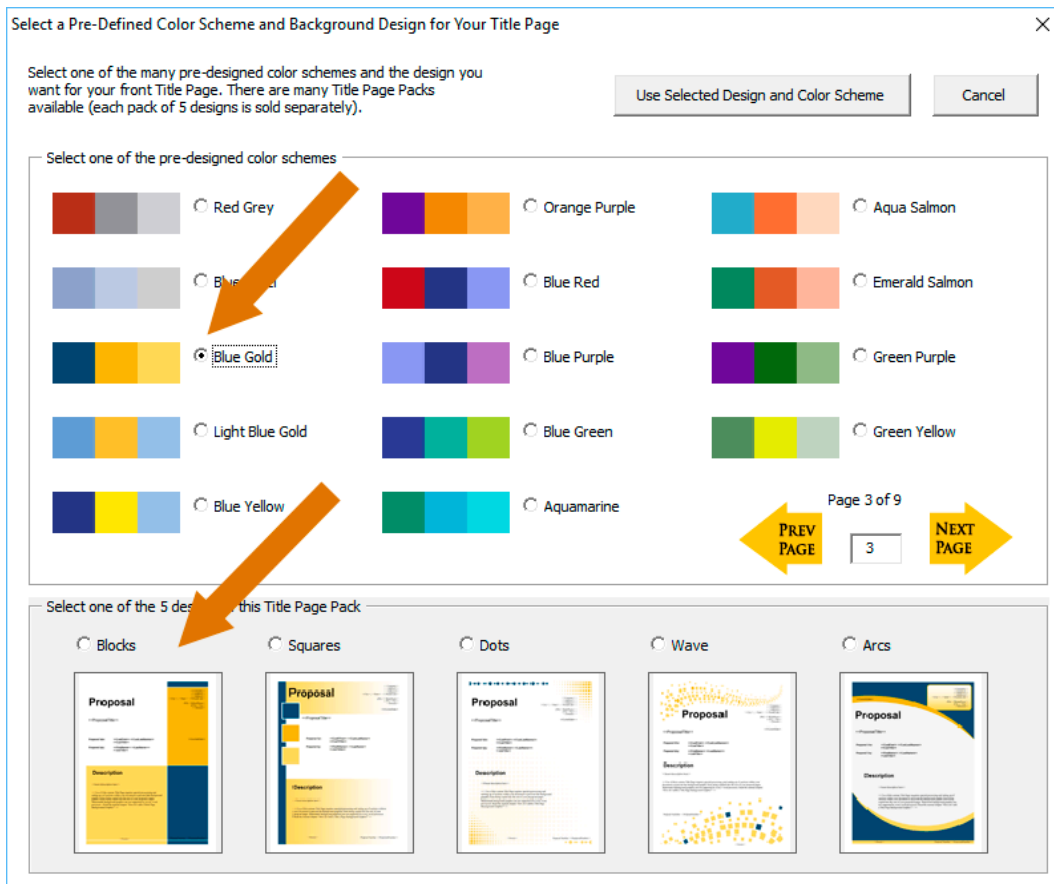
This tab gives you options to include the contract in your assembled document or have it created as a separate document. If the selected contract template also has exhibits or schedules related to it, those will be inserted into it.



Use the **Title Page** tab to select an alternate design and color scheme for your front title page.

Select one of the 5 designs available in the selected Title Page Pack then select one of the 120 color schemes available. When done click the **Use Selected Design and Color Scheme** button.

This option is generally used if you are using the “Proposal Pack for Any Business” or “Proposal Pack for Government Grants” styles. All our other Proposal Packs already come with a title page design tailored to match the rest of the pages. Your Proposal Pack comes with a starter package of title page designs and there are many more that can be purchased.





The **View and Reorder Selected Templates** button lets you change the order of the body pages. Special pages such as the Cover Letter and Title Page must remain at the front and the Back Page must remain at the end of the document.

You can also remove chapters from your project using this screen.

There are 2 panes in this screen. All the chapter templates that will be assembled into your document are shown in the left pane. All the templates selected that will be separate documents in your project are shown in the right pane (i.e. checklists, follow-up letters, external contracts, etc.)

**Selected Templates** [X]

The templates in the lists below have been selected for this project. Templates in the left list will be assembled together in the order shown and saved as a single document. Templates on the right will each be saved as separate documents.

Templates that will be combined together: 13

- Introduction -----
- Cover Letter
- Title Page
- Table of Contents
- Summary -----
- Executive Summary**
- Benefits
- Accounting
- Payroll
- Taxes
- Fee Structure
- Qualifications -----
- Company History
- References
- Qualifications
- Appendices -----
- Back Page

Templates that are not combined (letters, checklists, logs): 0

No templates selected yet

Move Up Move Down Unselect All

Remove Reset Order

OK Cancel Help

To reorder the templates for your final combined document, select a template in the left list then move it up or down in the list. When done, click the Ok button. The templates in the left list will be assembled together in this order when you click the Create Your Proposal in the Wizard home screen.

Some templates are not combined together such as letters, checklists, logs, etc. These templates are saved and edited as separate files in your project folder.

The **Presets** tab is a shortcut for saving your currently selected list and ordering of chapters for future use. If your future documents are going to use the same set of chapters create a Preset.

The next time you add a new Document Project and click the Pick Documents button, go to the Presets tab and select your saved Preset. Your list of saved chapters will be automatically loaded.

This saves you the time of having to find and select all those chapters again.

The screenshot shows a dialog box titled "Pick Documents for your Project (Proposal, Contract, Grant, Resume, Report, Business Plan, etc.)". The "Presets" tab is selected. The dialog displays the following elements:

- Proposal Type: General Business Proposal
- Number of Templates Selected: 0
- Navigation tabs: Remove Templates, Add Templates, Search by Name, View Samples, Add a Contract, Presets (active), Title Page, Quick Start
- A dropdown menu labeled "Pick Preset" showing "(0) presets for General Business Proposal projects".
- Buttons: Load Templates from Preset, Delete Selected Preset, View Selected Preset, Auto-Populate New Projects from Preset
- Text: "Presets are custom selections of templates that you define for use in future projects. First select templates using the other tabs then create the preset below. You can then save time by loading the templates from the preset for new projects. You can create up to 40 different presets. Each of the 12 proposal types (general business, grant, etc.) has its own preset list. If you created presets in a previous project and do not see them here, make sure your current project is set to the same type as before."
- Form: "Name:" followed by an empty text input field.
- Button: "Create New Preset from Selected Templates"
- Text: "You can define your own custom selections of templates using presets. First select one or more templates using the other tabs of the Pick Documents screen. Then make up a name for your preset and click the Create New Preset from Selected Templates button. When you create new projects in the future you can return to this tab, select the preset from the list above and click the Load Templates from Preset button. All of the templates in the preset will be selected for your project. You can save even more time if you have a single preset you want to always use. In this case select the preset and click the Auto-Populate New Projects from Preset button and check the Enable Auto-Populate box. When you use this option, every time you create a new project it will automatically have the templates for that preset added. You can turn off Auto-Populate by unchecking the box."
- Text: "To 'update' a preset, load it, make your changes to the selected templates, then delete the preset and create it again using the same name."
- Buttons: OK, Use Selected Templates; Cancel; View & Reorder Selected Templates; Help

Click the "View & Reorder Selected Templates" button for a list of all currently selected templates. When you are done selecting templates for this project click the "OK, Use Selected Templates" button, then click the "OK, Save Project" button, then click the "Create Document" button in the Wizard home screen to create your documents.

When done selecting the chapter templates for your document click the **OK, Use Selected Templates** button which will take you back to the project screen.

Pick Documents for your Project (Proposal, Contract, Grant, Resume, Report, Business Plan, etc.)

Proposal Type: General Business Proposal  
Number of Templates Selected: 13

Remove Templates | Add Templates | Search by Name | View Samples | Add a Contract | Presets | Title Page | Quick Start

**Next** → Top 40 Most Common Topics (178) [Show All Templates](#) Click the Show All Templates button to show and edit all 2195 available templates.

[Click Here for More Topics](#) ↑

<input checked="" type="checkbox"/> Cover Letter	<input checked="" type="checkbox"/> Benefits	<input checked="" type="checkbox"/> Project Summary
<input checked="" type="checkbox"/> Title Page	<input type="checkbox"/> Features	<input type="checkbox"/> Capabilities
<input checked="" type="checkbox"/> Table of Contents	<input type="checkbox"/> Project Deliverables	<input checked="" type="checkbox"/> Qualifications
<input type="checkbox"/> Non-Disclosure Form (Short Version)	<input checked="" type="checkbox"/> Evaluation	<input checked="" type="checkbox"/> Company History
<input type="checkbox"/> Introduction	<input type="checkbox"/> Acceptance Criteria	<input type="checkbox"/> Services Provided
<input type="checkbox"/> What You Can Expect	<input type="checkbox"/> Financial Information	<input type="checkbox"/> Products
<input checked="" type="checkbox"/> Executive Summary	<input type="checkbox"/> Budget	<input type="checkbox"/> Comparison Chart
<input checked="" type="checkbox"/> Cost Summary	<input type="checkbox"/> Cost/Benefit Analysis	<input type="checkbox"/> Company Operations
<input type="checkbox"/> Estimate	<input type="checkbox"/> Work Order (Without Deposit)	<input checked="" type="checkbox"/> References
<input type="checkbox"/> Needs Assessment	<input type="checkbox"/> Work Order (With Deposit)	<input checked="" type="checkbox"/> Back Page
<input type="checkbox"/> Opportunities	<input type="checkbox"/> Hourly Services Contract	
<input type="checkbox"/> Market and Audience	<input type="checkbox"/> Invoice	
<input type="checkbox"/> Goals and Objectives	<input type="checkbox"/> Payment Schedule	
<input type="checkbox"/> Statement of Work	<input type="checkbox"/> Contract and Terms	
<input type="checkbox"/> Expected Results	<input checked="" type="checkbox"/> Recommendations	

The Top 40 most commonly used templates are shown here in one easy tab. The rest of the tabs in this Pick Documents screen give you additional ways to find and add more templates to your project from the whole library of templates.

**OK, Use Selected Templates** | Cancel | View & Reorder Selected Templates | Help

Click the "View & Reorder Selected Templates" button for a list of all currently selected templates. When you are done selecting templates for this project click the "OK, Use Selected Templates" button, then click the "OK, Save Project and Build Documents" button to create your documents.

Now that you are back on the project screen click the **Company Data** and **Client Data** buttons to enter the name/address data that will be merged into your document(s). Use the **Line Item Quote** button for adding quotes, schedules, etc.

Save your project by clicking the **OK, Save Project and Build Documents** button to build your customized Word template.

The screenshot shows the 'Enter Project Data' dialog box with the following fields and options:

- Project Name:** My New Project
- Save To Folder:** c:\ProposalKit\ProposalPack\ProposalProjects\_V##\My New Project
- Document Configuration Options:**
  - Merge Company and Client Data with templates
  - Combine templates into single master document
  - Turn on Page Numbering
  - Currency: \$ United States Dollars
  - Language: American English (default)
  - Project Type: General Business Proposal (Select what type of project to create.)
  - Title Page Graphic: Pick Title Page Graphic (Select Title Page graphic. This replaces the 'Proposal' header with the alternate wording or logo.)

Below the configuration options, a sequence of six numbered buttons is shown with arrows indicating the workflow:

- 1 Pick Documents (START HERE)
- 2 Company Data
- 3 Client Data
- 4 Other Data
- 5 Multiple Choices
- 6 Line Item Quote

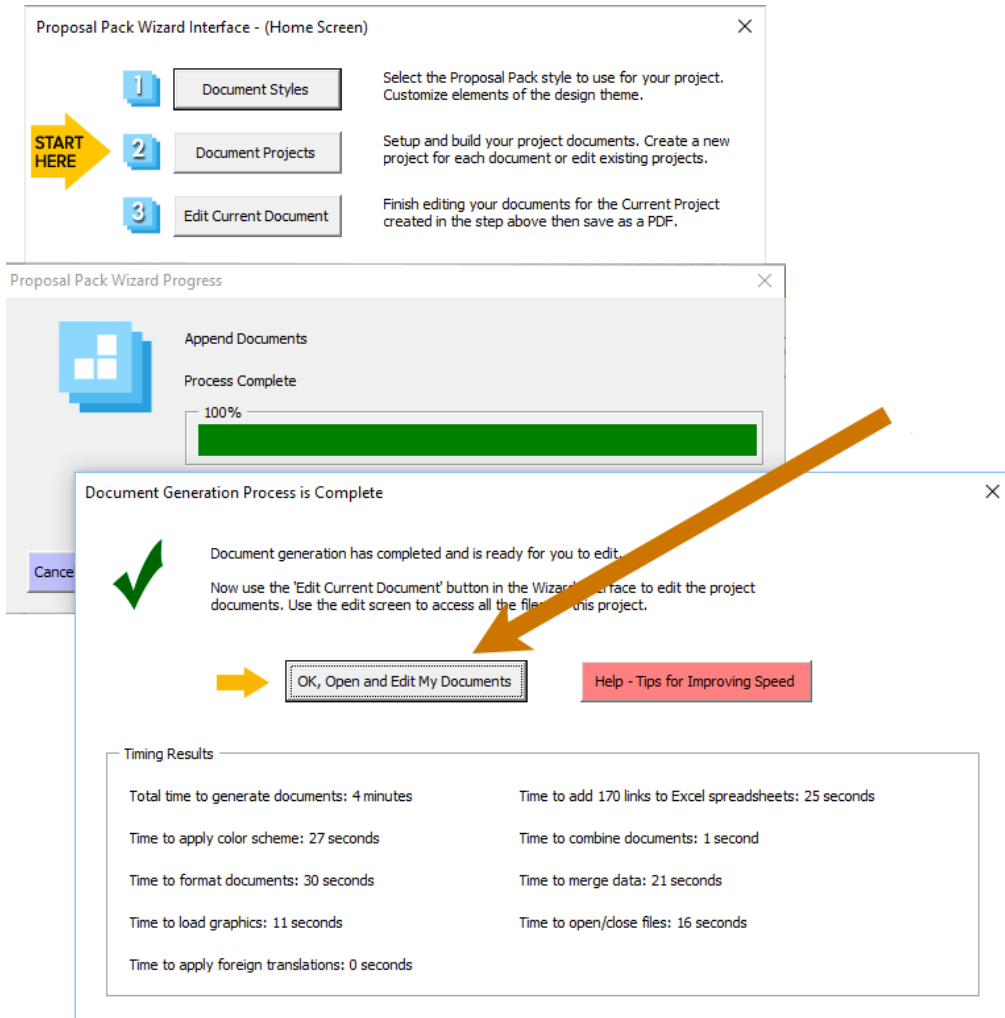
At the bottom, there are four buttons: 'OK, Save Project and Build Documents', 'Save Project w/o Building Documents', 'Cancel', and 'Help'.


At this point the Wizard will automatically build the document if you choose to have it created right away.


If you choose not to build and open your document at this point you can do it later by editing the current project and saving the project again. This gives you the option to go back and edit your project settings before building your document(s). You will see a few dialog boxes displayed with status information during the document creation process.

When you see a dialog box saying **Process Complete**, your template is now complete and ready to fill in the details.

With slow computers and/or an exceptionally large document using many chapter templates this process can take a few minutes. If it appears your computer is not responding, or you see “(Not Responding)” in your Wizard’s Word document wait for the process to complete. Do not close the wizard while processing.




 **Fifth** - Click the **OK, Open and Edit My Documents** button in the Process Complete message and your templates will be opened in Microsoft Word and Microsoft Excel.

All of your documents are stored in a folder on your hard drive which can be located in the  **Edit Current Document** button on the Wizard home screen.

If you close your documents in Microsoft Word you can open them again by using the Wizard and clicking the **Edit Current Document** button on the Wizard home screen.

Each time you create a new project that project will be your current project. Your old projects will still exist, and you can get to them by making an old project your current project.

 **Sixth** - Now that you have completed creating and opening your first document you are now ready to create more projects and to start customizing the Wizard and templates as needed.

The Wizard can be configured for creating long and complex documents, for creating one-off custom documents or for creating custom tailored documents for many clients each tailored to the individual client.

There are features for customizing the visual look of your documents including color schemes and branding with your own custom logos and graphics, custom font types, etc.

Start reading the Wizard documentation and looking at the various configuration features in the Wizard's **Document Styles** and **Preferences** screens next.

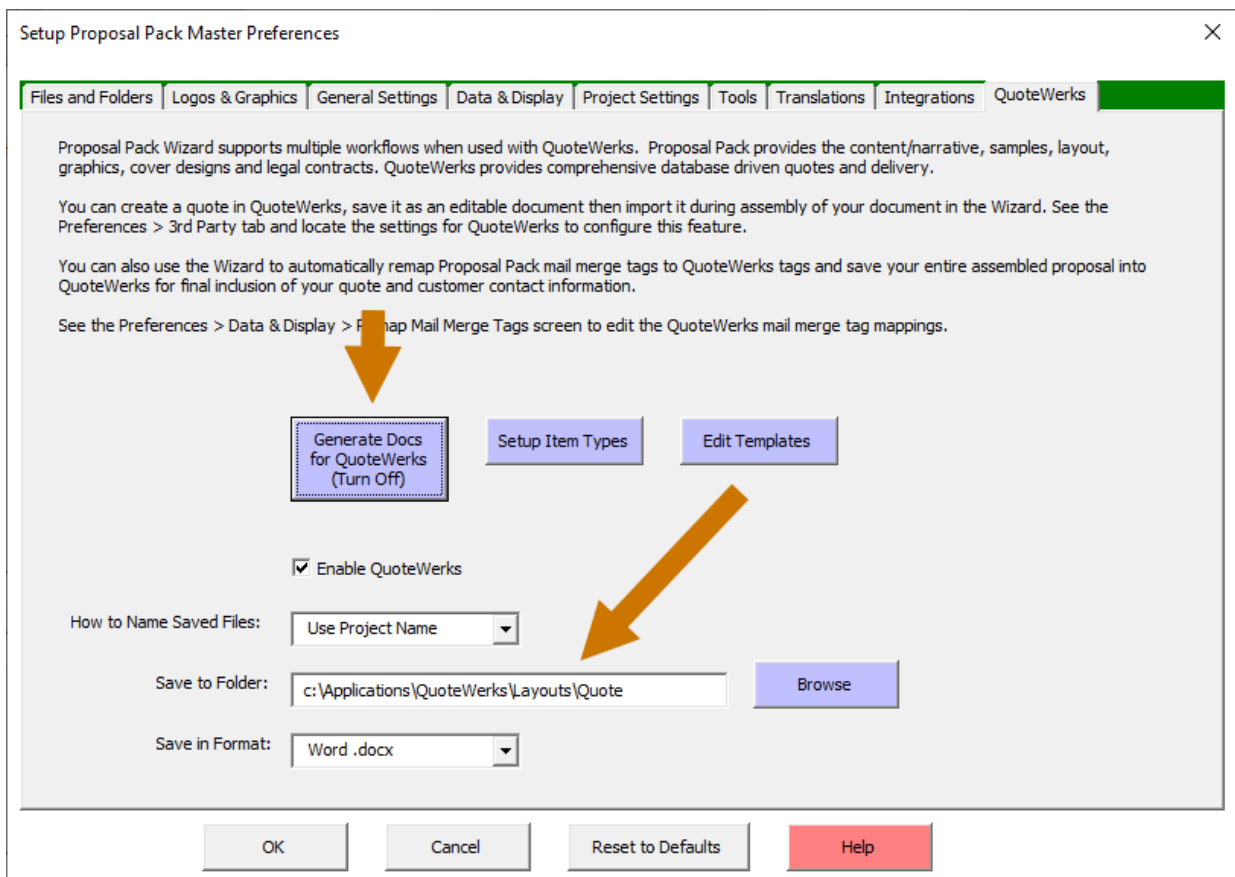
# 5 MINUTE QUICK START QUOTEWERKS



Watch a video of these getting started instructions at:  
<https://www.ProposalKit.com/htm/videos-quotewerks.htm>

These are the minimal steps required to create a QuoteWerks layout file after having setup the Wizard and creating your first test document following the 5 Minute Quick Start instructions above.

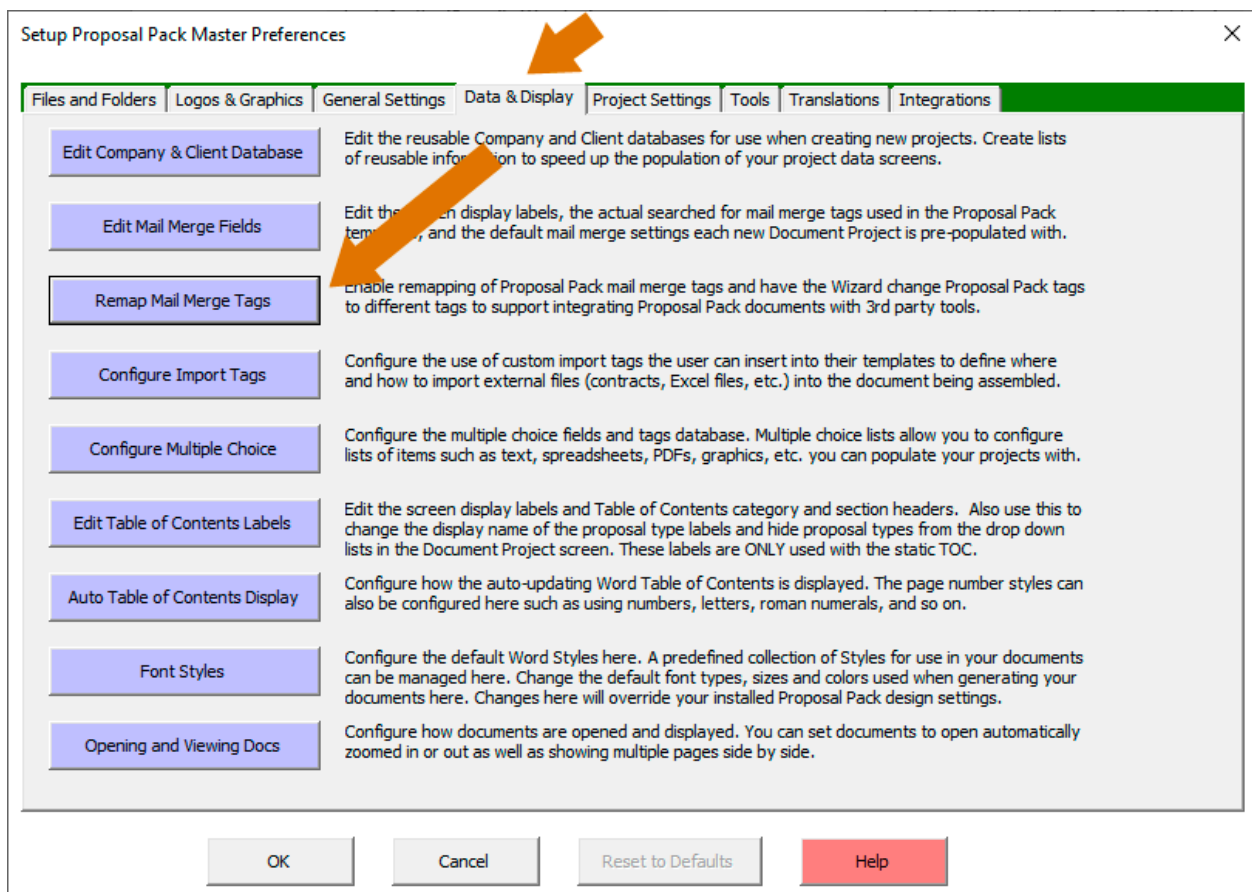
**First**, click the Wizard's Preferences > QuoteWerks tab and click the **Generate Docs for QuoteWerks (Turn On)** button. You can also edit the layout and tags used in the QuoteWerks table templates.





 **Second**, click the Preferences > Data & Display > Remap Mail Merge Tags button.

This step is only if you need to change any of the default tag remapping. By clicking the **Generate Docs for QuoteWerks (Turn On)** button in the step above the stock remapping tags will already be enabled for QuoteWerks.



'QuoteWerks' will already be selected from the drop down list and the **Turn on mail merge remapping** checkbox will be checked. This will cause the Wizard to replace our Proposal Kit tags with equivalent QuoteWerks tags.

**Remap Mail Merge Tags** [X]

Proposal Pack Wizard can change the default mail merge tags embedded in the Proposal Pack templates to alternate mail merge tags. This is typically done when the generated document is going to be used in a 3rd party system which uses different mail merge tags and the 3rd party tool will be mail merging its data into your document. To completely remove a Proposal Pack mail merge tag, set the Remap To field to the word BLANK.

Tags 1-5	Tags 6-10	Tags 11-15	Tags 16-20	Tags 21-25	Tags 26-30	Tags 31-35	Tags 36-40
Proposal Kit Tag:	ProposalNumber	Remap To:	<<&DH_DocNo>>				
Proposal Kit Tag:	ProposalTitle	Remap To:	<<&DH_CustomText01>>				
Proposal Kit Tag:	Reference	Remap To:	<<&DH_SoldToPONumber>>				
Proposal Kit Tag:	WorkOrder	Remap To:	<<&DH_SoldToPONumber>>				
Proposal Kit Tag:	DeliveryDate	Remap To:	<<&DH_DocDueDate>>				

Turn on mail merge remapping    QuoteWerks    Name of application remapping to

OK    Cancel    Reset to Defaults    Help

**Third**, create a new document project from the Wizard home screen. All buttons and options on this screen that are not used during the creation of QuoteWerks layouts will be greyed out.

In the **Pick Documents** button add a page that will hold your quote such as the Cost Summary, Quote, Estimate, Invoice or Work Order. When adding one of these pages the Wizard will automatically insert a QuoteWerks compatible table layout. If QuoteWerks is also running it can build a custom table to match your QuoteWerks Item Types in your currently loaded quote.

After you have selected all your chapters click the **OK, Save Project and Build Documents** button. The generated document will then be created as a QuoteWerks layout file.

Enter Project Data

Project Name:

Save To Folder:

Document Configuration Options

Merge Company and Client Data with templates

Combine templates into single master document

Turn on Page Numbering

Select what type of project to create.

Select Title Page graphic. This replaces the 'Proposal' header with the alternate wording or logo.

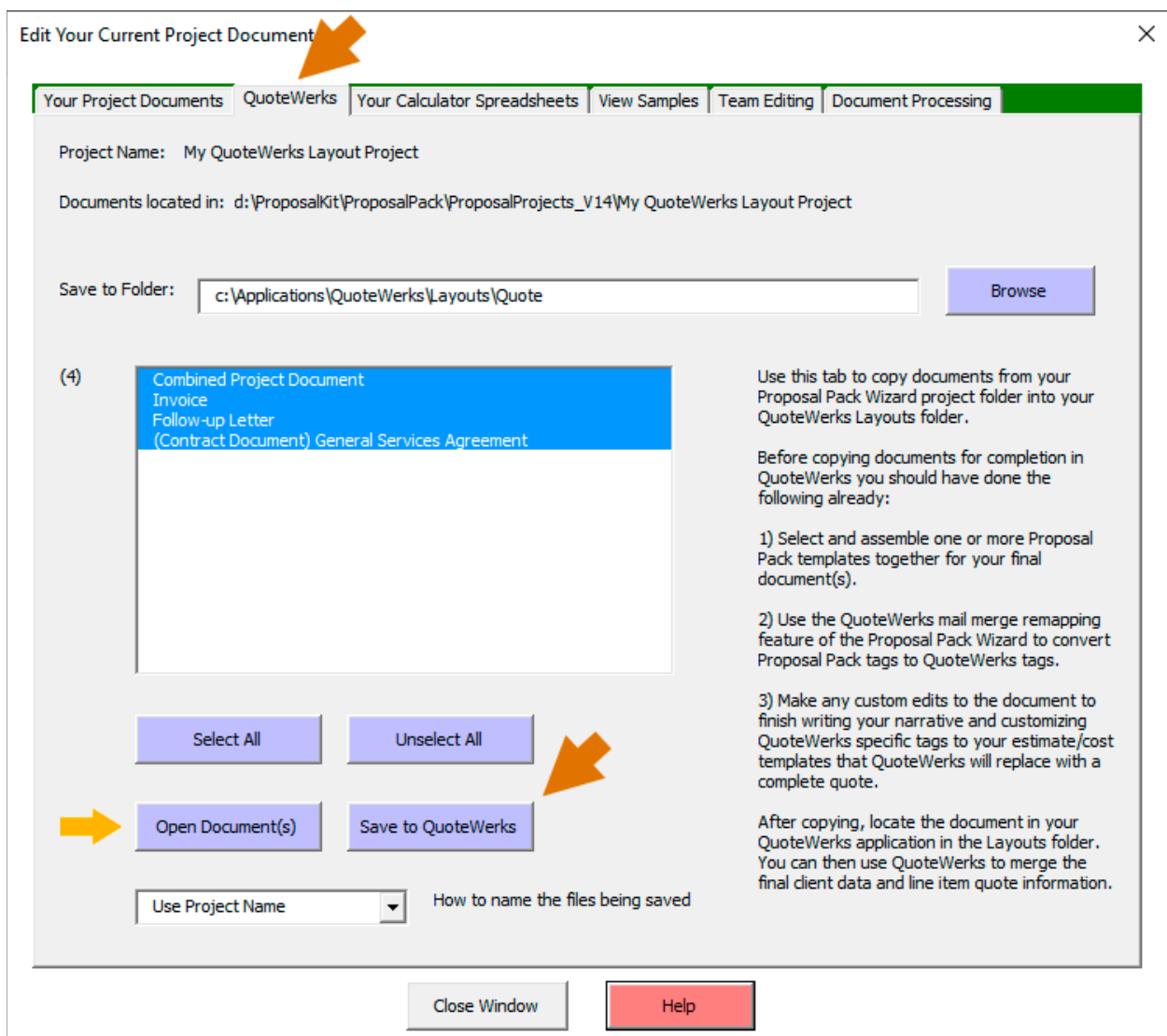
**START HERE** →

→

**Fourth**, the Wizard's Edit Your Current Document project screen has a QuoteWerks tab. This tab makes it easier to open and edit then save your generated document into your QuoteWerks layout folder.

You can also do a 'Save As' with the Word document open and manually save it where you need and in the format you need for how you use QuoteWerks.

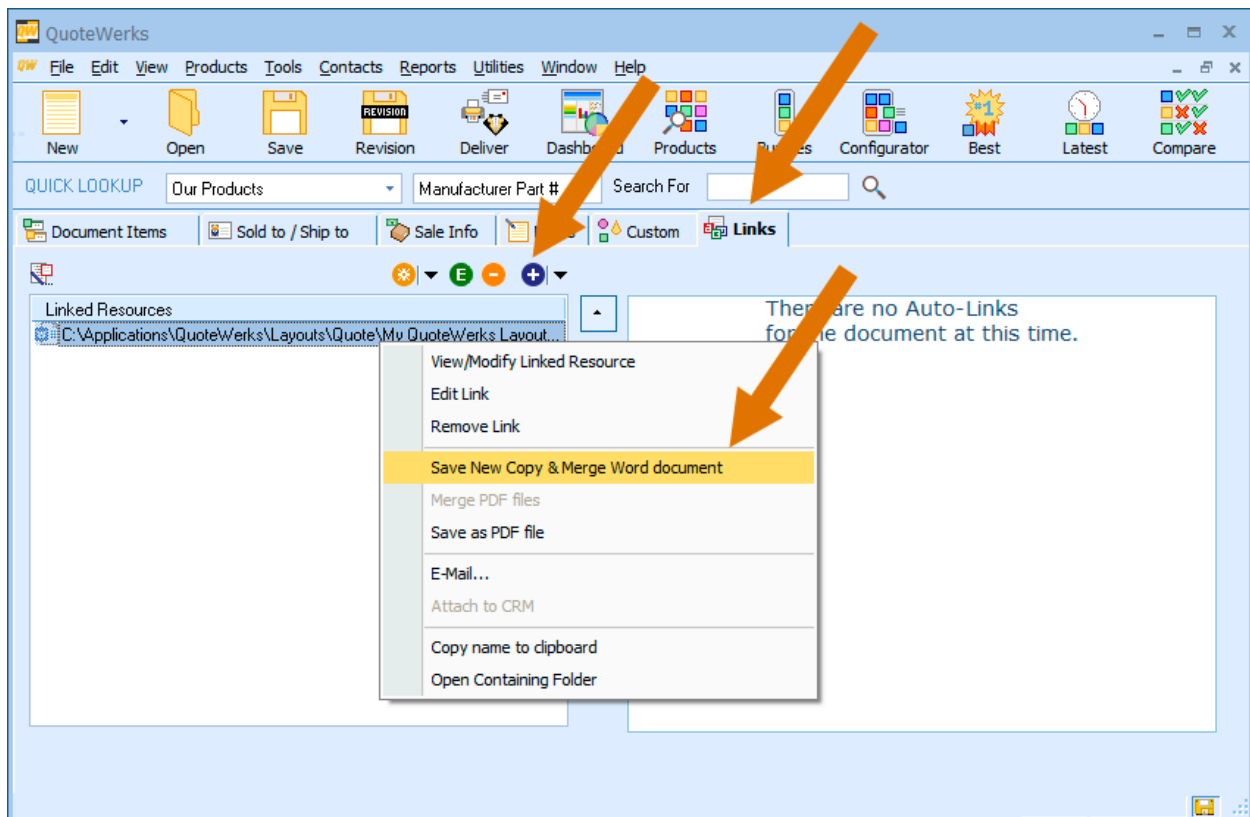
Any documents you generate including proposals, invoices, letters and contracts can be converted into QuoteWerks layouts.



**Fifth**, at this point you are ready to start using QuoteWerks with the new layout file. Using QuoteWerks click the **Links** tab then click the **blue +** button and select the new layout file. Finally, right click your mouse over the link and click the **Save New Copy & Merge Word Document** option.

At this point QuoteWerks will merge your current quotes data into the layout file and you can make any final edits as needed.

Consult your QuoteWerks documentation for help or contact QuoteWerks at this point for assistance with their software. Everything you do at this point is within QuoteWerks.



In this workflow you are using our Wizard and Proposal Kit template package to create a Word document that will be used independently within QuoteWerks.

Due to differences in how QuoteWerks does their own custom processing on Word documents the Wizard will make some additional formatting changes to our standard layout. While we try to output files that work in QuoteWerks without any extra editing required there may be times when additional manual modifications need to be made to fix a formatting issue. If you see anything in the final layout that does not look correct contact us for assistance.

QuoteWerks also has their own proprietary PDF generation which does not work with all the Word layout features our templates use. We do not recommend using our templates to output straight to PDF within QuoteWerks. Use the QuoteWerks Link tab and output to Word format in QuoteWerks first then use the Word Save as PDF or use Adobe Acrobat to create your final PDF file.

It is also possible to work in the reverse direction using QuoteWerks to output just the quote and use our Wizard to assemble the rest of the proposal and pull in the quote output into the Wizard generated document. This workflow is not as commonly used. Consult the Wizard manual and QuoteWerks examples on how to setup alternate workflows.

\*\*\* QuoteWerks is a 3rd party quoting application not sold by nor supported by Proposal Kit, Inc.

## IN CONCLUSION

Creating your custom document only requires basic word processing skills such as opening Word documents, cutting and pasting text, typing, saving, printing, etc.

The most overwhelming part for most people is figuring out where to start and how to select a set of documents from the large collection we provide. Think of your Proposal Pack as a large reference library that you are going to be taking portions out of and assembling together for your specific needs.

The Wizard is designed to help you select templates from this reference library and assemble them into a single document. Proposal Pack template collections also include many completed samples to help guide you.

Proposal writing runs the gamut from short one-page quotes to 100 page multi-million dollar grants and everything in between. Most proposals are 5 to 15 pages long. Proposal Pack Wizard and Proposal Pack templates are used by companies (small and large) and individuals around the world to create these kinds of proposals, quotes, contracts, bids, grants, business plans, resumes, reports, studies and more.

Contact us for assistance at:

<https://www.proposalkit.com/htm/contact.htm>

