

PROPOSAL PACK WIZARD

USER'S GUIDE PROPOSAL PACK WIZARD V18.0

Proposal Pack Wizard is an optional interface which requires Microsoft Word 2010 to Microsoft 365 for Windows and at least one Proposal Kit, Contract Pack or Proposal Pack.

While the Proposal Kit, Contract Pack and Proposal Pack templates are cross-platform, the Proposal Pack Wizard is only for use with Microsoft Word 2010 to Microsoft 365 on Windows.

This manual is written for the Expert Edition of the Wizard and includes information for features not available in the Novice Edition.



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Proposal Pack Wizard works with all versions of Word that support macros and that are currently supported by Microsoft. While the Wizard still runs on obsolete versions of Word in most cases, not all features will work perfectly on outdated versions of Word, and we are not able to fix issues related to bugs or features missing in unsupported editions of Word and Windows. We do not test the Wizard on obsolete versions of Word, and we do not guarantee it will operate in obsolete versions.

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WHAT'S NEW IN V18.0?



- Added an AI Writer. The AI Writer will write the content for any narrative page of your document such as your Cover Letter, Executive Summary, product/service/project pages, etc. Once you give it the details the content will be tailored specifically to you. What used to take hours or days of work can be done in minutes.
- The AI Writer will analyze your project and suggest additional chapters that can improve your proposals.
- The AI Writer allows you to choose from different AI models such as a Narrative or a deeper Reasoning model depending on the type of page being written.
- The AI Writer lets you create multiple copies of a page where you can alter the instructions to improve the results then pick the best one to be built into your document.
- The AI Writer can analyze and organize your instructions. You do not need to be a good writer, simply paste in whatever information you have about your company, client, project, etc. and let the AI organize and clean it up.
- 30 new Quick Start import lists added (800 total).
- Going forward the Wizard will now automatically download new Quick Start import layouts as they are added to the website.
- The Wizard will now detect when new updates are available and give you an easy-to-follow path to update your Wizard.

- Added the ability to have mixed landscape and portrait pages within the body pages of the document to accommodate wide tables and other media.
- Updated forms to accommodate Windows displays with text increased up to 150%.
- Added the ability to use the Back Page and Title Page in the MyTemplates folder.



WHAT'S NEW IN V17.14?

- 20 new Quick Start import lists added (770 total).
- Added more chapter name mappings to the Select by AI feature.
- Fixed a subscript out of range error that could occur during the preview of a line-item quote.
- Added a notice to the project edit screen's spreadsheets tab that those spreadsheets are legacy versions superseded by the line item quoting system.
- Added additional error checking to line-item quote importing of Excel spreadsheets to pinpoint and report malformed Excel calculations that cause the import to fail (i.e. cells that display as #REF for example).
- Added Bluesky to the default list of social media profiles.
- Fixed an issue where the logo settings could be blanked out in the Preferences.


WHAT'S NEW IN V17.13?

-  20 new Quick Start import lists added (750 total).
-  Added more chapter name mappings to the Select by AI feature.




WHAT'S NEW IN V17.12?

-  20 new Quick Start import lists added (730 total).
-  Added more chapter name mappings to the Select by AI feature.

WHAT'S NEW IN V17.11?

-  Added more verbose message for older versions of Word if an error occurs calling an Excel rounding function. In some cases outdated versions of Office may need to have patches applied for missing functionality.

WHAT'S NEW IN V17.10?

-  Added more chapter name mappings to the Select by AI feature.
-  10 new Quick Start import lists added (710 total).
-  Fixed issue with importing pre-made line item data from an Excel spreadsheet in the line-item quoting database Preferences that would show an empty sheet message.

WHAT'S NEW IN V17.9?

- Added more chapter name mappings to the Select by AI feature.
- Fixed an issue with calculating spacer widths when no rows exist for a line item database that could display a subscript out of bounds error message.

WHAT'S NEW IN V17.8?

- Added a search box to the Select by AI manual mapping screen to search for additional template not found by the partial matching.
- Added more chapter name mappings to the Select by AI feature.

WHAT'S NEW IN V17.7?

- Added a new tab in the Pick Documents screen called 'Select by AI'. This tab is designed to be used with a custom OpenAI GPT named '[Business Proposal Outline Creator for Proposal Kit](#)'. This allows you to ask the GPT to give you outlines for any type of proposal and the Wizard will convert those suggestions into a list of selected chapters in your project.
- Added a Paste from Clipboard button on the Wizard's setup screen to make it easier to paste in the activation code.

WHAT'S NEW IN V17.6?

- Updated the Security System and Communication Proposal layout to display in the full list of layouts instead of the From Customer Support section.

- When importing a new Quick Start list is now unchecked if the project previously was associated with a sample proposal.
- Fixed an error message that would occur when a spacer line was added to an empty line item database. Spacer lines can now only be added if at least one line item row exists.

WHAT'S NEW IN V17.5?

- Added View Image buttons to various screens that deal with images and logos in the Preferences and in the line item database for Image data types. This will show a preview of the image and details about the image.
- Changed the behavior of the Clear Form buttons in the line item database screens to always clear every field instead of reverting back to the values when the form was entered.

WHAT'S NEW IN V17.4?

- Added the ability to insert spacer lines into the line item data rows. Spacer rows can use blank spaces or characters such as dashed lines and have colors applied. Use spacers to add additional breaks or groupings to your line item data rows.
- Added an Example database showing use of the new spacer lines and a new manual chapter for spacer lines.
- Added a Split Multi-Category Tables option to the line item database definitions to force each category on a template page to be put into its own Word table. By default, if all categories on a page have the same number of fields they will all be combined into a single Word table for all categories.

- Added more error checking and a retry count on all calls from the Wizard to Excel in case Excel does not respond to Word.
- More verbose messages are given if Word is unable to communicate with Excel.
- Added progress bars to the importing of zip files for the line item database customer support screen.
- Added selected project templates to customer support line item database extract zip file.
- Turned off Compile on Demand due to Word bug that can generate a 35010 error to reduce likelihood of error occurring.
- Fixed issue with importing line item data from another project using the same line item database not picking up the line items.
- Fixed issue with line item database global header fields causing extra blank lines being added to the end of the main line item table when multiple categories combined into a single table.








WHAT'S NEW IN V17.3?

- Added a backup and restore database definition screen with features that help identify which previous backups may want to be restored. Automatic backups are made whenever the Wizard automatically clones in a component database and whenever the user enters the Edit Definition screen.
- Added ability to import custom premade lists into the DropDown list to speed up creation of custom lists. Premade lists are included for states, countries, races, ethnicities, genders and

months. Also allows for customizing these premade lists and adding additional custom lists.

- Added ability to use the word BLANK as the default List data type value which will output an empty string to the documents.
- Added the component page databases to the list of external databases can be cloned from. Now they do not need to be loaded first to clone them into your database.
- Fixed Get More Suggestions button on Global Formatting screen wasn't loading additional formatting suggestions.
- Improved error checking descriptions when testing databases.
- Added testing of database definition and require an error free test before allowing creation of a custom template in the Quote Templates screen.
- Test List screen was returning one level too high. Now returns to add/edit screen.
- Hid the Test Function button when adding new functions as needs to be saved into db def for being able to run tests. Only visible when editing functions.
- Fixed issue with category specific images not being available for use as a default field image.
- Fixed issue with Dropdown data type if no item selected was defaulting to the 1st item on the list.
- Added more manual chapters to the line item database manual.

WHAT'S NEW IN V17.2?

-  Added a new feature to the Quote Templates screen in the Preferences. This allows you to have the Wizard build a more custom-tailored custom template in the MyTemplates folder by selecting which fields to output and the order of fields. This makes for faster creation of customized Word tables.
-  Added options on all Pick Documents screens and the Manage Templates screen in the Edit Styles to only show line item database enabled templates to help identify which templates are premade ready to use with the line item database system.
-  Added hidden weight fields to all product cost related built-in and component databases to help determine shipping charges. Hidden fields can be enabled for output or by adding tags to custom Word templates.
-  Set the Price and Rate field widths to 60 to make more room for the Description field in the cost related line item databases.
-  Added additional fields to most schedule related built-in and component databases so that all schedule related databases calculate days, weeks, months, and years to completion fields. User can then determine which one(s) to display in their output.
-  Added table borders to built-in custom component line item database templates that were missing in some schedule related files.
-  Fixed an issue where the default line item database was not being automatically set as the project database when a new

project was created and the option to auto-assign the default database to new projects was enabled.

- Added more chapters to the line item database manual.
- When a database is disabled, it is immediately removed from the drop down list of available databases.
- If the default line item database is disabled it is also cleared from being the default database.
- Added the database quote code onto a couple Preferences screens.








WHAT'S NEW IN V17.1?

- Fixed database count to not count disabled databases in project screen.
- Added video library links to the line-item database project and Preferences screens.
- Added links to line-item database video library to manuals.
- Fixed Line Item Quote button in the Preferences not being visible depending on the Activation Code used.

WHAT'S NEW IN V17.0?

- Added a line item database system for quotes, schedules, business plan financials, etc. The new line item database system works for both Novice and Expert Edition users. Novice Edition users can use any of the premade quote and Sample Proposal

databases as-is. Expert Edition users can customize any premade databases and create custom databases.

-  A new PDF manual has been added for the line item database system.
-  All the included Sample Proposals that used to use Excel spreadsheets for quotes, schedules and business plan information have been converted to use the new line item database system. Importing any of these Sample Proposals will let you use that Sample Proposal's custom line item database for your own projects. Expert Edition users can customize these databases.
-  The Wizard and the installers have been upgraded to new EV code signing certificates for enhanced Windows security.
-  Permission errors are captured better with an option to retry once the user closes the file that was trying to be deleted.
-  Changed all Twitter references to X in the Social Media tags.
-  The Excel spreadsheet linking feature is now disabled by default as the new line item database system takes precedent. The Excel linking feature can be turned on in the Preferences and used along with the new line item database system. Note that the new line item database system has features that allow for pulling in cell data from an Excel spreadsheet into the line item database which may be more useful.
-  Removed the legacy static Table of Contents creation option.

- ❏ Turning on QuoteWerks document creation features will temporarily turn off the new line item quoting system. The line item system will be turned back on when QuoteWerks creation is turned off.
- ❏ The 32-bit QuoteWerks direct connection API has been removed. QuoteWerks support is still included and works as it always has. The direct connection feature was a time saving option and since QuoteWerks never released a 64-bit API the direct connection option has been removed as Word is primarily installed in the 64-bit version now.
- ❏ The project database import/export feature has been removed.
- ❏ The Word Insert Bug screens have been removed after Microsoft fixed their bug.
- ❏ Minor bug fixes and enhancements.

WHAT'S NEW IN V16.6?

- ❏ Expanded the capabilities of the Excel spreadsheet linking tags to allow multiple columns within a tag in the format <<RS#-#C#,#,#>>. Up to 2 additional columns can be included in the tag when the tag is an RS tag (which causes each new row to expand into a new table row). This puts all the columns within the same cell with delimiters that can be defined in the Preferences.
- ❏ Added 2 new articles to the Read How-to Articles screen on the topics of using ChatGPT and Chat AI bots to aid in proposal writing.

- Updated messages when the Word Insert Bug occurs that the bug has been patched by Microsoft and requires updating Word to the most recent version.
- Added additional Word Insert Bug workaround code when using the MyTemplates folder files.

WHAT'S NEW IN V16.5?

- 9 new Quick Start import lists added (700 total).
- Added a new post processing tool to the Edit screen list of tools to run the data merge and Excel spreadsheet linking operation. This allows you to easily link new or existing spreadsheets cells into an existing document during the editing process. Any data tags in the document will also be merged if the data is filled in the project screens.
- Extended the Excel spreadsheet dynamic linking feature to work with custom templates and spreadsheets in the MyTemplates and MyProjectFiles folders.
- Added a new workaround option for the Word Insert Bug. There is a new post processing tool in the edit documents and Preferences batch processing screens that will run a conversion process on a folder of Proposal Kit library templates. This conversion process recreates each file in a way that stops Word from crashing when assembling them using the standard Word InsertFile API function that is currently bugged in Microsoft Office.
- Added another workaround option for the Word Insert Bug that will rebuild all templates in the Proposal Kit template library and

turn off the Word Insert Bug workaround. This is another option to get the Wizard working normally until Microsoft fixes their InsertFile API functionality.

- Added extra check to installers to provide a more descriptive message if users computer does not associate the .docx file extension with Microsoft Word.
- Added time to completion estimates to the document building progress bars.
- Option to skip watching the tutorials and the training mode when running the Wizard for the first time.
- Added startup checks to ensure file naming conventions and formats are correct on any custom files in the MyTemplates and MyProjectFiles folders.
- Added removal of custom files copied from the MyTemplates and MyProjectFiles folders when using the Delete Old Files button.

WHAT'S NEW IN V16.4?

- Added two workaround options for a bug Microsoft introduced in their August 3, 2022 build that causes their InsertFile function to fail when assembling documents which causes an error message in the Wizard during document assembly. The Wizard will automatically detect the error and switch to one of the workarounds. A popup screen reminder will be displayed when the Wizard is run that the workaround is in use with instructions on how the workaround operates and how to rollback Office 365 to a working build.

See this page for details:








<https://www.proposalkit.com/htm/troubleshooting.htm#q37>

- Fixed an issue with the post processing batch tool for changing the text in the footers to a different style.
- Fixed an issue with the auto-adding of the Multiple Choice Database mail merge tag into the selected template where it would not always insert the tag.
- When upgrading from the Novice to Expert edition the Wizard will automatically be put into Expert Mode when the serial number is changed.

WHAT'S NEW IN V16.3?

- Added a new feature that allows for copying of custom files that are not part of the Proposal Kit system into each new project folder. This is called the MyProjectFiles folder and can be setup using a new Preferences screen.
- Added new manual chapter [How do I use the MyProjectFiles folder?](#)
- Outlook integration is now enabled in both 32-bit and 64-bit editions of Word.
- Removal of the Salesforce API allowed for removal of the 2nd copy of the Wizard meant for S Mode use.
- SalesForce API integration has been removed.

WHAT'S NEW IN V16.2?

-  1 new Quick Start import list added (691 total).
-  On the Edit Current Document screen if there is only one file present in the screens it will be preselected.
-  The QuoteWerks integration has been enabled for use in the 64-bit Wizard however the direct API connection features still require using the 32-bit edition of Word. Most features will now work in the 64-bit edition.
-  Fixed an issue with the new custom positioning of the Title Page's stock logo graphic when converting from graphic to text chapter headers.
-  Fixed an issue with stock logo being left aligned to page instead of margin when converting from graphic to text chapter headers.
-  Fixed an issue with the Grant Proposal Type database missing templates.
-  Fixed error message in conversion of documents into QuoteWerks compatible formats when international translations were turned on.

WHAT'S NEW IN V16.1?

-  Added the ability to create custom color schemes.

- When creating custom templates Wizard will ask if you want to put a shared copy in the MyTemplates folder to share between design themes.
- When cloning a Proposal Pack design theme Wizard will now ask if you want it set to be the default design theme instead of having to manually select it.
- Added option to turn off setting of the document zoom size and other zoom related page view settings when opening documents. Zoom settings are also not applied anymore to documents opened temporarily in the background and any zoom setting related error messages are now suppressed.
- The Edit Stock Template button will ask to open the shared MyTemplates folder copy if one exists instead of the stock template in the Pick Documents screen.
- Changed tab sequence on the Company Data screen to be top down.
- Cleaned up some unnecessary messages and added some extra tests to the document build process.
- Design themes that use white header text will use a white color for the title page replacement text when replacing graphic headers with text.
- Fixed an issue with the auto-copy of a template to the MyTemplates folder always adding a Multiple Choice tag if the Multiple Choice database is in use. Tag will now only be added if the template is attached to the tag and one or more paragraphs are associated with the tag.

WHAT'S NEW IN V16.0?

- Added support for the new Proposal Pack V19 and Proposal Kit Professional V22 products. 177 new chapter templates have been added and are now available in the Wizard.
- Added 19 more business situations to the Add Templates tab to accommodate the new chapter templates.
- 1 new Quick Start import list added (690 total).
- Streamlined the Wizard home screen interface by removing the Create Document button which is a redundant button. The project screen now includes a 2nd button to save the project without building the project documents and instead of asking to build the documents when the original Ok, Save Project button was clicked that button now automatically builds the project documents.
- The Team Editing feature is now automatically turned on by default in the Expert Edition.
- The Team Editing screen now can change the order of chapters and remove chapters when the main project document is rebuilt without having to go back to the project screen to edit the chapter layout.
- If multiple monitors are detected during startup the Wizard will ask if you want to turn on Multi-Monitor mode and will do so without having to turn it on in the Preferences. The Wizard will only ask this question once.

- Updated the post-processing tool for converting chapter headers and the Edit Styles option to automatically convert graphic chapter headers to text so they reposition the chapter headers more in line with how the original logos were positioned vertically relative to the chapter header text. This eliminates the need to manually reposition chapter headers to make them appear more visually appealing in many design themes.
- Updated the post-processing tool for converting chapter headers so it also converts the Title Page's Proposal graphic and repositions that graphic as well to be more visually appealing.
- Updated the conversion of the Title Page graphic to text to read the resolution of the image in case it is in a non-standard DPI which would previously cause the graphic to be repositioned incorrectly.
- Fixed a couple post-processing tools so if the setup screen for the tool was canceled it wouldn't continue to perform that operation.

WHAT'S NEW IN V15.18?

- 3 new Quick Start import lists added (689 total).
- Added a new post processing tool that allows changing the entire color scheme of a document including documents that have been edited with custom colors. The tool will prescan all changeable elements (fonts, tables, borders, shapes) to identify up to 10 used colors and allows changing each to a new color.









- Added the ability to create Font type presets. You can create up to 40 presets and each preset contains the settings for the entire set of 50 customizable font styles. This gives the ability to easily switch design themes and have different font types, sizes and colors created to go with different themes.
- All the font style settings and the new presets have been moved from the Options.ini database file to a new file FontStyles.ini.
- Removed limit of 40 selectable items in a Multiple Choice Database list when creating custom sort ordered lists. Max allowable number can now be custom sorted.
- Added 5 new categories (15 total) and 50 tags (150 total) to the Multiple Choice Database.
- The Multiple Choice Database configuration can now auto-add the Multiple Choice tags into the templates when assigning a tag to a template.
- The Multiple Choice system is updated to use the custom versions of templates found in the new MyTemplates folder if any exist.
- Added the ability to delete the Word files for user added templates from the database. Stock templates can still be removed from the database listings but the Word documents for stock Proposal Pack templates will still not be deleted.
- Added checks when removing templates from the database if they are in use in the Multiple Choice database and if a custom copy exists in the MyTemplates folder.

- Defaulted the Wizard to using Word popup message boxes. If running in a multi-monitor system and message boxes are displaying on the wrong monitor, there is now a Preferences checkbox to turn on Multi-Monitor Mode. This will use Wizard specific popup message boxes. However, this feature is not tested across all possible Wizard interactions. If Multi-Monitor mode appears to have a locked-up screen turn this feature back off and contact us for assistance.
- If the Show All Templates option is checked in the Add Templates screen, then changes are made to the template list outside this screen, the drop down lists will now reload with the current selections.





WHAT'S NEW IN V15.17?

- 2 new Quick Start import lists added (686 total).
- The Preferences tool for searching for template installations now allows browsing to any location to better accommodate custom installations.
- The Pick Documents screens Presets adds an Update Preset button to streamline making updates to presets vs having to delete then readd a modified preset.
- Added a new feature allowing users to copy their own versions of stock templates into a new folder MyTemplates. This allows users to keep their customized versions of chapter templates separate from the main library. This also allows a single customized copy of a chapter template to be used across multiple Proposal Pack design themes and for network setups




to have customized versions per individual user when the main library is shared by everyone on a network.

-  The Multiple Choice selection screen when adding data for a project will now warn the user if they are selecting drop in data but did not select the page for that data yet in the project.
-  Expanded sizes of Multiple Choice selection fields to accommodate long titles.
-  Expanded the maximum number of drop in content files in the Multiple Choice database from 300 to 2000.
-  Labels showing the count of how many data elements are selected added to the Multiple Choice selection screen.
-  Added an option to delete all paragraph data files created by the Wizard when resetting the Multiple Choice database to original settings. User has the option to backup the files in case they had been customized.
-  Added admin option to turn off Multiple Choice warning messages for missing data which may be non-issues depending on how the Multiple Choice system is setup and used in practice.
-  Fixed an issue where only about 65 items could be selected from all the Multiple Choice drop downs due to a string length limitation in Word saving to the .ini database files. Now up to 2000 drop down items could be selected for a single project.
-  Fixed an issue in the database export/import with the new Social Media data values.

WHAT'S NEW IN V15.16?

-  5 new Quick Start import list added (684 total).
-  Added a post processing tool to the Preferences to batch update legacy Word .doc format files to .docx to help migrate old installs into the current version and formats.
-  Replaced Word's default message popups with Wizard versions to fix an issue with use on dual monitors where sometimes Word popups from the Wizard would display on another monitor than the Wizard screens were open on.
-  Fixed error message that could occur with older installs of Word that were missing Word's functions for retrieving the MAC address or IP address of the computer when the unique user id was being generated using a random number instead.

WHAT'S NEW IN V15.15?








-  1 new Quick Start import list added (679 total).
-  Added a new post processing tool for changing table settings across the document(s). This tool will prescan the documents to determine what colors are used in the tables and will allow you to change the colors of the cells, margins and padding between cells, and border styles consistently across all tables.
-  Added button to remove custom ordering from a Multiple Choice list of paragraphs which resets the list to the order they were added to the database.

- Widened drop down lists in the Multiple Choice selection screen to accommodate long paragraph titles.
- Fixed an issue with custom ordered lists with disabled entries causing enabled entries to not be shown at the end of a multi select drop down list in the Multiple Choice database.
- Fixed an issue with the last entry on some Multiple Choice database entries being partially hidden and difficult to select.
- Fixed an issue with positioning of some Multiple Choice drop downs on the screen when using between 5 and 10 drop downs.
- Removed the saving of the Multiple Choice default selections in a Preset to avoid conflicts with changes to the Multiple Choice database after the Preset was created.
- Added option to the Novice edition to show what post processing tools are available in the Expert edition.
- Fixed an issue with older versions of Word being unable to determine the Mac address of the computer for generating a unique userid. The unique userid is still created via an alternate method but an error message is now suppressed.

WHAT'S NEW IN V15.14?

- Added new social media data tag support. 10 new tags <<SocialMedia[1-10]>> are now available to use in the Wizard interface and have been added to a number of templates in the recent Proposal Pack update. Templates with the new tags are

Company History, About Us, Company Information, Contact Us, Social Media, Back Page and Back Page Generic.







-  The new social media tags have an additional feature when embedded in the documents where the display text can be different than the underlying URL.
-  Reorganized the document post processing screens to group tools based on what they do (text tools, graphics tools, testing tools, structural tools and troubleshooting tools).
-  Added popup help descriptions of each document post processing tool.
-  Added a post processing batch tool to remove all hyperlinks from emails and URLs in the document. The text remains and only the clickable link and any URL font styling is removed (underline and color).
-  Added a post processing batch tool to remove page borders.
-  Added post processing batch tools to replace all the custom graphics that can be used in the MyGraphics folder. Tools are added to change out the Letterhead, Page Header, Title Page logo, Back Page watermark, Title page watermark, Body pages watermark and Description graphics.
-  Added post processing batch tools to load complex watermarks stored in external .docx format files such as are used in the MyGraphics folder for replacing the body pages watermark, Title Page watermark and Back Page watermark as well as the body pages headers and footers.

- Added support to all the MyGraphics custom graphics and batch processing graphics tools to use both PNG and JPG format files. If both JPG and PNG formats exist for a file the JPG format will be used first.
- Improved document creation performance by turning off the crash logging system by default (reverting to its previous default state) and reducing the volume of progress bar refreshes.
- 8 new Quick Start import lists added (678 total).
- If page borders are turned on (either via the Style Settings screen or using the Page Borders post-processing tool) and full size shape objects are used in the body pages then the full size shape objects will be removed to prevent the page borders from being hidden.
- Updated all Proposal Pack version numbers from 18.3 to 18.4 to reflect the updates to all the template package products for the social media tags.
- Removed the page header logo file, alternate header and alternate footer file options from the Edit Style's Branding tab as these features are handled via the MyGraphics folder options. The Branding tab has been renamed Page Headers.
- Fixed issue with batch data importing if a Nickname was used in a row that any subsequent rows that did not use a Nickname would not be imported.
- Fixed issue with the category list drop down disappearing in a recent update.

WHAT'S NEW IN V15.13?

- Added search capability to all company and client CRM database drop down lists and forms. Also added a search configuration screen to customize how the database searches are performed and to change the default options.
- Moved most of the Windows registry key settings to the Options.ini database to make transferring between computers and network installations easier and to support the new removable USB drive install feature.
- Added a removable USB drive installation feature. You can now install the Wizard and any Proposal Kit template package on a removable USB drive that can be plugged into any computer that has Word installed and maintain your entire Proposal Kit system on the removable USB drive.
- Added a manual chapter [How do I Install on a Removable Drive \(USB\)?](#)
- Replaced the numerical User Id setting in the Preferences with a system generated unique id string.
- Tested on Windows 11. Updated references to Windows 11 support.
- Marked existing CRM database records with the last batch number they were used in.
- Added Batch CRM Import screen option to only show records never used in any batch.

WHAT'S NEW IN V15.12?

-  A new startup screen is displayed when more than one Proposal Pack design theme is installed allowing the user to select which design to default to more easily.
-  Added a post-processing tool for adding up to 50 extra document sections to the start and/or end of a completed document. Sections are unlinked to allow inserting external content that requires independent page settings, headers and/or footers.
-  When updating existing projects and the company and/or client data is changed the Wizard will ask if you want to update the copy in the CRM database as well.
-  Installing the Wizard using the ZIP file installer into a OneDrive needed a fix due to Windows trying to use a hyperlink (https) path instead of a drive letter in some cases. The Wizard will now detect non-drive letter paths on the setup and if found will prompt the user to browse to a drive letter based path.
-  Suppressed an error that has occurred a few times in foreign language installations decrypting UTF8 to Unicode data. If an error occurs it will silently return as much of the data that could be decrypted as possible.
-  Fixed a duplicate record import issue in the CRM record importing feature where it would increase the duplicate record count by 2 instead of 1 in the final report.

- Fixed a project batch external data import issue where a duplicate record was not being detected and allowed a duplicate project to be created.
- If a Proposal Pack was deleted and the repair wizard is unable to locate it, or the user couldn't browse to it the Wizard will give the user the option to disable the style in the database to allow the Wizard to continue running.
- Added extra tests to the Wizard to compare the setup paths for multiple device or multiple user configurations using the same network or cloud based Wizard database. All root paths on all devices must be the same and the Wizard will test for this on each new setup and startup of each Wizard to ensure path integrity is maintained in the database.
- Added option to turn off archiving of orphaned project folders in the Preferences > Files and Folders screen. Intended for use with multi-user setups using the same project folder so users who don't see other users projects won't archive those other users projects.
- Added more documentation for network and cloud based installs.

WHAT'S NEW IN V15.11?

- Captured user button clicks and disabled all project screen buttons and form fields once the document generation starts and before the screen closes to prevent users from inadvertently stopping the document processing.

- Fixed an obscure error where Word was not able to unlink a document section thinking it did not exist when it did. By suppressing the error, the document assembly continues without issue.
- Updated installers and Wizard setup to not allow reserved folder names in custom install paths such as “documents”, “word”, “spreadsheets”, “pdf”, “graphics” and “PNG_graphics”. Installing into existing directory structures that include subfolders with these names could cause expected errors.
- Added a check to only allow one batch template project to be created for each batch.
- 5 new Quick Start import lists added (670 total).
- Added a better informational message during system errors when generating documents to let the user know more clearly most errors are caused by user interference.

WHAT’S NEW IN V15.10?

- Updated all Proposal Pack version numbers from 18.2 to 18.3 to reflect the updates to all the template package products.
- All 200 samples have been rebuilt. Most samples now use newer photo based Proposal Pack design themes. Some minor fixes were made to spelling and grammar errors in few samples.
- 5 new Quick Start import lists added (665 total).

WHAT’S NEW IN V15.9?

- Added a post processing tool to adjust the chapter header logo positions after they have been converted to graphics. This tool allows you adjust all the chapter header positions without having to restore the backup and redo the graphic to text conversion with the correct positioning.
- Post processing tool for converting graphics to editable text now supports settings in both points and inches.
- If using graphic design theme Proposal Packs the text “(With Deposit)” and “(Without Deposit)” will be removed from the Table of Contents when including one of the Work Order forms.
- Added Unselect All buttons to post processing batch forms for unselecting all selected tools.
- Added a Silent Mode to post processing batch screens to suppress popup information messages.
- Increased the Novice Edition limit of 15 chapters in a document to 50.

WHAT’S NEW IN V15.8?

- 5 new Quick Start import lists added (660 total).
- Added a feature to speed up data entry if your clients are in the same area. You can configure the Wizard to automatically copy the City, State, Zip Code, Country, and County from the Company Data to the Client Data screen. There is a new Preferences option to set this feature to Yes, No and Ask.

- Added a new tab to the Edit Current Document for managing project backups. Features include making new backups for individual projects, restoring from any backup, and deleting backups.
- Added support for changes in Proposal Kit Professional built-in design themes being changed to Global #4 and Classic #18.
- Added flag in the Preferences to turn off table borders globally for when using more than one design theme and you want to turn off table borders without individually disabling them in each installed design theme.
- Added flag to the Fonts screen to dynamically set the color based on Color #3 of the current design theme.
- Novice Edition users now have access to a handful of the document post processing tools.
- Added a post processing tool to batch change all hyperlinks and email addresses to a single value while retaining the original text. This is useful for when creating fictional documents with URLs where you do not want the links to be broken by pointing them at a known URL.
- Added a post processing tool to set all text in the document's footers to a specific Word Style.
- Added a post processing tool to change all the major body and header fonts in the document. This tool can be used with the tool to change chapter headers to editable text to also change the editable text font style as well.

- Added a post processing tool to convert all the chapter headers in graphic design theme Proposal Packs to editable text to prevent having to change that setting in the Styles screen and rebuild the document from scratch. This tool will update the Table of Contents and convert the Title Page Proposal graphic to editable text.
- Updated demo styles from line art to new photo design themes.
- If using graphic design theme Proposal Packs the text “(Long Version)” and “(Short Version)” will be removed from the Table of Contents when including one of the Non-Disclosure forms.
- Fixed an issue where if an invalid URL or email address were entered Word would generate an error trying to convert it to a hyperlink. If an email or URL field does not appear to be valid the Wizard will not try to have Word convert it to a hyperlink.
- Changed back to the default setting that keeps the Title Page and Back Page watermark pictures and shapes in the header vs moving them into the body. Some Word installs can get the ZOrder of the shapes wrong when moving them. This has no effect on the final printed or PDF versions of the documents.

WHAT'S NEW IN V15.7?

- Added support for 10 new Proposal Pack design themes (500 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 3 new Quick Start import lists added (655 total).

- Added a new document post-processing tool to allow changing the footer accent graphic. This tool can also add a footer accent graphic to a document that does not have a footer accent graphic.

WHAT'S NEW IN V15.6?

- Added support for 10 new Proposal Pack design themes (490 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 3 new Quick Start import lists added (653 total).
- Added more debug logging messages during document creation.
- Some forms had drop down lists that users could type their own information into that would result in index out of bound errors. All drop down lists on all forms are updated to prevent users from typing their own data into them.
- The zoom percentage option has added the ability to set the zoom value to 0 which bypasses the setting of the zoom value when the Wizard opens Word documents.
- Alternate settings for the footer accent graphic positioning have been removed from the Style Settings screen and consolidated into the MyGraphics folder features.

WHAT'S NEW IN V15.5?

- Added support for 10 new Proposal Pack design themes (480 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 6 new Quick Start import lists added (650 total).
- Added new manual chapter [How do I do Project Tracking and Reporting?](#)
- Added links to online help videos from help screens.
- Added document processing tool for changing bullet points in generated documents. The bullet tool can also set a custom bullet point graphic for use in all future documents created by setting it up in the MyGraphics folder.
- Added option for having the missing project folder test and repair feature to create missing folders in addition to searching for them or archiving projects with missing folders.
- Added list of default program associated by Windows for use when opening .docx, .docm, .xlsx, .pdf and .xml files to the About screen to help troubleshoot if old or incompatible office software is being used with the Wizard operations.
- Added popup question if project status changed without a date being set if the user wants to add the date or clear the field.
- Fixed an issue where a couple XML format export files would not open from the Wizard screens if Excel was not the default program set for opening XML files such as when the MSOXMLLED.exe program was set by Microsoft.

- Improved speed of closing Manage Project screen and added progress bars.
- Fixed an issue where if the table border style were set to a style that must have a width over the default width size (i.e., Thin Thick Thin Small Gap) but the border width setting is not set it would default to a thinner width and generate an error.
- Updated the project tracking status date screen to always update the date when the status has changed even if the date field did not change.

WHAT'S NEW IN V15.4?

- Added support for 10 new Proposal Pack design themes (470 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 1 new Quick Start import lists added (644 total).
- Added more comments to the crash reporting form. Added an extra field to help describe more details in crash reports.
- Added option to skip updating OLE Excel links between spreadsheets and Word documents when cloning projects with linked files.
- New project management screen added with expanded features. Now multiple projects can be cloned, deleted, and have their tracking statuses updated at once. The Clone Project button has been moved into the new screen. The clone, project status and tracking reporting are all Expert Edition features.

- The Delete Project option now includes a new option to archive project files to a new archive folder to ensure work is not lost on any documents created for projects being deleted.
- The Delete Project option now includes a new option to search for and archive orphaned project folders. Orphaned project folders are the hard drive folders containing the Word, Excel and PDF documents created for a project but the project itself has been deleted from the Wizard database.
- The Delete Project option has a new feature that will optionally delete orphaned project batches. Batches that are not linked to any projects (either due to not having any added in the first place or having them deleted) are considered orphaned batches.
- The project status tracking reports are updated to include the user comments and you can control which projects are exported to the tracking report. Field widths are set wider for the longer data fields in the exported spreadsheet.
- Open Project Folder and Refresh List buttons added to the Team Editing tab of the editing screen.
- Added drop down for selecting projects from a batch in the Search Projects form and the project selection form.
- Fixed issue with CompanyNickname field case in the example batch Excel import file.
- Fixed issue with the status tracking dates potentially not being cleared out when a deleted project slot in the database is reused for a new project.

- Added descriptions of new batch tools to manual.
- Added links to new videos into related manual chapters.







WHAT'S NEW IN V15.3?

- Added support for 10 new Proposal Pack design themes (460 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 2 new Quick Start import lists added (643 total).
- Added screens to the Company and Client CRM Database feature for mass deleting records and exporting records to an Excel compatible .XML file.
- Added Preferences options for Team Editing mode for automatically creating, not creating, or asking Yes/No to create assembled documents during project save.
- If Team Editing mode is turned on and assembled project documents not yet created, then the Edit screen will put you on the Team Editing tab first.
- Added select all and unselect all buttons to batch processing screens.
- Crash logging is now turned on by default.
- Added form to send crash log report to customer service if a crash during document assembly was detected.
- Added links to new videos into related manual chapters.








WHAT'S NEW IN V15.2?

- Added support for 10 new Proposal Pack design themes (450 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 5 new Quick Start import lists added (641 total).
- Added example files for use with the company and client CRM database importing using files.
- Added importing from Outlook to the Company Data screen and updated how QuoteWerks data is imported.
- Added ability to import company and client data directly into the reusable CRM database from external files, QuoteWerks and Outlook.
- Reorganized the interface for importing 3rd party company and client data to add all 3rd party options into a new popup screen.
- Added Preferences options to individually toggle on/off the popup screens for importing client data at the point a new project is added. The same functionality is now available directly from the Company Data and Client Data screens.
- Added Clear Form buttons to the Company Data, Client Data and reusable CRM Company and Client data screens.
- Rebuilt the Preferences Batch Processing screen to match the Edit Current Documents screen with a list box of options vs checkboxes allowing for easier additions of new tools. Also

added the ability to select individual Word documents to process from the selected folder instead of processing all documents in the folder.

-  Added a Batch Processing tool that will swap out the main document body section's watermark with either a custom watermarked defined in the MyGraphics folder's Watermark-Body.docx file or if that file doesn't exist from the stock design theme's Watermark-Body.docx file found in the Graphics/PNG_Graphics folder. This tool can be used to change the background design after a document has been changed or fix a problem that occurs on some installations of Word where the background watermark disappears during assembly.
-  Added a Batch Processing tool that will move any full size shape object in the main document body section to the rear of the ZOrder. This tool can be used to fix the ZOrder that occurs on some installations of Word randomly where Word will move a full size shape object to the front and hides the other elements behind it during assembly.
-  Added a Batch Processing tool to remove any full page shape objects in the document. This can be used to fix an issue with ZOrders out of order by removing unused shape objects.
-  Added a Batch Processing tool to automatically update the Table of Contents object.
-  Added ability to define which QuoteWerks field is used to determine if a quote is loaded. The default is using the "SoldToCompany" field in QuoteWerks.
-  Added links to new videos into related manual chapters.

WHAT'S NEW IN V15.1?

-  Added support for 10 new Proposal Pack design themes (440 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
-  Added an About button to the Wizard home screen which will display more information about what edition and mode the Wizard is running in as well as information about Word and Windows. Buttons are included to check for updates to installed template packs and buttons for instructions on how to unlock features when not running in full feature modes.
-  Updated the VBA code signing certificate on the Wizard document and the EXE installers till 2023.
-  6 new Quick Start import lists added (636 total).
-  Added button to Manage Batch screen to reset the design theme if reusing projects created previously with a different design theme and the new batch is going to build the documents in a different design theme.
-  If a batch is currently setup then saving document projects will not automatically generate the documents as the project is saved as the assumption is any projects being edited will be generated during the running of the batch.
-  Added feature to the batch processing that allows user to either overwrite duplicate files in the external batch folder or create new copies.

- Added ability to change the design theme assigned to previous batches to recreate the documents in a different design theme when the batch is rerun.
- Added more logging information to the crash log during document assembly.
- Captured Unicode character values out of range to prevent error messages during foreign language translations.
- Added links to new videos into related manual chapters.
- Added to startup tutorial for the Edit Current Document screen.
- Fixed issue when editing batch template from a previously run batch would change the index numbers of any projects created from that template.
- Added new manual chapter [How do I Switch to the 3rd Party Integration Enabled Wizard?](#)

WHAT'S NEW IN V15?

- Added support for 10 new Proposal Pack design themes (430 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- Several structural and database changes to the Wizard were required to complete the batch processing system that required a full version upgrade. Incremental patches are no longer possible to the previous version.









- The document batch processing system has been completed adding the ability to make batch updates to previous batches such as adding new pages to assembled proposals, letters, invoices, checklists, etc. and have them automatically added to all the projects in a previously run batch.
- Generated documents now have the background graphics of the Title Page and Back Page moved out of the header and into the body of the page. This makes it slightly easier to replace them with your own and shows the full color during editing.
- Added new messages when running restricted 10S version of Wizard why 3rd party integrations are disabled and how to ensure the proper Word software is installed to support them.
- The Wizard installer defaults to linking the Desktop shortcut to the version without 3rd Party integrations to ensure users do not get errors when using incompatible editions of Word. The Preferences features have been updated to add compatibility tests which give instructions about what integration options will work and how to resolve incompatibilities.
- Added button to Preferences > Integrations screen to test system compatibility for using 3rd Party integration features.
- Added button to Preferences > Integrations screen to make a new Desktop shortcut link for running the integration enabled versions of the Wizard.
- Added a new Document Processing tab to the Edit screen (Expert Edition only) that allows post processing cleanup and checking of project documents. This moves existing Preferences tools more easily accessible from the Edit screen.

- Added a document processing tool for testing for left over data and instructional tag text added to the Document Processing tab and Preferences batch processing screens.
- Added a document processing tool to remove all body text in a document set to the Proposal Kit Important Body Text style. This is to support the creation of an editor's version of a document that uses instructional text for writers that needs to be removed when the proposal writing is completed.
- Added ability to import a contact from Outlook when creating a new project.
- Added the ability to use the Wizard's built-in Client CRM database as a data source for creating projects for a batch.
- Addition of new Wizard CRM company and client records when a new project is created is skipped if the company name, first name and last name are all blank.
- Added QuoteWerks option to turn off the missing template messages when creating QuoteWerks templates that do not use any stock Proposal Kit cost related pages.
- Added new manual chapter [How do the Edit Screen Document Processing Tools Work?](#)
- Added new manual chapter [How do I Integrate with Outlook?](#)

WHAT'S NEW IN V14.11?

- Added support for 10 new Proposal Pack design themes (420 total) now available from the Edit Styles screen drop down as

new add-on designs. Add-on design themes are purchased separately.

-  5 new Quick Start import lists added (630 total).
-  As a part of the new batch system the ability to batch import contact data from a variety of sources was added to the Batch Projects screen. You can import contact data from Outlook, QuoteWerks, Excel and other file formats such as .txt, .csv and .xml.
-  Added new manual chapter: [How do I Import Contacts for Batching Documents?](#)
-  Template limit per document increased from 10 to 15 in the Novice Edition.
-  Added demo data to the company and client CRM database files to help people see what kinds of information typically go into those fields better. The Remove Demo tool will remove these demo records.
-  Added links to latest how-to videos into matching manual chapters for mail merge and file import tags.
-  Added an Integrations tab to the Preferences screen and moved the 3rd Party and QuoteWerks there. Also added a screen for Outlook configuration settings.
-  Due to versions of Word 2013 and earlier having outdated Outlook reference libraries that can cause compile errors all installs of the Wizard that detect Word 2013 and earlier will default to linking to the restricted 10S mode version of the

Wizard. The 10S mode version has 3rd party integrations such as QuoteWerks and Outlook disabled.

- The clone a project feature was not incrementing the project number when numeric project numbers are being used.
- Added a Batch Import folder to the Proposal Projects folder that contains example batch import files in various formats such as .xml, .xlsx, .csv and .txt.
- Added Preferences option to toggle mail merging into document headers and footers which is defaulted to turned off. This will speed up document creation as by default templates do not include merge tags in document headers and footer shape objects.
- Fixed some popups in the training mode of the Expert Wizard that would prompt to purchase the upgrade instead of prompting to enabling expert mode.

WHAT'S NEW IN V14.10?

- Added support for 10 new Proposal Pack design themes (410 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- 3 new Quick Start import lists added (625 total).
- Added a new batching feature that allows you to select multiple projects and generate the documents for all the selected projects at once.

- Added new manual chapter [How do I Batch Multiple Projects at Once?](#)
- Added support for running the Wizard on a secondary monitor in a dual monitor setup so the Wizard's forms will all open on the same monitor.
- Added an Ultrawide feature to the Edit Style > Table screen. This helps support creating documents that need very wide tables. When turned on the pages in the body section will be oriented in Landscape mode and all tables will be auto-fit to the width of the page. This option is recommended when building editable versions of the Federal Government Grant samples.
- References to Office 365 have been changed to Microsoft 365.
- Fixed an issue with importing complex table content where importing a Word template with some variations of tables with vertically merged cells would cause the cell color setting to fail with an error.
- Added more verbose information to path test and repair feature.
- The Import/Export feature will now create project folders for imported projects and clear the locked for editing flag if set in an imported project that has no files. This prevents the file test and repair tool from flagging imported projects that did not yet have folders or files created.









WHAT'S NEW IN V14.9?

- Added support for 10 new Proposal Pack design themes (400 total) now available from the Edit Styles screen drop down as

new add-on designs. Add-on design themes are purchased separately.

- 17 new Quick Start import lists added (622 total). These business situation lists have been added in response to the companies recently requesting help for various covid-19 related situations they are now facing.
- Word 2007 is no longer supported. References to Word 2007 have been removed. While Word 2007 may still work in most cases we do not test the Wizard on it anymore and do not guarantee it will operate. Microsoft has ended all standard and extended support for Word 2007. If you experience any issues running the Wizard in this obsolete version of Word, you should upgrade to the current version of Office.
- Added links to new videos in related chapters.
- Added new manual chapter: [How do I Add Invoice Linked to Existing Cost or Estimate?](#)
- Added more verbose information to some Preferences setting error messages to help diagnose mistakes in customizing the settings more easily.
- Added reminder popup screen for Proposal Kit Professional users who have not selected or installed the 5th design theme of their choice.
- Fixed an issue when adding additional templates to an existing project document and the graphic page header to editable text with logo page header option is turned on. This could result in the insertion point being off.

WHAT'S NEW IN V14.8?

-  Added support for 10 new Proposal Pack design themes (390 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
-  Added hundreds of new currency codes and language formats to the Expert Edition currency translation feature.
-  Added 5 new business situations to the Quick Start list (605 total).
-  The Wizard can now apply currency code translations to the Excel spreadsheets. When using the Excel Dynamic Spreadsheet linking feature the currency code translations in the spreadsheets will be applied to the Word document. For example, all currency cells in Excel spreadsheets can be changed from USD \$ to the Euro symbol €, Pounds £, etc.
-  Added a button to edit the custom delimiter file in the Multiple Choice Database setup screen.
-  Fixed an issue with the stock line delimiter not working after a recent upgrade to Word in the Multiple Choice Database feature.
-  Added extra error checking and ease of use feedback to the Multiple Choice Database screens.
-  Wizard installers will now detect if the 64-bit edition of Office is installed and will point the Wizard desktop shortcut to the 64-bit version of the Wizard.


- ❏ Wizard installers will not prompt to reboot the computer after an install or uninstall which in the past could occasionally be asked.
- ❏ The Proposal Pack product list has split out the sports related design themes into a new “Sports” category.
- ❏ Added a checkbox option on the first tutorial to turn off all other tutorials. This is helpful for users reinstalling or who are familiar with the Wizard already.
- ❏ Reduced lengths of strings used in Dynamic Excel Spreadsheet linking to potentially fix an occasional string to long error when expanding long ranges of tags.
- ❏ Added links to videos to the related Wizard manual chapters.
- ❏ Added new manual chapter [How do I Create an Editable Copy of one of the Samples?](#)
- ❏ Added new manual chapter [How do I Add Supporting Documents to my Project?](#)
- ❏ Added new manual chapter [How to Edit Page Headers that are Graphics?](#)

WHAT’S NEW IN V14.7?





- ❏ Added support for 10 new Proposal Pack design themes (380 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.

- Added a new feature to the Expert Edition to turn on exporting of Bookmarks or Headers as Bookmarks when saving Word documents as PDF files.
- Added additional checks on Wizard startup to test that the Wizard has Read/Write access to its database files and registry key. A more verbose message will be displayed giving more clear instructions on how to resolve access rights issues.
- Added extra error checking to catch customization mistakes.
- Fixed an issue with international versions of Word that change the “Heading #” Style names so that the international versions can be added to the Table of Contents object.
- Fixed an issue with the Orange and Grey predefined color scheme not having the correct color values.
- Fixed an issue with graphics not being scaled down to fit in certain locations due to Word applying its own downscaling in some cases first. Typically, when using the “Business Plan” or other longer Title Page custom titles in design themes that use larger size fonts. The Wizard will now scale all inserted graphics to 100% first, then apply custom scaling.
- Fixed an issue with importing custom Title Page and Back Page graphics that could cause ZOrder error messages in some design themes that only use a single background shape object.
- Fixed an issue when importing custom Proposal graphics into design themes that do not use the Description graphic when a custom Description graphic also exists in the MyGraphics folder

which would cause the Description graphic to be inserted in place of the Proposal graphic.

-  The Modify and Repair options in the Windows installers have been removed. These are unsupported options that are displayed by the installer when trying to run the installer more than once and can cause database paths to be blanked out resulting in errors when running the Wizard.

WHAT'S NEW IN V14.6?

-  Added 3 more business situations to the Quick Start import lists (600 total).
-  Added support for 10 new Proposal Pack design themes (370 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
-  Added a new feature for both Novice and Expert users that will convert the graphic designed chapter headers from pictures to text while still retaining the graphic designed themes chapter header logo. This allows for easier customizing of the templates when chapter headers need to be retitled without requiring the Professional upgrade. The Proposal Packs and Proposal Kit Professional have also been updated to support this feature.
-  Partial QuoteWerks support has been added to the 64-bit edition of Word. The Wizard can now create QuoteWerks layout files in 64-bit Word. Full functionality with communication with the QuoteWerks API still requires using the standard 32-bit Word.

- Increased the widths of unit price and total price columns in QuoteWerks layout files to accommodate longer dollar amounts without having to manually adjust the column widths or font sizes.
- Added orange arrows designating that settings should be saved in the Top 40 configuration screen when default and favorites boxes are changed.
- Fixed an issue where the display name of an externally added contract when multiple contracts are added to a project would show the wrong name in the edit document screen.
- Fixed an issue with the Top 40 customization screen where the default checkbox would turn off when a new template was added to the list.

WHAT'S NEW IN V14.5?

- Added support for 10 new Proposal Pack design themes (360 total) now available from the Edit Styles screen drop down as new add-on designs. Add-on design themes are purchased separately.
- Auto-populating Presets are now loaded when a project is created instead of when the Pick Documents button is clicked. This eliminates one extra step when creating projects using presets.
- Multiple Choice databases that are setup with specific templates that must have data selected for them will also be autoloading now when the project is created instead of when the Pick Documents button is clicked. This eliminates one extra step

when creating projects using the Multiple Choice database feature.

- Added 2 more business situations to the Quick Start import lists (597 total).
- Updated the Edit Screen popup tutorial to note buttons added in the last update for adding Estimate Pack and Project Management Pack documents from the Edit Screen.
- Add a new example in the MyGraphics folder illustrating how to create complex custom watermark backgrounds to be imported into the Title Page, body pages and Back Page. The new folder is titled Example-WatermarksUsingDocs.
- Using custom watermark documents such as Watermark-Title.docx, Watermark-Body.docx and Watermark-BackPage.docx now supports rotation of shape objects.
- Fixed an issue where the Wizard was not importing custom Watermark-Title.png/.jpg and Watermark-BackPage.png/.jpg graphics into styles that did not already have a background picture in the Title Page and Back Page.
- Fixed issue in Edit Document screen where Spreadsheet tab was not always turning on when Estimate Pack or Project Management Pack spreadsheets added to a project from the edit screen.
- Fixed an issue where the custom Back Page logo graphic was not being imported when a custom Watermark-BackPage.docx file was also imported at the same time.

- Fixed an issue where the background from the body section could replicate into the last back page section when using a custom Watermark-BackPage.docx file to import a custom back page design.

WHAT'S NEW IN V14.4?

- Added 5 more business situations to the Quick Start import lists (595 total).
- Added a new feature that allows you to swap out any photographs used in photo designed Proposal Packs by putting a replacement photo in the same dimensions and file name into the MyGraphics folder (Expert Edition only). This only works with the upgraded V18.1 versions of the Proposal Packs with redesigned Title Page and Back Page templates that split out every photograph into individual replaceable objects. Also added a matching help video.
- Added the ability to remove the <<Domain>> tag from document footers by setting the Alternate Footer Text field in the Preferences screen to the Word BLANK.
- The current project's <<CurrentDate>> field is updated every time documents are added to a project to ensure that the tag is inserted with the current date vs the date the project was first created. Primarily used for when adding extra documents to project such as invoices, contracts, Estimate Pack and Project Management Pack templates.
- The Wizard is now integrated with the Estimate Pack and Project Management Pack template collections which are part of the Proposal Kit Professional bundle. You can now add templates

from these libraries directly to your projects in the Wizard. Templates will also have the design theme customizations and data merge tags applied to them.

- When applying a color scheme to a document the Wizard will now set the fill color of text objects (in addition to Shapes) that have COLOR[1-6] set as the Alternate Text.
- When applying a color scheme to a document any paragraph borders that are visible with a black border will have their color set to the same color as table borders.
- Updated the URL conversion formatting to skip applying URL formatting to Table of Contents paragraphs.
- Updated instructions in the example CustomFooter.docx files that custom page numbers must be put inside text objects.
- The demo Title Page templates included in the Wizard have been updated to remove legacy shape objects.
- The demo Cost Summary templates have been updated to match the Cost Summary table changes in the retail Proposal Packs.
- Added a new example into the MyGraphics folder “Example-MultiPictureDesignReplacement” showing how to do a complete design change using custom photographs to replace those that come with photo designed Proposal Packs.
- Updated the Preferences tools for applying Proposal Kit Word Styles and page settings to external documents to also add

custom bullet points to the Bullet font type and the default 1.25” left and right page margin sizes used by Proposal Kit templates.

- When QuoteWerks remapping was turned off some buttons in the Project screen were not turning back on until the Wizard was restarted.
- When QuoteWerks remapping is turned on and the QuoteWerks 3rd-Party features is enabled (for use with a different workflow) the Wizard won't ask to import a quote.
- When QuoteWerks remapping is turned on the Wizard will move all header objects in the Title Page and Back Page to the background of the body of the page using the ZOrder and rebuilding the shape objects and reinserting the graphics one at a time as opposed the previous version that did a mass copy and paste operation. This prevents Word from causing the ZOrder to be out of order across the objects which can happen at times when moving all objects with copy and paste.
- Added new manual chapter [How do I Integrate with Estimate Pack?](#)
- Added new manual chapter [How do I Integrate with Project Management Pack?](#)

WHAT'S NEW IN V14.3?

- Added 5 more business situations to the Quick Start import lists (590 total).
- This update is primarily focused on expanded QuoteWerks integration features with the goal of being able to create custom

QuoteWerks layout files ready to use as-is in QuoteWerks without any manual reformatting or editing that was previously required. The process has been streamlined to require the fewest number of steps from turning on QuoteWerks remapping features to getting your document into the QuoteWerks system ready to use.

- A new button was added to the Preferences > QuoteWerks tab that with a single click will reconfigure all the Wizard options required to start creating ready-to-use QuoteWerks layout files. Previously several screens had to have specific options set separately. A single click of the same button will restore the Wizard to generating Proposal Kit format documents.
- Rewrote the [5 Minute Quick Start QuoteWerks](#) chapter and added a matching video.
- If QuoteWerks remapping is turned on the Wizard will put you directly into the QuoteWerks tab of the Edit Current Project Document screen after a document is generated.
- QuoteWerks remapping will also now replace the tables in all the cost related Proposal Pack chapters with a QuoteWerks compatible table complete with QuoteWerks tags that matches the design theme of the Proposal Pack in use. Chapters are those such as the Cost Summary, Estimate, Quote, Invoice, Work Order, and other variations of the quote pages.
- The Wizard can communicate with your running instance of QuoteWerks and can build either a single QuoteWerks compatible cost table layout for all line items or multiple tables one per QuoteWerks Item Type each with its own subtotal.

- The Wizard can be configured to build QuoteWerks layouts with QuoteWerks either running or not even installed on the same computer. You can manually enter your QuoteWerks Item Types in the Wizard's Preferences or have the Wizard load them from a running instance of QuoteWerks.
- The Wizard's default table layouts for use with QuoteWerks can be edited from the Preferences > QuoteWerks screen.
- Improved ability for Wizard to connect to QuoteWerks without having to be restarted. All QuoteWerks disconnected graphics can be clicked to initiate a reconnect and QuoteWerks can be reconnected from the Preferences > QuoteWerks tab.
- 9 new QuoteWerks tags added to the remapping feature.
- Spots for 20 additional remappable tags added to the remapping screen.
- Open Documents button added to the QuoteWerks tab in the Edit Current Project Document screen so all editing and saving of the QuoteWerks layout files can be done from one screen.
- Non-mapped Proposal Kit tags will now be left intact instead of being replaced with blanks when remapping to QuoteWerks is enabled.
- QuoteWerks database settings have been moved from the Options.ini file to the new QuoteWerks.ini file.
- Wizard will reformat documents to make them more QuoteWerks compatible. Such reformatting includes moving shape objects and pictures from the headers into the body of

the Title Page and Back Page, making the body watermark backgrounds less complex in some Proposal Pack design themes and changing the alignment of all shape and picture objects. QuoteWerks does its own document processing in ways that do not support Word features that Proposal Kit supports that can cause formatting problems.

- Added a new Bullets tab to the Edit Style screen with a new feature to give more control over bullet points. A dropdown list had been added that allows you to cause the Wizard to replace any stock bullet points (graphic bullets or symbol bullets) with an alternate standard bullet point with a custom color. This feature helps when creating documents for use in other platforms that may not support graphic bullet points.
- Added a 5.5x8.5 Statement size to the paper size settings.
- The Document Project's Delete All Files button will now remove extra documents added from the new buttons to add letters and contracts in the Edit Current Project Document screen.
- Added a button to the Add Contract tab to remove externally added contracts which also unchecks the Contract and Terms template.
- If the Contract and Templates template is removed from a project any externally added contract tied to that template will now be removed as well.
- Added the ability to load Quick Start lists and change out the general purpose Cover Letter for the grant Cover Sheet.

WHAT'S NEW IN V14.2?

- Added 5 more business situations to the Quick Start import lists (585 total).
- Added the ability for the Wizard to automatically import custom page header graphics when using graphic design themed Proposal Packs. The Wizard can now import custom made graphic page headers and substitute them in the correct page and update the Table of Contents text to match. All that is required is creating the new chapter header graphic and saving it into the MyGraphics folder with a specific file name.
- Added a new feature to the Font Styles configuration for making mass changes to the font types across all the custom Word Styles. This is a faster way to change all the various Word Styles that are associated with header styles or body text styles at once. For example, all the Title Page header, chapter header, body page sub header Word Style that are in Arial can be changed to another font type in one operation.
- Improved the ability to turn email addresses and web site domains into clickable hyperlinks in all areas of the document including headers, footers, text blocks and shape objects. All mail merge tags for email addresses and web site domains are turned into clickable links at the time they are merged into the document and if the http prefix is missing it will be added to ensure Word can turn it into a clickable link. Word Styles will also be applied using the Proposal Kit URL predefined style and if that is not in use it will default to the built-in Hyperlink style.
- Added custom color settings that can override the default 6-color palette colors scheme for bullet point colors and page border colors. These colors can be set in the Edit Styles screen.






- ❏ Wizard will switch from training mode to Expert mode upon entering the Edit Current Document screen instead of after the first document within the edit screen is opened.
- ❏ When importing content from the prewritten samples and spreadsheet linking is not in use then any unmapped spreadsheet linking tags such as <<R#C#>> will be replaced with the text “<< Insert Info >>”.
- ❏ Changed the default popup messages when only a Contract Pack is installed to tailor messages better and not add confusing Proposal Pack template information. The initial training mode project will also only add a Contract and Terms chapter when only a Contract Pack is installed instead of a default multi-page proposal set of templates.
- ❏ The Font Styles screen will default to the current Proposal Pack’s color settings when editing any of the default Proposal Kit Word styles if that Word Style has not already had its settings changed. This will show the colors you see applied in the order that they would be applied to the documents during document assembly.
- ❏ Added an option to the Font Styles screen to reset all the custom font styles to default settings at once to speed up the process of reversing mass changes or resetting many custom changes across different Word Styles.
- ❏ Stock Contract Pack templates can now be edited from the Pick Documents screen in the Novice Edition of the Wizard.

- Fixed an issue with the View Manual link not having a valid path to the Documentation.pdf right after having searched for and installing new a new template pack on startup.
- Added a fix for Word 2007 to prevent a known bug in Word 2007 from generating out of memory errors when adding Hyperlinks.







WHAT'S NEW IN V14.1?

- Added 10 more business situations to the Quick Start import lists (580 total).
- Added an Add Invoice button to the Edit Current Document screen (Expert Edition only). This allows you to easily add an invoice to an existing project. The invoice will be created as a separate document from the master project document. The Invoice Calculator Excel spreadsheet will also be copied unless a cost related page already exists such as a Cost Summary, Estimate, etc. In this case the Invoice will be matched to the existing cost page. If the spreadsheet linking is turned on the Invoice page will be linked to the cells in the existing cost spreadsheet, otherwise they will be linked to the Invoice Calculator spreadsheet.
- Added an Add Letter or Checklist button to the Edit Current Document screen (Expert Edition only). This allows you to easily add a letter or development checklist document to an existing project such as a customer follow-up letter, etc.
- Added an Add Legal Contract button to the Edit Current Document screen (Expert Edition only). This allows you to easily add a template from the Proposal Kit Professional's Contract

Pack library if installed. This feature also allows adding multiple Contract Pack templates to a single project whereas the Pick Document screen only supports adding one per project.

-  The Invoice template settings have been changed to create the Invoice as a document separate from the main project document instead of being inserted into it to support the new Edit screen button for adding an Invoice to an existing project.
-  The Create Reusable Template button on the Edit screen has been expanded to also allow selecting any external Word documents in the project for use as reusable templates such as an invoice, letters, checklists or contracts. If the selected Word document also has a matching Excel spreadsheet, that spreadsheet will also be added as a reusable template.
-  Added a Refresh button on the Edit screen for use when the user opens the projects file folder in the operating system and makes changes to the documents such as manually deleting files. Use the Refresh button to reload the interface lists of files based on the new contents of the file folder.
-  The Create Revision button on the Edit screen has been expanded to also create backup files for any Word documents on the Edit screen. Only the master project document will have a new backup file created with an incremented file name while all other Word documents will have a single copy saved to the project Backup folder.
-  An Expert Edition feature has been added to create additional Word Section breaks at the end of the assembled document. This allows for inserting additional content such as supplied forms and tables that requires different page margins and/or

different headers and footers from the rest of the document while still maintaining the overall structure of the Proposal Kit layout and the Back Page. Up to 100 additional pages with independent Sections can be added.

-  The Auto Open documents in the Edit screen has been changed to be turned off by default due to additional features that can cause many more documents to be available to be auto-selected than in the past. This option can be turned on in the Preferences.
-  If the Auto Open documents in the Edit screen is turned off, then the Word documents will also not be auto-selected in the file lists anymore.
-  The master project document when backed up by the Wizard will now be backed up into the project's "Backup" subfolder instead of the main project folder.
-  A ReadMe.pdf instruction manual has been added to the "Alternates" folder to help explain what the .docx files in that folder are used for and to direct users to read the appropriate manual chapters for additional information.
-  Two new screens have been added to the Edit screen tutorial to cover the new buttons added in this update.
-  If a file is deleted from the project using the Edit screen's Delete button and that file is an external invoice, letter, checklist or contract then the projects selected list of files will have that template removed so it does not get accidentally rebuilt into the project unless the user explicitly adds it back.

- A Delete button was added to the Spreadsheets tab of the Edit screen for deleting any project spreadsheets.
- In the Team Editing tab of the Edit screen when a document is recombined from the individual chapters and when projects are generated using user customized content the Wizard will check for added Section Breaks and warn that it may cause the template to not be formatted correctly.
- When the Edit screen detects both Word and PDF files and user selects PDF files to be opened it won't open the Excel files as well. Excel files are only opened if the Word files are opened.
- Added a Search Contracts button to the screen that allows the user to select a Contract Pack template in various tabs of the Pick Documents screen.
- If a custom Table of Contents object has been added to the stock TableContents.docx file by the user, the Wizard will use it instead of inserting its own stock TOC object. The Wizard will update the user added TOC object with the appropriate TC Field and Proposal Kit Page Header tags to ensure all the page headers are added properly.
- When the Add Templates screen's Contract and Terms checkbox is checked when the Proposal Kit Professional or a Contract Pack is installed user will be prompted to select a specific contract template.
- Added an Expert Edition configuration option to have the Wizard automatically remove the instructional text in red font type from the cost and invoice pages.







- Expanded the feature that replaces the <<R#C#>> tags in cost and invoice templates with plain text when the dynamic Excel spreadsheet linking is turned off to work with every alternate version of table layouts and Excel sheet. The layout of the Invoice will also be automatically matched to the layout of any cost page already added to the project.
- Fixed an issue when <<R#C#>> tags are replaced with OLE links to the Excel spreadsheets that the paragraph style (left, right, center) was not being retained. Now OLE links will be set to the same style as the text it replaces.
- Fixed an issue where the master project document was backed up when external files were added to the project that did not affect the master project document. The master project document is only auto-backed up when the Wizard makes changes to it such as adding new pages.
- Fixed an issue with the customizing of the file list database when editing the settings of existing stock templates.

WHAT'S NEW IN V14?







- All Proposal Kit template products and the Proposal Pack Wizard software have been upgraded to work only with .docx and .xlsx files. All Word and Excel documents included in all products have been converted to the current Word and Excel file formats. All use of and references to legacy file formats have been removed. This upgrade effectively removes legacy support for Word 2003 across all Proposal Kit products.

This allows you to now customize all the stock templates with

features available in all versions of Word and import content from any Word document.








-  A reusable Client and Company CRM database has been added. This allows you to select from a list of records for your company and client screens to be populated from. Create lists of employees who will be sending out documents and lists of clients or just base information for locations such as cities you provide services in.
-  Added a new manual chapter [How do I Use the Client and Company CRM Database?](#)
-  The configuration features for setting up a networking or alternate location for databases and project files will now automatically copy your database files and update all the links in the associated files such as absolute links between copied Word documents and Excel spreadsheets.
-  Added a fast and streamlined process to create reusable templates right from the Edit Document screen. This process will also automatically put the reusable templates on a Custom Top 40 list up and make that Custom Top 40 list the default you see in the Pick Documents screen.
-  The Wizard can detect when it thinks you might be creating a document for use as a reusable template (when the Mail Merge and Dynamic XLS Linking boxes are unchecked) and will ask at that point it is created if you want to add it to the database and will walk you through the process.
-  A new Category H (Section 12) has been added to the database of templates for holding all user-created custom fully assembled

templates. This makes it easier to locate your custom templates in the various Wizard screens for editing and adding to your future projects.


-  The ability to use already linked Word documents and Excel spreadsheets has been added to the reusable template feature. The Wizard will now update the links between files as they are copied from the database to your project folder.
-  Added 10 more business situations to the Quick Start import lists (570 total).
-  You can now set any of the many Top 40 lists, including the custom lists, as the default Top 40 that is shown first on the Pick Documents screen.
-  The Preferences tool for adding custom templates to the database will also allow you to automatically add the new templates to a Custom Top 40 list. The Custom Top 40 list will also be set as the default in the Pick Document screen making it easier to find and add your custom templates to future projects.
-  Changed the order in which Word and Excel files are opened together. Excel files for your project are opened first followed by the Word document. This prevents the spreadsheets from being opened in read-only mode by Word when they are directly linked with OLE links. This affects the Edit Style, Edit Project and Pick Documents screens.
-  The Clone Project feature is updated so it can also work with linked Word documents and Excel spreadsheets. The cloning process will update the links in the Word document as the files are copied to a new project folder.

- QuoteWerks features will default to saving layouts in .docx format. Other file formats can be used as well such as .doc and .rtf.
- The QuoteWerks tab in the Preferences screen is now visible if QuoteWerks is not installed. This allows for creating QuoteWerks layout files on a remote computer.
- Added a new manual chapter [5 Minute Quick Start QuoteWerks](#)
- All security signatures on the Wizard and the installer programs have been upgraded with SH2 SHA-256 certificates.
- All external web site links are converted from http to https.
- The Time Line template is now searchable using the term Timeline.
- Added 5 new slots in the Third Party Preferences screen to accommodate more add-on packages and external integrations.
- All reports generated by the Wizard are now in Word format instead of plain text files.
- The Wizard will not load old versions of template packages that use legacy file formats into its list of available templates. With the upgrade to .docx/.xlsx file formats only template products with these new file formats will be recognized by the Wizard.
- The ability to use relative links in a Word document to a cell in an Excel spreadsheet has been removed due to restrictions in

Word. All paths in a Word document must now be absolute paths.

-  The Import/Export tool now uses an .xml file format and opens it with Excel.
-  The new client and company CRM database has been added to the Import/Export tool. This feature can also export an older version Project database into the new client CRM database.
-  Fixed an issue with some design themes not adding the revision number to the Title Page when creating a revision document.
-  Fixed an issue with Word 2007 setting position of some graphics that would generate an error message.
-  The new client and company CRM database has been added to the database testing tool.
-  Sped up the process of canceling the generating of long documents.
-  Created a workaround for a Word 2007-2010 bug that can, in some cases, cause generated documents to lose the background Title Page and/or Back Page graphics.

WHAT'S NEW IN V13.2?

-  A new field for visibility of Word font Styles has been added to the font configuration Preferences screen. This field helps control displaying built-in font Styles so that Styles tied to Table of Contents sub headers are easily visible to the user.

- The number of Word Styles available in the Wizard Preferences has been increased from 40 to 50.
- The built-in Word styles Heading 1 to Heading 9 have been added to the Wizard's database to support easier creation of sub headers in the Table of Contents with custom settings that can be controlled through the Wizard software.
- Added a new manual chapter [How do I Add TOC Sub Headers?](#)
- The Wizard now automatically sets up generated documents with support for Table of Contents sub headers to be added by the user. To add sub headers the Heading 1 to Heading 5 will be automatically available and visible in the document Styles window. By setting any text you want as a sub header in the Table of Contents you can set the text to Heading 1 to Heading 9 then update the Table of Contents object and the sub headers will be added.
- The Wizard is now integrated with the help videos. Help video links are integrated into the Wizard home screen and documentation.
- Added 20 more business situations to the Quick Start import lists (560 total).
- Removed the Tab #15 from the RFP Response situation list and added it into the correct Page Dividers 1 of 2 situation list.
- The Wizard will display a warning if it encounters read-only files or folders. This would be a more common issue when setting up a network or cloud installation. Any Proposal Kit template

products must be installed with read/write access in order for the Wizard to find and add them into the database.

WHAT'S NEW IN V13.1?

- Support added for installing and running Proposal Pack Wizard on Windows in S Mode.

Windows in S Mode adds a layer of extra security that requires the Wizard and our template products (Proposal Packs, Contract Packs, Title Page Packs and Professional bundle) to be installed using the .ZIP files. Some minor updates have been made to all the template products .ZIP files to add setup files used by the Wizard that were previously only included in the .EXE installers. Because Windows in S Mode does not allow .EXE files downloaded from the internet or copied directly to the computer to be run all Proposal Kit products must be installed using the .ZIP files on Windows in S Mode PCs.

The functionality of the Wizard's installer .EXE program has been added to the Wizard itself and a .ZIP file installer for the Wizard has been added to allow downloading onto a Windows in S Mode PC.

The Wizard can now set itself up and configure its database and registry without having the .EXE installer perform that task.

- Added manual chapter [How do I Install in Windows S Mode?](#)
- The addition of the Wizard setup ability for Windows in S Mode has also been expanded to allow the Wizard to repair any broken paths found in the Wizard registry key and the Wizard database files. This allows you to now be able to drag and drop

your entire Proposal Pack Wizard and Proposal Kit product install folders from one computer to another or to move the install folders to a new location on your PC or to a network drive. The Wizard will check for any changed or broken paths every time it runs and will attempt to repair them based on the new location. This allows for seamlessly moving your entire installation without having to reinstall and reconfigure everything when moving to a new computer or a network setup.

- Added manual chapter [How do I Move to a New Computer?](#)
- The registered to name is first pulled from what the user enters in the product installer screen. If blank, then from what the user enters during the Wizard setup.
- Added 4 more business situations to the Quick Start import lists (540 total).
- Added more custom spreadsheet linking samples.
- The Wizard will automatically turn off the display of non-printing characters when the Wizard first runs and when it opens any of its documents. This will help prevent formatting issues that might occur during automated processing.
- Removed some old Word 2003 references.
- Removed message that could popup sometimes when trying to automatically set table vertical border colors on tables with mismatched rows and columns.
- Fixed the Orange Grey color values in the custom color scheme.

- Improved the instructions on how to set Custom X/Y logo scaling factors in the Edit Style Graphics tab.
- The ability to edit stock Title Page templates has been added to the Novice Edition of the Wizard. This was previously an Expert Edition feature.
- Added more error checking when opening PDF and Word documents in case the user's system is not configured properly with default applications.
- Added information to automated error reporting to tell when users are using 32-bit or 64-bit Word.
- Fixed a potential error that could occur with a list index out of range in the Preferences when the user custom configured one specific list and removed default items.

WHAT'S NEW IN V13?

- The major new feature in this version is the ability to dynamically link cells in Excel spreadsheets to your Word documents. In the past all the financial and schedule related pages (cost summaries, work orders, budgets, ROI, timelines, installation schedules, etc.) were static Word tables that had to be manually typed in.

This is an Expert Edition feature.

This feature gives you automated financial calculations and scheduling that used to require costly 3rd-party quoting and project management software. We leverage the display features of Word and the calculation features of Excel to do the hard

work for you.


Now all of the templates with matching spreadsheets will have the important data dynamically linked directly to the Excel spreadsheets. When you edit your calculations in the spreadsheet and save your changes your Word document can be automatically updated. This allows you to make changes to your financial data without having to keep manually retyping changes into the Word document. This also reduces the changes of errors occurring by mistyping data or forgetting to make updates manually.

For example, if you use the Cost Summary template to display a nicely formatted table in your Word document where you just want to show the major line items and totals you customize the Word template for the visual look and data you want the client to see. The Cost Summary page has a matching Cost Summary Calculator Excel spreadsheet linked to it where you type in your line items, costs, quantities, taxes and any number of other information to arrive at your final totals. As you make changes to the spreadsheet the Word document automatically updates whenever you open it.

This system is also completely customizable. You can customize our stock spreadsheets, Word tables and even make your own spreadsheets and link them to any pages. You can even embed links in any parts of the document to any spreadsheet cells. For example, if you want your total funding request amount to be displayed in the Cover Letter you can do so. Another example would be if you use an Installation Schedule you can link the starting date and ending date to your Cover Letter or anywhere else.

Most of the hundreds of samples have been reworked to include updated Excel spreadsheets using the new Excel dynamic linking feature that allow for all of the samples to be easily imported into your project.

- ❏ All of the original Excel spreadsheets in all of the Proposal Kit products have been expanded to accommodate many more fields and additional calculations to work with the new Excel dynamic linking features.
- ❏ The Edit Style > Manage Templates and the Pick Documents > Add Templates and Search by Name screens have checkboxes to let you filter by only those templates that have associated Excel spreadsheets to make it easier to find and add calculators to your project.
- ❏ The Wizard now allows multiple spreadsheets associated with a template. Up to 9 additional spreadsheets can be associated by adding a number 2 to 9 to the end of the spreadsheet file name. This is mainly to support preassembled multi-page templates that have 2 or more linked spreadsheets added to the database as custom selectable templates.
- ❏ Added a new manual chapter: [What Types of Cost Calculation Features are Available?](#)
- ❏ Added a new manual chapter: [What Happens if Dynamic Spreadsheet Linking is Disabled?](#)
- ❏ Added a new manual chapter: [How do I Add Dynamically Linked Spreadsheet Calculations?](#)

 With the new Proposal Pack V17 and Proposal Kit Professional V20 all 2000+ pages of Acrobat PDF sample content is now also provided in editable Word formats. We have painstakingly hand edited thousands of pages of our samples to make them completely editable and loadable into your project.

In the past all our samples were uneditable Acrobat PDFs. Now with just a click of a button you can import an entire sample as an editable Word document, and have it converted into the visual design theme you purchased. This means a sample that was originally created in a different design theme than the one you purchased will be imported into your purchased design theme seamlessly.

Plus we also have replaced the names, addresses and other data with our mail merge tags so that yours and your client's data will be merged into the sample content making it easier to reuse any of our prewritten samples.

Most of the samples with financial and schedule calculations (cost summaries, work orders, budgets, ROI, timelines, installation schedules, etc.) have filled in Excel spreadsheets dynamically linked to the Word document.

The end result is that instead of having a static uneditable PDF sample to just look at to get some writing ideas from and copying and pasting some of its text you can now with a click of a button have the entire sample merged into your document with your data and linked Excel spreadsheets in your design theme ready to edit.

All you have to do is select a sample in the Pick Documents screen then click the Import Content from Selected Sample

button, save your project and the sample content will be automatically imported replacing the stock fill-in-the-blank content.

- Any Quick Start import lists that were based on a completed sample can also have the content from the sample imported into the project just like when importing the sample content from the View Samples page.
- The Quick Start tab now lets you only show Quick Start layouts that have importable sample content.
- The number of licensed computers/users per copy purchased has been increased from 3 to 5. You can now install the Wizard on up to 5 computers for use by up to 5 individuals within your company per license purchased.
- The drop down lists of hundreds of samples are now sorted in alphabetical order.
- The Document Project drop down lists can be optionally sorted in alphabetical order. There is now a preferences option to sort the drop down project lists alphabetically.
- The Wizard will now detect when it stops processing a document and will ask if you want to automatically restart processing where you left off when the Wizard is restarted.
- The Wizard now has a crash logging feature to help diagnose if it terminates unexpectedly while processing a document.

- More detail has been added to the document processing progress bars so you know what stage it is in while processing long and complex documents better.
- Color scheme application to Word tables is now done by row when possible instead of by cell due to how slow Word is when programmatically modifying a table cell by cell. This dramatically speeds up the document processing when applying custom color schemes. If a table has cells of different colors in the same row it reverts to updating cell by cell.
- Sped up the document processing by determining when applying custom color schemes to Word tables was not necessary and skipping that process when possible. Word can be very slow when applying colors to Word table cells and table borders.
- The old “Process Complete” popup message box has been replaced with a full screen that includes a breakdown of how long it took to process the document including timings for all of the major activities. This can assist in determining how best to customize the system to speed up processing based on how the user is intending to use the system.
- The installer programs now check to see if Excel is installed and tell the user that it is required for using the new Excel dynamic linking features.
- Mail merging was not working with text that had mail merge tags inside of a AutoShape object (i.e. the pull quote text blocks in some templates). Now tags are replaced with data inside AutoShape objects.

- The error reporting feature now includes the count of number of documents that were processed to help diagnose processing errors.
- When importing the list of chapters from a sample the Wizard will automatically always add the Back Page as many samples were created before the Back Page was added to the system.
- Added a button on the document reordering screen to reset the default sort order and turn off the custom ordering of the pages. This is useful if you want to revert back to the stock ordering of pages.
- When changing the background color in the styles Color screen the Use Shape Watermark is checked automatically to reduce the steps needed to add background page colors and to make the feature more intuitive to use.
- Added a Preferences configuration screen to control how the new Excel dynamic linking features work.
- Changed the 'Add Templates Based on Selected Sample' button to 'Import Content from Selected Sample' now that this operation also imports the actual text of the sample and Excel spreadsheets used by the sample into your project.
- Replaced the digital security certificate with a new 3 year VeriSign security certificate.
- Added 21 more business situations to the Quick Start import lists (536 total).

- Added 35 more demo sample proposals (200 total). If you install a Proposal Pack or Professional bundle template package you will also get the complete versions of all 35 new samples.
- The Wizard interface screens have all been updated with new screenshots and typography to match the new Proposal Kit web site and product design.
- Added the registered users name or company to the home screen. This can be changed in the Preferences.
- Added keywords as searchable terms in the Search by Name tab of the Pick Documents screen and imported keywords for many templates. For example, a search on ROI will now find a match for the template Return on Investment as ROI is a searchable keyword.
- Added table formatting fields in the Edit Styles > Tables screen to set the top, bottom, left, right and spacing between cells. The fields are all set to DEFAULT which will cause the Wizard to skip any special processing. If you set these fields to within the allowable ranges the Wizard will apply the custom margins to all tables in the document.
- Added an option in the Edit Styles > Tables screen that allows for turning off all table styling for borders and colors. If unchecked the Wizard will hide all of the table borders and set all table cell colors to the default background color. This feature will also reverse the colors of the white table text as turning off table colors can cause white text to not be visible by setting the color of the Proposal Kit Table Text 1 and Proposal Kit Table Text 2 styles to the color of the Proposal Kit Sub Header style.

- The function that calculated unique identifiers (GUIDs) for the creation of custom import lists has been updated. The previous Windows API function now generates Permission Denied errors due to a recent Windows security update and Microsoft has changed the recommended method of generating GUIDs.
- When cloning a project and copying the project documents the Word documents will be updated to point to the new cloned folder if any dynamic OLE field links are in the documents.
- The Preset feature that used to be an Expert Edition feature is now also available in the Novice Edition.
- Increased some limits in the Wizard to accommodate the additional samples, spreadsheets and upcoming design themes.
- The list of spreadsheets in the Edit Styles > Edit Spreadsheets tab is now broken into categories of spreadsheets which are also now sorted alphabetically. Spreadsheets in the folder that are not in the Wizard's databases will also now be added to the drop down list.
- Fixed a decryption error message in the 64-bit Word version that would occur when saving the preferences. No actual problem was occurring.
- A recent Microsoft update to Word was causing some crashes on some computers during mail merging data into text block objects in the Title Page. A fix has been made to work around this bug Microsoft recently introduced.
- The Wizard now checks to see if it's document is in Print View mode and if not it switches itself to Print View on startup. If the

user had modified the Wizard's document to something like Full Read Mode it could cause Visual Basic error messages on startup on some versions of Word.

- Microsoft recently made changes in updates to Office 365 which cause hidden fields to be turned on by default which can cause the Wizard during assembly of documents to delete some graphic page headers. The Wizard now hides the hidden characters from view as it is processing files.
- Fixed a bug in the 64-bit Office version that could cause Word to crash in various setup screens when browsing for a folder.
- To improve the ability to open PDF documents from within the Wizard if a program is not detected as the default for viewing PDF files the Wizard will try to launch the PDF file via a browser.
- The Wizard's security certificate has been updated with a new Norton Symantec code signing certificate that doesn't expire until 2020.

WHAT'S NEW IN V12.8?

- Added 10 new photo designed Proposal Packs to the list of available add-on packs. New Proposal Pack designs can be purchased from within the Wizard (350 total design themes).
- Added 8 more business situations to the Quick Start import lists (515 total).









WHAT'S NEW IN V12.7?

- Added 10 new photo designed Proposal Packs to the list of available add-on packs. New Proposal Pack designs can be purchased from within the Wizard.
- Added 6 more business situations to the Quick Start import lists (507 total).
- Added some additional error checks to prevent an out of bounds error message.
- The Word 2003 version of the Wizard has been removed. Word 2003 support has been discontinued.

WHAT'S NEW IN V12.6?

- Added 10 new photo designed Proposal Packs to the list of available add-on packs. New Proposal Pack designs can be purchased from within the Wizard.
- Added 6 more business situations to the Quick Start import lists (501 total).
- Added additional searchable tags to some situations to make them easier to locate.
- The Multiple Choice pick list screen used when the user is selecting items from the multiple choice database has been restructured to display much larger if the Wizard detects the screen resolution is larger. This allows for more items to be displayed on the screen. Word 2016 was also hiding items due to a bug in how Word 2016 is displaying screen items. This update also makes the Multiple Choice screen display correctly in Word 2016.

WHAT'S NEW IN V12.5?

-  Added 10 new photo designed Proposal Packs to the list of available add-on packs. New Proposal Pack designs can be purchased from within the Wizard.
-  Added 5 more business situations to the Quick Start import lists (495 total).
-  Added additional checks in the Wizard's installer programs for the Webroot security software that can cause install errors due to interference from Webroot with the InstallShield's temporary files.
-  Removed the restriction in the Wizard on having periods in folder names. Periods can now be used in operating system paths in the Wizard database and project folders.
-  Any screens that populate drop down list boxes from a search will now automatically open the drop down list making it more obvious where to find the search results.
-  On the Add Templates screens where you select individual chapters. If the drop down item selected is already in your project then an orange arrow will display pointing you at the Edit Template button instead of the Add Template button making the interface more intuitive as to what button you should click next.
-  Added additional information to some error messages to clarify how to resolve the problem.
-  Added additional information to data decryption error messages to make it clearer that the problem was caused by a registry

error probably from the user deleting something in the Windows registry.

- Added additional code to help ensure that all work is done in Print View mode to prevent occasional view mode errors.
- Fixed a bug that may cause an error in specific Proposal Pack design themes such as Healthcare #3 when the Wizard is adding a full page colored background shape object when building the document.

WHAT'S NEW IN V12.4?

- In the Wizard's Pick Documents screen where the user has the ability to open and edit the Proposal Pack stock templates the user can now have only the selected templates in their project display in the drop down lists instead of the thousands of available templates. Only showing the currently selected templates makes it much easier to find and open just the desired templates for editing.
- Added checks for the 3rd party add-in "AcerCloud Word Addin" which will cause the Wizard to not be able to process documents. This is one of multiple Acer and other 3rd party add-ins that changes Word's default behavior and will cause other software such as our Wizard to not be able to function correctly. Once detected the Wizard will instruct you to disable the Acer add-ins.
- Added 10 new photo designed Proposal Packs to the list of available add-on packs. New Proposal Pack designs can be purchased from within the Wizard.

- Added 4 more business situations to the Quick Start import lists (490 total).
- Increased the maximum number of document projects from 250 to 500.
- Added the ability to use Word line objects as color changeable design elements just like Word shape objects for more complex Title Page and Back Page designs.
- Added code to help identify and eliminate errors that may be due to view mode changes during document processing when the Wizard is interfered with while building a document.
- Fixed an issue where multiple install, uninstall and reinstalls of the Wizard could cause errors to occur when old files from a previous install were not deleted before the next install. Wizard installer will now ensure old database files are removed during an uninstall. The Wizard will also terminate when a bad install is detected right away along with giving instructions on how to repair the bad install instead of generating many error messages.

WHAT'S NEW IN V12.3?

- Added 6 more business situations to the Quick Start import lists (486 total).
- Added 15 new photo designed Proposal Packs to the list of available add-on packs. New Proposal Pack designs can be purchased from within the Wizard.

- Added the ability to create more complex custom Title Page and Back Page background designs that can be imported from external Word documents. This ability makes it easier to create custom Title Page and Back Page designs that use multiple elements such as images and shape objects.
- Added examples of custom designed multi-element Title Page and Back Page designs into the MyGraphics folder.
- Added more information to some error messages.

WHAT'S NEW IN V12.2?

- Added more support for full page size watermark backgrounds.
- Added ability for Wizard to import .JPG images for the Title Page, Back Page and body background watermark images to better support photo-based design themes and custom creating your own photo-based design theme.
- Added ability for Wizard to load more complex body page backgrounds from an external Word document. This allows for more complex body page backgrounds than just the importing of a single graphic. Some photo based Proposal Packs use this feature to incorporate both images and colors that can be customized using the Wizards color palette feature.
- The Wizard can also now load a custom body background from the Watermark-Body.docx file in the MyGraphics folder. This allows for both adding your own more complex body watermark to any Proposal Pack and overriding any default one that may exist in a photo designed Proposal Pack.

- An example custom Watermark-Body.docx file has been added to the MyGraphics folder.
- Added a photo based example to the MyGraphics examples to show how to create a photo based custom design theme.
- Added a longer chapter on specific steps to follow when creating a customized design theme to the MyGraphics/Readme.PDF instructions.
- Added 10 more business situations to the Quick Start import lists (480 total).
- Changed some integer variables to long to help avoid overflow errors when dealing with large volumes of files.
- Newer versions of Word were not allowing some combinations of border style and border width that used to work in older versions of Word. This would generate an out of bounds error when trying to use an invalid width. The default border widths have been changed to ensure invalid widths cannot be selected.
- Added 10 new Proposal Pack designs to the Wizard database for the new photo designed pack add-ons.
- Expanded size of error report screen to accommodate longer messages.
- 6th color added to the colors palette screen for customizable full page colors. Customizable full page colors are now part of the new photo based Proposal Packs and have been added to

the Proposal Pack for Any Business and Proposal Pack for Government Grants packs.

- You can configure different background colors for the Title Page/Pack Page and body pages as well as configurable dividers for separating images. Most new photo based Proposal Packs use shape objects on top of the photo backgrounds to allow the Wizard to change the colors of the separator lines between photos.
- In the Word Fonts Preferences screen changed background color in view fonts so inverted colors are visible and now any custom colors from the current style and project will be applied to the sample view to show the final output the Wizard will generate.
- Added 4 new custom Word Styles for inverted text colors to support light text on dark backgrounds.
- Wizard can combine shape objects with custom background images or photos for more customizable page colors mixed with images. New photo designed Proposal Packs make use of customizable shape objects over the background photos. This allows for easy customizing of the colors of the blank areas reserved for text without requiring a graphics editor.
- Moved page size setting higher up in the document processing process to work with resizing new photo designed watermark full size images when the paper size is set to a size other than standard 8.5x11 Letter size.
- Added extra error checking if a custom footer file was defined to be used but no file was found.

- Added extra error checking if both full page shape object and page borders turned on that page borders will be hidden. Word does not support both features together.
- Added an example photo design theme to the demo version of the Wizard.
- Expanded the manual chapter on using the 6-color palette with more tips.







WHAT'S NEW IN V12.1?

- Added 12 more business situations to the Quick Start import lists.
- Added more help material to the installation.
- Updated links to the Facebook page.
- Retitled the “Photographers Contract Pack” product to “Photography/Media Contract Pack”.

WHAT'S NEW IN V12?

- Increased maximum limits of number of templates in the Wizard databases to accommodate the newly added Proposal Pack templates with room for hundreds of custom user additions.
- Added 380 new entries in the database for all of the new Proposal Pack templates.

- Added 3 new entries in the database for all of the new Proposal Pack estimate spreadsheets.
- Added 27 new business situations to the Quick Start import lists (over 450 total).
- Added a document revision feature that archives your current master proposal document then updates a revision number in the Title Page of the document. All edits to the master proposal will then be made to the current revision and all past revisions will still exist in your project folder.
- Added a feature to clone an entire existing installed Proposal Pack set of templates to a duplicate copy that is selectable in the Wizard as a new style. This is useful for when you want to make multiple custom design themes of your own or other customizations to the templates that would be too cumbersome to manage with just a single library of templates.
- The Multiple Choice database feature now allows for changing the insert order of paragraph content in the Wizard's Preferences. This is for use with lists that are setup for allowing the user to select multiple items for a single tag.
- Added a new article to the articles database for [How to Follow Up or Revise Your Business Proposal](#).
- Added edit buttons to open and edit the stock templates from within the Add Templates screens in the Wizard's Project screen. This will make it easier to edit the stock templates while in the Project vs. having to go out to the Wizard home screen and into the Document Styles edit screens.

-  Added better error messages for a couple of obscure problems to better help catch invalid input values that can cause problems with Word.
-  The Wizard installers will give notices to Office 2003 and Office 2007 users to make sure they have all of the required Microsoft Office Service Packs #1, #2 and #3 installed to prevent potential problems running the Wizard on old and unpatched Office installations.
-  The Search By Name tab in the Pick Document screen now puts all exact and partial matches first followed by a the lists of alternate and related templates making it easier to find the exact and partial matches when long lists of results are found.
-  Added a Yes/No prompt when the Quit button on the Wizard home screen or the X box in the corner of the Wizard home screen are clicked. Along with an extra notification if the Wizard is still processing a document. This is to prevent accidental closing of the Wizard. If the Reduce Messages box in the Preferences is turned on this new Yes/No prompt will not be shown.
-  Updated the custom graphic import feature to allow for a full page size body watermark graphic image. Previously body watermark graphics would only be contained within the area of the colored page border. The full page size body watermark image will also be scaled if the page size is set differently than the standard letter size.
-  Added a message when selecting an alternate Title Page Pack design for the front cover that if the user already had a Proposal Pack with a custom designed front Title Page it will warn them

the design might clash. The Title Page Packs are intended for use with the more customizable ‘Proposal Pack for Any Business’ and ‘Proposal Pack for Government Grants’ that let the user start with a pack of templates that doesn’t already include a graphic and logo design.

- Added more information to an error message that can occur due to interference with the Wizard during processor or due to 3rd-party Add-In’s that have changed Word’s default behavior.
- Restricted the screen for adding new documents copied from existing .docx files that the file extension must remain as .docx.
- Updated the Wizard tutorials to include the new features added to this version
- Maximum number of templates the Novice Edition will assemble has been set to 10.
- Renamed SoftwareDevelopment.docx legal contract to SoftwareDevelopmentContract.docx to prevent Wizard from confusing it with the Proposal Pack’s SoftwareDevelopment.docx template. Checks put in place to ensure no Contract Pack and Proposal Pack templates share the same file names. This is to prevent contract exhibits and schedules from being accidentally appended to a proposal template that shared the same name.

WHAT’S NEW IN V11.6?

- Updated installers with Office 365 Word 2016 support.
- Updated Wizard with Office 365 Word 2016 support.

WHAT'S NEW IN V11.5?

- Updated installers with Windows 10 support.
- Added links to the 25 new Proposal Pack add-on purchasable design themes recently added to the [ProposalKit.com](https://www.proposalkit.com) web site.

WHAT'S NEW IN V11.4?

- Added detection features for 3rd-party Add-Ins that are known to cause the Wizard to fail such as 'Acer ABDocs'. Some 3rd-party Word Add-Ins such as mailing label and document management software integrated into Word can cause Word's default find handling to be changed which results in our Wizard software generating errors. Checks have been added specifically for 'Acer ABDocs' and additional messages have been added to help identify other conflicting products.

WHAT'S NEW IN V11.3?

- Updated the code signing security certificate which was expiring with a new 3 year certificate.

WHAT'S NEW IN V11.2?






- Added 30 new business situations to the Quick Start import lists (430 total proposal situations to get started with).
- Added 2 new how-to articles "How to Market Your Business with A Community Workshop" and "Automate or Die – What Your Business Needs to Survive".
- Manual updates for how to create multilevel Table of Contents.

- Added the ability to create Table of Contents so that outline levels can be used together with TC Fields (when used with our graphic based page headers).
- The Wizard can now detect new product installations while it is running and will prompt you to restart the Wizard to complete the installation and setup of newly installed Proposal Kit products.
- Fixed a bug in the Novice mode where a different field was set for use with the users custom logo than what was mentioned on the documentation.
- When importing Quick Start lists of templates for business situations if there are any invalid characters in the import list's title they will be removed to prevent error messages when saving your project to remove those characters.
- Double quote characters are now not allowed in any file names or file path names. This is to help prevent system error messages from occurring if creating an invalid file name or path.
- There were some cases where the order of the Cover Letter or Title Page could get changed in a custom sort order out of sequence. This has been fixed to ensure the Cover Letter always comes first, the Title Page follows, then all body pages.

WHAT'S NEW IN V11.1?

- The Wizard now has built in support for creating and managing Acrobat PDF files. While you can always save your Word documents as PDF with Word and Acrobats built-in features. The Wizard now integrates the creating, opening and managing

of the PDF versions of your documents directly into the Wizard interface. You do have to have Word 2007 or greater to use the PDF features, this feature is not available in Word 2003.

-  The Acrobat PDF support has also been integrated into other parts of the Wizard such as saving PDF files when cloning or backing up projects, notifying the user when PDFs may need to be resaved when the Word documents are changed, and testing the Word templates for tags that may have been forgotten to be edited or removed before saving in PDF format.
-  Added new manual chapter: [How do I Save in PDF Format?](#)
-  A new Preferences tool has been added for batch processing old or external Word documents. This allows you to make mass updates to a folder of Word documents for things such as updating headers, footers, page borders, page settings, color schemes, clickable URLs, Word font Styles, and document meta data. This feature is used to update old documents and to help prepare custom templates to be integrated into the Wizard database.
-  Added new manual chapter: [How do I Batch Update Old or External Documents?](#)
-  The Wizard now automatically opens the documents once they are built instead of the user having to manually click the Open Documents button which saves an extra step. This auto-open feature can be disabled in the Expert Wizard to restore the manual opening of the documents every time the edit screen is entered. The Wizard now also, auto-opens the documents after recombining them in the team editing mode.

- Added 50 new Quick Start business situations (400 total) to the import lists of templates.
- Added 2 new how-to articles to the article library.
- Many of the existing Quick Start import lists of templates have been updated with more specialized chapters.
- Added a delete button to the Edit Current Document screen to make it easier to remove files from the project folder.
- Added a select button to the Edit Current Document screen for selecting all PDF's. Also reworded the current select button for selecting only the Word documents.
- If the Quick Start import list is a different proposal type (i.e. setup for a Grant or Business Plan) the Wizard will automatically now switch the proposal type of the project to match.
- All documents opened by the Wizard are now put into Print View Mode. This can prevent errors if the user saved a document in a different view mode then later opened it in the Wizard and the Wizard tried to do an operation on it that is not allowed in that view mode.
- Added some more error checking for out of range values in table border setting.
- If the default project name is not changed by the user and a Quick Start list is selected the Wizard will now set the project name from the name of the imported list of templates.

- If a Quick Start import list of templates is loaded then user cancels out of the Pick Documents screen the Wizard will now reset the main project screen settings that had been changed during the import of the Quick Start list.
- Cleaned up the creation of folder names to remove extra blank spaces when introduced by removing other invalid characters.
- Added checks so the Wizard home screen buttons cannot be clicked and used while the Wizard is building a document which could cause unexpected errors when users do not read the instructions to let the Wizard complete its build process uninterrupted.
- If adding the Blank Templates to a project that also uses the new Back Page the Wizard now makes sure the Blank Templates come before the Back Page.
- Added more verbose descriptions to some error messages created by Word.
- When auto-generating file names the Wizard will now remove the “#” sign from any file names.
- Replaced calling the Chr\$ and ChrW\$ functions in the foreign language translation features with Chr and ChrW calls because some early versions of Word 2003/2007 and some foreign language packs installed by Microsoft are missing the \$ versions of the functions resulting in error messages.

WHAT'S NEW IN V11?

- The Wizard can now add new pages to an existing document that you have already started editing. In the past any new pages would have to be manually copied and pasted into an existing document the Wizard has already built. The Wizard will add new pages in the correct order as defined in your project and will also update the Table of Contents and page numbering.
- Added 28 new Quick Start business situations for new types of proposals (350 total).
- If a Title Page Pack cover is used and you have already defined a custom background graphic then the Title Page Pack's color scheme will not be used so it doesn't clash with your custom background's colors.
- All of the color picking dialog popups now set the initial starting color.
- Added a style settings screen so the user can configure various styling settings for table borders such as turning table borders on or off, changing the color, line style and line width.
- If the Back Page Generic template is used the logo and contact information text block is automatically centered. This can be overridden in the MyGraphics configuration file.
- The Edit Styles > Colors screen now lets you select from a pre-designed set of almost 100 color palettes to get started with.
- Added a number of graphic tutorials to help new users how to use various parts of the Wizard.

- Added a new graphical based screen for selecting the Title Page design and color scheme.
- Removed the button to delete installed Title Page Packs, now uninstalled Title Page Packs are automatically removed from the drop down list.
- Progress bars are displayed now when loading the Pick Document screen.
- Added the ability to turn on or off the Title Page Pack color scheme when using a custom Title Page Pack background.
- The Edit Selected Title Page button in the Pick Documents screen will also open the generic Back Page template and will apply the selected color scheme.
- Added Next/Previous buttons to the Pick Documents checkbox screen to more easily scroll between pages of checkboxes.
- Wizard includes an option to replace the graphic page headers (in graphic versions of Proposal Packs) with text. This removes the stock logo and text in the graphic headers and replaces them with text only headers.
- The Cover Letter, Cover Sheet, Title Page and Back Page now cannot be reordered or repositioned, this is to prevent problems moving a document meant to be in its own standalone "section" into the main body section and causing formatting problems with headers, footers, page numbers, page borders, watermark graphics, etc.

- More error troubleshooting information added to some messages.
- 30 new custom mail merge fields have been added (50 total custom fields).
- Color settings for Word Styles are now stored in text R,G,B strings making it easier to manually update the database files to specific color values.
- If the CustomFooter.docx file exists in MyGraphics folder the Wizard will now auto-set the "Use My Custom Footer" option in the Table of Contents configuration screen. This saves the user having to remember to set this value when using a custom external file for the document footers.
- Values can now be set in both points or inches in the GraphicSetup.ini file for positioning of custom graphics.
- The internal limits of the Wizard have been increased to allow for up to 1000 templates per section in the database files and 2000 total templates to accommodate the newly added 400+ templates with room for hundreds of additional custom customer added templates.
- The Wizard will now remove any existing TC Fields from templates to ensure no outdated page headers are added and no duplicate entries occur in the Table of Contents when using graphic page headers with the new templates that now include TC Fields already embedded in them.
- The Wizard database files are updated to add over 400 new templates for the latest Proposal Pack upgrades.

- The Wizard now automatically puts you into the Edit Current Document screen after manually starting the document build process.
- All of the new 400+ template page headers are translated into 15 foreign languages.
- Updates have been added to the Wizard's contract database to support the new templates added to the latest Contract Packs.
- The Quick Start import lists are now alphabetically sorted to make it easier to browse.
- Reworded some interface text to simplify descriptions of buttons or menu options.
- Updated the saving of custom Quick Start import files to remove double or triple dashes from when non-usable characters are stripped out of the file name.
- Updated instructions on how to update a Preset (i.e. load it first, delete it, then add it again).
- When the Novice training mode is changed to the Expert mode, the Custom Proposal Type is also automatically enabled to be customized. Saves the user having to manually enabled the Custom Proposal Type.
- The Wizard will ask if you want to change the default Proposal Type when a non-default Proposal Type's settings are changed. Saves the user having to manually change the default type or forgetting to change it.

- Improvements to Preferences screen when adding templates to remind user to save their changes before leaving the screen when changes detected.
- The Import/Export feature now tests the Multiple Choice database during the import pre-scan to notify how to migrate them to the latest version.
- The Multiple Choice system now has a test and report option that will check your custom settings and display a formatted report of your settings.
- The Wizard will now automatically insert your custom letterhead logo graphic into the header of your contract page.
- Added new Multiple Choice delimiter option page break + custom which allows for adding a subheader to the custom delimiter file so the subheader starts at the top of each page.
- The Wizard now asks if you want to add a Table of Contents once you get to over 8 pages selected for your document instead of you having to remember to add it once your document gets long enough to justify having a Table of Contents.
- Reorganized some screens to better fit on small laptops with increased font sizes and minimum screen sizes. Wizard screens will now have all the important buttons visible on screen at a minimum screen resolution height of 768 and with a medium font size setting of 125%.
- Changed the <<Fixed Rate>> mail merge tag to <<FixedRate>>.

- The Wizard now detects and gives instructions for fixing various setup and installation mistakes users make from time to time such as forgetting to install the Expert version of the Wizard after making an order and still are running the demo, using demo or limited styles when they have full retail packages installed, etc.
- Fixed up some translations in the Korean and Japanese translation lists.
- Fixed a bug in using custom graphics in the MyGraphics folder. If custom positions were set to 0, it was setting the graphic to the actual position 0 instead of using the default position.

WHAT'S NEW IN V10.5?

- Added more business situations to the Import Lists (322 total). These lists are used to load your project with all the templates needed for various types of proposals, business plans, business documents and other situations.
- This patch of the Wizard focuses on making the Wizard operate consistently with the custom logo replacement features across all combinations of logo designed Proposal Packs, non-logo designed Proposal Packs, Title Page Pack templates and when used in conjunction with the language translation features.
- A new configuration file is added to the MyGraphics folder to allow users to exactly define the position and scaling of all custom graphics that can be imported into the various Proposal Pack templates. This helps keep all of the users custom created graphics and positioning data in one place. This file is the GraphicSetup.ini file. Using this settings file will override any

other settings defined for logo positioning and scaling via the Wizard interface screens.

- Scaling features have been added to the Accent graphics used in the Title Page and body page footers.
- Added a new feature to let the user select the zoom level of all documents opened by the Wizard as well as how many pages to show in rows and columns when opening documents from within the Wizard.
- If the user had defined a custom logo or alternate Title Page logo, the Wizard will automatically add the Title Page and Back Page templates to your project to save the user having to add the pages manually to their project.
- When using the custom body page header logo to define a custom company logo that sits in front of the chapter headers with a logo designed version of a Proposal Pack the Wizard will delete the body page chapter header graphics and replace them with the actual text of the chapter names. This prevents a “double logo” with the users custom logo being put in front of the Proposal Pack’s logo theme logo on each body page. The user does lose the graphic designed version of the chapter headers, but can mimic the same look and color by modifying the Proposal Kit Page Header font Style settings.
- Improvements have been made to the creation of the automated Table of Contents to ensure the proper use of TC fields vs. font Styles are used when using the language translation features with the custom page header logo replacement features.

- Expanded the new custom defined graphics to also be loaded into templates that are not combined into the master document (such as external checklists and letters).
- Added more checks on user-configurable Word settings to catch out of bound conditions before Word reports them with more cryptic error messages.
- Increased the maximum number of templates from 1300 to 2000 to accommodate users with large number of custom templates.
- Added additional troubleshooting tips to error messages when 3rd party application launching returns an unexpected error.
- The Wizard will now detect if someone using the Novice edition is trying to setup custom replaceable graphics (which is an Expert edition feature) and will direct the user to purchase the Expert Wizard upgrade.
- The Wizard will periodically offer upgrades to higher end products when running more limited editions of products. These upgrade offers can be disabled in the Expert edition of the Wizard.
- Fixed a problem with the new Back Page Generic template that was having the page borders and background watermark graphics loaded into it when it was manually selected as a template instead of automatically swapped in when using an alternate Title Page Pack background design.
- Fixed a problem with logo designed Proposal Packs not loading custom user-created bullet point graphics into all of the

templates using some of the new features added in the previous patch update.








WHAT'S NEW IN V10.4?

- Added 20 more business situations to the Import Lists (320 total). These lists are used to load your project with all the templates needed for various types of proposals, business plans, business documents and other situations.
- The Wizard can now do mail merging into tags that are contained within text boxes that are in the template headers and footers. Previously tags could only be put into text boxes within the body text of the document.
- More configuration options have been added to configure the look and initial settings for the document's page numbering (such as the starting page number, turning on/off the display of the page numbers on the first body page, and changing the styling and positioning of the page numbers).
- A new "Back Page" has been added to all the Proposal Pack document packs. This new Back Page is a final ending page to your document that has a design that compliments the front "Title Page" giving a more polished looking ending to your documents. The Wizard now supports this new "Back Page" in a variety of ways.
- Most of the 300+ importable lists of situations have been updated with the new "Back Page" template.
- A new multi-page popup displays at the start of the Wizard that helps explain all the custom branding features.

- The Wizard now supports the customizing of the colors in the new pull quotes that have been added to the most recent updates of the Proposal Pack document packs.
- Added a new manual chapter: [How do I Add TOC Sub Headers?](#)
- Added a new manual chapter: [How do I Use the 6-Color Palette to Match My Logo Colors?](#)
- Added support for a set of 5 color attributes assigned to each Proposal Pack style and Title Page Pack design. These 5 colors are used to set the colors of fonts, bullet points, page borders, table cells and pull quotes. Use of this new color scheme allows more visual configuration of the documents generated by the Wizard. The use of the new color scheme is completely configurable in the Document Styles screen.
- The Novice edition of the Wizard now includes some of the Document Styles configuration screens such as for customizing the newly added color schemes as well as editing the stock document templates and spreadsheets directly from the Wizard interface.
- Added more auto-importing graphics features using the MyGraphics folder. Now the Wizard will auto-import the MyLogo-TitlePage.png into the Letterhead, Fax Cover Sheet and Envelope templates. Or – if there is a Letterhead.png graphic in the MyGraphics folder it will load that graphic instead.
- The auto-importing of all of the graphics from the MyGraphics folder feature now also work on the plain text versions of Proposal Packs (Proposal Pack for Any Business and Proposal

Pack for Government Grants). Previously most of the custom graphic replacement was only supported when using Proposal Packs that already included a graphic design theme.

- The auto-importing of graphics from the MyGraphics folder feature now also work when a custom Title Page Pack alternate front Title Page design is selected.
- Now the Wizard will auto-import the Description.png graphic from the MyGraphics folder into the Title Page.
- The custom Title Page selection screen has been updated with popup messages that help guide you through using the screen as well as additional displays of thumbnails to help make selecting designs easier.
- Custom headers and footers can now be automatically loaded by the Wizard by creating a CustomHeader.docx or a CustomHeader.docx file in the Wizard's MyGraphics folder. Putting a custom header or footer file here will override any custom header/footer defined in the style settings configurations, and also is quicker to use this feature than customizing the individual styles settings in the Wizard database.
- The Wizard will now automatically scale the various logo options for the front Title Page to fit each specific Proposal Pack logo theme. Previously you would have to manually resize logos that were larger than the allocated space on the Title Page.
- Example custom header and footer files have been added to the MyGraphics folder.

-  Added example custom graphics to the MyGraphics folder that can be used as a guide to create your own per the instructions.
-  A PDF example that shows how the example graphics included in the MyGraphics folder look when assembled into a completed document. The sample also illustrates how the 5-color scheme and font styles were configured for a completely custom look.
-  The Preferences tool for adding the custom pre-defined Proposal Kit Word Styles to a single external Word document has been extended to also allow batch adding the Word Styles to an entire folder of external Word documents.
-  The Novice edition of the Wizard has had its upper limit increased from 10 to 20 templates per document. For documents greater than 20 pages long the Expert Edition of the Wizard is needed.
-  A new feature has been added to the Preferences > Project Settings > Configure Template Lists screen to select all of the master templates based on the templates selected for your current project. This is a more efficient way of building up the Custom proposal type by first picking templates for a project.
-  The Wizard initializing progress bars are now hidden when the initial setup screen is shown to prevent people thinking the Wizard is hung up while it is actually just waiting for the user to finish closing the setup screen.
-  Added a troubleshooting tip to the manual on how to resolve an issue with page numbers turning on in the Cover Letter/Title Page when you have edited the stock templates and completely removed the stock footer information.

- The Wizard now tests for write access to its registry key and if unable to modify its key reports an error along with detailed troubleshooting tips on how to correctly install the Wizard with access to its registry key.
- The Wizard can now be shut down from the initial first time running setup screen in case the user is unable to access the buttons on the bottom of the screen. The Wizard will display a message for users with screen resolutions or desktop font sizes set too small for the Wizard screens to be completely viewable how to resolve the issue and resize their desktop or fonts.
- The Envelope template is now kept in the default paper size and not changed when the default page size is changed for the combined documents.
- The maximum number of active projects per project database has been increased from 160 to 250 (Expert edition only).
- The Cost Summary is now added to all of the Wizard demo styles.
- The Cost Summary is now added to the first proposal's list of pre-selected templates.
- The X close window buttons on all screens are now active and will invoke the close or cancel functions for each screen.
- The Wizard now automatically changes from Novice to Expert mode in the full Expert Edition when you open your first completed document for editing. This saves new users the time of entering the Preferences screen and manually turning on Expert mode.

- Added extra information to the build document message to not interfere with the Wizard or use Word until the documents are built to avoid errors that can occur if you interrupt the Wizard while it is processing.
- Added more troubleshooting tips for old versions of Word 2003 that may need to be updated to prevent an error occurring in the Wizard related to the translation features. Also disabled the language translation features by default in the Word 2003 version of the Wizard to prevent possible errors on first startup. Word 2003 users can turn on the translation features in the Preferences to test if their version of Word 2003 will work or if it needs to be updated.
- Fixed a bug in the Configure Proposal Files screen where the Wizard lost the Section Number of where the template being edited was to be placed when the list is sorted alphabetically.
- Added extra error checking to various functions.

WHAT'S NEW IN V10.3?

- Added 50 more business situations to the Import Lists (300 total). These lists are used to load your project with all the templates needed for various types of proposals, business plans, business documents and other situations.
- Support has been added for the 20 new Title Page Pack volumes of front cover designs. There are now 40 total Title Page Packs with a combined collection of 24,000 choices of designs and color schemes (each Title Page Pack is sold separately).

- Added a new Word Style “Proposal Kit Pull Quote Text”. This Word Style is used for the bold emphasized text in pull quotes or short statements in a highlighted text box.
- The complete list of Title Page graphic replacement options is now supported in the non-logo designed Proposal Packs. When using the drop down list of replaceable Title Page headers with a non-logo Proposal Pack the stock ‘Proposal’ text header will be replaced with the text version of the selected header. This helps support the newly added features of the samples and Import Lists being able to change the Title Page header text to match the imported sample or import list automatically in both non-logo and logo designed Proposal Packs.
- Added new articles to the how-to and help article database.
- Added new manual chapter: [How to Import Custom Graphics Using the MyGraphics Folder?](#)
- Added tests to the Import Lists function to check for incorrect import files. Some users accidentally rename (or their email programs rename) the .ini files as .txt files. The Wizard now checks to make sure an Import List file is not accidentally saved with a .txt file extension.
- All of the Wizard’s sample document databases have been updated with the custom Title Page graphic used in the sample (i.e. if the stock ‘Proposal’ graphic was changed to something else like ‘Project’, ‘Business Plan’, ‘Resume’, etc.). The Wizard will now automatically change your project’s default Title Page logo graphic to match when importing the list of templates for a given sample (if you are using a logo designed Proposal Pack and haven’t set a custom Title Page logo graphic already).

- All of the Wizard's 300 Import List files have been updated with custom Title Page graphics used to match the situation (i.e. if the import list is for something else like 'Project', 'Business Plan', 'Resume', etc.). The Wizard will now automatically change your project's default Title Page logo graphic to match when importing the list of templates for a given Import List (if you are using a logo designed Proposal Pack and haven't set a custom Title Page logo graphic already).
- When importing a list of templates using an Import List and your project already has templates selected you are given the option to replace or append to the list of templates in your project. This gives you the option of adding templates from multiple specialty lists when creating a complex document that covers multiple unique situations.
- If QuoteWerks was running the background but you had disabled the use of QuoteWerks in the Wizard's Preferences, the Wizard would still try to load the contact data from QuoteWerks. Now the Wizard will ignore QuoteWerks if it is running but disabled from use in the Wizard's Preferences.
- Fixed a list index error if running the current release of the Wizard on an older Wizard's database from before when currency conversion features were added.
- Added some additional error checking and logging to various functions.
- Expanded the descriptions of some error messages with more verbose troubleshooting information.

WHAT'S NEW IN V10.2?

- Added 50 more business situations to the Import Lists (250 total). These lists are used to load your project with all the templates needed for various situations. All of the Import Lists have also been categorized to make it easier to find a group of related situations.
- Added support for 30 newly added Proposal Graphics Packs products. There are now over 250 Proposal Pack logo design packages available (each sold separately).
- Added a new feature for supporting international currency symbols in the Expert Edition of the Wizard. The Wizard can now automatically replace any United States Dollar (\$) symbols in the templates with either 3 character currency codes or the Unicode symbols for most international currencies. The currency translation feature is also integrated into the use of the Presets, Import Lists and data Import/Export features.
- Added new manual chapter: [How do I Translate Currency Symbols?](#)
- All of the Import List business situations have been expanded with additional information about which type of proposal situation they were used for (i.e. real estate, healthcare, contracting, and so on). The Import Lists screen has also been expanded with a new drop down list of business categories so you can also see all proposal lists by category in addition to searching by name.
- Added an additional “Remove” button to the viewing selected templates screen to make it more efficient when removing selected templates. This is a 2nd way to remove templates in addition to the usual Remove templates tab.

- The ability to create your own “Favorites” list has been added to the Import Lists screen. Now you can add any of the business situation lists to your Favorites list to quickly locate them later.
- Changed the name of the “Add Templates Based on Samples” tab to “View Samples” and changed the name of the “Import” tab to “Quick Start”. An extra popup message was added to help direct new users to the “Quick Start” tab their first time using the Pick Document screen instead of manually selecting chapters.
- Added a “Start Here” arrow button to the Wizard home screen to help point new users at where to start creating their documents.
- Added a “Start Here” in the Novice training mode to the Document Project screen to make it more obvious to new users where to start the process of creating a new document.
- Added new options to configure the Search Samples and Search Import Lists screens to help narrow down the list of found matches.
- Added a new Preferences repair tool to recreate the ‘Run Proposal Pack Wizard’ desktop shortcut created by the Wizard installer program. You can now rebuild the shortcut link if you have upgraded your version of Word or had deleted your shortcut link from the desktop.
- Added a new manual chapter: [Repair the ‘Run Proposal Pack Wizard’ Desktop Shortcut](#)

- The Wizard now goes straight to the Add New Project screen when there are no projects to edit. Otherwise the normal screen to select projects to edit or add a new project is displayed.
- The Wizard will now resize the Title Page background to fit the page if the Letter page size is changed (i.e. to Legal, A4, etc). This will eliminate white bars around the edges of the background design.
- The Wizard will now automatically reposition the faded body page watermark background graphic if the Letter page size is changed (i.e. to Legal, A4, etc). This will help keep the watermark within the color borders and in the bottom right corner of the page.
- Added new articles to the library of help articles.
- Added notification messages if a limited Demo or Limited style is selected when the user also has a full retail style also installed to inform the user to switch to the retail style to access all of the installed content.
- Added more feedback messages in some operations when operations were completed.
- In Demo mode the Pick Documents screen now default to the “Quick Start” tab. In Novice and Expert Mode the Pick Documents default is still the “Add Templates” tab.
- Added a new help screen for the View Samples tab of the Pick Documents screen that reiterates some important information about the samples.

- Added more orange pointer arrow images to help show user the next button or operation that can be performed.
- Added additional error checks in case users are still running versions of Word 2000 or earlier that are not supported and will cause errors while running.

WHAT'S NEW IN V10.1?

- Over 150 new business situations added to the Import List files to help you more easily figure out what chapters to add to different types of proposals.
- Added a “Search” button to the Import File list screen. Now that the number of import lists has grown we have added search screen to make finding specific import lists easier. Use of import list searching has also been expanded by adding keyword lists to the import files.
- Added a “Search” button to the Edit Current Document’s screen for viewing samples.
- Added a “Search” button to the Add a Contract screen. This makes it easier to locate specific contract templates in installed Contract Pack libraries.
- Added a “Search” button to the Document Project screen. This makes it easier to locate a specific client project if you have added a lot of projects.
- Added the ability to clone past projects including both project settings and data as well as all of the source project’s documents. This feature makes it easier to make new

documents for past clients and to reuse a past proposal for a new client. This is an Expert edition feature.

- Adjusted the positioning and spacing of text fields in the interface to prevent text from being cut off or wrapping. In some cases on new tablet platforms (such as Microsoft Surface Pro) Microsoft Word alters the screen size of text fonts in the Wizard interface causing display issues. All of the Wizard screens have been updated to provide more screen space for interface text to avoid text elements being cut off in the interface.
- When adding a new project the project name is automatically generated with a default title and incremental number. The Wizard's Preferences allows you to turn this feature off and also configure the default project name.
- Added a new manual chapter: [How do I Use the Cloud or OneDrive?](#)
- Added easier access to the extensive library of online help and how-to articles with a new screen available on the Wizard home screen. You can directly search for and lookup specialty how-to articles from the Wizard and open the web page efficiently from the Wizard interface.
- Added a new manual chapter: [How do I Configure the Articles Database?](#)
- The new online how-to and help article screen can also be completely customized with your own URLs and article and resource links. This allows you to build your own tailored article repository and make it easily searchable and viewable from our Wizard interface.

- Added admin features to completely hide the help and article buttons from the Wizard interface. Existing admin features for disabling specific interface buttons on the Wizard home screen have been expanded to also hide the buttons. This allows administrators to tailor the Wizard home screen better to hide features they don't want their end users accessing or seeing.
- Added tests and messages for inaccessible folders for use when the Wizard is configured to access files on networked or cloud based drives. If your connection to the remote drive is broken the Wizard will detect and report access problems.
- If the Wizard has been configured for remote network or cloud access to your project files and the remote access is not available the Wizard will ask if you want to temporarily use your local hard drive project folder so you can continue working without an Internet connection.
- Added a “Select All” button to the Configure Template Lists screen and improved performance for when large amounts of templates are updated at once.
- Added a “Select All” and “Unselect All” button to the Configure Top 40 Lists screen and improved performance for when large number of templates are updated at once.
- Added orange pointer arrows to the Document Project screen to help show what buttons still need to be clicked to finish adding templates or filling in project data in order to complete a project before building the documents. Helps show new users what still needs to be completed and helps remind expert users to not forget important details.






- Added buttons to the Preferences > Configure Top 40 Lists screen to mass enable and disable all of the pre-defined Top 40 lists. This lets you quickly tailor the users Pick Document screen to only show checklists of custom lists you have defined. This is more efficient than manually disabling each predefined lists one at a time or having to manually edit the Situations.ini database file for mass updates to all lists at once.
- Added 6 new fields to the Edit Style > Page Setup screen to set specific page margins on the body pages of your assembled documents. This can be useful when using the Wizard to import custom documents that have wider than default page margins.
- Add 2 new logo positioning fields to the Edit Styles > Page Headers screen (From Page Left and From Page Top). These fields allow absolute positioning of the body page custom logo from the top and left corner of the page. Use these fields to fine tune the positioning of custom logos. If either of these fields is set to non-zero they override the Relative Top and Relative Left fields.
- Fixed a problem in the new feature that allows the Wizard to auto-import your custom graphics from the new MyGraphics folder. The file being looked for was a different name than shown in the documentation.
- Fixed a display issue in the interface where the use of the demo style was showing the wrong count of available documents.
- Added support for future versions of the Title Page Packs.
- Minor interface message cleanup.

- Added progress bars for the various search screens to provide more feedback during longer processes.
- Added more error checks to ensure invalid data entry is not allowed in some screens.
- Added more error checks and messages to notify about problems accessing files that are not available or caused by interfering with the Wizard during processing.
- Increased the number of configurable Top 40 lists from 80 to 100.
- Fixed a bug where the Default Top 40 list would still be displayed if it had been disabled in the preferences.
- Set the maximum number of active document projects to 40 for the Novice Wizard and 160 for the Expert Wizard. If the proposal database becomes full there is also a new Preferences button to create a new empty database (Expert Wizard users also have the option to archive or delete individual projects to create more space in the active project database).
- Added more error checks when deleting Title Page Packs from the interface to prevent an error message.
- Added a new manual chapter: [How does the Wizard Use the Windows Registry?](#)

WHAT'S NEW IN V10?

- Added a major new feature for multiple choice content. This allows you to define custom pick lists of external content

(paragraphs of text, entire documents, image files, spreadsheets, PDF files, etc.) for inserting into your documents when they are assembled. You can define up to 100 custom tags inserted anywhere in your templates and up to 300 custom pick list items organized in any combination you need and grouped in up to 10 different categories. For example, you can define a pick list of product descriptions, sample photographs, client references, etc. When you create your project pick your desired content and the Wizard will automatically insert it into your documents. Create your customized client proposals even more efficiently than before.








-  Added support for 9 new custom Title Page graphics. In addition to the 17 existing choices of graphics for the front Title Page the following new ones have been added: “Policies”, “Procedures”, “RFP”, “Request for Proposal”, “Samples”, “Handbook”, “Bid”, “Memorandum” and “Solicitation”.
-  This allows you to use the Wizard and Proposal pack to create additional types of business documents with a consistent design theme.
-  Translation support has been added for 15 languages: Canadian English, British(UK) English, Australian English, Spanish, Portuguese, Dutch, Italian, French, German, Romanian, Russian, Chinese, Korean, Japanese and Arabic.
-  Added a new manual chapter: [How do I Translate Into Foreign Languages?](#)
-  More support for creating Request for Proposals (RFPs) has been added. One of the 12 pre-loaded database lists has been

updated to include the RFP writing topics. “Request for Proposal” is now one of the selectable proposal types.

- Added a “quick project change” drop down button to the Wizard home screen to allow quickly changing the current project. This makes it easier to swap between different projects when editing multiple proposals at once.
- The Wizard will now automatically build your documents and open the edit screen when you have finished saving your project. This saves a couple extra steps of having to click the build button then the edit button from the Wizard home screen after saving your project. You can also disable the auto-build feature to return it to the legacy way of operating.
- The Wizard can now automatically load graphics into your document by copying your own custom graphics into the new MyGraphics folder. See the ReadMe.PDF file in the MyGraphics folder for details. This can be a more efficient way of quickly getting your custom graphics into your document without having to configure various Wizard screens.
- Internal limits on the number of documents the Wizard database can manage have been increased to accommodate the large number of new proposal and contract templates.
- Added a large number of additional import files with lists of template defined for many new types of proposal situations.
- Added support for the 30 new samples included in the new Proposal Packs.

- Added support for more new categories of templates and expanded categories to accommodate the additional new templates added to the latest edition of the Proposal Packs.
- Added a new custom import tag specifically for inserting a custom spreadsheet anywhere in your assembled proposal. In addition to the <<ImportFile>> and <<ImportContractFile>> tags, you can now use the <<ImportExcelFile>> tag.
- Extended the import tags (<<ImportFile>>, <<ImportContractFile>>, and <<ImportExcelFile>>) so they can be used to also import other file types such as PDF files.
- Added the ability to import the contents of the footer of an external document into your assembled proposal. See this new chapter for details: [How do I Import a Custom Page Footer?](#)
- The Wizard can now be configured to disable the display of the “Default Top 40” entry of the list of drop down choices in the Pick Documents screen. This allows you to completely customize the Top 40 drop down list to only include your own custom lists.
- When custom documents are added into the Wizard database via the Configure Proposal Documents tool the Wizard will now automatically add the default Proposal Kit Word Styles to the custom documents as they are copied by the Wizard into the Proposal Pack’s document folder.
- A new tool has been added to the Preferences > Data & Display > Font Styles screen to allow you to automatically add all of the custom Proposal Pack Word Styles to any external Word document. This can help maintain a consistent format across all

of your documents and aid in importing custom documents into the Wizard with consistent formatting.

-  The Edit Current Document screen will now bring your already opened proposal to the foreground whenever you click the button to open your documents. This is helpful if your proposal is actually open but hidden behind other windows.
-  Added a new Preferences configuration screen and options to configure how the custom import tags work. You can now configure the starting folders to look for your external import files and how the imported files are inserted (linked, static or the Wizard will ask before each file is imported).
-  Added additional error checking to data entry fields to prevent invalid data in some cases.
-  Fixed a minor problem in the importing of data from past versions of the Wizard when custom sort orders were defined for projects and presets that would cause the sort order to not be reapplied to the imported data.
-  Added extra error checks to ensure that if too many custom contracts are added to the system it will not cause overflow error messages.
-  Added extra checks on all important Wizard screens and forms to ensure they will fit on the minimum size supported screen size dimensions.
-  Added extra error information when there is a problem launching PDF or Excel documents from within the Wizard screens. For example, if there is no file association setup or an

unsupported application is defined in the operating system for opening the documents the error message may help pinpoint the configuration problem.

WHAT'S NEW IN V9.4?

- ❏ The Wizard licensing has been increased from 1 to 2 computers and 1 to 2 users per license to 1 to 3 computer and 1 to 3 users.
- ❏ The documentation shortcut link is no longer put on the Windows desktop. Open the documentation right from the front page of the Wizard interface instead, or from the Windows Start menu.
- ❏ The 'Search for Styles' button is now available in the Novice Edition
- ❏ All of the 310+ demo contract documents included in the Wizard (i.e. the previews of what is available in the Contract Packs) have been updated with more content and are now completely reformatted to make use of the Word 'Styles' features now supported in the Wizard and the Proposal Pack documents.
- ❏ The Novice Edition is now limited to creating documents only up to 10 pages long. The Expert Edition must be upgraded to for creating longer documents.

WHAT'S NEW IN V9.3?

- ❏ Added a new manual chapter [What's the Novice Edition vs. Expert Edition?](#)

- Added a new manual chapter [How do I Add Subheads to the Table of Contents?](#)
- The Wizard has been split into a Novice Edition and Expert Edition. The Novice Edition is bundled with all Proposal Packs and Contract Packs. The Expert Edition is bundled with Proposal Kit Professional. This has enabled us to make the initial purchase for Proposal Pack users less confusing and with a lower price for those who do not need the Expert Edition features. Novice Edition users can upgrade to the Expert Edition if they need any of the advanced Expert Edition features.
- The Wizard has additional screens that make it easier to find and purchase add-on document packs (Proposal Packs, Contract Packs and Title Page Packs). Past versions of the Wizard only showed you what add-on document packs were installed. The Wizard now also shows all other packs that can be purchased with links to add to your shopping cart right from the Wizard interface.
- The Wizard now has the ability to insert your own custom logo into every single body page of your document. You can also specify different logos for your Title Page and all of your body pages. The body page logo feature also includes fields to fine tune the placement and scaling of your logo. Your logo will be inserted in front of the header text of every body page of the document (i.e. in front of the text “Executive Summary”, “Cost Summary”, “Company History”, and so on.
- Added a new manual chapter [How do I Add My Logo to the Headers of all Pages?](#)

- The Wizard now has the ability to import the header of an external document into the body pages of your document. This is now handled via the MyGraphics folder features.
- Added a new manual chapter [How do I Import a Custom Page Header?](#)
- Custom logos can now be scaled automatically by the Wizard. You can set a scaling factor in the Wizard's Edit Style > Graphics screen. This will help not having to rescale your logo in a graphics program before inserting into your documents. You also don't have to manually resize custom logos each time they are inserted now.
- Fixed a bug in the Configure Proposal Documents screen where if the list of templates was sorted alphabetically an error message would be displayed when deleting a document from the database.
- If the Wizard is unable to locate the actual Word document for any templates in its database it will now generate a warning message with a list of the file titles and file names that cannot be found. This is typically only an issue when someone is customizing the Wizard database files manually and forgets to copy documents to the right folder or mistypes the file name in the database.
- The Open Folder Button on the Proposal Edit screen has been disabled in Novice mode to reduce confusion over having multiple methods for opening the master proposal.
- Added a more obvious graphic in red text and with red arrow pointing to the drop down list of additional Top 40 categories to







make it easier for new users to locate all of the 1000+ available topics via the various Top 40 sub categories.

- Support for the upcoming Word 2013 has been added to the Wizard.
- When adding a template to a disabled Top 40 list, the enable box will be automatically turned back on to prevent problems forgetting to enable the Top 40 list.
- Additional error handling messages have been added to aid debugging obscure configuration problems.
- Minor interface improvements.
- Added more import files for additional types of proposal situations.
- Added additional error checks for unsupported Word versions such as Word 2002.
- Improved the encoding of URLs when the Wizard calls web site scripts.
- Improvements to the Graphics & Logos screen such as auto-enabling entries as soon as a file is browsed to and selected to help ensure the user does not forget to enable custom logos. Additional tips are also displayed when adding custom logos on how to finish setting up and configuring the use of custom logos. Custom logos are also now checked to ensure they are graphic file extensions such as (.png or .jpg).







- Additional text has been added to a number of Wizard messages to make steps more clear and to offer additional tips.
- The Import function of the Pick Documents screen will now display a warning message if importing templates that do not actually exist as documents - such as when using the (Limited) stripped down set of templates that ships as a demo in the Wizard.

WHAT'S NEW IN V9.2?

- The samples can now be searched. A new search feature has been added to more efficiently locate samples by searching the sample titles, descriptions and keywords. This feature also allows you to find all samples that use specific Proposal Pack templates. For example, you can search for all samples that use the Executive Summary template or the Project Management template. Look for the new “Search Samples” button in the Pick Documents screen in the View Samples tab.
- When you use the Wizard Preferences to set your own custom company logo for the Title Page the Wizard will automatically change the default graphic to be the custom graphic you setup in the Preferences. This saves you the time having to make 2 setting changes in different screens for getting your custom logo setup.
- The “Edit Current Document” screen now pre-selects your assembled documents saving you the time of having to select the documents each time the screen is entered. All you have to do is click the Edit button to open the project documents.

-  In some cases Microsoft Word was applying default settings to custom Word Styles that were added to documents for settings such as the “No Proofing” flag when the Wizard was not specifically setting the flag. This sometimes meant Microsoft Word was defaulting to turning off the spell checker for text that had a specific custom Word Style applied to it. The Wizard now defaults to always ensuring the spell checking is turned on for all of the custom defined Word Styles. There is also a Wizard Preferences setting to turn off the spell checker for any specific Word Style.
-  When using a Proposal Graphics Pack that includes custom bullet point graphics, the Wizard will now automatically set the “Bullet” Word Style to use the custom bullet point graphic.
-  Previously the Wizard would not import custom graphics into templates that were designed to be plain text (i.e. the Cover Letter, Inquiry Letter, etc.). Now the Wizard will import custom bullet points graphics into these templates during the assembly process when operating on a Proposal Graphics Pack that includes custom bullet point graphics.
-  The Wizard no longer requires the user to click on the Logo tab of the First Run screen during the initial setup of the Wizard.
-  The Wizard will skip processing of shape objects that do not contain text (such as autoshape checkboxes) when scanning the objects in the document during the mail merge process. This can significantly speed up the mail merge processing if you have added a lot of custom shape objects to your document.
-  A number of error messages have been enhanced with additional information to help more precisely determine the

cause of those error conditions (i.e. such as point sizes out of range, or running versions of Microsoft Word with limited functionality).

-  When using the Wizard on laptops with small screen sizes, some buttons were being cut off at the bottom of the screens. The buttons have been moved a little higher on those screens to make them accessible on very small screen sizes.
-  A couple cloud styled graphics were added to the Wizard document to help point new users at where to find the macro security button and the Add-Ins tab for running the Wizard.
-  If no document project is selected from the Pick Project drop down, the edit and change buttons will be greyed out and not accessible until a valid project is selected from the list.
-  If a custom sort sequence for a set of template in a Document Project gets out of sequence and causes an error message about the sort sequence not being correct, the Wizard will now automatically repair the error.
-  All of the samples included as demos have been updated with new graphics.
-  In some cases when installing newly purchased additional Proposal Graphics Packs they were not being automatically selected as the current Document Style. Now whenever a new Proposal Graphics Pack is installed it will automatically be set to your current style so you don't have to manually select it from the Document Styles list.








- The Alphabetical template listings are now enabled in the Novice mode in the Pick Documents screen.
- The message displayed when new Proposal Graphics Pack installations are detected by the Wizard is now updated with more information to help direct the user to where to manage those new packages in the Wizard interface.
- If the Pick Documents > View Samples cannot locate the specific Cover Letter for a sample it will default to whatever Cover Letter it finds first in cases when you didn't change the default Proposal Type to match the one used to create the sample initially.
- In some cases when using custom Word Styles that were "Character" styles and not "Paragraph" styles and the user set a flag that was not applicable to "Character" styles the settings would not be applied correctly. The Wizard now checks for settings that are not applicable to "Character" styles and won't try to apply those settings.
- Fixed an error message that occurred during the First Run setup screen when the "Other" catch-all drop down item was selected. This error message did not actually result from a problem, it was just an erroneous message.
- Some documents had minor cosmetic formatting updates.

WHAT'S NEW IN V9.1?






- Improved processing time of documents that include shape objects.

- Added buttons to various screens to directly access document folders using the desktop as an option to selecting documents from the interface lists.
- Added a new button to the Pick Document's 'Search by Name' tab to clear out the form fields. This will make it more efficient when doing lots of searches as you don't have to manually clear out the fields each time you start a new search.
- Changed the default Word "Style" Proposal Pack Title Page alignment to be right aligned. Also changed all of the custom styles from "Paragraph" to "Character" styles to avoid problems with applying styles to existing documents and having to deal with formatting changes.
- Added the ability to change settings of built-in Word Styles (such as Normal, Heading 1, Heading 2, Title, Subtitle, Bullet, Hyperlink, Header, Footer, and Page Number).
- Added a new field to the Word Styles options to allow setting the First Line Indent of the Style's paragraph settings. This option also allows for negative numbers.
- The Wizard database includes default settings for these 10 standard built-in Word styles that match settings for the custom Proposal Kit styles. Use of the Wizard to update the built-in Styles and use the custom Styles can help ensure all text in your documents can be easily changed and will be consistently used across your entire document.
- Added a new custom style "Proposal Kit Faux Page Header". This style is used to match the same styles as the "Proposal Kit

Page Header” but will cause the Wizard to exclude headers in this style from going into the automated Table of Contents.

-  Added a new custom style “Proposal Kit Important Body Text”. This style is the same as the body text however is in a dark red font. Used to highlight important body text.
-  Added a new custom style “Proposal Kit Sample Header”. This style was intended for internal use to highlight text in bold red in demo documents. However you can use this style for your own purposes.
-  Added a new custom style “Proposal Kit Sample Text”. This style was intended for internal use to highlight text in bold red in demo documents. However you can use this style for your own purposes.
-  The Wizard will now set the header text of any templates that are NOT included in the Table of Contents to the “Proposal Kit Faux Page Header” style.
-  Added the ability for any of the Style settings to be left unchanged. This is mainly used when specifying changes to built-in Word Styles.
-  Increased the number of supported custom Word Styles from 20 to 40.
-  Proposal Packs that are loaded into the Wizard that use the new Word Styles will turn off the auto-reformat feature of the Wizard by default.





- Changed the auto-updating Table of Contents to assign a Word Style to the actual Table of Contents using the pre-defined “Proposal Kit Body Text” style.
- Updated the custom bullet point graphic replacement feature to not replace numbered lists with custom bullets.
- Updated the document reformat process to no longer reformat text set to the “Normal” style.
- Any new Proposal Packs version 13.1 or higher will automatically have the document reformatting process turned off by default now that all of the documents use Word “Styles” to prevent formatting problems with documents are combined together.
- If all of the custom Top 40 situation lists have been disabled and there is only 1 Top 40 screen left (the default screen) then the drop down list of all Top 40 lists will be hidden from view in the Pick Documents screen.
- Added some more information to some error condition messages.
- The Edit Style screen has been updated to allow switching between the lists of templates in category listings and alphabetical listings to make it easier to locate specific templates.
- More arrow icons have been added to the interface screens to visually show when operations are available (i.e. such as turning on an arrow icon next to an edit button when a selection has been made).

-  The Wizard now includes a new Import tab in the Pick Documents screen. The Import tab is a new feature that allows for auto-selecting a set of topics for a proposal from a list that someone else created. A number of common situations have also been added for the user to auto-select a set of templates from. This feature also allows administrators to create custom lists of templates for other users to import into their projects - saving the end user taking the time to find and select a set of templates. This is very similar to using Presets, Auto Recommend or View Samples, however this allows the list to be selected based on an external file that was created outside of the Wizard.
-  The Pick Documents screen of checkboxes was not being updated as templates were added using the other tabs. As you add templates to your project from any of the tabs and you then go to the tab of checkboxes, the boxes will now be checked for added templates.
-  Fixed a bug that may have prevented custom logos from being inserted into the plain text versions and alternate Title Page Pack title pages.
-  The 'View Samples' tab now warns if any templates in the import list are not available in the current proposal type (i.e. if you are importing a list of topics for a business plan but you do not have your project type set to a business plan for your current project).
-  Turned off the messages about mail merge tags that were not filled in after each proposal is created. The message can be turned back on in the Preferences.






- Turned on the ability to change the order of selected templates when in the Novice training mode and demo mode.
- Fixed an error message that would occur when multiple templates were added from a “Search by Name” screen to a project that had a custom sort order defined for its templates.

WHAT’S NEW IN V9?

- Proposal Pack Wizard had been updated to work with over 230 new Proposal Pack Templates, 5 new samples and over 40 new Contract Pack contracts included in the new 2012 products.
- Added 4 new custom logo options and 4 additional custom logo options to the Preferences > Logos & Graphics screen to support the 4 new logos available in the 2012 Proposal Packs. Now you can include graphic headers into the title page for “Manual”, “Information”, “Documentation” and “Instructions”. This allows you to use the Wizard and Proposal pack to create additional types of business documents with a consistent design theme.
- Proposal Pack Wizard now directly integrates with the QuoteWerks quoting software. Multiple workflows are supported allowing you to either import QuoteWerks data and documents into your proposal or copying your Proposal Pack master proposal into QuoteWerks as a Layout to be completed within QuoteWerks. The Wizard will automatically detect and configure itself to work with QuoteWerks. Other features include auto-launching and logging into QuoteWerks when the Wizard is started. When creating a new Proposal Pack Wizard project you can also import your contact information directly from QuoteWerks.

-  The Wizard's mail merge tag remapping feature has been expanded to support multiple lists of remappings. The Wizard is now pre-configured with tag remappings for the QuoteWerks quoting application. Three custom lists of remapping tags are also now supported. Tag remapping will automatically convert Proposal Pack tags to a different set of tags to allow easier use of integrating documents between applications.
-  A new file import feature has been added to the Wizard. You can now insert multiple <<ImportFile>> and <<ImportContractFile>> tags into your templates. During document assembly the Wizard will prompt you for files to be inserted into your assembled proposal. If you have third-party applications such as QuoteWerks installed it will default to looking in their document folders. This new feature allows you to create a single combined reusable master proposal that can have quotes, multiple contract options, or other information imported into it for each new proposal.
-  The Third-Party configuration screen now includes a Skip Mail Merge checkbox (which is turned on for QuoteWerks by default). This feature improves performance when importing complex 3rd-party created documents that don't include mail merge tags.
-  The "Top 40" list of most common templates screen of checkboxes has been significantly expanded with over 65 "Top 40" lists. Instead of a single "Top 40" list, then all 1000+ templates being accessed via other screens and entire suite of "Top 40" categories has been added. These new lists allow you to instantly see all of the topics for specialized business types (contracting, events, security, real estate, logistics, and so on), proposal types (service sales, product sales, projects, business

plans, and so on), and usage categories (introductions, summaries, company details, financials, appendices, and so on). The new categories make it much faster to locate topics out of the library.

-  During the initial setup the Wizard will add selected situations from the new suite of “Top 40” lists to your Favorites list making it easier to locate. This initial setup will also add samples related to your type of situation to the samples favorites list.
-  The Top 40 screen does not require an extra button to be clicked after selecting templates. Templates are now automatically added to/removed from your project as boxes are checked.
-  The new suite of “Top 40” lists is also customizable. You can put your important lists in a Favorites category. You can define multiple custom lists. You can change the topics in all of the lists. You can also remove lists from the display.
-  The Wizard can now create a true Word auto-updating Table of Contents. The Wizard will automatically insert a Word Table of Contents object into your document and update all of the page headers to support the Word Table of Contents object. Text page headers are set to a Word “Style” and graphic page headers have TC Fields inserted next to them during document assembly.
-  A new Preferences > Data & Display > Auto Table of Contents Display screen has been added to allow configuration of how the Word Table of Contents will be created. All of the standard Word settings for the Table of Contents are supported.

- When inserting page numbers into your document the new Auto Table of Contents options can be used to define the type of page number allowing for more options besides standard numbers.
- When creating the Table of Contents the Wizard will now automatically exclude any topics/pages above and including the Table of Contents from the Table of Contents.
- To support the Word Table of Contents and the updated reformatting process the Wizard now inserts a collection of 20 pre-defined Word “Styles” into the documents during assembly. This collection of Word styles defines the font styles for various parts of the document. Up to 20 Word Styles are supported by the Wizard and a number are set aside for future use and custom use.
- A new Preferences > Data & Display > Font Styles screen has been added to allow customizing of all of the Wizards custom Word “Styles”.
- The Wizard’s document reformatting process has been updated to make use of the new Word “Styles”. While it does not change the existing styles in the document, it will use the font settings to update the text of the document. This is to ensure the reformatting process does not alter the document layout. You can cause the Wizard to skip reformatting text by setting paragraphs to an actual custom (non-built in) Word “Style”.
- A new option has been added to the Preferences to have the Wizard do the reformatting of the document on a Word by Word basis instead of the default Sentence by Sentence basis. The by Word option is much slower however it is more precise. The by

Word option is recommended when you have a lot of sentences that mix multiple font types in the same sentence (i.e. a bold Arial header and a non-bold Times New Roman).

- More progress bars have been added to various Wizard operations.
- More visual feedback is provided in many of the Wizard screens such as arrows pointing to buttons once the screen fields are in a state where you are ready to perform an operation.
- File and folder browse buttons now default to starting in a specific folder to reduce the amount of time locating files and folders on your hard drive.
- The new “What You Can Expect” template is now included in the main Top 40 list for general business proposals.
- The Top 40 tab in the Pick Documents screen is now defaulted to being displayed first in both Novice and Expert modes.
- If a Contract Pack has been uninstalled the Wizard will automatically turn off messages about missing files.
- All of the drop down lists in the Wizard screens have been adjusted to fill the available space on the screen giving more visibility all of the options.
- The Wizard documentation can now be opened from the Wizard home screen. This is useful if you have deleted the desktop shortcut icons.

- The color picker dialog screen now retains any custom colors setup while using the Wizard. Custom colors are only retained while the Wizard is running.
- To improve performance during assembly custom mail merge tag wrappers are not searched for now by default. If you are using custom mail merge tag wrappers you can enable them in the Preferences > Data & Display > Edit Mail Merge Fields screen.
- The maximum number of documents the Wizard can manage has been increased to accommodate the hundreds of new templates in the new Proposal Packs.
- When switching from Novice to Expert mode you do not have to exit and reenter the Preference screen anymore after switching modes.
- Added new manual chapter: [It's not just for Proposals and Contracts!](#)
- Added new manual chapter: [How do I Import the Contents of External Files?](#)
- Added new manual chapter: [How do I use the MyProjectFiles folder?](#)



The Wizard allows you to copy your own custom files that are not part of the Proposal Kit system into each of your new projects using the MyProjectFiles folder.

This feature allows you to automatically copy your own content such as worksheets, checklists, letters, spreadsheets, forms, etc. into each of your new Proposal Pack Wizard project folders.

The MyProjectFiles folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyProjectFiles


Whenever you build a new document in the Wizard a copy of all the files in the MyProjectFiles folder will be made into your document's project folder.

You should not name any of your custom files the same file names and extensions as any of Proposal Kit's document file names.


Use the Preferences > Project Settings > Configure MyProjectFiles Settings screen to manage adding files, removing files, and setting attributes for the custom files in the Wizard database.


You can manually copy files into the MyProjectFiles folder however that will not setup any of the attributes such as human readable titles for use in the Wizard drop down menus. Use the Wizard's Preferences tool for managing the attributes.

 How do I Change/Use Word Font Styles?


 Added new manual chapter: [How do I Integrate with QuoteWerks?](#)


WHAT'S NEW IN V8.11?


 Added information to supplement some Microsoft Word system error messages that occur if a required Windows/Word DLL is missing or unregistered.


 Uninstalled Title Page Packs would generate a missing file message. Updated the Wizard to disable Title Page Packs in its database that have been uninstalled to prevent error messages about missing files.


WHAT'S NEW IN V8.1?

 Added support for more category groupings of the Title Page Packs. The Wizard now groups the Title Page Packs by single color, dual color, triple color and textured color designs.










 Added color swatches next to the selected alternate Title Page Pack title page document.

 Added additional information to a couple Word generated error messages.

 Updated the Wizard demo to check for updated versions of the demo.

 Updated the Wizard error handling system to detect if a new Wizard version is available.

WHAT'S NEW IN V8?

-  The Windows bitmap (.BMP) files and folders have all been converted and renamed to PNG format files. The Wizard will still be backwards compatible with old styles of Proposal Packs that still use Windows bitmap (.BMP) graphic files. The Wizard now defaults to looking for all Proposal Pack graphics in PNG format.
-  Added the “Company History” template to the Wizard demo.
-  Added the “Company History” as an auto-selected template to your first proposal created in Novice training mode.
-  The demo version of the Wizard now uses the newly redesigned Title Page backgrounds and graphics.
-  All of the templates that come with the Wizard and Wizard demo have been updated to the new Proposal Pack template designs, colors and layouts.
-  A number of samples have had additional content added to them. The Wizard database has been updated with this new content for use with the “View Samples” feature.
-  The Sample Business Proposals in the Wizard demo have all been updated with the new Proposal Pack graphic designs.
-  Removed the “Replace Graphics” checkbox from the Document Styles screen. This is an obsolete feature not supported anymore.
-  The Wizard now loads the new Proposal Pack setup.ini fields for use with the new custom bullet point graphics, Title Pages with

background watermark graphics and body background watermark graphics.

- Added a new manual chapter [How do I Use Custom Graphic Bullet Points?](#)
- Fixed a drop down on the Document Styles settings screen that wasn't being displayed to the correct value in the database.
- The project status buttons in the Pick Project screen are now disabled when there are no projects in the list.
- The project status buttons in the Pick Project screen are now disabled in Novice training mode.
- The Pick Data screen is now refreshed to update the drop down lists of projects when the status of the current project is changed or the project is deleted and removed from the list.
- All data coming from the registry and INI database files is now trimmed to remove any leading and trailing white space.
- If an error condition occurs and the error report screen is displayed a clickable link to the troubleshooting web page is given. This makes it easier to locate more details and resolutions for errors that may occur.
- Added more information to the diCryptoSys.dll error messages caused by user installation mistakes such as installing the Wizard from a user login with restricted access permissions.
- Added the ability to set the page width and height in the Options.ini as points instead of inches. This helps get around

problems using the Wizard when inches are not converted by international non-English versions of Windows/Word that may use different characters such as commas instead of periods for floating point numbers.

- Other uses of inches for page layout settings have been changed to points by default to avoid potential floating point conversion problems in international versions of Windows and Word.
- Added better error messages for errors due to running trial/expired/limited versions of Microsoft Word. Microsoft will disable some features of Word if used with limited or expired installations of Word software, which can translated into error messages when the Wizard is run.
- Fixed a list index error message that occurred if the user configured the database incorrectly and disabled all of the Wizard's default proposal types.
- Added some more verbose error message information to a number of Word generated errors for various situations.
- Added support for the new Title Page designs with custom watermark backgrounds. The Wizard will now default to using the new Title Pages using the newly redesigned background graphics first. The Wizard is also backwards compatible with old Proposal Pack designs and will revert to using the old style Title Page design for older Proposal Pack versions.
- Added new manual chapter [How do I Use Custom Title Page Background Graphics?](#)

- Updated how users custom logos are inserted into the Title Pages (both old and new Title Page designs) so the logo can be repositioned easily in the layout without having to manually change the picture layout settings.
- There are new X and Y coordinate settings in the Document Styles settings screen for the user to custom position imported logos in the Title Page.
- Added support for new background body watermark graphics embedded into background of body. Can turn on/off or change the background watermark. The body background watermark is a custom graphic faded into the background of all of the body pages of the main document. Custom body background watermark graphics are new design elements added to the most recent version of Proposal Pack.
- Added new manual chapter [How do I Use Custom Body Watermark Graphics?](#)
- Added support for new custom graphics used as bullet points. Can turn on/off or substitute in custom bullet graphics. Custom bullet point graphics are new design elements added to the most recent version of Proposal Pack.
- Added a new Title Page tab to the Pick Documents screen that allows selecting a custom Title Page from the new line of Title Page Pack products and options to apply those settings to all new projects. The new Title Page settings also work with the Presets and database Export/Import features.
- Added new manual chapter [How do I Use Add-on Title Page Packs?](#)

- Updated the Project screen to allow resetting of the customers logo for a project. Once a custom logo was selected for a specific project it previously could not be changed in the data entry screen.
- Added a new tab to the First Run screen to allow faster customizing when first using the Wizard to add a custom logo.
- The Cover Letter and Cover Sheet documents are now combined into the master proposal using section breaks to isolate them in their own section without page numbers and colored borders. Previous versions of the Wizard kept the Cover Letters and Cover Sheets in separate documents from the main proposal.
- The main proposal document is now broken into multiple “sections” to separate the Cover Letter/Cover Sheet, Title Page and rest of the body of the proposal. This ensures that header/footer and page number information is properly maintained throughout each section of the proposal. For example, the Cover Letter/Cover Sheet is maintained as a plain text page with no page numbers, graphics or colored borders. The Title Page is maintained as a separate section without page numbers and uses a new custom background graphic. The body of the proposal is maintained as a separate section with page numbers, colored borders, footer accent graphics and faded body watermark graphics.
- Added new manual chapter [How do I Use Word Document Sections?](#)
- Changed the tab stop settings in the Table of Contents to ensure all of the entries line up correctly.

- ❏ Removed some legacy code that caused existing hyperlinks and other linked fields in documents to be removed that may have removed some links added by custom edits to the stock Proposal Pack documents.
- ❏ Added the location of any installed Title Page Packs to the file location report.

WHAT'S NEW IN V7.3?

- ❏ When adding a new custom template and there are not already 40 templates in the Top 40 list, the new template will automatically have the Top 40 check box turned on in the add new template screen. For example, when adding new custom templates using the Custom proposal types this makes it easier to ensure your new templates will show up in your Fast Access lists.
- ❏ Added a more detailed error message when unable to create a folder. Typically, due to someone trying to create a subfolder in a path when a parent folder in the path also does not exist.
- ❏ Fixed a bug in the Document Project screen that was not allowing users to set the project folder path to a custom folder using the browse button or manually changing the system generated project folder. It would always revert back to the system default of using the Wizard project parent folder and the project name as the projects subfolder when saving the project.
- ❏ Added more details to the 5 Minute Quick Start chapter on how to run the Wizard as a Word Add-In.

- ❏ Cleaned up an error message when someone used an old version Wizard database with the new Wizard software and the old database was missing the new project tracking data.
- ❏ Added a tip in the activation code screen on how to cut-and-paste the activation code from the users email.
- ❏ Added an extra one-time tip message when first entering the Pick Documents screen pointing out how to quickly select templates using the View Samples tab.
- ❏ Added 20 more Proposal Pack skins to the Demo version of the Wizard.

WHAT'S NEW IN V7.2?

- ❏ Added the ability for administrators to disable more Wizard screens for use when creating customized versions for end users. The “Document Styles”, “Preferences” and “Check for Updates” buttons can now be individually disabled; preventing end users from entering any of the configuration screens.
- ❏ Added a new chapter to the manual to describe the new configuration features that allow administrators to disable specific Wizard features: [How do I Disable Access to Features as an Admin?](#)
- ❏ When in Novice training mode the Edit Tag Labels & Defaults button in the Contract and Custom Merge data screen is now disabled. This makes the behavior consistent with all other screens disabling advanced features in the Novice training mode.

- Added a Quit Wizard button to the error handler screen. This comes in handy if a system error such as not having admin permissions to edit a database cause a cascade of error windows you can quickly exit the Wizard.
- Completed integration of the new error handling and reporting system into every function of every screen of the Wizard to assist in tracking and resolving system errors generated by Word or Windows that affect the operation of the Wizard.

WHAT'S NEW IN V7.1?

- Added more verbose instructions to the -2147467259 PrivateProfileString error message which occurs when a user does not have access permissions to write to an INI database file or the Wizard registry keys. The old message was the standard cryptic Word system error. Instructions have been added to this error condition that are more meaningful and direct the user to the file that does not have access permissions.
- Fixed a minor bug when customizing templates. When using the Preferences > Tools > Configure Proposal Files screen to edit an existing document and change its title an error message was occurring.
- Optimized the process when making custom edits to existing templates using the Preferences > Tools > Configure Proposal Files screen. The processing time to check all of the cross references between the various database files has been significantly decreased.

- Added extra error messages to help diagnose possible file permission problems when editing custom templates that may be accidentally protected from editing.
- Added the Windows system version and the Word version to the error reporting system to aid remote diagnosis of reported errors.
- Added the new error handling system to more parts of the Wizard code.
- Added a feedback screen to the demo version of the Wizard.
- Fixed a minor glitch that cropped up when a user customizes one of the 12 project types and removes ALL of the templates from the list. The Wizard would display empty rows in some cases in edit screens until at least one file entry was added back to the list of templates for that project type.
- Fixed a bug in the new Configure Templates screen that could cause the templates to be deleted when bouncing back and forth between the screen multiple times.
- Fixed a bug in the new Configure Templates screen that would cause custom retitled templates that did not match stock Proposal Pack template names to not be written back to the list of files during the Save operation.
- Also added a backup feature that backups the current FileList#.ini file before the Configure Templates screen Save operation rebuilds the file.





WHAT'S NEW IN V7?

- Proposal Pack Wizard had been updated to work with over 200 new Proposal Pack Templates and over 20 new Contract Pack contracts.
- Since the Wizard now supports a collection of over 800 templates, 120 samples and 270 contracts it can be sluggish on older and slower computers. While we have optimized the Wizard quite a bit this version you can setup a customized set of templates that will both be faster for you to work with and will make the Wizard run faster as well. Added a new manual chapter on how to improve the Wizard performance: [How do I Improve the Performance of the Wizard?](#)
- The Wizard now uses an Activation Code you received with your order.
- Updated Wizard to allow user to setup Word auto-generated Table of Contents. Added a new chapter to the manual on how to set up an auto generating Table of Contents [How do I Add a Word Auto-Generate Table of Contents?](#)
- Rewrote the manual chapter on using the Pick Documents screen for adding and removing templates from projects: [How do I Add a New Document Project?](#)
- In the Pick Documents screen the Auto Recommend tab is now hidden once you switch from Novice training mode to Expert mode. This tab is primarily only used as a training tool for beginners.
- Progress bars have been added to a variety of operations such as creating project documents, database tests and data import/export functions.





- ❏ Documents opened by the Wizard for processing during the document creation process are opened minimized so the new progress bars will be visible.
- ❏ The document creation process is now better protected against the user changing the active document during processing which could cause errors or Wizard crashes.
- ❏ Import data from past versions of the Wizard with the new export/import tool. The new data export/import tool is a multi-step process that assists migrating to the new version of the Wizard if you have customized your old Wizard databases. The tool runs a prescan of your old databases and generates a report of potential customizations it found and how to migrate them to the new products. A detailed import report is also generated outlining any issues it found with the imported data. Added a new chapter to the manual to assist with migrating: [How do I Migrate from a Previous Version?](#)
- ❏ The export tool allows exporting your projects to an XML file for external use. Your project data can be manipulated and integrated into 3rd party systems. Added new manual chapter: [Import/Export XML File Format](#)
- ❏ The import tool allows importing of project data from an XML file. This provides another tool for integrating with 3rd party systems.
- ❏ Research Proposals have been added as a new type of proposal with a customized selection of templates. Select the Research Proposal type when creating a new project.

- The auto-recommendations have been revised for Micro, Small, Medium and Large sized proposals. Micro proposals will now show an average of 3 templates, Small proposals will show about 6 templates, Medium proposals will show about 10 templates and Large proposals will show about 15 templates on average (depending on the type of proposal being created). The “Everything” option has been disabled by default to prevent accidentally selecting too many templates. If you have made use of the “Everything” option in the past, it can be enabled in the Preferences when in Expert mode. The Everything option is only meant for customized proposal types. The auto-recommend tab also now requires that all 3 of the drop down boxes be selected before clicking the Recommend button.
- The maximum number of documents the Wizard can manage has been increased to accommodate the hundreds of new templates in the new Proposal Packs.
- The “Limited” collection of templates that ships with the Proposal Pack Wizard has added 7 new templates increasing the total number of templates to over 60: Rates, Payment Options, Vendors, Confidentiality, Instructions, Diagrams, Appendices
- A number of existing templates that ship with the Proposal Pack Wizard have been updated with more content.
- The Novice mode that the Proposal Pack Wizard starts in has been much more streamlined to make the creation of your first proposal easier. The Pick Documents screen will now auto-configure itself to show you only the most relevant information first, and still gives you all the past features (including new ones)






to find what you are looking for in the entire collection of templates.

-  The Pick Documents screen has been redesigned to configure itself differently based on what product(s) are installed to help show only the most relevant information. For example, some tabs may be hidden when they are not relevant to the situation. You may notice the various tabs and templates change in the Pick Documents screen if you have multiple products installed and you switch between them (such as using Proposal Packs vs. Contract Packs, or Proposal Kit Professional, etc.
-  When the Proposal Pack Wizard is used with a full Proposal Pack for Any Business template collection, the default limited collection will be disabled to help prevent new users from accidentally selecting the wrong template collection.
-  All Help buttons have been changed to have red backgrounds to help make them stand out on the interface screens.
-  The “Top 40” templates feature has been completely revised. The last version of the Wizard included a basic “Top 40” feature that rebuilt the drop down lists of templates with the top 40 most commonly used templates. The same Top 40 list was also used for all proposal types. The new “Top 40” system now uses a different list of top 40 templates for each of the 12 proposal types (i.e. general business proposals, grant proposals, business plan proposals, grants, government contracts, resume proposals, contracts, quotes, research proposals, booking publishing proposals and the 2 custom types). Also, the Top 40 list can be overridden for a specific Proposal Pack style (at this time only Limited styles have custom Top 40 lists). Also, the entire list of Top 40 templates is now shown at once on the





screen using checkboxes (instead of listing them in drop down lists). This makes it much more efficient to check off a set of templates to add to your proposal, and it will be tailored more specifically based on the type of proposal being created. You can also quickly flip between the “Top 40” tab and the tab that gives you access to all 800+ templates. In addition, in Novice mode, beginners will see the Top 40 list first vs. in Expert mode when they see the tab with all 800+ templates first.

-  The Pick Documents tab which gives access to all 800+ templates via drop down lists has been streamlined to only use one set of Add/Description buttons for the entire tab, instead of one set of buttons for each drop down list. This makes the screen more intuitive and easier to use. The Pick Documents tab has also been revised to move the Remove Template(s) button to its own tab to contain all template removal to one button and one screen.
-  More help information is displayed regarding the Delete Old Files button in the Project screen and how to safely add and remove templates and change mail merge data when you have already created a proposal. The Delete Old Files button will be disabled when there are no files created. If you try to make changes to an proposal that has already been created additional help information will be displayed on the Project screen.
-  Added examples in the help screens for the company and client mail merge data screens about what types of information should be entered in those fields.
-  The Presets feature has been moved to its own tab in the Pick Documents screen and is not part of the Auto Recommend tab



anymore. The maximum number of presets has been increased from 5 to 40. The Presets feature also has been enhanced to add an auto-populate feature. You can now designate one of your presets to be used to auto-populate the templates for each new project saving you time each time you create a new project. NOTE: Each of the 12 proposal types that can be selected for your project (general business proposal, grants, contracts, resumes, business plans, etc.) has its own set of up to 40 presets (effectively giving you up to 480 presets total). Use the Auto-populate in conjunction with customized proposal types to more efficiently create each new proposal.

-  The Presets feature has also been enhanced to allow saving of a custom contract and all of the contract configuration settings (such as if the contract is created separately or is included in the proposal).
-  The Presets feature has also been enhanced to save the custom ordering of the templates if you have changed the default order the templates are assembled in the final combined project document.
-  Selecting templates from alphabetically sorted lists has been added as another way to select templates in the Pick Documents screen.
-  In Novice mode the first time a new project is created the Wizard will pre-select the Cover Letter, Title Page and Cost Summary templates to help new users get started learning what templates to select.
-  The Wizard includes many more popup messages that help guide what you need to do. In many cases when you perform an





operation without performing required steps before hand, the Wizard will give you additional instructions on what to do first.

-  Added new Preferences options to allow administrators to configure the tabs shown in the Pick Document screen. Admins who are configuring the Wizard for other users can configure individual tabs to have them always displayed or never displayed. This allows more customized installations that only give end users access to the options you want. Added new chapter in the manual for this feature: [How do I Turn On/Off the Various Pick Documents Tabs?](#)
-  Added new Preferences options to configure what templates are displayed in the Top 40 template screen. Each of the 12 major proposal types has its own unique list of Top 40 templates (i.e. for general business proposals, business plans, grants, resumes, etc.). You can change the default Top 40 lists we supply to your own Top 40 list. This is a handy tool for administrators to configure the Wizard for their end users that is more specific to their needs. Added a new manual chapter on how to customize the Top 40 lists: [How do I Setup my Own Top 40 List of Templates?](#)
-  Added meta data fields to the Wizard. The Wizard will now set the Author, Comment, Company, Keywords, Subject and Title meta data tags in each new document you create. You can override the default meta data fields in the Wizard's Preferences. Added a manual chapter on setting up the property meta data: [How do I Change My Final Document's Properties?](#)
-  The Wizard now requires new users to create one proposal document in the Novice mode before the Expert mode can be

turned on. This helps ensure new users do not get lost in configuration screens and sections of the Wizard that are not necessary for creating a proposal. New users will be guided through an easier setup process for creating their first proposal so they will understand the basic elements of the system (i.e. adding a new project, selecting templates, entering mail merge data, creating the proposal document and editing it). The Novice mode has been simplified even more in this new release to restrict access to areas of the Wizard that are not required for learning the basics of the system.

-  While the Wizard was revised in the past to protect users from overwriting their work too many users are not paying attention to the instructions on how to safely add or remove templates or change the mail merge data in a project that has already had its documents created. This version of the Wizard includes more checks to detect when someone is attempting to incorrectly alter an existing project and will direct them as to how to do it safely.
-  Another new feature added to both help prevent unintended overwriting of edited documents and to give additional instructions on how to safely change projects is the Locked for Editing feature. Once you have created the documents for a project and have opened at least one of them for editing, you will not be able to go back and save changes to the project (i.e. adding/removing templates or changing mail merge data). If you have not made custom edits that could be overwritten, you can unlock the project, delete the old files and safely recreate the project with your changes.

- When deleting a document project from the Wizard, the Wizard will also prompt to delete any existing files for the project and will delete them as well.
- The Edit Project screens have been streamlined to allow multiple spreadsheets and templates to be opened from a single list box of project files. The Team Editing feature is disabled by default, when Team Editing mode is enabled in the Preferences, a new tab will show in the Edit Project screen. A new safety feature has also been added to the Team Edit screen where the combined project document will be locked for editing if it has been opened and will prevent it from being overwritten if you try to recombine the documents while it is locked for editing.
- Fixed a problem that could generate Run Time Errors 5152 and 5187 which relate to customized lists of files that included duplicate file names and titles of document names that included invalid characters such as slashes in the file name.
- Demo versions of all of the Contract Pack Professional/Proposal Kit Professional contract documents are included in the Wizard. Demo contracts are truncated down to part of the first page for illustration purposes so you can see what types of contract material are included in the Contract Pack products and you can test the functionality of the Contract Pack products without having to purchase them first.
- Add a new Preferences screen for customizing the Top 40 template lists more efficiently. This new configuration screen allows you to manage all of the Top 40 listings for all proposal types on one easy screen instead of having to manually update each proposal template one at a time.

-  The Wizard now includes a feature that allows you to easily change the default order of the templates for each new project. The new ordering will be used when the Table of Contents is built and the templates are assembled together in the specified order. All screens that display the selected templates will show them in the custom ordering (i.e. the remove templates screen, the view selections screen, the presets features and the final project edit screens). There is also a Preferences setting that administrators can use to disable the custom ordering feature to help control how much ability end users in a larger environment have to edit predefined proposals. Note that the ability to change the order of the templates is only available in Expert mode.
-  Added 7 new styles to the demo version of the Wizard. The demo of the Wizard now includes 20 of the over 200 Proposal Pack skins. The Contract and Terms template has also been added to the demo version to allow users to see how the Wizard integrates the proposals and contracts.
-  The Document Styles screen now displays a graphic of the currently selected Proposal Pack skin to help users see which skin is the currently selected one. Added the ability to edit the original stock Contract Pack contract templates directly from the Add a Contract tab of the Pick Documents screen. This feature will also open all of the related exhibits/schedules that will be attached to the contract when it is assembled.
-  Disabled the close buttons in the upper left corner of all Wizard screens to ensure users use the appropriate close buttons on each screen and to avoid unintended problems with windows being closed while work is in progress.

- Added a simplified version of the Document Styles window for use in Novice mode. The operations of the Document Styles window have also been enhanced with more messages to help assist the user in how the styles or skins are managed.
- The Wizard will now automatically disable the use of the limited Proposal Pack template collection that ships with the Wizard when a full retail Proposal Pack for Any Business template collection is installed. The Wizard will also automatically default to using the most appropriate Proposal Pack when multiple packs are installed.
- Added the actual counts of all proposal and contract templates to the various tabs of the Pick Documents screen.
- The Document Styles screen now dynamically determines what products are installed and displays the appropriate discount for add-on Proposal Packs along with a link to the web site form to order discounted Proposal Packs.
- The Wizard home screen now includes visual cues as to the state of your current project. Next to each of the major buttons for managing your projects there will be a graphic that lets you know what operations are ready to proceed with, are completed or are not ready to continue with.
- When reformatting the combined document's text, the Wizard will not reformat large font (20 to 28 point Arial Black) text or text in the dark red or red font color. This will retain formatting of custom sections of Contract Pack documents.







- The Wizard can now automatically convert URL's and email addresses to clickable links when it creates your documents. This feature can also be disabled in the project preferences.
- The document creation process now ensures that change tracking is turned off. This will prevent some reformatting messages in contract exhibits when the combining of templates causes some lists to be reformatted in the contract exhibits.
- The document auto-reformatting process is not performed when only one template is selected for the project. This is meant to prevent unwanted font reformatting when a custom proposal already pre-assembled is being used as the project template.
- The document formatting process is done twice, once during the Table of Contents creation and once after. This helps ensure the page numbers are all correct in the initial Table of Contents.
- The Wizard works better with multiple different versions of Proposal Pack and Contract Pack template products installed. The Wizard will default to enabling the most current products it finds as the default starting products.
- A version number field was added to the Third Party fields to help the Wizard determine which Contract Pack products are the most current and which one should be enabled if it detects multiple versions of products installed.
- When a Proposal Pack style is deleted from the Wizard, it is also archived so the Proposal Pack will not be reloaded into the Wizard again. The files still exist so no custom work will be removed if you have edited the product files.

- Added a proposal and contract status tracking system to the Wizard. Now projects can be tracked through the entire process of being developed, submitted, approved and completed. The Wizard includes 8 stages that the project can be moved through and can be configured with up to 20 custom stages. All of your projects can also be exported to a single project tracking spreadsheet.
- Added a new error reporting system that allows error reports to be automatically submitted to customer support via a web form.
- Added a new preferences configuration screen to efficiently define custom lists and default orderings of templates for all new projects.







WHAT'S NEW IN V6?

- The Wizard has a new feature to show alternate and related templates when searching for templates to add to your proposal. When using the Project screen to select templates there are 2 new checkboxes in the Search tab. This can give you ideas for different templates to use or additional templates you hadn't considered. For example, if you check the Alternate and Related boxes and search for "Executive Summary" you will also see the "Client Summary", "Abstract", "Introduction" and "Forward" templates.
- The Wizard now integrates the Proposal Pack samples allowing you to more efficiently find, view and even select templates automatically based on specific samples. In past versions of the Wizard you had to access the samples from the separate desktop organizers for the Proposal Pack template collections. Now you can access them directly from within the Proposal

Pack Wizard interface. You can even add all of the templates used to create a specific sample to your project with the single click of a button.

-  Added a new manual chapter [Stay Out of Trouble Copying Proposal Examples](#)
-  Added a new manual chapter [Boilerplate is Bad for Business – Templates without the Fluff](#)
-  Added a new manual chapter [It's All About Trust – Winning Proposals by First Winning Trust](#)
-  The Wizard now integrates the Proposal Pack calculator spreadsheets into your projects. Proposal Pack has always included a number of spreadsheets to help assist in your financial calculations. The Wizard now integrates those spreadsheets into your document projects. Each time you create a new document project that uses templates that also have associated spreadsheets (i.e. a Budget, Cost Summary, Return on Investment, Quote, etc.) the related spreadsheets will be copied to your project folder. The “Edit Proposal” screen now allows you to open these spreadsheets along with your proposal and the “Edit Styles” screen is updated to allow you to edit the base spreadsheets so your customized spreadsheets will be copied over for each new project. You can also disable the copying of spreadsheets in the Wizard Preferences.
-  Added a new manual chapter [How do I Add Calculations from Spreadsheets Manually?](#)
-  Proposal Pack Wizard now supports more than one Contract Pack template collection and a new tab in the Pick Documents








screen allows easier selection of contracts and switching between different Contract Packs.

-  The Wizard's error, warning and message system has been updated to consistently display messages in the same format and to code every popup message with a unique number to assist customer support. Also all popup messages are now forced to display in the foreground to ensure they will not be hidden behind other windows.
-  Added a Repair Registry tool to the Wizard's Preferences tools. This tool can restore a lost Windows registry set of keys, typically caused when someone tries to move their Proposal Kit software from one computer to another. This feature can ease migrations by not requiring a reinstall of the original Wizard software.
-  The Wizard document now closes when the Wizard interface is quit.
-  When a project is deleted all of the contact information fields in the Wizard database are now deleted as well to provide better data security.
-  The Search For Styles tool has been changed to not allow searching the entire drive. You must select a specific folder on a drive to search.
-  Drop down lists in the Wizard interface screens have been updated to not allow the user to type into the drop down fields.

- ❏ Removed the demo Proposal Pack styles from the retail version of the Proposal Pack Wizard's Pick Styles menu. Demos are still included, just not added to the Wizard menu.
- ❏ Button colors changed to purple to stand out when on a grey tabbed page background.
- ❏ Added a dark green background to all tabbed screens to help the tabs stand out better and be more obvious.
- ❏ Added more messages to the 5 Minute Quick Start and the Wizard popups to keep beginners from terminating the Wizard while it is still processing the documents. Assuming they even read the comments and instructions.
- ❏ The Preferences screen cannot be exited now if there are data errors in any of the Preferences fields. User must fix the errors or cancel the screen.
- ❏ Changed the install folders names from "V50" to "V60"
- ❏ Changed the registry key name from "V5" to "V6"
- ❏ Changed the Wizard file name from "V5" to "V6"

WHAT'S NEW IN V5.1?

- ❏ Updated the Wizard to work with the new Office 2010 in 64-bit mode. Some code changes were required to prevent a "compile error" message when running the Wizard on this platform.

-  The Wizard is now saved in the .docm file extension (Macro Enabled Word Document) for Office 2007 and Office 2010 users.
-  The Wizard installer will determine if your system supports the .docm file extension (i.e. Office 2007-2010) and will link the Wizard shortcuts to the .docm file. Legacy versions will have the .docx file linked to the desktop shortcuts.
-  Updated the Wizard document with Office 2010 installation instructions.
-  Fixed an obscure problem that only affected a few international foreign language users. In a few cases where the Windows system used a comma instead of a period for the decimal place the Windows system was incorrectly recalculating the page size which caused the Wizard to display an error message '5149'. In this case the Wizard now defaults to the users current page size setting and does not try to reset the page size.
-  Fixed a problem introduced in the 5.0 release where templates that are selected to be removed from a pre-existing project were still showing up in the selected template list.
-  The Proposal Pack Wizard has stopped being supported on Word/Office 2000 due to a feature of the Visual Basic for Applications (VBA) used throughout the Wizard that is not available in versions of Word prior to the 2003/XP version.
-  Fixed a problem in multi-user versions of the Wizard where the preferences setting was not editable when trying to change the current user id.

- Reorganized a few interface screens for users with 800x600 resolution monitors to better fit all of the buttons.

WHAT'S NEW IN V5?

- Added support for the over 200 new proposal templates included in the latest release of Proposal Packs.
- Added support for all of the Contract Pack templates included in the latest release of Contract Packs.
- Added a new search feature to the Wizard. The search feature allows you to search for a specific template or collection of templates quickly and efficiently instead of having to scroll through long lists of templates. This feature makes adding templates out of the hundreds of available templates much easier. The search screen will also allow searching for Contract Pack templates if they are installed.
- Reorganized the Pick Documents screen by breaking up the various ways of selecting templates into three different tabbed screens. It is now much easier to locate templates and add them to your projects.
- Tested on Windows 7 and installer program upgraded to be Windows 7 compliant.
- Added a new chapter to assist with network installations [How do I Install and Configure for Use on a Network?](#)
- Changed the install folders names from “V42” to “V50”
- Changed the registry key name from “V4” to “V5”

- Changed the Wizard file name from “V4” to “V5”
- Changed one of the Custom proposal types to be used for Business Documents.
- Changed one of the Custom proposal types to be used for Government Contracts.
- Renamed the “Save Selections” button to be “Create Preset” in the Pick Documents screen.
- 10 new templates have been added to the Proposal Pack “Limited” which is included with Proposal Pack Wizard. Templates added are: Getting Started, Solutions, Prototyping, Networking, Launching, Choices, Affiliates, Price Comparison, Prospect Thank You Letter, Customer Thank You Letter.
- Increased size of internal variables in the Wizard to accommodate the new material added in the new Proposal Packs.
- Changed the “Miscellaneous” documents section header to “Letters and Checklists” in many of the 12 proposal types.
- Added the ability to have custom cover letters, cover sheets, inquiry letters, title pages, table of contents, envelope and letterhead templates for each of the 12 proposal types. This feature provides an override for the default special files used across all 12 proposal types. The Business Plan and Government Contract proposal types make use of this feature to use custom cover letter and cover sheet templates for these proposal types.

- Fixed a minor problem with the “#” sign when used in the title of the document. String comparisons were using the # sign as a pattern match incorrectly. This only affected people who may have added a custom template with a title that included a “#” symbol.
- Fixed a minor problem with custom master proposals causing the Wizard to close itself when the proposal was created. This only affected people who may have setup a custom master proposal document and added it as a selectable template in the Wizard.
- Fixed a minor problem with custom master proposals when a normal template title in plain text was used in the first page of the master proposal document. In some cases the page header of the master proposal when a title page was not the first template could have its title changed to the title of the entire proposal. For example, if the “Executive Summary” template was used as the first page of a custom master proposal titled “My Master Proposal”, the “Executive Summary” header text would be changed to “My Master Proposal”. This only affected people who may have setup custom master proposals using the Proposal Pack for Any Business or Proposal Pack for Government Grants.
- Added more checks to make sure files exist before they are copied during the initial installation.
- Added more error checking for the existence of the Wizard database files before they are accessed to provide more detailed error messages in cases where users alter the Wizard installation to the point the paths to the database cannot be found (i.e. when users copy the Wizard to another computer).

without moving the registry, or trying to run the Wizard from a remote computer, etc.).

- Added more error checking for the existence of the Wizard registry keys before they are accessed to provide more detailed error messages in cases where users alter the Wizard installation to the point the paths to the registry cannot be found (i.e. when users copy the Wizard to another computer without moving the registry, or trying to run the Wizard from a remote computer, etc.).
- Added REPORT_OFF sections to the recommend database files to help control what templates are recommended for different types of proposals. Also added these options to the Preferences > Tools > Configure Proposal Files screen. This allows you to set specific templates to not be auto selected when creating business documents like reports.
- Added “Report” as an option for the type of document being created.
- Fixed a minor problem when the default title page graphic to be applied to new projects was off by one in the index of available graphics.
- Optimized the adding of new projects so they save to the database a little faster.
- Fixed a problem with selecting a custom Preset when in Novice Mode that caused the Wizard to select all available templates.

WHAT'S NEW IN V4.5?

- ❏ Replaced the Thawte digital security certificate with a 3 year VeriSign security certificate.
- ❏ The new Proposal Packs V10.1 and Proposal Kits V13.1 now store the paths they were installed in when the default install location is changed. The Wizard can now search all of the non-standard install locations and find all of the installed Proposal Kit, Contract Pack and Proposal Pack products when they are not installed in the default folder.
- ❏ The Wizard now automatically searches for installed Proposal Packs, Proposal Kits and Contract Packs every time it is run so you do not have to manually search and install new products after the Wizard has been configured the first time.
- ❏ Added a new public macro function RunWizard_SafeMode which bypasses the automatic search for styles in case there are any problems accessing folders.
- ❏ Added a new Preferences checkbox to turn off the auto-searching of Proposal Pack styles. This checkbox basically returns the Wizard to the same method of operation in the previous version where it would only search for installed products once. Turning this feature off can speed up the process of running the Wizard.
- ❏ Added error handling to prevent error messages stopping the Wizard when Proposal Packs installed on network drives are unavailable due to broken network connections.
- ❏ Added a new chapter to the manual for helping select documents [How to Select Templates: The Top 5 / Top 40 Rule](#)

WHAT'S NEW IN V4.4?

- Replaced the Thawte digital security certificate with a 3 year VeriSign security certificate.
- Added some troubleshooting instructions for some installations of Word 2007 that are unable to enable macros when the Wizard is first run. This only occurs on some users computers and only when launching the Wizard from a shortcut link the first time. The resolution is to run the Wizard directly from the install folder the first time if you have problems enabling the macros.
- Fixed a problem with changing the paper width and height from the default 8.5 x 11 to international sizes. The Wizard was always defaulting to 8.5 x 11 even when selecting alternate page sizes. Also added a default option to disable the resetting of the page height and width when the Wizard is assembling a proposal.

WHAT'S NEW IN V4.3?

- Updated the graphics with our new logo. This is a cosmetic change and not a functional change to the Wizard.
- Slashes and colons are not allowed in the Project Name anymore. Since the Project Name is used in the file name for the Project folder this can cause problems with the Wizard not finding the path to the files.
- Leading and trailing blank spaces are now removed from the Project Name. This could cause path not found errors since the Project Name is used in the folder name of the project.

WHAT'S NEW IN V4.21?

- Updated the Wizard to recognize the new IT/Software/Hardware Contract Pack product.
- Updated the Wizard to recognize the new Advertising/Marketing Contract Pack product.
- Updated the installation programs to not allow the Wizard to be installed into the root of a hard drive.

WHAT'S NEW IN V4.2?

- Added support for the 122 new proposal templates included in the latest release of Proposal Packs.
- Added support for the 30 new contract templates included in the latest release of the Contract Packs.
- Improvements to this manual, including hyperlinking chapter references and table of contents to the content.
- Add 6 new demo styles.
- Added a “project” type to the drop down lists of proposal types being written in the Pick Documents screen (i.e. in addition to product and service types).
- Added a Top 40 button in the Pick Documents screen to only show the most commonly used 40 templates. This helps beginners find templates more easily than being shown over 400 templates to pick from.
- Added a new mail merge tag: <<EffectiveDate>> for contract use.

- Increased the maximum number of proposal templates the Wizard can operate on from 300 to 500.
- Increased the maximum number of proposal templates in a section of the proposal from 100 to 150.
- Renamed all references to the old product name Proposal Pack PlainText to Proposal Pack for Any Business.
- Updated the Wizard digital certificate valid until 2010.
- Updated the Wizard to recognize the new Contractors Contract Pack product.
- Added PROJECT_OFF, OTHER_OFF and PRODUCTSERVICE_OFF sections to the recommend database files to help control what templates are recommended for different types of proposals. Also added these options to the Preferences > Tools > Configure Proposal Files screen.
- Added new manual chapter [How do I Combine the Cover Letter Into a Master Proposal?](#)
- Added new manual chapter [How do I Manage this Much Information?](#)
- Made many messages in the Preferences > Tools > Configure Proposal Files screens more meaningful when editing and removing documents.
- Added underline graphics and mouse pointer changes to clickable web site links in the Wizard interface screens.

- Fixed a bug where the current project settings were not being reset after exiting the Preferences screen in some cases.
- Added more tests to the Test Database function.

WHAT'S NEW IN V4.1?

- Added a new mail merge dynamic data type “CURRENTDAYNUMSTR” to support Contract Pack contract templates. The <<CurrentDay>> mail merge tag string has been changed to use this data type by default. This data type will create the <<CurrentDay>> mail merge tag as the string “1st”, “2nd”, “3rd”, etc. This is used in contract strings such as “this <<CurrentDay>> day of” which if it was on the 22nd of the month would become “this 22nd day of”.
- The buttons on the Document Styles page for purchasing new Proposal Packs will take you to the specials page for a discount on new Proposal Packs.
- An obsolete warning message about out of date Proposal Pack styles was changed.
- The Contract and Terms page header was being removed when contracts were integrated into a proposal in some cases. This behavior is now consistent with the Document Project settings being used.
- A potential problem with the Table of Contents page numbering was fixed.







- A potential problem with the page footer not being included when the final FullProposal.docx file is created was fixed.
- The Wizard runs automatically now when the desktop shortcut is run.

WHAT'S NEW IN V4?

- Colon and equal signs are not allowed in the template titles and file names. Extra error checking has been added to prevent this when adding new templates.
- The “Compress Templates” tool is now obsolete and has been removed from the preferences.
- The “Test Database” tool was reporting errors that were not real errors in the database files. These erroneous error messages have been removed.
- Fixed some cases of template names having mixed cases between database files (i.e. “Long Form” vs. “long form”) which are now all consistently named.
- The “Reset to Default” button in the “Edit Style” screen now resets the path to the graphics files.
- The Pick Documents screen display is cleaned up when the database has blank section headers.
- The database folder used by this version of the Wizard has been changed to “Database_V4”.

- The project folder used by this version of the Wizard has been changed to “ProposalProjects_V4”
- A new feature has been added for integrating 3rd party documents such as contracts, quotes, invoices, etc. into your proposal. Now you can automate integration with your other business document creation software better. See the “3rd Party” tab in the “Preferences” screen.
- Better integration with our Contract Pack contract documents has been added. Now you can use the Wizard to manage your contract documents separately or include them in your proposal. This feature also automatically inserts all of the referenced Exhibit/Schedule templates at the same time. The specific Contract Pack you have installed will be detected by the Wizard and can be selected as one of your proposal types when you create a new project. This feature can be configured using the Preferences tool “Configure Contract Files”.
- The Wizard allows you to enter alternate text to be used in place of the <<Domain>> tag in your proposal footer, such as your company name, etc.
- When using the Proposal Pack for Any Business or Proposal Pack for Government Grants themes (i.e. the themes that use plain text headers in each template instead of an embedded graphic design), the Wizard will now change the header of each template during assembly of the proposal if you have retitled the page header in the database. This is useful for large government grants where a single template is used multiple times in the proposal with different chapter headers such as the “Worksheet” template. For example if you create a proposal using the Worksheet template and you add it multiple times

titled “Form SF-424”, “Fixed Sites” and “Non-Fixed Sites” both the Table of Contents and the page headers for each of those 3 pages will be changed to match your new page header text.

-  The Wizard can now replace the “Project” placeholder in the Title Page template with your own custom logo graphic in the Proposal Pack for Any Business and Proposal Pack for Government Grants styles which do not come with an embedded graphic design.
-  The Wizard can now detect and display an error if your Windows Registry settings for the Wizard do not exist. This typically happens when moving the Wizard incorrectly from one computer to another, or logging in as a new user other than the one the Wizard was originally installed for.
-  A File Location Report tool has been added to the Wizard Preferences. This tool will create a report showing you all of the locations on your hard drive the various files used by Proposal Pack and the Wizard are located including your projects, installed Proposal Pack templates, installed Contract Pack templates, Wizard database files, etc.
-  The maximum number of projects the Wizard will support in a single database has been increased from 100 to 150.
-  When generating a proposal, the Wizard will now display a message about any of the mail merge tags which did not have data filled in for them in your Document Project. This message can be disabled in the Preferences.
-  Added 2 new company mail merge tags <<Address3>> and <<MobilePhone>>

- Added 2 new customer mail merge tags <<CustAddress3>> and <<CustMobilePhone>>
- Fixed tab orderings for consistent tab navigation in a number of screens.
- Added the ability to remap Proposal Pack mail merge tags to alternate tags to help support integration with 3rd party applications which will be used to add further data to the proposal documents created by Proposal Pack and Proposal Pack Wizard.
- The Graphics tab on the Edit Styles screen is now set as the default tab first seen when the screen opens.
- Added 20 new contract mail merge tags to support the integration of Contract Pack templates: <<ContractCompany>>, <<Approver>>, <<Month>>, <<Amount>>, <<Supervisor>>, <<Department>>, <<InsuranceCoverageAmount>>, <<Credits>>, <<SSN>>, <<HREmail>>, <<HRPhone>>, <<HRContactName>>, <<TimeZone>>, <<Date>>, <<Minutes>>, <<Hours>>, <<Days>>, <<Months>>, <<Years>>, <<Weeks>>
- Added a Search For Installs button in the Preferences Tools tab. This performs the same function as the Search for Styles button in the Document Styles screen. This makes it easier to install new Proposal Packs and setup 3rd party applications after the Wizard has been installed.
- Added a button on Document Styles screen to launch web browser to display the Proposal Pack product web page to make it easier to purchase additional Proposal Pack styles.

- Added a Preferences option to reduce the number of informational message boxes displayed during the proposal generation process.
- A new method of removing templates from the Document Project's Pick Documents screen has been added. Now you can select from a list of templates to remove selected ones in a batch which makes the process much less time consuming.
- Added new tests to the Test Database preferences tool.
- Lots of additional refinements to the interface, messages and text for usability and readability.

WHAT'S NEW IN V3.5?

- Updated to support the latest Proposal Kit 12.0, Contract Pack 11.0 and Proposal Pack 9.0 product upgrades so documents in the latest products will be accessible in the Wizard menus.
- Added support for the 9 new Title Page graphics added to the new Proposal Pack 9.0. The new Title Page graphics are available in the Project screen and can be configured in the Preferences screen.
- Fixed problem with the Limited version of Proposal Pack for Any Business having the same name in the drop down list box of styles as the full version.
- Fixed an error message which occurred when trying to edit the demo styles.

- Turned off the ability to create extremely large proposals in Novice mode.
- Enlarged the screen displaying selected templates for the proposal. When selecting a very large collection the list of selected templates would be truncated. This did not affect the operation of the Wizard, just the display of all of the templates selected.
- The Add/Edit Project screen now disables the Title Page graphic drop down list box when using a Proposal Pack style that does not have a graphic theme (i.e. the Proposal Pack for Any Business and Proposal Pack for Government Grant styles).

WHAT'S NEW IN V3.4?

- Due to security issues in Windows Vista all of our related products such as the Proposal Packs and Proposal Kits have been moved from the c:\Program Files\ProposalKit install folder to c:\ProposalKit. This change was made to prevent users having their proposal templates installed in read-only mode which happens when installed in the c:\Program Files folder in Windows Vista. This update to the Wizard now installs it in c:\ProposalKit by default and also searches for your Proposal Packs in both the new c:\ProposalKit location and the legacy c:\Program Files\ProposalKit folders.

WHAT'S NEW IN V3.3?

- When running the Wizard on a new installation of Windows Vista and Office 2007 the Normal.dot template's default settings caused the Wizard's combined master proposal formatting to 10 points of space after each paragraph. This update resets the

default paragraph line spacing to 0 points before and after each paragraph when the Wizard combines your individual proposal templates into a combined master proposal.

WHAT'S NEW IN V3.2?

- Fixed a problem running the Wizard with Word/Office 2007. Office 2007 removed a key function (Application.FileSearch) which was previously used by the Wizard to search for files. This missing function has been replaced. The new Proposal Pack Wizard 3.2 will now run on Windows Vista, Word/Office 2007 and previous versions of Word.





WHAT'S NEW IN V3.1?

- Updated to support the latest Proposal Kit 11.0, Contract Pack 10.0 and Proposal Pack 8.0 product upgrades so documents in the latest products will be accessible in the Wizard menus.
- The Quote.png alternate Title Page graphic is now an enabled option in the Wizard now that the Quote.png graphic is part of the new Proposal Pack 8.0 products.
- 6 new mail merge tags have been added for more contract support: <<DeliveryDate>>, <<WorkOrder>>, <<FixedRate>>, <<ContractFirstName>>, <<ContractLastName>>, <<ContractJobTitle>>

WHAT'S NEW IN V3?







- The biggest changes in the new Proposal Pack Wizard are the ability to configure the Wizard the way you want to work with your proposal documents. Just about every aspect of the wizard

interface and the documents can now be customized. All of the hard coded wizard settings and screen text have now been moved into configurable database settings. Other changes have been made to streamline the Wizard interface to remove or change options confusing or harder to use for the first time proposal writer in a hurry.

-  Added screens for adding, editing and removing individual documents in the Wizard. Allows the user to change the order of templates, add custom templates and customize the attributes of all of the documents.
-  When the Wizard is run for the first time a short question and answer form is displayed for the user to answer some questions. This causes the Wizard to be pre-configured for the user with some default data specific to each user.
-  The General Business Proposal and Business Plan Proposal auto recommend Small proposal now includes the Table of Contents template and removes the Total Cost of Ownership template.
-  The Wizard now has an Expert and Novice Mode. The Wizard defaults to Novice Mode when first installed. Novice Mode disables all of the advanced features which are not necessary for a first time user to be able to create a proposal. Novice Mode is meant to streamline the process of creating proposals for first time users by reducing confusion about what options they should be using or configuring. When Expert Mode is turned on, all of the Wizard features are unlocked.






- There is a new tool to remove the default installed Demo styles and Demo projects to clean up the menus. The remove demo option is also run when you enable Expert mode.
- The Pick Documents screen now allows saving of up to 5 custom selections of documents for each of the 12 proposal types. Preset selections can be named and then selected for each future proposal. The Preferences tab for the Document Project defaults will also allow you to select your custom recommend preset selections as the default to be used for each new proposal.
- If you have selected more than 40 documents for your proposal an extra warning popup message is shown to alert you that the process may take a longer time and you must wait for the process to complete.
- Added a new Preferences option to allow the default folder created for each new proposal to be based either on the default system generated proposal index, the user defined proposal number or the name of the proposal. If you change the proposal number or proposal name fields with that option selected while editing your proposal, the save to folder will be automatically updated.
- Added “Reset to Default” buttons on all database configuration screens. These buttons will reset the currently viewed tab or screen to the original settings from when the Wizard was first installed. Only the data in the visible screen or tab will be reset.
- A new administrator feature has been added. The “Do Not Alter” button on the document project settings tab allows you to disable the various project settings when a Document Project is

created or edited. This option can be used to prevent your users from inadvertently changing the default settings for the proposals.

-  A new option has been added to the Title Page graphic list box in the Document Project screen: “Do Not Alter Title Page Graphic”. Choosing this option is the same as not picking any graphic to be changed. It is meant to be an information only option to show the user that no change to the Title Page graphic will be made when the proposal is created.
-  Added the proposal development checklists as selectable files in the Document Project and also as an easy to use checkbox option in the Pick Documents screen. If selected, the proposal development checklists will be copied to your new document project folder.
-  The ability to add a custom logo has been expanded to allow complete configuration of the existing 4 pre-defined logos and 4 custom logos.
-  Each of the 12 project types can have a default Title Page logo used to pre-populate each new document project. When changing the proposal type in the document project screen, the logo graphic will change as well if you have defined a default logo for the new proposal type.
-  The current proposal type is now displayed in the Pick Documents screen.
-  The Cost Summary template has been added to the Demo version of the Wizard along with more informational messages about what is included in the retail version.






- A single edit screen with multiple tabs has been added for editing all of the mail merge screen labels, mail merge tags, default pre-populated data, custom merge tag wrappers and date formats.
- When the mail merge edit screen is opened the appropriate tab is displayed related to the screen the user came from.
- The Table of Contents label editing screen has been extended to allow editing of the major category headers, the proposal type labels and the ability to hide individual proposal types. You can now limit and configure the text of the number of options shown in the Document Project screen.
- The Preferences screen has been broken up into multiple tabs to differentiate the various editable options.
- A new Preferences screen has been added for customizing the default data pre-populated into each new Document Project including the default Pick Documents auto recommendation options.
- New proposal types have been added for “Short Form Contract” and “Quote”. These are designed for short proposals of only a few pages. The Pick Documents screen will only show a very small collection of recommended documents. New FileList#.ini files have been added to allow complete customization of what documents are available for these proposal types.
- 5 customizable proposal types have been added. This allows you to name and configure your own proposal types and collections of templates. For example, you can have a different proposal type for different product lines or services. You can

also use them for having pre-created proposals to choose from where you just want to change the mail merge information without having to assemble a new proposal from scratch every time.






-  The documents recommended by the Pick Documents screen are now completely configurable via the new Recommend#.ini database files. You can now configure what documents you want to have recommended for each new proposal you create. Each proposal type (business, grant, book, resume, quote, business plan, contract, custom types) has its own set of recommendations that can be configured.
-  The Preferences screens have been expanded to allow customizing of the labels for all of the proposal types and proposal section names used in the Table of Contents created for your proposal. Click the “Edit Table of Contents Labels” in the Preferences screen.
-  The names of the proposal type drop down lists in the Wizard can be customized by editing the FileList.ini database files.
-  A new option for the Pitch and Industry auto recommend lists was added for “Other”. This is intended for use as a user defined default option when the other options in the list are not applicable.
-  The text on the Wizard screens for the proposal sections can now be configured using the FileList.ini files. For example, general business proposals will show “Client Centered Documents” while book proposals will show “Author Centered Documents”. This text as well as the text for the 5 custom proposal types can be customized.

- Added a database test function to the Preferences screen. This button will run a test of all of your INI database files to check for errors. A log of the test will also be created which can assist in diagnosing database customizing mistakes.
- A new database file Options.ini file has been added to allow custom configuration of many of the Proposal Pack Wizard functions such as mail merge options, paper size options, extensions for graphics file names, date formats, translation of month and day names, default mail merge tags to pre-populate each new document project, complete customizing of ALL custom and pre-defined mail merge tags and tag labels, customizable mail merge tag wrapper, define which files are not to be combined into the master proposal, define which templates do not use page numbering, define which templates to not add to the Table of Contents, redefine the name of the master proposal file and how to locate new Proposal Packs, redefine the special files such as the cover letter, cover sheet, inquiry letter, etc.
- Using the new Options.ini file, configure which files are used for the special files Table of Contents, Cover Letter, Cover Sheet, Inquiry Letter, Envelope, Letterhead and Title Page. See the [SPECIAL_FILES] section of the Options.ini file.
- Using the new Options.ini file, change the name of the master combined project document created for each new project which is FullProposal.docx by default. See the [SPECIAL_FILE_NAMES] section of the Options.ini file.
- Using the new Options.ini file, change the name of the file searched for when installing new Proposal Packs in case there are conflicts with existing files on your system. By default this is






BlankTemplate.docx. See the [SPECIAL_FILE_NAMES] section of the Options.ini file.

-  Using the new Options.ini file, define which documents are not to be added to the Table of Contents when creating a new proposal. By default documents such as the cover letter, inquiry letter and title page are not added. See the [ADD_TO_TOC] section of the Options.ini file.
-  Using the new Options.ini file, define which documents are not to have page numbering turned on when creating a new proposal. By default documents such as the cover letter, inquiry letter and title page do not use page numbers. See the [USE_PAGE_NUMBER] section of the Options.ini file.
-  Using the new Options.ini file, define which templates are not to be added to the master combined project document (FullProposal.docx) file when creating a new project. By default documents such as the cover letter, cover sheet and inquiry letter are not added. See the [COMBINE_INTO_MASTER] section of the Options.ini file.
-  Using the new Options.ini file, define your own custom mail merge tag wrapper if you are using pre-existing content with a different style of tags. By default the Wizard uses double brackets << >> and a customizable single bracket [] to enclose mail merge tags with your documents. The [] style can be configured to any type of wrapper such as { } as an example. See the [TAGS_WRAPPER] section of the Options.ini file.
-  Using the new Options.ini file, redefine the default company mail merge tags and screen labels. For example, if you don't want to use our default <<FirstName>> tag, you can change it to




something like [First]. See the [COMPANY_TAGS] section of the Options.ini file.

-  Using the new Options.ini file, redefine the default customer mail merge tags and screen labels. For example, if you don't want to use our default <<CustTitle>> tag, you can change it to something like [ClientJobTitle]. See the [CUSTOMER_TAGS] section of the Options.ini file.
-  Using the new Options.ini file, redefine the default custom mail merge tags and screen labels. For example, if you don't want to use our default <<Custom1>> tag, you can change it to something like [WorkOrderNumber]. Also 10 new custom tags have been added for a total of 20 custom mail merge tags. See the [CUSTOM_TAGS] section of the Options.ini file.
-  Using the new Options.ini file, redefine the default contract mail merge tags and screen labels. For example, if you don't want to use our default <<HourlyRate>> tag, you can change it to something like [Rate]. 20 new mail merge tags have been added specifically for contract related mail merge data. See the [CONTRACT_TAGS] section of the Options.ini file.
-  The customizable custom mail merge tag data from Version 2.0 used to be stored in the Windows registry, it has now been moved to the Options.ini database file in Version 3.0
-  Using the new Options.ini file, added customizable default data to pre-populate each new project with. This feature replaces the older Version 2.0 pre-populate feature which used the settings from your first project for each new project. See the [DEFAULT_CUSTOMER_TAGS], [DEFAULT_COMPANY_TAGS],

[DEFAULT_CUSTOM_TAGS] and [DEFAULT_CONTRACT_TAGS] sections of the Options.ini file

-  Dynamic mail merge data tags have also been added: CURRENTDATE, SYSTEMDATE, INCREMENT, CURRENTDAYSTR, CURRENTDAYNUM, CURRENTMONTHSTR, CURRENTMONTHNUM, CURRENTYEARYY, CURRENTYEARYYYY
-  Using the new Options.ini file, you can define the default date format and the text of the month and day strings for foreign translations. The default current date format is M/D/Y however any common date format can be used including international date formats. See the [MONTHS], [MONTHS_SHORT], [DAYS], [DAYS_SHORT] and [DATE_FORMAT] sections of the Options.ini file.
-  Using the new Options.ini file, you can define new file extensions for graphics files to be used when inserting custom logos. All of the common graphics types are already pre-defined. See the [GRAPHICEXTENSION] section of the Options.ini file.
-  Using the new Options.ini file, you can define new page sizes for your proposal formatting. New landscape settings have also been added. See the [PAPERSIZE] section of the Options.ini file.
-  The “Change Source Document” feature has been removed from the Wizard. This feature replaced the text of one document with the text of another document. This feature was too confusing for many users to setup and is also an outdated feature now that so many new configuration options have been added to the Wizard. The “Reset to Defaults” option has also

been removed from the auto recommend screen which was part of the removed feature.

-  The proposal type drop down list box on the Auto Recommend screen has been removed. This was a redundant option. The Auto Recommend screen will be configured based on the proposal type selected on the previous screen for the document project.
-  Document drop down lists and buttons which operate on specific documents are now disabled when no file(s) exist or are unavailable for editing or use.
-  The proposal editing screen now disables any buttons which do not have files available for editing. Also a new “Team Editing” option has been added to the Preferences screen which is turned off by default. This option when disabled (by default) does not allow editing of the individual proposal documents, only the complete master proposal and any special documents not normally combined into the master proposal are available for editing. This makes the final editing less confusing for new users who do not read the documentation about which version of the proposal to edit. Usually editing of individual proposal documents is used for team proposal writing which is a smaller set of Proposal Pack Wizard users. To enable individual document editing enable the “Team Editing” option in the Preferences screen.

WHAT’S NEW IN V2.72?

-  Updated graphics in the interface.

- Work around for a potential Word error when replacing the Title Page project graphic on some Proposal Pack designs on some versions of Word.








WHAT'S NEW IN V2.71?










- Minor interface adjustments.

WHAT'S NEW IN V2.7?

- Updated to recognize the templates in the new Version 7 Proposal Packs and Version 10 Proposal Kit products released for 2006.
- Added an option to the Project screen to allow the user to select a variety of pre-built and custom graphics for the Title Page Logo. Choose from pre-built “Project”, “Proposal” and “Business Plan” graphics or choose your own custom logo graphic.
- Added the ability to add new documents to the Wizard. For example, you can create multiple product lists to choose from.
- Added the ability to change the ordering of documents in the Wizard.
- Added the ability to change the document descriptions in the Wizard.
- Updated the proposal template Auto Recommend screen to recommend templates for all supported types of proposals

(general business, grant funding, business plan funding, book proposals, and resumes).

-  Added what type of proposal the current project is setup as to the main Wizard screen. For example, if your current project has the “Grant Funding Proposal” type selected in the Auto Recommend screen, you will see on the home screen of the Wizard interface “Type of Current Proposal: Grant Funding”.
-  Added an RFP response checkbox to the Auto Recommend screen. When checked this option will cause RFP response related templates to be added to the list of selected documents when the Recommend button is clicked.
-  Added a preferences option to change the sub header labels in the Table of Contents.
-  Minor enhancements to the Wizard interface.
-  Added a Reset to Default button to the Document Project Auto Recommend screen. This option clears all selected templates and removes all custom alternate document links for the currently selected document project.
-  Fixed bug where a border was being added to the Inquiry Letter template when used with a Proposal Pack style which includes a page border. No border is added to the Inquiry Letter document now.
-  Updated the macro security certificate which will now expire in Dec, 2007.

-  New document projects are saved in the current Word format instead of the RTF format. This also reduces the file size of your proposal documents when using the Wizard. All file extensions still end in “.docx”.
-  Added a “Compress Files” option to the Styles editing dialog box to compress large RTF format documents by resaving your original installed Proposal Pack documents in Word format instead of the default RTF format.
-  New method for setting tab stops in Table of Contents added.
-  Added visual graphics to the final proposal edit screen to differentiate better between editing individual templates or the combined project document.
-  Auto Recommend screen settings for which dialog boxes were originally selected are retained in the registry to make editing the selected document list easier.
-  Fixed bug where the “Automatic” page border color would crash the Wizard when trying to edit the style settings.
-  Fixed bug where Wizard would put a page border around Proposal Pack styles which were initially designed without page borders.
-  Added a preferences option to search again for older Proposal Pack Wizard database settings if reinstalling the current Wizard.
-  Added an option to the Document Styles menu to not reformat every sentence of the combined project document.

WHAT'S NEW IN V2.63?

- Added ability for Wizard to recognize new Proposal Pack styles without requiring a new Wizard patch as new styles are released. Wizard now reads setup.ini file included with new Proposal Pack installations.

WHAT'S NEW IN V2.62?

- Changed how Boolean values are saved in INI database files to work with international versions of Microsoft Word.
- Fixed bug that would cause an error message when trying to edit styles Contemporary #3 and #4.

WHAT'S NEW IN V2.61?

- Updated to recognize the latest collection of 12 new Proposal Pack graphic themes (Business #5, Business #6, Business #7, Education #1, Contemporary #3, Contemporary #4, Medical #2, Classic #4, Global #1, Flag #1, Painter #1, Photography #1).

WHAT'S NEW IN V2.6?

- Updated to work with the new Proposal Kit 9.0 and Proposal Pack 6.0.
- Updated Code Signing Certificate valid until 2006.
- Added support for 2 new tags: <<ProposalTitle>> and <<CurrentDate>>.

- Added support for 4 new Proposal Pack styles: In Motion #1, #2, #3 and #4.
- Changed behavior of “Create Document” operation to not overwrite existing individual documents if the configure operation is run multiple times. This will now prevent edited documents from the previous configuration from being overwritten when regenerating a document project multiple times. A more verbose warning message is included when reconfiguring a project to help avoid overwriting your master document work when reconfiguring and recombining all your individual templates into a master proposal document. A backup copy of your project’s files is also made each time the “Create Document” operation is run.
- Added 7 new Proposal Pack templates. Templates added: Inquiry Letter, Services Provided, Benefits, Features, Qualifications, Products, Follow-up Letter.
- Added a Proposal Development Checklist.
- Added a Post-Proposal Analysis Checklist.
- New version of the “Proposal Writing Primer” included in the documentation.
- Replaced Microsoft Word specific mail merge tags in all Proposal Pack styles with editable plain text tags for better support on all word processors.
- When installing the full retail Proposal Pack Wizard after installing the Demo version, the full retail version will rescan your hard drive for installed Proposal Pack Styles.

- Added “How do I Create a Custom Set of Documents?” chapter.

WHAT’S NEW IN V2.5?

- Changed references to “State” to “State/Province” and “Zip Code” to “Zip/Postal Code” for international users.
- Added the ability at both the Style level and Project level to override the default text in any proposal document to load the text from an alternate file. For example, if you have multiple contracts for various types of projects, use the Style override to suck in the text of your most commonly used contract into the “Contract” template. Then for specific projects using an alternate contract, use the Project override to override the custom Style setting. This feature was added to support better integration with our “Contract Pack” product, a collection of legal agreements.

WHAT’S NEW IN V2.2?

- Added workaround for an error introduced by a some systems (most commonly Dell) where the Wizard could not find files which did exist. The problem is actually a driver problem on some systems causing the Visual Basic for Applications function FileSearch to not return results when it should. This problem only affects a very small number of systems and this patch includes a work around to resolve it.

WHAT’S NEW IN V2.1?

- Added workaround for an error introduced by a Microsoft Office patch which caused Visual Basic 4198 error messages to be displayed by the Wizard.

WHAT'S NEW IN V2?

- Updated to support 15 new templates added to the upgraded 5.0 Proposal Packs.
- Added ability to configure the titles and embedded tags of the 10 custom mail merge tags.
- Updated the format of the Table of Contents creation to match the new 5.0 Proposal Pack framework organization.
- Added new templates to the Auto Recommend.
- Added “Anatomy of a Proposal” section to the documentation.
- Added an 11 page “Proposal Writing Primer” article to the documentation. Written specifically for Proposal Pack by the proposal development company, Design Café.
- Added popup descriptions of all of the template documents.
- Added more error checking.
- Added more help information.
- Added version numbers to the Proposal Pack styles so you can manage multiple versions of Proposal Pack styles from the Wizard.
- Added auto-incrementing of the Proposal Number each time a new document project is created. The starting number can be set in the Preferences screen.

- Added Paper Size setting field to the Style screen. Each style can now have its own paper size (Letter, Legal, Executive, A4 or B5).
- Added the Proposal Pack for Any Business (Limited) collection of templates to the Proposal Pack Wizard. The Wizard can now be used as a stand-alone proposal generator for small proposals without requiring any extra Proposal Packs.
- The Auto Recommend and dynamic Table of Contents generation now do not include templates which do not exist in Demo, Limited or older Proposal Pack styles.
- Reduced size of Windows download by 5mb.
- Minor bug fixes.








WHAT'S NEW IN V1.1/1.2?


- A couple cases were reported on systems unable to open files. File searches were changed to fix this problem.

WHAT'S NEW IN V1?

- This first release of the Proposal Pack Wizard helps automate the management and setup of your Proposal Pack documents. The Wizard automates the tedious tasks of picking documents, creating client folders, copying templates for each project and merging your company and client data into the templates.
- Built in data manager for name address data for your company and client. Data manager also automatically recalls your

personal information for each new client proposal to save retyping.

-  Proposal Pack style manager allows you to use one Wizard interface for all your Proposal Kit and Proposal Packs. If you have multiple Proposal Pack styles installed, you can easily pick styles to use for each proposal from one menu.
-  Auto Recommend screen helps you select a collection of proposal templates based on the size and type of the proposal.
-  Built-in mail merge replaces the manual Word mail merge feature and automatically merges your data manager data into each proposal.
-  Change page border styles using the style wizard. Add and remove page borders, change the border color, size and style.
-  Automated Table of Contents and page numbering. If you include a Table of Contents, you can have the Wizard automatically create a Table of Contents matching just the documents picked for each proposal.
-  Combined master proposals. The Wizard can combine all your individually selected templates into a single master proposal document.
-  Automatically replace the proposal graphics with your custom versions. Using this feature requires that you create your own custom graphics using your own graphics program. The Wizard can then automate the process of deleting the stock graphics that come with the proposal templates and replace them with your custom graphics.

 Multiple user licenses are also available. Single user versions can maintain your style and data manager information on a single computer. Multiple user versions can store the style database and data manager database separately on the user's local computer and/or a networked computer. For example, each user can have their own data manager database and access the Proposal Pack styles from a single network server.

WHAT'S THE NOVICE EDITION VS. EXPERT EDITION?

The Proposal Pack Wizard is available in a Novice Edition that is included with each Proposal Pack and Contract Pack template product.

The Novice Edition includes all the basic features that cover most document assembly needs. You can create projects, select from the entire library of templates, view samples and build your proposal and contract documents.

The Novice Edition does not include the more advanced features.

Advanced Expert Edition features include things such as:

- The ability to create and customize line item databases
- The ability to configure the Wizard interface
- The ability to configure the Wizard databases
- Ability to create your own graphic design theme
- 3rd party integrations such as QuoteWerks
- Ability to edit the stock templates via the Wizard interface
- Ability to add your own custom documents to the Wizard database
- Project status tracking
- Ability to define more than one custom company logo
- Ability to remap and redefine mail merge tags
- Ability to change the Word 'Styles' for changing font styles and colors
- Ability to use dynamically linked Word and Excel files
- Ability to use the company and client CRM database
- International text and currency translation features
- See the [Wizard features list](#) for a complete list


WHAT IS “PROPOSAL PACK WIZARD”?


Proposal Pack Wizard is an optional software interface for use with Proposal Pack and Contract Pack templates (sold separately). Proposal Pack Wizard is a built-in Word add-in which runs as a Word macro. The Wizard runs on Windows versions of Word 2010 or greater.


Since the Proposal Pack Wizard is an optional interface, older Word version users and Mac and Linux users can still use the Proposal Pack and/or Proposal Kit products without the Wizard. The Wizard helps automate tasks commonly performed manually using the proposal documents.


If you purchased Proposal Pack Wizard separately, you must also have a Proposal Pack, Contract Pack or Proposal Kit already purchased and installed on your computer.


The Proposal Pack Wizard can be used to setup a one page long to hundreds of pages long document framework in just minutes with the click of a few buttons. The Wizard will help automate tasks such as:


 **Managing all your Proposal Packs.** With one Proposal Pack Wizard you can select any of your purchased Proposal Pack design styles from a single interface. The Wizard can also automatically search your system and setup any installed styles. For example, if you have multiple products such as Proposal Kit Pro, Proposal Pack Business #1 and Proposal Pack for Any Business, you can select between all these styles to use for any given client proposal from the Wizard.

-  **Writing Proposals and Contracts.** You can create a proposal and a detailed contract when using the Wizard with our Contract Packs. For example, you can create a proposal document and a contract together or as separate documents for a client.


-  **Writing Business Documents.** You can create just about any kind of multi-page business document using Proposal Pack Wizard and a Proposal Pack template collection. We have added enough material to the template packages over the years that you can write information packets, instruction manuals, reports, studies, plans and more with it.


-  **Picking a collection of templates** to use in your document. Without the Wizard you must manually choose what documents to use out of the entire collection, create folders for your document and copy the documents. The Wizard includes a built-in Auto Recommend tool which will assist in quickly picking a collection of documents. The Wizard will also create a new client folder and copy the selected documents to that folder for each project.


-  **Merging client and company data** into your document. Without the Wizard you can manually search and replace common tags with your contact information. With Proposal Pack Wizard, all you must do is enter your client and company data once and the Proposal Pack Wizard will automatically merge your data into every selected template.


-  **Managing multiple client proposals.** Without the Wizard you must manually create folders for each project and copy templates for each new proposal. With Proposal Pack Wizard, you can automatically create new client folders and copy all

your merged and combined documents into a separate folder for each client.

 **Combining all your templates into a single document.** Some users like to combine all their templates into a single master document. There are pros and cons to both ways of managing the proposal writing process. Proposal Pack Wizard supports both methods. Without Proposal Pack Wizard you must manually append all your individual templates into your master proposal document. Word also has a habit of changing the formatting of text when combining documents which requires manual reformatting of paragraphs at times. With Proposal Pack Wizard you can have the Wizard combine all your selected documents into a single file and perform clean-up of the document formatting.

 **Page border style settings.** The Proposal Pack Wizard can be used to automatically change the page borders on each document created. Without the Wizard you must manually set the page borders after the document is created on each individual template and the combined master document. With Proposal Pack Wizard all documents can have the borders automatically changed during the configuration process.

 **Integrating with third-party software.** Proposal Pack Wizard directly integrates with quoting applications such as QuoteWerks. The Wizard also includes features that allow you to import documents created in other systems.

 **Dynamic linking with Excel spreadsheets.** The Wizard can dynamically link cells in financial and scheduling spreadsheets to your document. This allows you to change pricing and schedules and have your documents auto-update.

REQUIREMENTS

Word 2010 or greater using Windows operating system. Proposal Pack Wizard is entirely dependent on the Visual Basic for Applications (VBA) component of Microsoft Word/Office. You must have an up to date version of the VBA components for the Proposal Pack Wizard to operate properly and an edition of Microsoft Word/Office that supports macros.

OPTIONAL

Any Proposal Kit, Contract Pack or Proposal Pack product (sold separately). The Wizard comes with a limited collection of demo templates which is a limited version of what is included in the full retail Proposal Packs. Add-on Proposal Pack specialty styles will add a broader range of templates.

Add-on Title Page Packs give you a wider variety of custom designed Title Pages to choose from in multiple designs and color choices.

The Proposal Pack Wizard is an optional software interface for use with Proposal Kit and Proposal Pack products found at <https://www.proposalkit.com>

5 MINUTE QUICK START



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

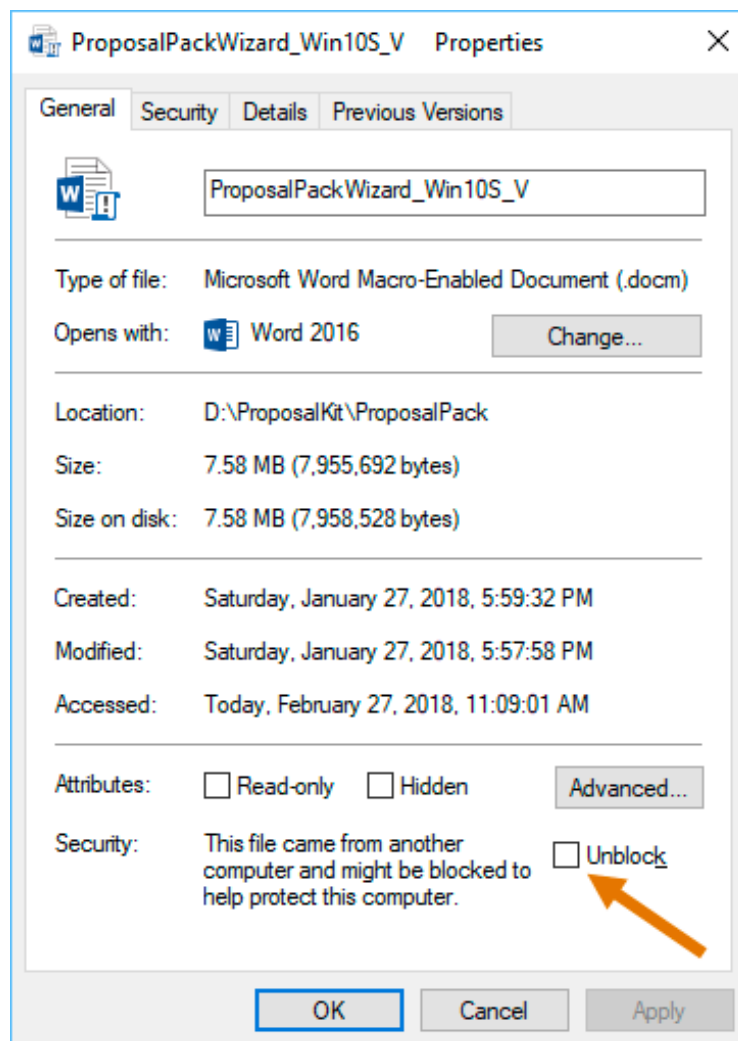
Follow the instructions in the first page of the Wizard Word document for how to enable the macros. The Wizard program will not run if you do not enable the macros.

If you are using Windows in S Mode

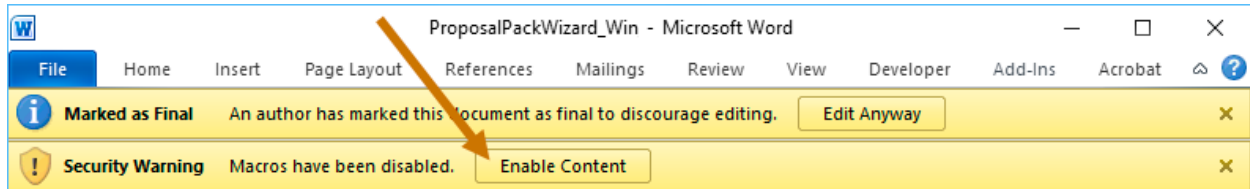
If you are using Windows in S Mode, there is one extra setup step that may be required in addition to enabling the macros.

You may have to also right-click this document in the install folder, click the General Properties tab then click the Unblock checkbox or Unblock button.

This is a security measure required by Windows in S Mode.

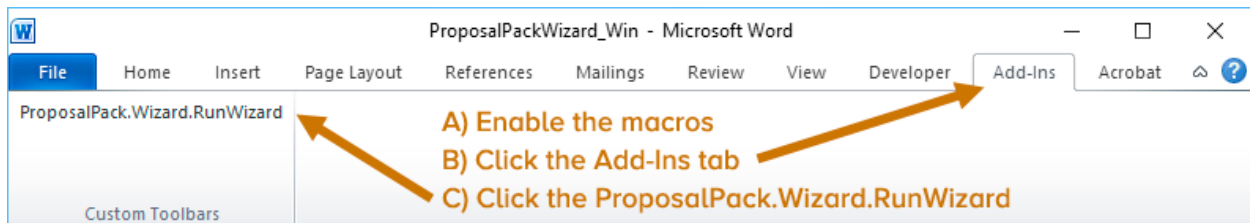


For **Microsoft Word 2010 and greater** you must click the **Enable Content** button in the yellow bar next to the Macros are disabled warning message which looks like this:




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: 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 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.

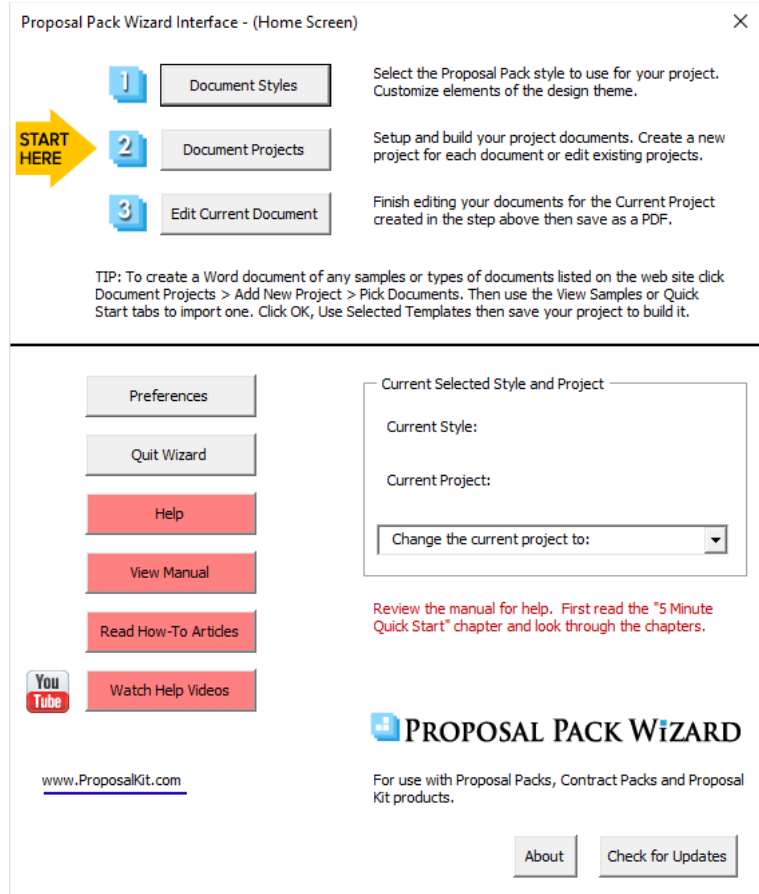
From then on, the Wizard software will automatically run each time you double click the icon, and you will see the Wizard interface.


 **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.

Proposal Pack Wizard Interface - (Home Screen) ✕

**START
HERE** →

1 Document Styles

2 Document Projects

3 Edit Current Document

Select the Proposal Pack style to use for your project. Customize the elements of the design theme.

Setup and build your project documents. Create a new project for each document or edit existing projects.

Finish editing your documents for the Current Project created in the step above then save as a PDF.

TIP: To create a Word document of any samples or types of documents listed on the web site click Document Projects > Add New Project > Pick Documents. Then use the View Samples or Quick Start tabs to import one. Click OK, Use Selected Templates then save your project to build it.

Preferences

Quit Wizard

Help

View Manual

Read How-To Articles

Watch Help Videos

Current Selected Style and Project

Current Style:

Current Project:

Change the current project to:

Review the manual for help. First read the "5 Minute Quick Start" chapter and look through the chapters.

PROPOSAL PACK WIZARD

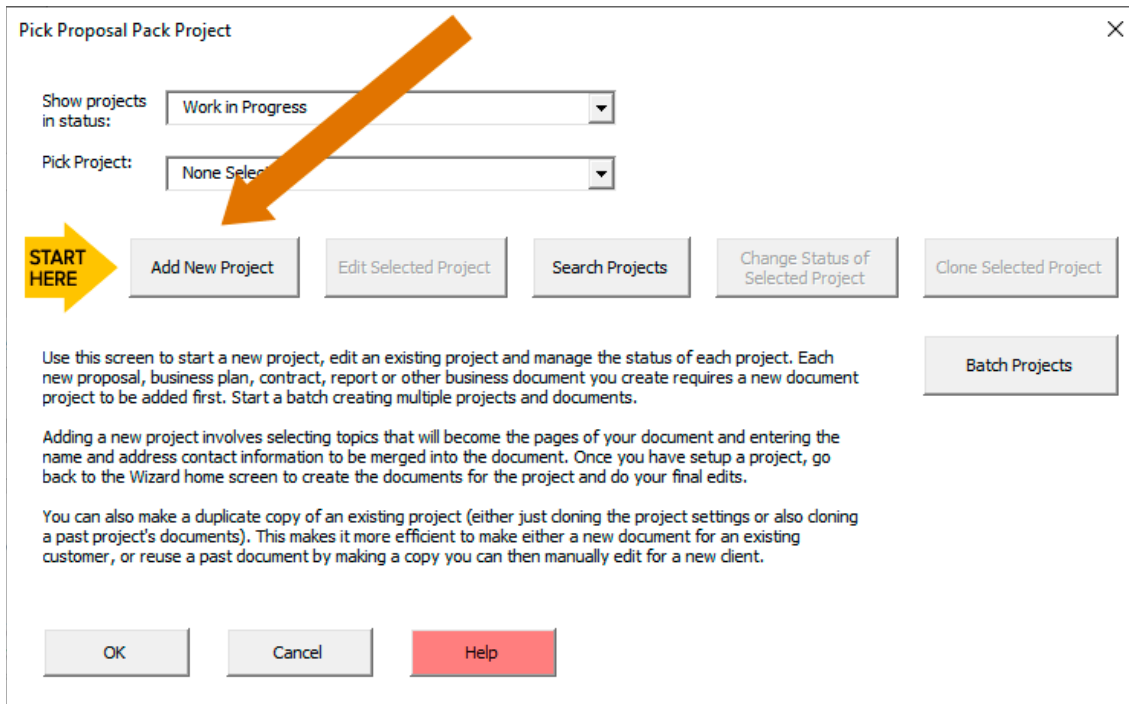
For use with Proposal Packs, Contract Packs and Proposal Kit products.

About Check for Updates

www.ProposalKit.com

Fourth - Add a new project by clicking the button **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**



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**

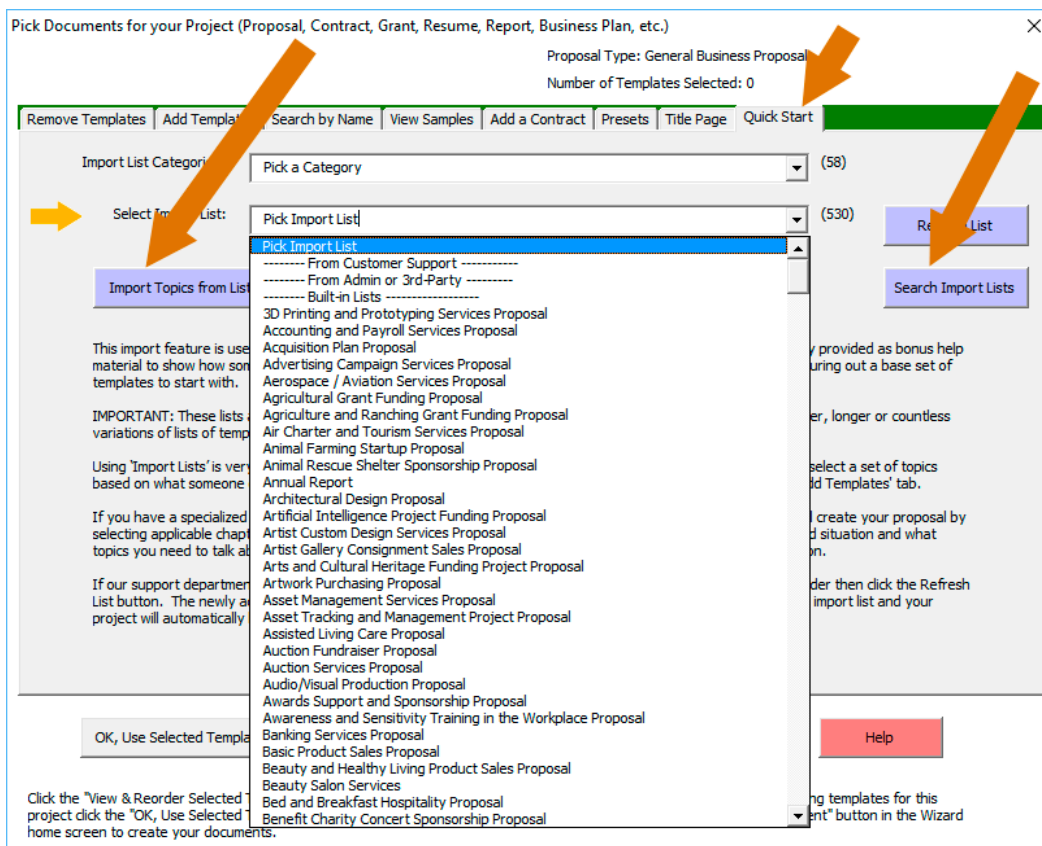
2 **5**

→ **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 different 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 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 Fo
- Introduction
- What You Can Exp
- Executive Summar
- Cost Summary
- Estimate
- Needs Assessmen
- Opportunities
- Market and Audier
- Goals and Objectiv
- Statement of Wor
- Expected Results

OK, Use Selected Templates

& Reorder Selected Templates

Help

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.

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, Invoice, 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 Input Fields:
|

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

And Or Case Sensitive

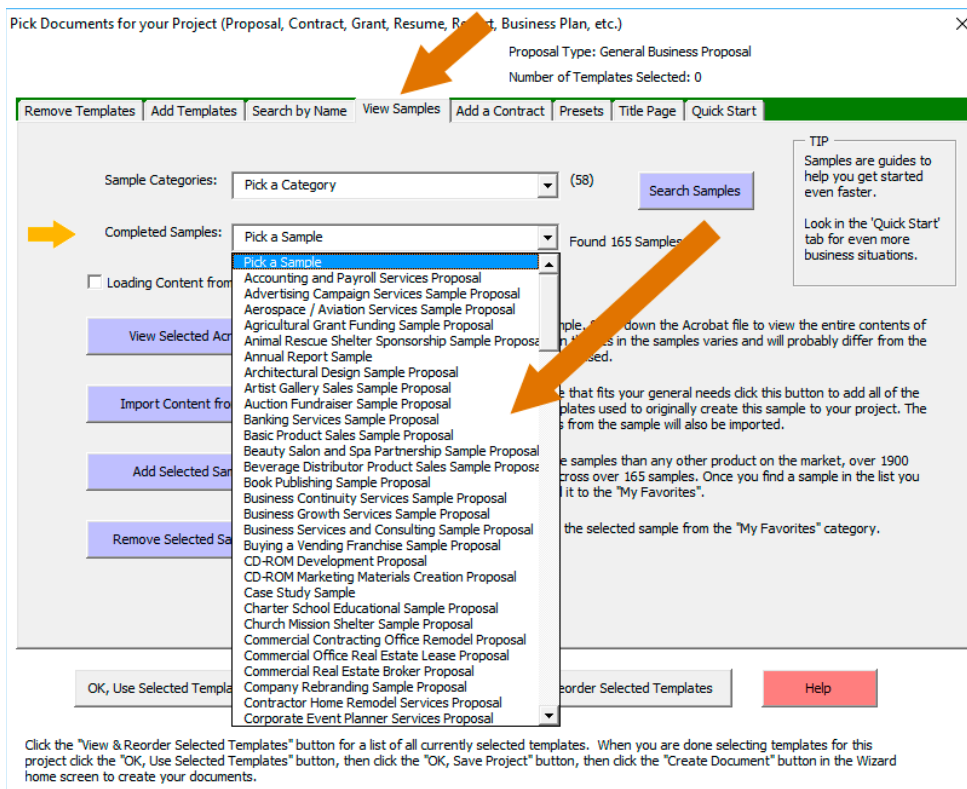
Do Search Clear Form Search Help

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.

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.

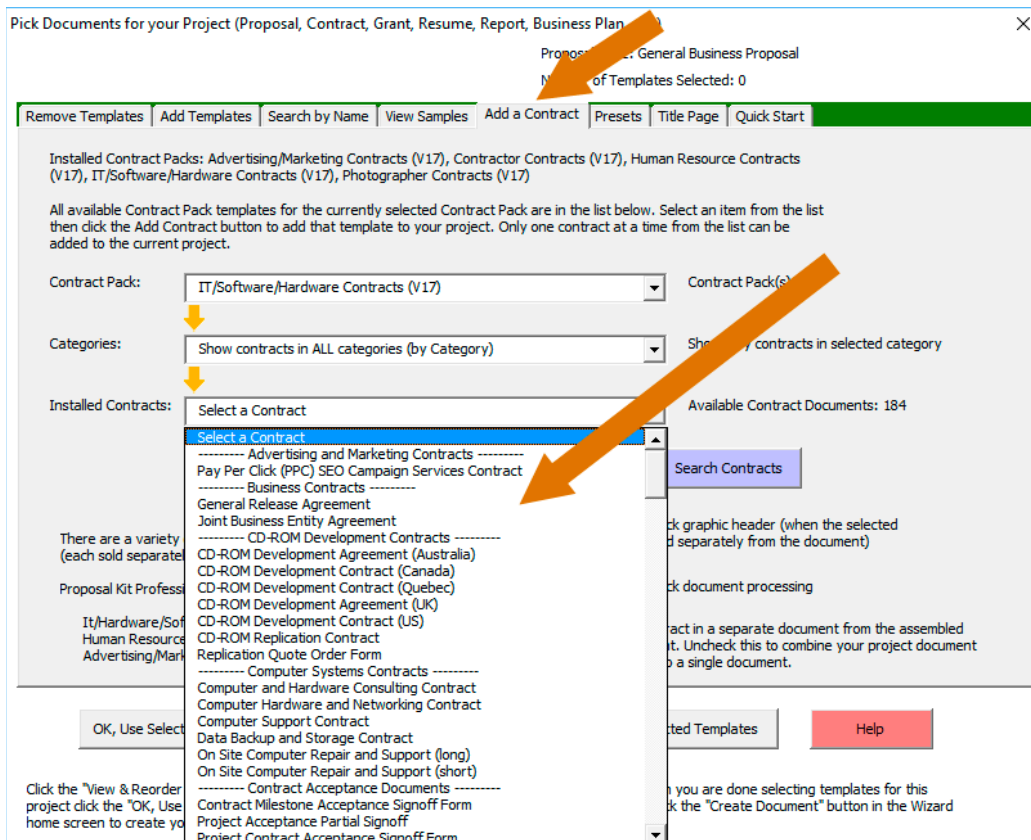
While we have a very large selection of samples, samples are only meant as general guides to show you how other people have assembled and filled in their documents. Millions of business documents like these are written every year so the samples are not intended to exactly fit your situation page for 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.

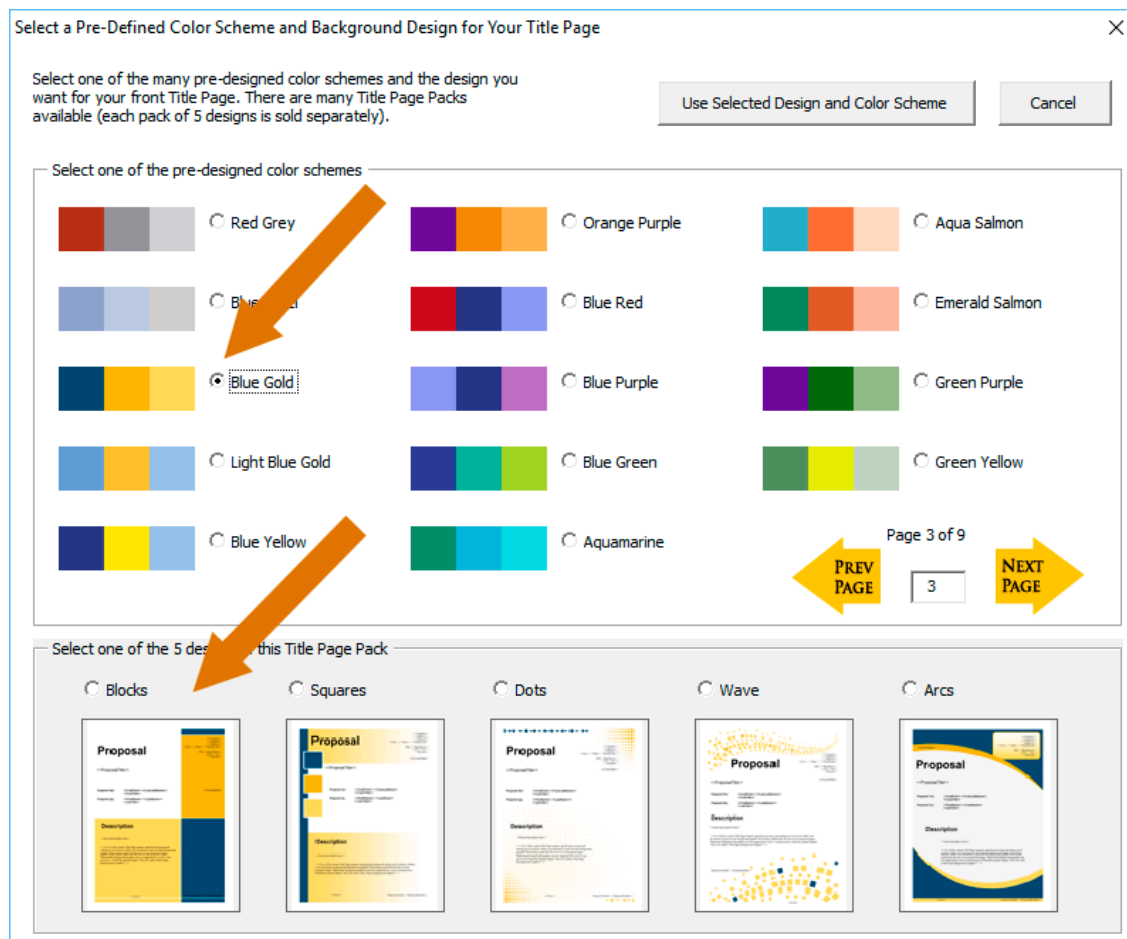
This tab gives you options to include the contract in your assembled document or have it created as a separate document. If the selected contract template also has exhibits or schedules related to it, those will be inserted into it.



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.

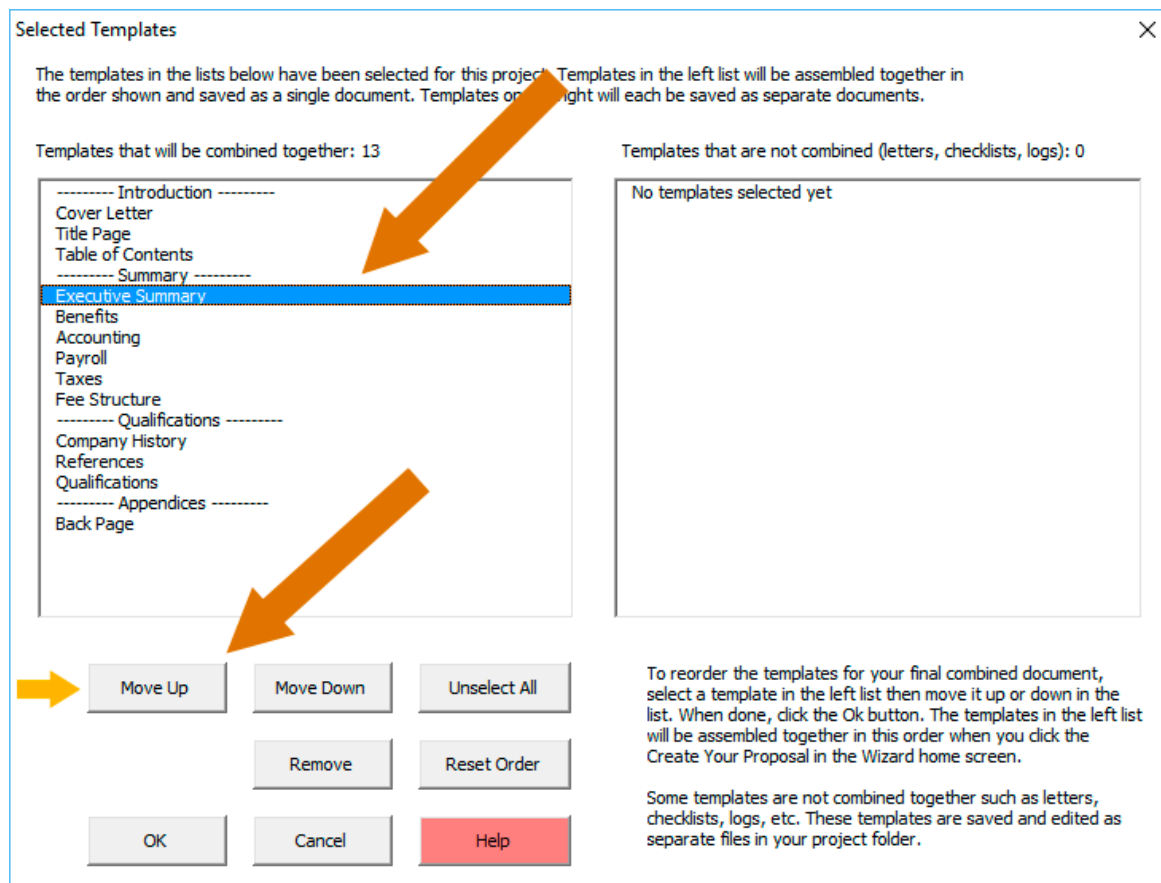
This option is generally used if you are using the “Proposal Pack for Any Business” or “Proposal Pack for Government Grants” styles. All our other Proposal Packs already come with a title page design tailored to match the rest of the pages. Your Proposal Pack comes with a starter package of title page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



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.

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

Pick Preset (0) presets for General Business Proposal projects

Load Templates from Preset | Delete Selected Preset | View Selected Preset | Auto-Populate New Projects from Preset

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.

Name: Create New Preset from Selected Templates

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.

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.

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. At the top, there are input fields for 'Project Name' (My New Project) and 'Save To Folder' (c:\ProposalKit\ProposalPack\ProposalProjects_V##\My New Project), with 'Browse' and 'Delete Old Files' buttons. Below is a 'Document Configuration Options' section with three checked checkboxes: 'Merge Company and Client Data with templates', 'Combine templates into single master document', and 'Turn on Page Numbering'. There are also two dropdown menus: one for currency (\$ United States Dollars) and one for language (American English (default)). Below these are two more dropdown menus: 'General Business Proposal' (with the instruction 'Select what type of project to create.') and 'Pick Title Page Graphic' (with the instruction 'Select Title Page graphic. This replaces the 'Proposal' header with the alternate wording or logo.').

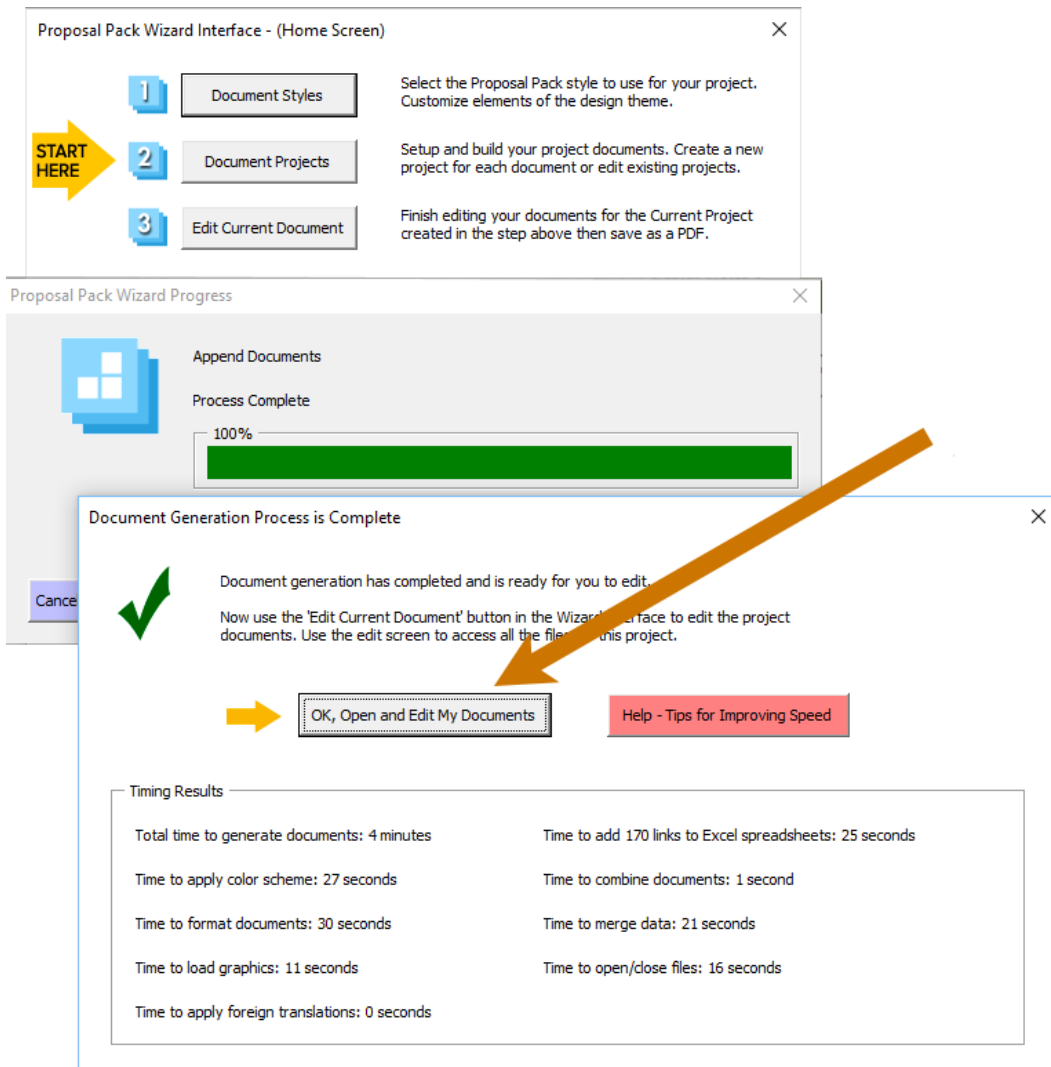
At the bottom of the dialog, there are six numbered buttons: 1 Pick Documents, 2 Company Data, 3 Client Data, 4 Other Data, 5 Multiple Choices, and 6 Line Item Quote. A yellow arrow labeled 'START HERE' points to button 1. Orange arrows show a sequence from button 1 to 2, 2 to 3, 3 to 4, 4 to 5, and 5 to 6. At the very bottom 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 a very 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 **4 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.

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.


If you have problems running the Wizard software or have questions about how to get started, contact us for assistance at: <https://www.proposalkit.com/html/contact.htm>

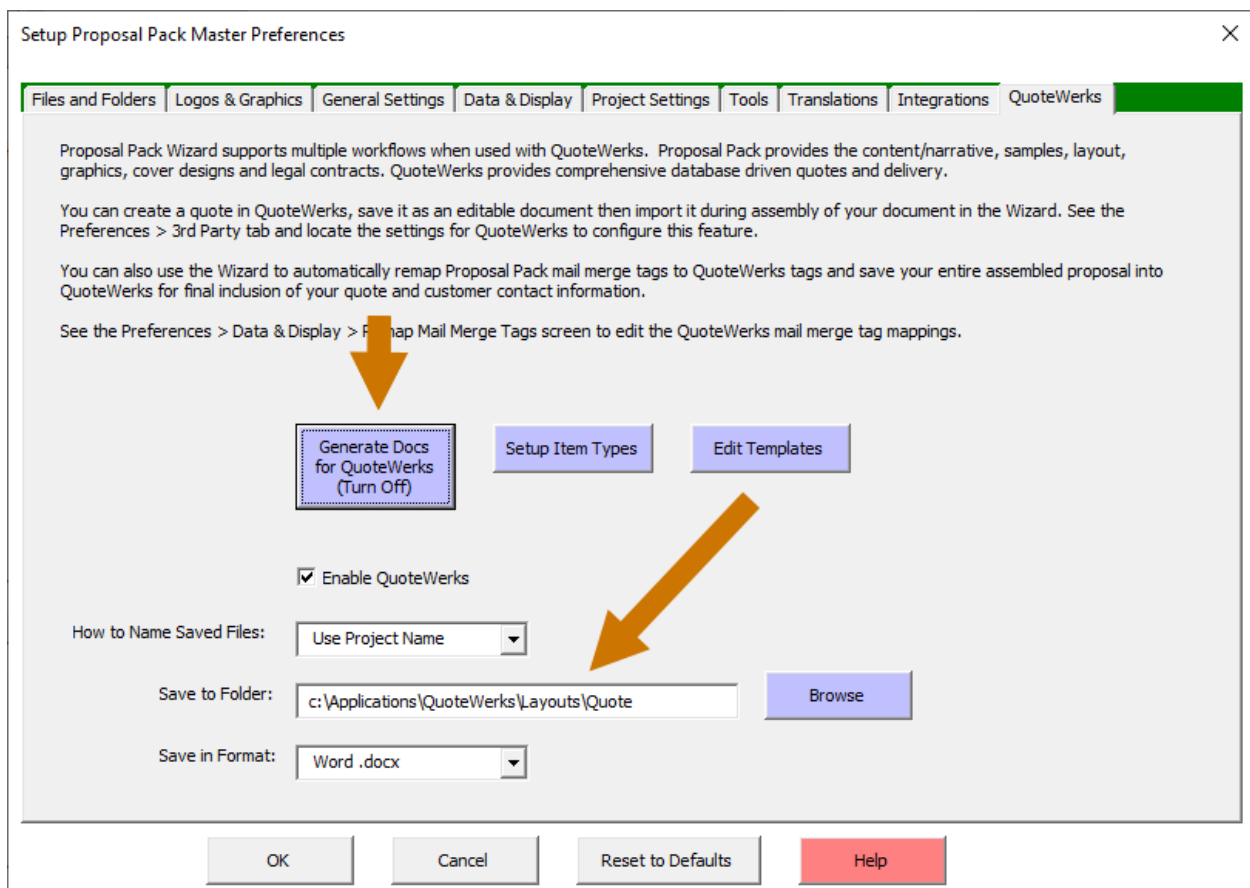
5 MINUTE QUICK START QUOTEWERKS



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

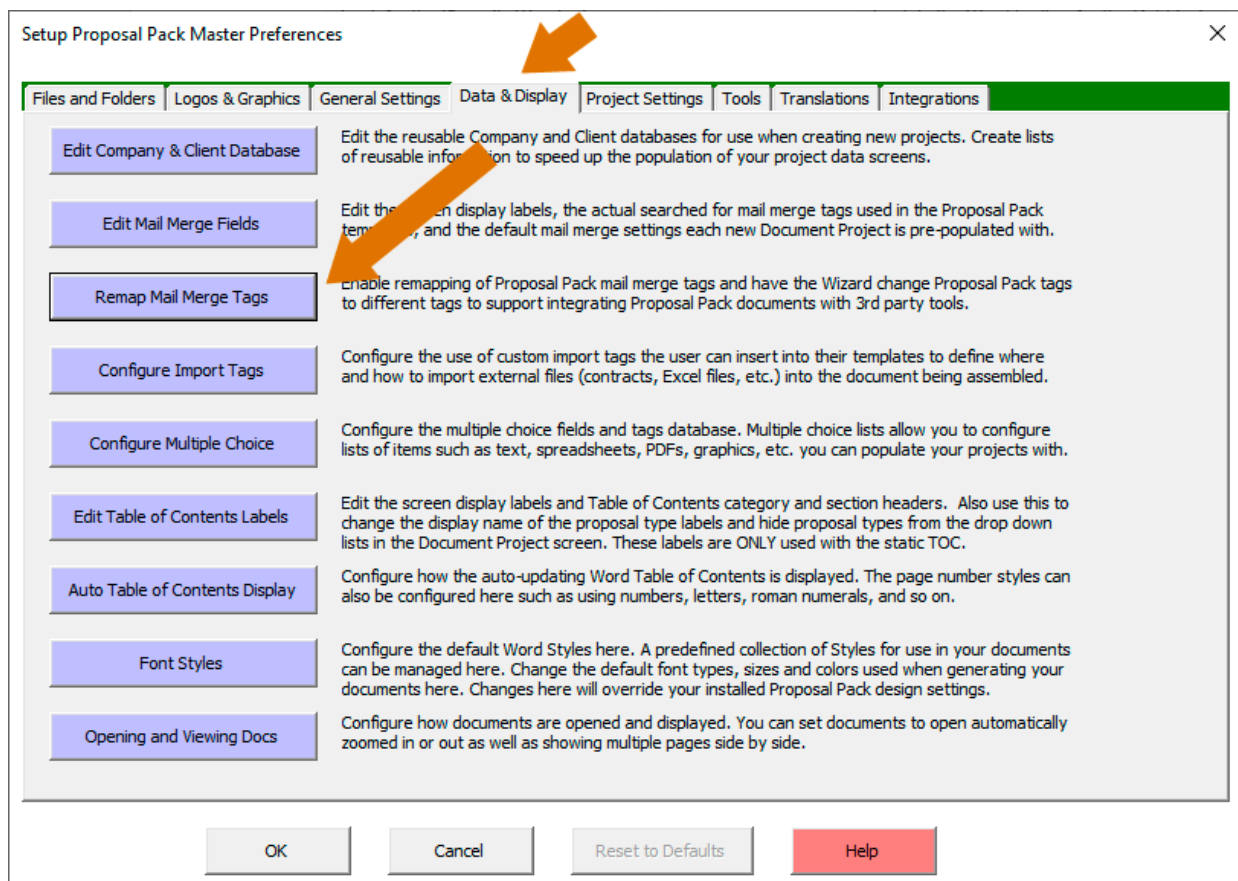
These are the minimal steps required to create a QuoteWerks layout file after having setup the Wizard and creating your first test document following the 5 Minute Quick Start instructions above.

 **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 in the Pick Documents screen 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: My QuoteWerks Layout Project

Save To Folder: c:\Proposalkit\ProposalPack\ProposalProjects_V#\My QuoteWerks Layout Project Browse Delete Old Files

Document Configuration Options

Merge Company and Client Data with templates

Combine templates into single master document

Turn on Page Numbering

\$ United States Dollars

American English (default)

General Business Proposal Select what type of project to create.

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

START HERE → 1 Pick Documents 4 Other Data

2 Company Data 5 Multiple Choices

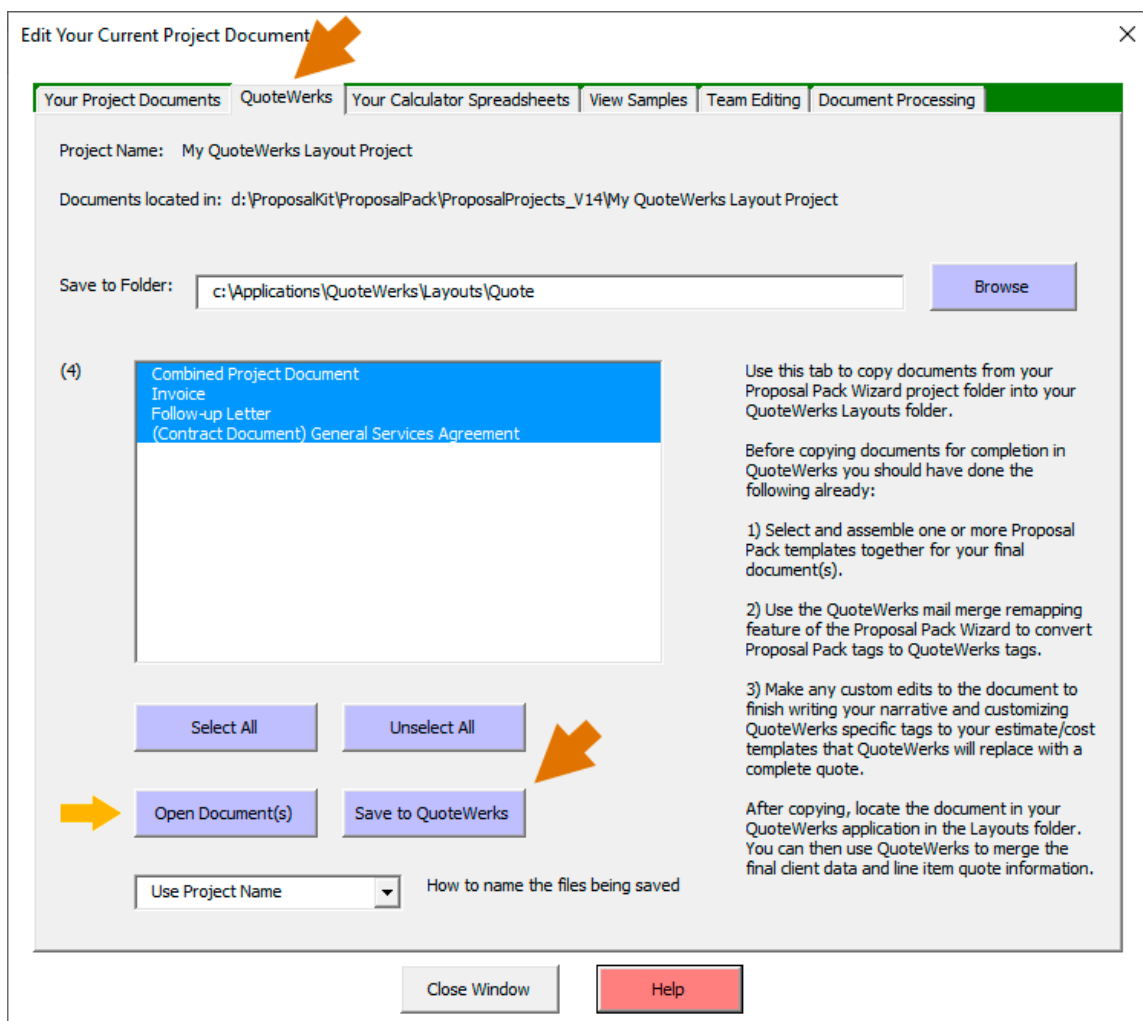
→ 3 Client Data

OK, Save Project and Build Documents Save Project w/o Building Documents Cancel Help

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.

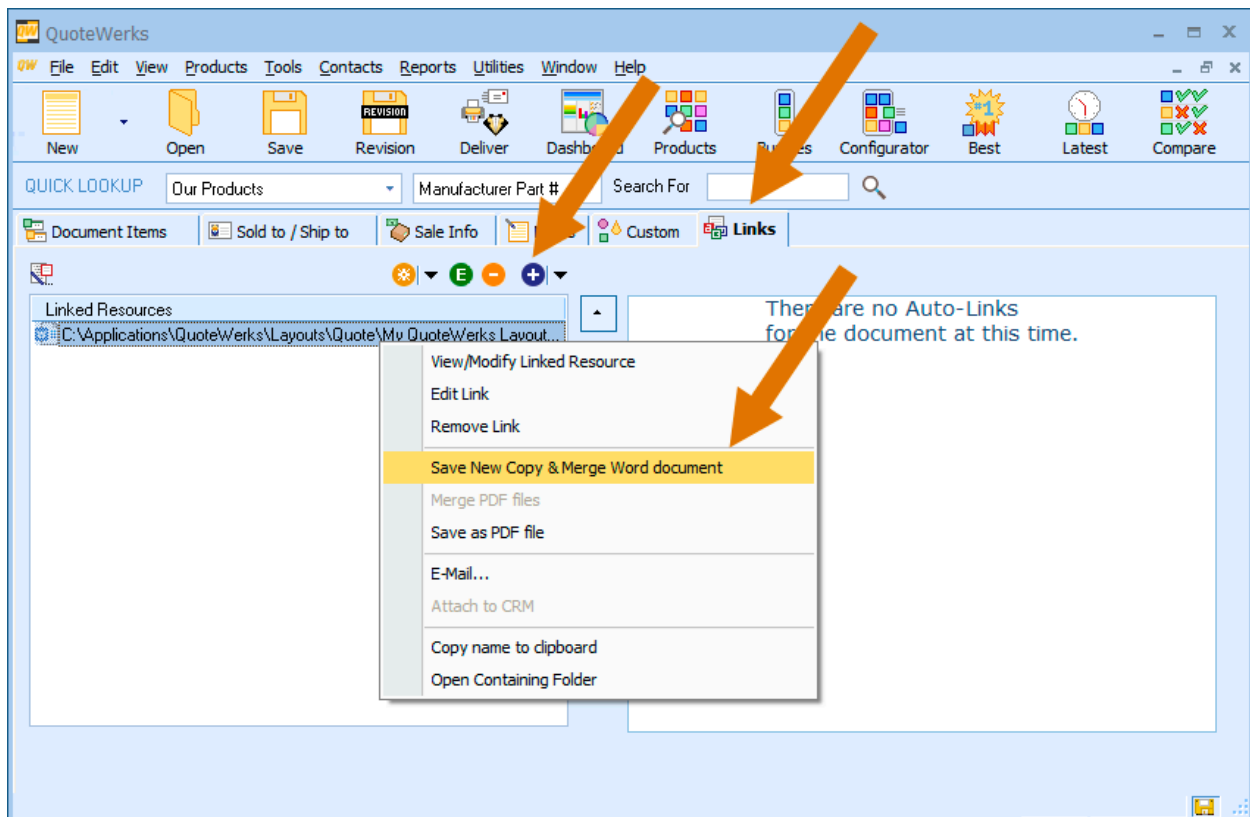
Any documents you generate including proposals, invoices, letters and contracts can be converted into QuoteWerks layouts.



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.

HOW DO I ACTIVATE THE WIZARD SOFTWARE?

Activating your Proposal Pack Wizard software is straightforward and required the first time you launch the application. Activation ensures your software license and user account are appropriately verified, enabling full access to all features, including the AI Writer.

Follow these steps to activate your software:

STEP 1: INITIAL LAUNCH

Upon launching the Wizard the first time, you will be prompted to activate the software.

STEP 2: ENTER YOUR ORDER DETAILS

You must enter the following details exactly as they appear on your original order confirmation from the Proposal Kit website:

- **Order Number:** Enter your unique order number provided at purchase.
- **Order Email:** Enter the email address you used when placing your order. Even if this email was misspelled or is no longer used, you must enter it precisely as initially provided. This email is only used to validate your order details and will not be used to send communications.
- **Amazon Orders:** For orders from Amazon, do not use the Amazon-generated order # or your Amazon account email. The paperwork provided with the DVD will include an

Proposal Kit order # and custom email address, which must be used.

STEP 3: CREATE A USER ID AND PASSWORD

Create a new, unique User Id and Password specifically for your Proposal Pack Wizard account. These credentials will be used to access the AI Writer feature and manage your account.

STEP 4: VALIDATE AND ACTIVATE

After entering your order details and creating your User Id and Password, click the activation button. The Wizard software will validate your details and activate your license. This process requires an active internet connection.

STEP 5: CONFIRMATION AND USAGE

Once your account is validated and activated, you can use the Proposal Pack Wizard software. Internet connectivity is only required during initial setup and activation or when using the AI Writer feature.

IMPORTANT NOTES

- Ensure your Internet connection is active during initial activation.
- Keep your User Id and Password secure, as they will be required to access AI Writer functionality.

- If you reinstall or activate the software on another device, reuse your original order details for activation.
- Do not simultaneously run multiple instances of the Wizard software using the same User Id. You can create up to five (5) User Id's per order. Each user on the license must have their own unique User Id.
- If you need more users, you must purchase an additional software license.
- You can use the same User Id on multiple installations such as your personal laptop and a desktop computer. Ensure you do not use them simultaneously such as when using the AI Writer.

IT'S NOT JUST FOR PROPOSALS AND CONTRACTS!

Yes, the name is Proposal Pack, so you are no doubt thinking "Okay, that may be great for proposals, but I also need to create other types of business documents. Is it good for anything other than writing proposals?"

The answer to both these questions is a resounding "Yes!"

The term "proposal" in much of the product and documentation is also synonymous with "business document". You can also create reports, studies, plans, information packets, manuals, and more with Proposal Pack and the Wizard.

If you are using a Proposal Pack that includes a graphic logo design, we include a collection of alternate graphics for your Title Page that lets you easily create other types of business documents with the same visual look. For example, instead of using the "Proposal" graphic logo in the Title Page we give you graphics for all these options:

"Project", "Proposal", "Business Plan", "Quote", "Response", "Submission", "Contract", "Estimate", "Plan", "Presentation", "Report", "Resume", "Study", "Documentation", "Information", "Instructions", "Manual", "Policies", "Procedures", "RFP", "Request for Proposal", "Samples", "Handbook", "Bid", "Memorandum", "Solicitation", "Confidential", "Bill of Materials", "Analysis", "Annual Report" and "Prospectus"

For example, this is what the “Proposal” and “Manual” graphics look like in the Proposal Pack Global #1 product:



Scroll through the extensive list of the thousands of templates included in the Proposal Pack, and you'll see documents you can use in business plans, resumes, reports, grants, contracts, feasibility studies, government contracts, case studies, project quotes, RFPs, and bids - you name it; it's in there.

Say, for example, that you're opening a small gym and you want to tell your local community about your facilities and the classes you plan to offer. You'll find templates in Proposal Pack for describing types of memberships, describing facilities, listing classes, and more. You can easily produce a simple single-page flier, a price list, or a whole packet of information.

Or maybe you work in a scientific field where you need to conduct experiments, perform analyses, and write up conclusions, including statistics, charts and graphs. You may need to put together a report with appropriate citations and so forth. Templates for all those uses are included in Proposal Pack, too.

Perhaps you've been tasked with writing applications for grants or putting together a loan application, and you never really thought of those sorts of requests as proposals. But they are, in that you need to explain all the things your organization proposes to accomplish in exchange for receiving funding. Proposal Pack is not just for business needs or for selling products. Nonprofit organizations will find all the pages they need there, too.

The longer and more complicated the document you need to create is, the more you will appreciate Proposal Pack's features. It allows you to easily assemble templates (thousands, if you need that many) and structure them into an organized, professional-looking, easy to read package.

All the templates include suggestions and examples of the types of information you might want to include. You get a jump start by using these templates because we've already done a lot of the thinking for you. You'll find yourself reading the suggestions and thinking, "Oh, yeah, I need to include this data and that piece of information—thanks for reminding me!" or "Oh, I was thinking I'd structure this page this way, but that suggestion makes more logical sense." Just by reading down the list of included templates, you'll probably find a few pages that you hadn't yet put on your list but that should be included in your proposal, application, or report.

Keep in mind that most of the text on most template pages is designed be replaced, so you can customize each page in your document to be exactly what you need it to be. The whole product is endlessly flexible and customizable, because we want to make it easy for you to create not a carbon copy of our ideas, but a document that represents your organization and meets the needs of the project you're working on.

We give you a basic structure and tips to help you along the way. Odds are that by starting with Proposal Pack's templates, you will end up assembling a more thorough, thoughtful, and organized quote, report, or study than you would have if you started from scratch. And with our graphic designs, your finished package will look professional, too.

It's true that we started Proposal Pack with the goal of making it easy for anyone, from a sole proprietor to a proposal writer inside a big company, to create proposals. Over the last decade we have expanded the products to cover a much broader range of business situations and nonprofit projects. Even community activists and hobbyists and a variety of clubs find the templates useful. Now, by including so many different templates for so many different purposes, we've made it easy for any individual or organization to put together almost any type of document package.

There's also a collection of over a hundred samples. But they're not just samples of business proposals. The samples will assist with your proposal writing, grants, business plans, studies, and so forth by giving you ideas on how to get started, showing pages to include, and demonstrating ways to sell yourself or your organization or your ideas to your readers. Perusing the samples will spark your imagination, show you a variety of document structures, and remind you of the information you need to include in your writing projects.

So be sure to check out the sample list - you'll find that as well as giving you samples of all kinds, we provide samples of contracts, resumes, feasibility and case studies and many other documents created with Proposal Pack. You'll be surprised by the variety in style, tone, and types of documents included among the samples, and you'll find yourself imagining all sorts of new ways you can use the product.

So, don't get stuck thinking that Proposal Pack is only for proposals, or only for use by marketing departments or sole proprietors selling products or services. No matter whether you are running a small business or managing a team inside a large corporation; no matter what sort of business documents you need to write; Proposal Pack will make all your writing tasks easier.

WHAT IS INCLUDED?

- Proposal Pack Wizard includes add-in Word Wizard software and documentation.
- Proposal Pack Wizard includes a limited collection of templates from the Proposal Pack for Any Business template product.

WHAT IS NOT INCLUDED?

- Additional Proposal Pack, Title Page Pack, Contract Pack and Proposal Kit templates are sold and installed separately. You must have at least one Proposal Pack or Proposal Kit to access the complete range of available templates.

If you are new to proposal writing, we strongly urge you to read several books on this subject. These books go into much more detail on writing a client-centered proposal and proposal management. Recommended book resources can be found at:

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

ANATOMY OF A PROPOSAL



<https://www.proposalkit.com/html/videos-the-perfect-proposal-kit.htm>

Your proposal may be anywhere from one page long to hundreds of pages long depending on many factors. The average proposal is 10 to 15 pages in length. The diagrams on the following pages show the anatomy of a proposal containing many of the various types of proposal templates included in the Proposal Packs. Your specific proposal will use a subset of the full collection of templates. Specific examples of proposals based on the same diagram are also included below. You will find the actual samples illustrated below, which are bundled with each Proposal Pack.

The first diagram shows the anatomy of a complete proposal including templates from all the major categories (Introduction Pages, Client Pages, Project Pages, Your Company Pages and the Appendix Pages).

If you are also using the add-on Proposal Pack Wizard, the Recommend Wizard uses this same structure for creating the proposal frameworks. You can also manually open and edit all these templates using your word processor.





If you look at the included Table of Contents template, all the templates in the Proposal Pack are grouped in order to assist you in selecting which documents to use and what order to use them in. The Proposal Pack HTML organizer also lists all the templates in the same consistent order. Note that these examples and default orderings of the proposal pages are only examples and

suggestions. You may organize the proposal and use the templates in any order and combination you see fit.




These diagrams show that regardless of the industry or type of proposal being created a similar framework is used, usually starting with the basics of a Cover Letter, Title Page, Executive Summary and as many supporting templates as needed in each case. Make sure to review all the included samples which illustrate a wide variety of uses for the Proposal Packs. Also review the [Proposal Writing Primer](#) section of this manual for further details on the organization of a proposal.

Comprehensive collection of templates organized by category:




Introduction Pages

-  Cover Letter
-  Title Page
-  Table of Contents
-  Non-Disclosure




Client Pages

-  Executive Summary
-  (more body page chapters here)
-  Opportunities




Project Pages

-  Expected Results
-  (more body page chapters here)
-  Project Summary

Your Company Pages

-  Mission Statement
-  (more body page chapters here)
-  Qualifications

Appendix Pages

-  List of Illustrations
-  (more body page chapters here)
-  RFP Cross Reference

Micro (or Letter) Proposal Example:



The following diagram shows the anatomy of a micro project proposal using only 4 templates. This diagram is based on the sample included titled “Micro PowerPoint Project Proposal”. See the complete PDF version of the actual proposal in the included samples.

This sample was created for pitching a PowerPoint development project. Since this was a small dollar amount project, most of the proposal was contained in a one page Executive Summary. A one page Cost Summary was included to show the costs of the project. A one page short form contract was included to spell out the terms of the agreement.

Introduction Pages

-  Title Page

Client Pages

-  Executive Summary
-  Cost Summary

Project Pages




-  Contract and Terms

Small Proposal Example:



The following diagram shows the anatomy of a small service proposal using nine templates. This diagram is based on the sample included titled “Accounting and Payroll Services Proposal”. See the complete PDF version of the actual proposal in the included samples.

This sample was created for an accounting firm proposing its accounting and payroll services to a potential client. Since this was a more expensive project covering ongoing client services more templates were added. A one page Cost Summary was included to show the costs of the project including setup, monthly and yearly fees along with a custom contract and terms statement.





Introduction Pages

-  Cover Letter
-  Title Page
-  Table of Contents

Client Pages

-  Executive Summary
-  Client Operations

Project Pages

-  Cost Summary
-  Contract and Terms
-  Benefits
-  Project Management

Medium Proposal Example:

The following diagram shows the anatomy of a medium project proposal using eighteen templates. This diagram is based on the sample included titled “CD-ROM Development Proposal”. See the complete PDF version of the actual proposal in the included samples.

This sample was created for pitching a marketing CD-ROM development project. Since this was a more expensive project (over \$10,000), many more templates were added. The additional templates were added to clearly show that the company making the proposal is a leader in their area of expertise and has the experience and portfolio that is a perfect fit for the client’s needs.

Introduction Pages







- Cover Letter
- Title Page
- Table of Contents

Client Pages

- Executive Summary

Project Pages

- Benefits
- Features
- Technical Approach
- Production Schedule
- Deliverables
- Cost Summary
- Project Management
- Training Plan

-  Case Studies
-  Company History
-  Testimonials
-  References
-  Portfolio
-  Team Resume

PROPOSAL WRITING PRIMER






<https://www.proposalkit.com/htm/videos-the-perfect-proposal-kit.htm>

Writing a good proposal takes planning and preparation. Your proposal may be your only chance to sell yourself to a prospective client, so spend the time you need to present your history, your analysis of the needs to be met, and your solution in a polished, professional manner.




Depending on the complexity of the project under consideration, proposals may be as short as three pages of basic, straightforward information, or as long as one hundred pages filled with detailed research studies, projected results, and cost summaries. Proposal Pack includes templates for all the standard parts of a proposal.

Whether concise or complex, all proposals must include the following basic information:

-  A discussion of the problem you are proposing to solve or the need you are proposing to meet.
-  Your qualifications to undertake the project.
-  A detailed description of what you propose to do to solve the problem or meet the need, including your proposed timetable and costs.

Some proposals, such as those submitted in response to a specific Request for Proposals (RFP), may need to meet strict guidelines spelled out by your prospective client.

In many cases, to receive an invitation to submit a proposal, you'll need to send an inquiry letter first. Inquiry letters should be printed on your company's letterhead and should contain:

-  A brief summary of the problem or need.
-  A summary of information about your organization and how it is qualified to solve the problem or meet the need.
-  A request for permission to submit a full proposal.

With the inquiry letter, you may also need to include an executive summary, which summarizes the highlights of your proposal. Your following full proposal will spell out the details.

Use Proposal Pack's Inquiry.docx template for your inquiry letter, and, if needed, the ExecutiveSummary.docx template for your executive summary. You can read more about the executive summary in the following pages.

Here is a common order of documents in a proposal:

- Cover Letter (Introduction templates)
- Executive Summary (Client-centered templates)
- Cost Summary
- Needs Assessment Section
- Goals and Objectives Section (Project-centered templates)
- Methodology Section
- Evaluation Section
- Financial Section
- Project Summary Section
- Your Company Qualifications Section (Company-centered templates)
- Appendices (Appendix templates)

The following is a more detailed step-by-step discussion of how to put your proposal together using the Proposal Pack templates.

Proposal Pack includes a very large collection of templates to cover most of your needs. Your proposal could be one page long to hundreds of pages long depending on many factors. The average business proposal is 10 to 15 pages long. Use your best judgment to determine which templates are suitable for your specific proposal.

Start with a Cover Letter, Executive Summary and Cost Summary then continue adding pages as they relate to your client, project and proposal.

Cover Letter

Introduce yourself and your purpose. Like any good business letter, cover letters are typically printed on company letterhead.

Use the CoverLetter.docx template for your cover letter.

Executive Summary

Present the highlights of your proposal and how it will benefit this prospective client, then concisely state your qualifications for accomplishing this project. The executive summary is frequently the most often read section of a proposal: take the time to hone it to professional perfection.

Use the ExecutiveSummary.docx template for your executive summary.

Cost Summary

Sum up the costs for your proposal. If you're considering a complex project, list only broad categories here; save the details for later in the financial section.

Use the CostSummary.docx template for your cost summary.

Needs Assessment Section (Problem Statement)

Explain the problem or need you propose to address and then detail how you performed your analysis and reached your proposed solution. You may want to include statements about business opportunities, comparisons with competitors or a general discussion of the industry, or discussions of marketing

or operations issues.

Choose from the Opportunities.docx, Competitive.docx, Industry.docx, Background.docx, Operations.docx and Market.docx templates as needed for this section.

Goals and Objectives Section

This section describes the results you plan to accomplish and provides explanations of how your success will be measured. For example, you may want to discuss how a process will be streamlined, how sales will increase, or how customers will be more satisfied.

Use the Results.docx, Statement.docx, Benefits.docx, Features.docx, Samples.docx, Deliverables.docx, and Services.docx templates as needed to flesh out the goals and objectives section of your proposal.

Methodology Section

Here is where you get down to all the details. Describe the process you will use to carry out your proposal, making sure to address all parts of your plan. Include discussions of personnel and equipment needed, the project schedule and milestones, the constraints and assumptions you're working with, and any other information your client needs to understand precisely what you propose to do.

Use the Technical.docx, Schedule.docx, ProjectManagement.docx, MarketingPlan.docx, TestingPlan.docx, Integration.docx, InstallSchedule.docx, Training.docx, MaintenancePlan.docx, Legal.docx, Risk.docx,

Assumptions.docx, Storyboard.docx, Constraints.docx and Contingency.docx templates as needed for the methodology section.

Evaluation Section

Explain how the success of your solution will be concretely measured, by whom, and when these tests will be performed. For a complex project, you may need to include milestones along the way.

Use the Requirements.docx, Documentation.docx, Interface.docx and Accept.docx templates as needed to cover the evaluation sections of the proposal.

Financial Section

In the previous Cost Summary, you listed the total cost of your proposal, and perhaps the major cost categories as well. In this section, present the details that demonstrate how you arrived at your total cost. Be sure to include all items the prospective client will pay for, as well as any discussion needed to show how you arrived at the budget figures listed.

Use the CostBenefit.docx, SuppliedMaterial.docx, Equipment.docx, HardSoft.docx, Payment.docx, Contract.docx, WorkOrder.docx, WorkOrder2.docx templates as needed to cover the financial section of the proposal.

Project Summary Section

Here's your final chance to sell your proposal again. Concisely describe the problem to be tackled, and then sum up the

highlights of your proposed solution, and how your proposal will meet the client's needs.

Use the Summary.docx and Recommend.docx templates for your project summary.

Your Company Qualifications Section

What makes you qualified to take on this project? Describe your history, other similar and successful projects, and other clients as needed to show that you are the perfect choice to get the job done.

Proposal Pack includes many templates for your qualifications, including but not limited to: MissionStatement.docx, Qualifications.docx, QualityControl.docx, CaseStudy.docx, CompanyHistory.docx, Products.docx, Future.docx, ExecBio.docx, Testimonial.docx, References.docx, Portfolio.docx, Resume.docx.

Appendices

Attach any details you need to complete your proposal. These might include legal papers for your company, lists of personnel, financial statements, testimonials, charts, blueprints—anything you require to provide all the information your client needs to decide.

There are many templates to use for your appendices, including but not limited to: Illustrations.docx, Acronyms.docx, Benchmark.docx, RefMaterial.docx, Financial.docx, CrossRef.docx, Disclaimers.docx and Warranty.docx.


HOW TO SELECT TEMPLATES: THE TOP 5 / TOP 40 RULE

There are thousands of proposal templates to choose from in a Proposal Pack (the Wizard by itself includes a small basic set of templates). Because any type of proposal for any industry, any business situation, and any size of proposal can be written with a Proposal Pack, we need a large collection of templates to cover everyone.


The trick is then to figure out what small set of templates are best suited for your situation and how to efficiently find them.






Technically, using Proposal Pack is very easy. It is nothing more than opening some documents and typing in your word processor after using the Wizard to assemble the selected templates together. The hard part is wrapping your head around the large amount of material and deciding what parts to use.


A very short proposal may be 1-3 pages long for a short form quote or bid, an average size proposal may be 5-15 pages long, a government grant could be 30-80 pages long.


















 Start by looking at the large collection of samples. There are many samples which you can use to get ideas from. Samples will show you how other people selected templates, assembled them together in a specific order and filled them out. They will give you ideas on what templates you might want to select. Samples Proposals are the PDF documents included with the large collection of editable templates. Samples do not come with the Wizard, they are in the Proposal Pack template



















collections. Find the samples by opening the Proposal Pack desktop organizer.

 Then consider using these **Top 5** most commonly used templates first:

-  Cover Letter
-  Title Page
-  Table of Contents
-  Executive Summary
-  Cost Summary

 Then consider templates from the **Top 40** most commonly used list:


-  Non-Disclosure Form (Short Version)
-  Introduction
-  Estimate
-  Needs Assessment
-  Opportunities
-  Market and Audience
-  Goals and Objectives
-  What You Can Expect
-  Statement of Work
-  Expected Results
-  Benefits
-  Features
-  Project Deliverables
-  Evaluation
-  Acceptance Criteria
-  Budget
-  Cost/Benefit Analysis

-  Work Order (Without Deposit)
-  Work Order (With Deposit)
-  Hourly Services Contract
-  Invoice
-  Payment Schedule
-  Contract and Terms
-  Recommendations
-  Project Summary
-  Capabilities
-  Qualifications
-  Company History
-  Services Provided
-  Products
-  Comparison Chart
-  References
-  Company Operations
-  Financial Information
-  Reference Material

When picking documents in the Pick Documents tabs, click the **Top 40** button to narrow the large collection of templates down to just these Top 40. This will make finding these templates in the lists easier.

This is only the default list of Top 40 templates for the General Business Proposal type. Each of the 12 Proposal Types has its own unique Top 40 set of templates (for example the Grant Proposal has a slightly different list, the Business Plan type has another slightly different list, etc.). You can also customize the Top 40 list to show your own personalized selection of templates. See this

chapter for details: [How do I Setup my Own Top 40 List of Templates?](#)

 Finally, start looking through the rest of the entire collection of templates to find specialty templates that will fit your situation.

If you know the name of the template(s) you are looking for you can also search for them by name using the **Search by Name** tab in the Wizard.

You can search for specific templates by name using the search feature of the Proposal Pack PDF manual, by using the search feature of your web browser when you are viewing the complete list of templates in the Proposal Pack Desktop organizer, or by using your operating system Search feature to search for text across all the templates installed on your hard drive.

AI WRITER OVERVIEW

The AI Writer is a powerful feature within Proposal Kit's Proposal Pack Wizard software, designed to simplify the creation of proposals, reports, and business documents. This feature allows users, regardless of their writing skills, to quickly generate well-organized and customized narrative content tailored to their specific needs.

Users begin by providing information about their company, client, project details, and specific instructions for the proposal or RFP. Information can be conveniently copied from sources such as company or client websites, project specifications, or RFP guidelines.

Once these initial details are provided, the AI Writer rapidly analyzes and synthesizes the input, automatically generating all the required narrative sections of the document (e.g., Cover Letter, Executive Summary, About Us, and so on). The AI Writer can create thousands of topics.

For example, an HVAC company bidding on a project to install a specialized HVAC system in a hot yoga studio would input their company details, client specifics, a description of project requirements, and optionally, financial and scheduling data from a quote. The AI Writer generates a comprehensive, professionally formatted proposal in mere minutes. This allows the business to focus on final proofreading and minor edits, significantly reducing the time and effort typically required for proposal creation.

KEY BENEFITS OF THE AI WRITER

- **Ease of Use:** No specialized writing skills required. Provide the necessary details, and the AI handles the rest.
- **Speed and Efficiency:** Generate complete proposals and business documents in minutes rather than hours.
- **Customization:** Easily fine-tune and personalize content using detailed instructions in global and individual chapters.
- **Professional Quality:** The AI produces well-structured, grammatically correct, and contextually relevant narratives ready for immediate use.
- **Integration:** Seamlessly imports AI-generated content into your Proposal Kit templates for professional formatting within Microsoft Word.

By utilizing the AI Writer Proposal Kit, users streamline the creation of detailed, persuasive documents, enabling them to respond promptly and professionally to client requests and opportunities.

CONFIGURING THE AI WRITER

The Wizard's Preferences screen is a centralized place to configure the settings to streamline your use of the AI Writer across all future projects. Setting up your global preferences saves valuable time and ensures consistency in your proposals and business documents.

GLOBAL AI WRITER INSTRUCTIONS

Within the Wizard's Preferences, you can set up global instructions that apply universally to all new projects. These instructions typically include:

- **Company Data:** Your organization's background, contact information, mission statement, and other essential details.
- **Client Data:** General client information templates to standardize how client details are structured in your proposals.
- **Project Data:** Common project elements, services, products, or specific data points frequently included in your proposals.
- **Writing Instructions:** General writing guidelines or specific narrative styles that align with your company's brand and communication standards.

By predefining these global instructions, you eliminate repetitive setup tasks and provide the AI Writer with a solid baseline for generating highly customized and accurate content immediately upon starting a new project. Whenever you create a new project in the Wizard, the global copies of the instructions will be copied to

your project folder, allowing you to customize them further for that specific project.

DEFAULT AI WRITER FINE-TUNING SETTINGS

The Wizard's Preferences screen also allows you to preset default fine-tuning settings that control how the AI Writer generates content. These settings include:

- **Content Model Selection:** Choose between narrative or reasoning models to best suit your typical proposal or document style.
- **Tone and Style Preferences:** Set your preferred writing tone (formal, casual, persuasive) and general document style preferences to maintain consistency across projects.
- **Optimization Parameters:** Define AI parameters influencing content generation's length, complexity, and depth to ensure outputs align closely with your needs.

By configuring these defaults once, you ensure that each time you use the AI Writer, the output matches your typical requirements and minimizes manual adjustments.

USER ACCOUNT MANAGEMENT

Managing your AI Writer account settings is simple through the Wizard's Preferences. Here, you can:

- **View and Manage AI Credits:** You can check your credit balance and add credits directly from the preferences screen.

- **User Account Setup:** Create, update, or delete User Ids and passwords for authorized access. This is especially important if your Proposal Kit license includes multiple users.
- **Server File Management:** Enable or turn off the automatic or manual purging of server files associated with your AI Writer projects, enhancing data security and compliance.

BENEFITS OF USING THE PREFERENCES

Configuring these settings in the Wizard's Preferences screen provides several immediate and long-term benefits:

- **Time Savings:** Reduce setup time for every new project.
- **Consistency:** Ensure consistent quality and style of your AI-generated content.
- **Efficiency:** Quickly manage your AI Writer resources, preferences, and account settings from a single interface.

Using these configuration options, you can optimize the AI Writer's functionality, enabling faster, more efficient, and consistently professional proposal generation.

CREATING YOUR AI WRITTEN CONTENT

The AI Writer within Proposal Kit's Proposal Pack Wizard dramatically simplifies the content creation process for your proposals and other business documents. Follow these step-by-step instructions to use the AI Writer feature in your project:

STEP 1: SET UP YOUR PROJECT

Begin by selecting the main chapters for your document during the initial project setup. In the Company Data and Client Data sections, fill in your company and client name/address, as the AI Writer will use this information to personalize your document.

STEP 2: ENTER FINANCIAL AND SCHEDULE DATA

Use the Line Item Quote screen if your document includes financial sections such as a Cost Summary, Budget, or schedule. Input the financial details and schedules here, as the AI Writer can automatically incorporate this data into your document when you create the Quote Data instructions.

STEP 3: OPEN THE AI WRITER

Once your initial setup is complete, click the **AI Writer** button to open the AI Writer interface.

STEP 4: SELECT PAGES TO WRITE

In the **Pages to Write** tab, you'll see a list of chapters eligible for AI content creation based on your selections. Check the boxes next to the pages you want the AI Writer to generate.

STEP 5: FINE-TUNE YOUR AI WRITER SETTINGS

Click the **How to Write** tab. Here, select your preferred content generation model:

- **Narrative Model:** Ideal for most general writing tasks.
- **Reasoning Model:** Recommended when you require the AI to perform deeper reasoning, analysis, or data-intensive writing tasks.

Adjust additional fine-tuning options such as writing tone and style to align with your project's needs. If you use the Reasoning model, consider only using it on specific chapters that benefit from deeper reasoning and/or data analysis. The Reasoning model does not necessarily write better narrative content.

STEP 6: PROVIDE DETAILED INSTRUCTIONS

In the **Instructions** tab, enter detailed instructions to guide the AI Writer. The **Company Data** and **Project Data** instruction files are required. You do not need to be a good writer; use clear, natural language to convey essential information to the AI as best possible and it will understand it. Let the AI Writer do the actual writing and formulating of the pages. You just have to give specific details about you, your client/recipient, the pitch/project/product/service, etc.

STEP 7: CREATE AI CONTENT

After selecting your pages, adjusting fine-tuning options, and filling in your instructions, click the **Create AI Content** button. The AI

Writer will generate your content, which will be available in the **AI Results** tab.

STEP 8: REVIEW AND MANAGE AI WRITTEN CONTENT

In the **Results** tab, you can:

- View, edit, and select the best version from however many AI-generated copies of each page you have written.
- Create reusable copies of AI-written pages for future projects.
- Review suggestions for additional chapter topics provided by the AI Writer. You can add these suggestions and generate further content by repeating step 7.

You can continue adjusting your fine-tuning settings and instructions, prompting the AI Writer to rewrite content until you achieve your desired results.

STEP 9: FINALIZE AND BUILD YOUR DOCUMENT

You do not have to perform detailed edits in the AI Writer interface unless you are creating reusable templates. Once satisfied, close the AI Writer screen and click the **OK, Save Project, and Build Documents** button on the project screen. The Proposal Pack Wizard will assemble your final document, at which point you should conduct your final proofreading and editing.

AI WRITER TIPS, TRICKS, AND BEST PRACTICES

TIPS AND TRICKS

- **Batch Processing:** Split your AI content creation into smaller batches to allow for customized settings for individual pages. This approach helps tailor each page's tone and style more precisely.
- **Tone Variation:** Use a persuasive tone for cover letters and executive summaries, adopt a technical tone for specification and detailed product pages, and utilize a narrative tone to create engaging company profiles or About Us pages.
- **Experiment and Iterate:** Try multiple rewrites of key pages, experimenting with different tones and writing styles. Retain all generated versions and select the best one for your final document.

BEST PRACTICES

- **AI as First Draft Creator:** Treat the AI Writer as a tool for creating robust first drafts rather than a solution to complex business problems. AI-generated content requires human oversight to refine and finalize.
- **Set Realistic Expectations:** AI may occasionally ignore or misinterpret instructions, generate content inaccuracies, or fabricate details. These behaviors are expected. Always review and edit AI-generated content carefully.

- **Editing and Proofreading:** Consider AI-generated content as preliminary drafts. Thorough editing and proofreading are crucial to ensure accuracy, consistency, and quality.

By incorporating these tips, tricks, and best practices, you'll optimize your use of Proposal Kit's AI Writer and achieve professional, polished results in your proposals and business documentation.

SELECT YOUR CHAPTERS WITH CHATGPT

The Wizard has a tab in the Pick Documents screen that works with ChatGPT to get your project's chapters selected automatically.

While we have hundreds of human curated lists of proposal layouts in the Quick Start and View Samples tab you can use ChatGPT or another AI to generate a list of chapters for special use cases to speed up your chapter selection.

This screen is designed to be used with our custom GPT '[Business Proposal Outline Creator for Proposal Kit](#)'. You will need a subscription to OpenAI to use this GPT.

We do not directly link to any specific AI using an API which also means we don't charge credits or have any extra fees for using this AI assistance feature.

While we designed this feature to work with our custom GPT which is trained to use our list of thousands of chapter templates you may be able to use it with other AI models however results will vary. Even the custom OpenAI GPT has a mind of its own and will give chapter names that are not exact matches to our templates or will give its output in varying ways.

The Wizard will process the AI response to pull out the chapter templates (based on all the ways we have seen it generate output so far) and will attempt to map as best possible mismatches to our templates.

If multiple pages may be applicable, you will have the option of selecting which template to use and updating the mappings to always use your selection in the future.

If you paste in output from another AI, it may be in formatting we haven't accounted for or may generate more mismatches that have to be manually mapped.

To reduce problems with formatting the best way to input a list of chapters is in a comma separated list with each word capitalized.

You can generate a report when the list has been imported and email it to us if you would like help mapping templates and to help use update our mappings or account for new formatting we haven't seen yet.

A handful of chapters that are almost always selected for proposals will be automatically added in case the AI doesn't suggest them such as a Cover Letter, Executive Summary, Cost Summary and the front Title Page and the ending Back Page.

Once the chapters are processed, they will all be automatically selected and you can further customize the list using the other tabs.

IT'S ALL ABOUT TRUST – WINNING PROPOSALS BY FIRST WINNING TRUST

It's a big impersonal world out there, especially on the Internet. The competition for attention is fierce. Anyone can slap together a price quote and a cover letter and ship them off via email, but that's not a strategy that's likely to succeed.

So how do you create a proposal that will land your next customer or secure your business loan or grant money or get your project approved? We all want to do business with people we trust. Your proposal must convince readers that you are worthy of their trust.

If possible, add a personal touch by requesting a face-to-face meeting to present your proposal. Shaking hands with the other party can go a long way toward finalizing a deal. But in-person meetings are not always possible, especially in the world of global business, so often your printed proposal needs to do all the work for you.

How do you inspire trust? And particularly, how do you inspire trust in people who don't know you at all?

First, demonstrate that you have integrity and experience. To do this, provide honest, easily understood information about your background, your strengths, and your intentions. To do this with Proposal Kit, you could use the Company History, Credentials, Capabilities, and Awards and Achievements templates to describe yourself or your organization. Use concrete, straightforward language to describe how your proposal will benefit everyone (Opportunities and Benefits templates).

Clarity is important. Be sure to set forth clear expectations that both parties can understand, with results that can be measured. You may want to use the Goals and Objectives or Expected Results documents to provide a concise summary, and then use other pages to supply more explanation. Be as detailed as possible to ensure that you and the reader have a shared vision of what you are proposing. If you are responding to a request for proposal (RFP), show your thoroughness by carefully considering the information provided and by specifically addressing each requirement. If you are unclear about any requirement, get more information if possible so that you can include appropriate data instead of vague generalities.

In every proposal, you should encourage feedback from the other party, and explain that you are willing to listen and modify plans as needed to make the project successful for everyone.

Show your ability to complete the proposed project by explaining how and by whom the process will be accomplished. Proposal Kit products contain many templates you can use for this purpose, such as a Project Plan, Implementation Plan, Schedule of Events, and so forth. Describe the resources—such as equipment, financial backing, or experienced personnel—that you will employ for the project (Equipment, Facilities, Financial Information, and Personnel, just to name a few templates you might use).

Be thorough. Demonstrate that you understand the complexity of the project under consideration. If blueprints, diagrams, or photographs would demonstrate your ideas better than words, be sure to add those (using templates such as Blueprints, Diagrams, Illustrations, Samples, etc.)

Establish your reputation by listing similar projects you have finished and recommendations from your satisfied business partners (Company History, Testimonials, Referrals, and References templates). If you have copies of complimentary newspaper or magazine articles about your company's projects or history, you might want to include those as well.

We are all more likely to trust others who hold themselves accountable for their actions. Legal contracts generally spell out the terms of accountability, and Proposal Kit contains many different types of contracts that you can adapt for your needs. You can also show your accountability by explaining how and when results will be analyzed. Some of the many templates available for this are Accountability, Testing Plan, Evaluation, Acceptance Criteria, and Reporting. Describe what you will do if wrongs need to be righted or the process needs to be changed. You might offer a guarantee of satisfaction or a warranty to fix any defects in a product—Proposal Kit includes Guarantee and Warranty templates for that purpose.

If you are already allied with respected brands or organizations, highlight that (Brand Strategy or Strategic Alliances templates). Memberships in organizations with good reputations can go a long way to establish respectability—be sure to list any you belong to on the Accreditations template.

If it's appropriate, you may want to demonstrate your loyalty to good customers by providing a volume discount or other special offer. The Discounts template can be used for those descriptions.

Finally, we all tend to trust organizations and people who are good citizens. Do you donate to charity, lead a nonprofit organization, or lend a hand in your community? If so, point that out using the Donations or Contributions templates. Have you won any awards or experienced any publicity for your good deeds? Include any evidence that shows you are a contributor to a cause larger than your immediate organization.

Presenting a proposal package that is full of errors will make even the best plans look unprofessional. Whenever possible, have others review your proposal and provide feedback, and get someone with a good eye to check your final version for grammar and spelling errors. Before you ship off the proposal, ensure that all pages are numbered appropriately, and all pieces are present and in order. Prospective partners will have more confidence in your ability to complete a project when you show that you are professional in your planning and presentation.

Above all, be polite and show your respect in your Cover Letter by thanking prospective business partners in advance for their time and consideration and inviting their questions and feedback on your presentation. You may want to send a handwritten thank you note and follow up with a phone call.

Use every aspect that your Proposal Kit product offers to help establish your credibility and dependability with your prospective business partners.

Because it's all about trust.

BOILERPLATE IS BAD FOR BUSINESS – TEMPLATES WITHOUT THE FLUFF

It used to be that most business was conducted in person, or at least over the phone. Odds were that your prospective clients knew who you were, and your competition was local—you knew who they were, too. In that environment, it was possible to distinguish yourself from the competition by your personality.

Now our world is global and connected mostly by impersonal means via email and the internet. Whether you're vying for a job, trying to secure a loan or a business contract, or reaching out to new customers, odds are that your competitors will be many, and they can come from anywhere.

Many of our competitors' products feature proposal documents with a great deal of boilerplate text; their pages encourage you to 'fill in the blanks' with your own information. This results in proposals that contain a lot of fluff but deliver little useful data. And worst of all, the proposal ends up looking and reading like hundreds—if not thousands—of others. This greatly increases the odds that the proposal will end up in the slush pile instead of on the decision maker's desk.

Proposal Pack takes a different approach from this 'fill in the blank' style. Instead of giving you paragraphs of essentially meaningless boilerplate text, we provide you with instructions, constructive suggestions, and examples of appropriate information to put into each proposal page, as well as a professional format you use to present your ideas. The words come from you, and so does the tone and style of your presentation.

You'll never be perplexed about what to add to your proposal when you're using Proposal Pack. We have an extensive library of template pages for you to choose from, and hundreds of suggestions on how to connect those pages and elaborate on important topics. Proposal Pack also includes hundreds of samples from a wide variety of organizations for all sorts of situations. By exploring these samples, you'll see how our templates can be easily used and assembled into a unique package.

You want your proposal to showcase your ideas, show your personality, and stand out from the crowd. Those are our goals, too. When you use Proposal Pack, your proposal will be easy to write. You'll feel like an expert as you put your information on the pages. Your finished product will be well structured, easy to read, and best of all—it will be a proposal that represents you.

STAY OUT OF TROUBLE COPYING PROPOSAL EXAMPLES

Why you should not copy someone else's proposal example. A Best Practices article to help keep you out of trouble when you are writing your business proposal.

From a Proposal Kit article by Pam Beason:

I received a packet of information recently in the mail. The introductory letter started off like this:

Dear Mr. Beason,

We know you sometimes need temporary office help at WildWing Press. Did you know that you can hire a construction worker for just a day to handle the extra work? Our temporary service is here to give you help when you need it. We've enclosed a list of available services and prices, as well as information about some of our staff. After you've had a chance to read through our offerings, we're sure that you'll call Hard@Work Temps to learn how we can make your life easier.

As a business owner, I file packets like this in my recycle bin. Why? Because I can tell that this is only a copy that is going out to thousands of other business owners. For one thing, I have multiple business licenses, so I got multiple copies. But even if I hadn't, I could tell that the sender has substituted only a few words—my last name, the word “office,” and the name of my company—because he forgot to change the font, so all the text would match. The sender clearly hasn't bothered to check that I am a 'Ms.' not a 'Mr.' And most telling of all, the sender forgot to take out the word

‘construction,’ and why would my publishing company need a construction worker? Does Hard@Work even employ construction workers, or is this a copy of another company’s proposal or proposal example that they found on the internet?

I recognize that the person who created this proposal was not a writer but a copier. I have no doubt that Hard@Work Temps is sending the same package to thousands of other companies. As a matter of fact, I’m sure I’ll discover exactly that when I get together with local business owners at our next networking meeting.

Did receiving this packet inspire me to use the services of Hard@Work Temps? No way. It makes me think that if the company is this lazy and careless in sending out proposals, they’ll probably be that lazy and careless in all their business dealings.

I’m a professional writer and editor, and of course I re-use formats, proposal examples and basic information where it’s appropriate, but I start from scratch when I write, and I always proofread carefully to make sure that everything I’m sending out represents me and is intended for my specific client. Copying someone else’s proposal would be like copying someone else’s homework—it’s not ethical and it’s certainly not professional, and some telltale sign is bound to be left—mismatched writing styles, the wrong word, a name that doesn’t belong.

Proposal Kit is designed around best practices, and one of those is that copying samples and proposal examples is not recommended. Any professional will tell you the same thing.

Proposal Kit gives you all the tools you need to create good proposals and other business documents. The editable proposal

templates are full of suggestions and proposal examples for you to follow. The sample PDF proposal examples are not editable, but they provide you with great ideas of how to create your own proposal. Take those ideas and do what the sample writers did—use Proposal Kit’s templates to generate your own unique proposal.

Proposal Kit gives you a big head start, but you need to do the work of creating a document that represents you and is designed for your specific audience. A copied proposal or proposal example just won’t cut it when your proposal is not the only one on the client’s desk. If you are absolutely in love with a proposal example, you can copy and paste the text from the PDF file, but you run all the risks I mentioned above.

The competition’s tough out there. Use Proposal Kit’s features to create your own personalized proposal. Then at the next networking meeting, instead of laughing about the latest crummy copy they all received, your clients and potential customers will be raving about your fantastic proposal.

FREQUENTLY ASKED QUESTIONS

Q: How do I insert graphics?

A: If you are inserting a new graphic into a Word document, click the “Insert > From File” menu option and pick your new graphic. We recommend using a 150 dpi transparent PNG format graphic. Try to avoid compressed JPG or GIF files as they might not print high quality. To position your logo, select the “Text Wrapping” option on the Picture toolbar when your logo is highlighted (after inserting it). Select the “in front of text” option. You can now drag your logo around the Word document.

Transparent PNG graphics will also overlay background colors and graphics in cases where a more complex layout is being used.

If you want to add your logo to the graphics, you must first edit the graphics in a program such as Adobe Photoshop or Adobe Illustrator. Save your edited graphics as a 150 dpi PNG file. Follow the instructions above to import your updated graphics back into the Word documents. The Proposal Pack Wizard can be used to automatically replace stock graphics already in the Proposal Packs. See the documentation section on creating your own custom graphics for details.

Q: Where are the files on my computer?

A: When first installing the Proposal Pack Wizard, you were prompted to choose a location for installation and all associated files. This is where files are located. No desktop icon or application is launched during installation. All files are contained on your hard drive in the original folder you chose. The default install folder is “C:\Proposal Kit\Proposal Pack”

Q: Where do I start?

A: First review all the material to get an idea of what is included. Then review this documentation. See the [5 Minute Quick Start](#) section in this manual on how to quickly create your proposal framework.

Q: How do I edit the text in the page header graphics?

A: The page header title text cannot be edited in Word. If you try to click the page headers, the entire box will be selected. Each page header is a graphic file imported into the template. You must use your graphics program to edit the page header titles. Once edited and saved, delete the existing page header graphic in the Word template and import the new one in the same location. The Proposal Pack Wizard can automatically delete the stock page title graphics and import your own custom versions. Also see the section in this manual titled [Easily Create Your Own Graphic Style](#) for instructions.

Q: Why are all the templates in separate files?

A: Since there are a huge number of combinations of templates for any given proposal, the templates are best left in individual files. Using separate templates also allows you to have multiple people working on sections of the proposal. Future proposals can easily be put together using individual template files from existing proposals. The Proposal Pack Wizard can be used to automatically combine your selection of templates into a single master proposal and can create a custom Table of Contents.

The Proposal Pack can also be used to create any kind of multi-page business document such as information packets, instruction manuals, reports, studies, plans, resumes, business plans, RFPs, and so on.

In order to create an unlimited number of complex documents the only way to do so is to keep every pre-written chapter in its own separate template. You can then select just the topics you need and assemble them into your own unique master template.

HOW DO I GET HELP CONFIGURING THE WIZARD?

Most people use the Proposal Pack Wizard and Proposal Pack template products with the default settings of the Wizard. The most basic configuration changes (such as turning on/off messages, adding custom logos to be added to your Title Page, editing the default mail merge data, etc.) are straight forward.

The Wizard interface help screens contain a lot of information to help with the most common situations.

This manual will cover just about every major type of configuration scenario you might need. Look through the various chapters here first.

While the Wizard does include many configuration options, and this may make it look very complicated, most people do not need to change the default settings.

Proposal Pack Wizard is used by most people in its default configuration however there are many consultants and companies that have heavily customized the Wizard for specialized situations. Some examples are for teams of salespeople who only need access to portions of the material and they need some Wizard features disabled or hidden. Or maybe you need to setup multiple variations of price lists, products or services that a salesperson can pick from to build the proposal.

If you need help with complex custom configurations, hourly consulting services are available. You can contact us here for more information:

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

Free product support for basic issues and software problems is available by email using our web site contact form.



HOW DO I MANAGE THIS MUCH INFORMATION?

With an extensive collection of templates available for your document some people get overwhelmed with the amount of material.

Here are some tips for beginners to help deal with the task of writing a business proposal, business plan or other complex business document.

With millions of proposals being written in many different business situations and industries it takes a core library of this many templates just to begin to cover everyone who uses Proposal Kit products.

Nobody will use all the material; you may only pick 5, 10 or 20 templates out of the available template library. The reason there are so many templates is that you need a large library to cover all the possible situations that may need to be written about.

-  Read the [5 Minute Quick Start](#) chapter.
-  Look at the samples to get an idea of how others have written their proposals. The samples are only included in the retail Proposal Pack template collections. Look at your Proposal Pack Desktop Organizer for the links to the samples. Samples will give you ideas on what templates to pick and how to fill in the content.

- The Proposal Pack Wizard operates in Novice mode initially. Novice mode disables all of the more advanced features, so you don't get off track with the basics of generating a proposal.
- When you are picking documents in the Wizard you have access to the entire library of templates included in whatever template packs you have installed. To narrow down this list to only the most commonly used templates when using the Add Template tab click the Top 40 button. There are Top 40 lists covering many business situations to help you locate topics related to your situation.
- If you are just writing a short quote, bid or contract use the "Contract" or "Short Form Quote" proposal types when you create a new document project. This will narrow down the volume of templates considerably. Read the chapter [What are the 12 Proposal/Project Types?](#) for more details.
- Once you select your own set of templates in the Pick Documents screen, click the Presets tab and "Create New Preset from Selected Templates" button and save it as a named collection. Then whenever you return to this screen you can pick that entire set from the Load Templates from Preset button.
- You can define your own custom selections of templates which will give you fast access to just the material you want to deal with daily. By default, you will have access to the entire collection of templates. Use the 'Custom' project type and configure it with a small subset of templates, then set the 'Custom' project type as your default project type for all new proposals. Read the chapter [How do I Setup My Own Short List of Templates?](#)

HOW DO I MIGRATE FROM A PREVIOUS VERSION?

Depending on how extensively you have configured your old Wizard, migrating your old data and configuration can be as easy as pushing a couple buttons or it could require a significant amount of manually copying documents and re-applying customizations.

MIGRATING LEGACY FORMATS

The Wizard and all Proposal Kit template packages now use current .DOCX and .XLSX format files. Older versions use legacy .DOC and .XLS format files. The files otherwise are still the same root names in the same folders. So, you can manually migrate custom versions of your old Proposal Kit files by saving them over the new files in the new format.

For example, if you have a custom ExecSummary.doc template you want to keep using in the new format you can open that file and do a 'Save As' and save it over the top of our newer ExecSummary.docx template in the current Word Document format.

Old versions of the Wizard can be installed at the same time as new versions without interfering with each other. It may be safest to keep your old version installed then install the new version and make the same configuration changes to the new version such as custom Preferences settings.

Next, determine if you have customized any of the stock templates. You can copy any customized templates from the Documents/Word folder of one Proposal Pack version to another if you save them all in the new .docx file format.

If you use the MyTemplates folder for your custom templates, then you do not need to do anything as this folder is shared across all versions of the Wizard.

You should keep your old projects in the original folders and use the old Wizard to manage your old projects.

HOW DO I USE EXPERT/NOVICE MODE?

By default, the Wizard first installs in Novice Mode. Novice Mode is intended for first time users to be able to quickly start creating proposals without being confused or distracted by the advanced features of the Wizard.

In Novice Mode only the essential configuration options are enabled. The Wizard is still fully functional, you will just find that some of the configurable options have been disabled (the buttons, list boxes or checkboxes will appear grey and will not operate).

To enable Expert Mode, use the Preferences screen and enable Expert Mode under the General Settings tab. Expert Mode will enable all of the configurable options which appeared grey in Novice Mode.

If you are in a hurry to create a proposal leave the Wizard in Novice Mode, especially if you do not have the time or interest in reading documentation, which means you are probably not reading this anyway.

When you are ready to start configuring the Wizard, adding your own custom templates, changing the ordering of documents, etc. you can enable Expert mode.

Once you have built your first document in Novice Mode (and you are running the Expert Edition of the Wizard), the Wizard will automatically switch to Expert Mode.

HOW DO I USE THE WIZARD?

To use the Proposal Pack Wizard, begin by setting up any installed Proposal Pack styles so the Wizard can access their documents. For each proposal to be created, first pick a style to use, create a document project, select a collection of documents to use and enter your company and client contact information. Finally click the **OK, Save Project and Build Documents** button then edit the created framework.

The Proposal Pack Wizard automates the tedious task of managing the proposal framework setup. Once the framework is created, you can start editing the combined and merged proposal template to fill in your company, project and client specific information.

The Proposal Pack Wizard will help guide you with pop-up information and help screens on each page with detailed information on how to use the various advanced features. Also see the specific chapters in this documentation on how to use specific features or accomplish specific tasks.

Read the chapter [5 Minute Quick Start](#) for a more detailed step by step on how to create your first proposal.

HOW DO I SETUP THE WIZARD?

When you first install the Proposal Pack Wizard, it will be pre-configured automatically by the installation process to operate as a single user system on a single computer.

With the multiple user license, you can change the database paths to store the style database and/or the project database on a different computer. This allows you to have a single style database for all users and a single project database for all users. Each user will have to have their own copy of the Proposal Pack Wizard installed with a unique User Id number. Your serial number will determine how many users can be setup. Each individual user can have their style database local to their machine or on a network server. Each individual user can also have their project database local to their computer or on a network server. When first installed, the User Id always defaults to a unique system generated id and the style and project databases are local to the computer the Wizard was installed on. For network use read the chapter [How do I Install and Configure for Use on a Network?](#)

To create your own documents, you will first have to set-up your Proposal Pack(s) and/or Proposal Kit in the Wizard. Proposal Pack and Proposal Kit templates must already be installed on your computer before you use the Wizard. See the section below on adding styles to the Wizard.

HOW DO I INSTALL IN WINDOWS S MODE?



<https://www.proposalkit.com/htm/videos-windows-10s.htm>

All our products will work on a Windows in S Mode PC as well as full versions of Windows.

The only difference is how they are put onto a Windows in S Mode computer.

The biggest issue with installing on Windows in S Mode is that you cannot run executable programs that did not come from the official Windows App Store.

Because our products are template collections and Word add-in software that is built into a macro enabled Word document, they will all work once they are put onto a Windows in S Mode computer.

How you do that is to download the .ZIP files from our download web page then uncompress them onto your computer as there are no restrictions in Windows in S Mode from downloading .ZIP files and copying documents to your computer.

Once you download the .ZIP files for your Proposal Kit product(s) instead of the .EXE installers unzip them into a common folder such as C:\ProposalKit. If you unzip everything into this default folder, it will make it easy for the Wizard to set itself up and locate all your template packages.

You may have to also right click the Wizard's Word document and in the General settings tab look for a checkbox or a button that says Unblock. Click that to tell Windows in S Mode that you are explicitly allowing that file to run the embedded macros.

The Wizard's document is **ProposalPackWizard_Win_V#.docm**

It will be in the ProposalKit\ProposalPack folder of the uncompressed .ZIP file.

Make sure on Windows in S Mode to open this file, enable its macros then run the macro ProposalPack.Wizard.RunWizard from the Add-Ins tab.

If you need to reset your registry keys for the Wizard in Windows in S Mode you can run the **RunWizard-ResetRegistry** macro from the Wizard document's macros in the Word toolbar.

There will be minor differences in how the Wizard operates between a full version of Windows and Windows in S Mode.

One example is that the Windows App Store version of Microsoft Word cannot be launched from a desktop shortcut link. When run under Windows in S Mode the Wizard will create the 'Run Proposal Pack Wizard' desktop shortcut with only a link to open the Wizard's document without launching the program automatically.

When run under a full version of Windows the Wizard's desktop shortcut link will open the document and launch the software automatically.

To run the Wizard program once the Wizard's document has been opened using the 'Run Proposal Pack Wizard' desktop shortcut all you must do is click the Add-ins tab in the Word toolbar then click the RunWizard button.

Because Windows in S Mode is a relatively new feature from Microsoft which is constantly being changed at the time of this writing there may be additional setup or usage issues not yet known. If you experience any issues using the Wizard or any Proposal Pack products in Windows in S Mode contact us for assistance.

HOW DO I MOVE TO A NEW COMPUTER?



<https://www.proposalkit.com/htm/videos-how-to-migrate-between-computers.htm>

Proposal Pack Wizard stores many paths to folders and files in its Windows registry key and in many database files.

For the Wizard to operate properly when moved to a new location such as a cloud drive or a new computer all the files and folders must still point to existing files and folders.

If you drag and drop your entire Proposal Kit installation into the same drive letter and directory structure on the new computer will make this process much easier as those paths will not be broken.

The Wizard tests all these paths in its registry and database files every time it runs. If any files or folders are missing the Wizard will start a repair process.

The Wizard will first try to automatically repair the paths without intervention. It is best able to do this if you keep then entire Proposal Kit directory structure intact.

If the Wizard's registry key is missing it will also rebuild it to the factory settings.

One example of how this works is if you installed the Proposal Pack Wizard and any template products to the default folder on your computer. In this case all files would be contained within the folder C:\ProposalKit

If you then drag and drop that folder to a new computer and put it in a folder on a different drive such as D:\MyProposals\ProposalKit All the paths in the database will still point to C:\ProposalKit which does not exist on the new computer. Plus, the registry key with default install paths and paths to where the database files are located will be missing on the new computer.

When the Wizard is then run on the new computer it will see that there are many broken paths and that there is no registry anymore. At this point the Wizard will rebuild the registry then will attempt to repair all the database files replacing anything starting with C:\ProposalKit with D:\MyProposals\ProposalKit.

If the Wizard is still unable to locate any missing files or folders which most commonly will happen if you have customized the Wizard to use external files such as links to your company logo or hooks into 3rd party systems folders and those files and folders were not copied to the new computer. The Wizard will let you browse to those missing files and folders to reset them. If the Wizard is still unable to locate missing files and folders it will start disabling custom features that depend on those missing files and folders, so the system will still be able to run and leave you to cleanup any missing or disabled content on your own later.

This feature allows you to move the Proposal Kit to a new folder on the same computer it is installed on, to a new computer or to a networked drive with minimal setup problems so you do not have to do a fresh install from scratch and must take the time redoing any custom configurations.

To fix this you can either run the Windows S Mode version of the Wizard which does not include the 3rd party integration features.

HOW DO I RESET/RECOVER SETTINGS?

The Wizard is installed with a backup of all the original configuration settings.

If you need to reset the configuration settings to the original values, click the **Reset to Defaults** button on the affected screen.

The Reset button will only reset the values for the screen being displayed; it will not affect any other screens not in view.

The Wizard also stores some setup and configuration data in the Windows registry. If you are copying your Proposal Kit software from one computer to another you also should copy the Windows registry key for the Wizard. An alternative is to use the Preferences > Tools > Repair Registry function. The Repair Registry function will rebuild your Windows registry and reset it to the original default settings. The Wizard is also capable of rebuilding a missing registry.

If your copy of the Proposal Pack Wizard had been corrupted to the point you cannot locate the files and folders, or they are in a corrupted state, you may have to reinstall the Proposal Pack Wizard from the original installer program.

The Repair Registry tool is typically used when you have copied the entire install folder and all files as-is from one computer to another. Current versions of the Wizard can rebuild the registry key if it is missing.

To make a complete copy, you should also export the Proposal Pack Wizard registry key from the source computer and import it into the new computer. You may also have to edit paths in the imported registry if the source and destination folders are not identical.

The Wizard registry key changes each version of the Wizard. Replace the ## with the version number of the Wizard:

HKEY_CURRENT_USER\Software\ProposalPackWizV#

The Wizard can rebuild its registry key and repair broken paths in the registry and in its database files. This can happen when copying an entire Proposal Kit installation from one computer to another computer. Especially if the directory structure or drive letters are different on the new computer.

The Wizard tests all its paths in its database files and registry key and tests for the existence of its registry key every time it runs. If anything is missing it will start a repair process and try to repair any missing paths. If all the Proposal Kit product files are in the places the Wizard normally keeps them then the repair process should be able to seamlessly repair itself.

If the testing and repairing tool needs to be bypassed for whatever reason you can set a string in the Wizard's Options.ini file

BypassPathTest = 1

You can also run a macro from the Word document's macros called **RunWizard-ResetRegistry** which can be found in the Word toolbar tab for the document's macros.

This function was added to support the Wizard in Windows S Mode because you do not have access to the Windows registry directly using command line tools like regedit or 3rd party registry tools. This is due to security restrictions imposed by Microsoft in Windows S Mode.

This function allows you to delete all the main keys in the Wizard's registry that will force the Wizard to rebuild its entire registry from scratch the next time it is run. This can come in handy if you have bad paths in the registry that cannot be easily edited.

HOW DO I INSTALL PROPOSAL PACK LOGO/GRAPHICS PACKS?

You must first have a Proposal Pack style installed on your computer before using the Proposal Pack Wizard to create your own proposals if you want to have access to the full range of available templates.

A Proposal Pack with custom logos is commonly referred to as a Proposal Graphics Pack, Proposal Pack Style or sometimes a “Skin”. All these terms are interchangeable and refer to our Proposal Pack product line.

If you have purchased one or more Proposal Packs and/or Proposal Kits from <https://www.proposalkit.com> or a reseller, you must first follow the install instructions with those products to install them on your computer.

Proposal Pack Wizard does come with a limited set of proposal templates from the Proposal Pack for Any Business style.

The first time you run Proposal Pack Wizard it will ask to search your default c:\ProposalKit install folders the Proposal Packs are normally installed into. If any are found it will automatically set them up in the Wizard. If none are found, you can always manually search your hard drive (if they were installed after you ran the Wizard or if you installed them in a location other than the default locations). Use the “Document Styles” button on the main Wizard interface then choose the “Search for Styles” button to manually search for installed Proposal Pack styles. Any styles not already set-up in the Wizard will be added if found.

If you have created your own custom style or have renamed the original Proposal Pack install folders to a new name that the Wizard cannot recognize, you can add them to the Wizard. Click the “Add Style” button and manually set-up the style in the Wizard by browsing for the folders your Proposal templates and graphics are located in.

The Wizard, in most cases, will be able to automatically find and set-up any known styles.

The Wizard will detect and setup any new Proposal Packs it finds each time the Wizard is run if you ran the installer program on the same computer as you are running the Wizard on.

HOW DO I ADD A NEW DOCUMENT PROJECT?



<https://www.proposalkit.com/htm/videos-how-to-select-chapters.htm>

This is how you create your proposal, business plan or other business document. To create a project, click the “Document Projects” button on the main organizer screen. Then click the “Add New Project” button. Enter a title for your project, follow the numbered buttons to select a collection of templates and enter your contact information. The basic tasks of creating a project are selecting the templates to be used to create the final documents and entering your company and client contact information.

The Pick Documents button will take you to the screen where you can add templates, remove templates and change the order of templates. There are several tabs in this screen that are used in different ways to help you find and select documents.

Here is the list of all available tabs and what they are used for:

Remove Templates

This tab is very straight forward. It contains all the currently selected templates. You can remove templates by selecting them from the list and removing them.

Add Templates – By Category

There are three different Add Templates tabs, but only one is

displayed at a time. This tab shows you all available templates broken up into major categories. Templates are displayed in the lists in a general order of how they usually fit together.

Select a template from one of the drop down lists and add it to your project by clicking the Add Selected Template button.

You can customize the default order of these templates using the Preferences > Project Settings > Configure Template Lists screen.

Add Templates – By Top 40

This tab shows you the Top 40 most commonly used templates all on one screen with checkboxes. This makes it more efficient to quickly select the most common templates. You can also customize the Top 40 lists to show your own custom tailored Top 40 set of templates.

Add Templates – By Alphabetical

This tab shows you all available templates in alphabetical order. This can make it easier to locate a specific template out of a large collection than using the category listing.

Select a template from one of the drop down lists and add it to your project by clicking the Add Selected Template button.

Search by Name

This tab allows you to search for a specific template out of the library of available templates. This may be the most efficient way to locate a template when you might only know one word to

describe it. Such as searching for “summary” to locate the Product Cost Summary or searching for “history” to locate the “Company History” template.

This tab can also be used to show you other templates that are related to this one or that are alternative versions that might be more suited to your specific situation.

This tab may be turned off in some situations, such as if you are using a very small collection of templates that doesn’t make sense to need search options to find templates in that small of a list.

Do not try and search for complex descriptions using sentences. The searching is very basic and only matches words or strings exactly that occur in the document titles and short descriptions. If you type something like “baby sitting cost analysis proposal” you won’t find any matches. First, this search is too specific. Templates are generally very high level and won’t be so specific they would have a word like “baby” or “sitting” in them. Also, putting in a word like “proposal” will not find any matches. Templates are short and general topics you would find in a Table of Contents (i.e. Executive Summary, Benefits, Features, Company History, Cost Summary, etc.) and a word like “proposal” is a description of a completed document (i.e. not a single template/topic). So, in this case simplify the search terms by splitting the 2 words into 2 search fields and search for “cost” AND “analysis” which would result in a match for the “Cost/Benefit Analysis” template.

View Samples

This tab allows you to select one of the completed samples and

build a list of templates for your project using the same templates that were used to create that sample.

This only adds the same templates to your project that were used to create the sample; it does not copy any of the actual text from the sample into your project. Unless you click the “Import Content from Selected Sample” button.

This can make it more efficient to setup a proposal for a specific situation. For example, if you are selling accounting services you can select the “Accounting and Payroll Services Proposal” from the samples list then click the “Import Content from Selected Sample” button and all 9 templates used in that sample will automatically be added to your project. You can also build up your list by adding templates from multiple samples to your project.

This tab may be turned off in some situations, such as using custom project types with small collections of templates.

Auto Recommend

This tab is primarily used as a training tool. It is similar to the View Samples tab, but it is simpler and more generic. Beginners can use it to get a general idea of what kinds of templates could be used for a variety of types and sizes of projects.

Once you switch from Novice training mode to Expert mode this tab is turned off by default.

Add a Contract

This tab is used when you have a Contract Pack template

collection installed. Contract Packs and Proposal Packs are separate products.

While Proposal Pack template products do include a handful of basic and generic contracts and work orders, the Contract Pack template products contain large collections of very specialized contract documents. Use this tab to add a detailed contract to your project.

There are also options to have the contract inserted into your main proposal or to have the contract created as a separate document from the main proposal.

If this tab has been disabled and you later purchase and install a Contract Pack template product, this tab will be turned back on automatically.

Presets

This tab is used to create and load preset collections of templates you have created. You can select a collection of templates, organize them in any order you like, even add a Contract Pack contract and save them all as a preset.

You can even set one of your presets to auto-populate every new project with. For example, if every one of your proposals is virtually the same you can save time even having to come to the Presets tab and load the files from the preset by setting that preset to auto-populate new project with. Then, every time you add a new project it will already have those templates pre-selected.

You can have 40 different Presets for each of the 12 project

types (i.e. General Business Proposals, Grant Proposals, Business Plan Proposals, RFPs, Custom, etc.).

Title Page

This tab is used to manage the Title Page Pack products which are sold and installed separately. A Title Page Pack gives you access to a much larger collection of pre-designed Title Page cover documents with different designs and color schemes.

You can install and manage multiple Title Page Packs on one screen.

You can also configure how the Title Page will be integrated into your master proposal, such as having it retain the plain text “Proposal” and “Description” elements or replacing them with custom graphics (if you have any installed) from a Proposal Graphics Pack.

You can also elect to have a specific custom Title Page design used for all of your future projects you create. This will save you time having to reselect the custom Title Page design each time you create a new document.

Quick Start

This tab is used to quickly load your project with a set of templates already pre-selected for hundreds of business situations.

Once you have selected your documents and entered your data, click “OK, Use Selected Templates” > “OK, Save Project and Build Documents” to return to the main Wizard Interface with the new project selected as the current project.

The Wizard will create your document(s) when the project is saved and will then direct you to the document editing screen.

HOW DO I USE THE CLIENT AND COMPANY CRM DATABASE?



<https://www.proposalkit.com/htm/videos-company-client-crm-database.htm>



<https://www.proposalkit.com/htm/videos-how-to-import-crm-data.htm>

There are two databases for holding lists of company contacts, client contacts and configuration settings. To manage these databases, click the Preferences > Data & Display > Edit Company & Client Database button. This is an Expert Edition feature.

The Wizard database files this information is stored in are:



CompanyContacts.ini



ClientContacts.ini

By default, all new projects have the company data populated with the information entered in the initial setup screen. This information can also be updated in the Wizard's Preferences.

Every time you create a new Document Project if you have filled in the Company Data and/or Client Data screens the Wizard will automatically add a new record to these databases if that information for the project is filled in and is unique. A record is unique if it has a First Name, Last Name and Company Name that doesn't exist in the database.

The Company contacts database lets you create a list of multiple records you can pick from. This can be useful if you have more than one person who will be creating documents.

The Client contacts database is a list of unique records from all your past projects. You can also add new records, delete records and edit records.

Because these databases are separate from the project database, any additions, deletions or edits will not affect the project database.

Records created during the saving of your projects will have the Nickname field set to a blank string. Using the Preferences screen, you can set unique nicknames on the records. This can also be used in conjunction with the Nicknames Only checkbox. If checked, only records you have added a unique nickname to will be shown. This is a way to create a specific list of records you want to be able to choose from in your projects.

You can create a specific list of company employees and set the Nickname to their first names to populate the Company Data from.

If you have a small number of cities you do business in you can create records with the basic information for each city such as the city name, state, zip code, area code, etc. and set the Nickname for the city. This will let you more easily preload the Client Data screen for each new project with some default data.

There are a couple special strings you can use in the data fields. If you put the string 'BLANK' (without quotes) in a data field that will tell the Wizard during assembly of a new document to replace the

entire <<xxx>> tag with a blank string. Otherwise if you leave a data field an empty string it will leave the tag in the document.

Another special string is 'DEFAULT' (without quotes). Using this string in a data field in the contact database will cause that field to not be overwritten when you load a record from the database. This can be helpful if you want to use the default in the preferences to hold some common information, but you only want the client or company database to overwrite some specific values.

Another way to speed up the population of data in your projects is to use the Populate From drop down. You can set a specific record to always populate new projects with. This will save you the time of selecting a record from the drop down manually when creating each new project.

HOW DO I INTEGRATE WITH CONTRACT PACK?



<https://www.proposalkit.com/htm/videos-how-to-create-proposal-and-contract-together.htm>

If you want to have your contract documents included as part of your proposal you can integrate your Contract Pack documents with the Proposal Pack Wizard.

There are multiple ways to use Proposal Pack with your Contract Pack documents. Pick the method(s) that best fit your workflow.

METHOD #1

Proposal Pack Wizard will detect if you have a Contract Pack installed and will set it up as a “3rd Party” set of templates. This happens when the Wizard is run for the first time and searches for any Proposal Pack template collections and when you manually search for installed Proposal Pack styles from the “Document Styles” screen. You can find these settings in the “3rd Party” tab in the “Preferences” screen.

When selecting documents in the “Pick Documents” screen use the “Add a Contract” tab to add a Contract Pack document. The contents of that specific contract will replace the content of the Proposal Pack “Contract and Terms” template in your proposal. Also, any referenced Exhibits/Schedules will be inserted along with the contract.

Any mail merge tags in the contract will also be replaced with the data you entered in the Document Project screens.

You can configure this feature including disabling it, changing the path to where the Exhibits/Schedules are located and changing which Exhibits/Schedules are associated with the contracts. Click the Preferences button, then the Tools tab, then the “Configure Contract Files” button to configure this feature.

METHOD #2

You can use the Wizard to manage contracts by themselves (i.e. without a complete proposal. This is basically the same as Method #1 above, just simplified. Create a new project and set the proposal type to be the contract pack you have purchased such as “Contract Pack Pro Contracts”, “Web Freelancer Contracts”, “Photographer Contracts”, “Contractors Contracts” or “Human Resources Contracts”. Then add a contract template from the Pick Documents screens “Add a Contract” tab. When the proposal is created it will only consist of the selected contract.

If you use this method and do not want the Proposal Pack graphic design added to the contracts go into the “3rd Party” tab in the “Preferences” screen and uncheck the box for using the Proposal Pack headers.

METHOD #3



<https://www.proposalkit.com/html/videos-how-to-add-new-documents-to-project.htm>

Using the Expert Edition of the Wizard from the Edit Current Document screen you can click the Add Legal Contract button to add any installed Contract Pack template to your existing project.

HOW DO I INTEGRATE WITH ESTIMATE PACK?



<https://www.proposalkit.com/htm/videos-how-to-add-new-documents-to-project.htm>

Estimate Pack is a library of extra documents and spreadsheets included with the Proposal Kit Professional bundle.

The Wizard can add documents from this library into your projects and additional files from the Edit Current Document screen.

This is an Expert Wizard feature. Both the Expert Edition of the Wizard and the Estimate Pack are included in the Proposal Kit Professional bundle.

From the Edit Current Document screen click the button “Add Estimate Pack Spreadsheet”.

Select any of the templates from the list and it will be copied to your project.

If a Word template is selected it will also have the design theme of the currently selected Proposal Pack and any custom preferences applied to it including the color scheme, font types and bullet points.

Templates added from the Estimate Pack will be copied to your project folder as individual documents. They will not be inserted into any documents already in your project folder.

HOW DO I INTEGRATE WITH PROJECT MANAGEMENT PACK?



<https://www.proposalkit.com/htm/videos-how-to-add-new-documents-to-project.htm>

Project Management Pack is a library of extra documents and spreadsheets included with the Proposal Kit Professional bundle.

The Wizard can add documents from this library into your projects and additional files from the Edit Current Document screen.

This is an Expert Wizard feature. Both the Expert Edition of the Wizard and the Project Management Pack are included in the Proposal Kit Professional bundle.

From the Edit Current Document screen click the button “Add Project Management Pack Document”.

Select any of the templates from the list and it will be copied to your project.

If a Word template is selected it will also have the design theme of the currently selected Proposal Pack and any custom preferences applied to it including the color scheme, font types and bullet points.

Templates added from the Project Management Pack will be copied to your project folder as individual documents. They will not be inserted into any documents already in your project folder.

HOW DO I CREATE AN EDITABLE COPY OF ONE OF THE SAMPLES?



<https://www.proposalkit.com/htm/videos-create-editable-sample.htm>

There are hundreds of completed samples included in each Proposal Pack and Proposal Kit Professional that include the Wizard software.

These samples are the completed versions of other people's work and are included in Adobe Acrobat PDF formatting to preserve the details including the graphic design theme. Because these are completed works created in design themes other than the design theme purchased and have been customized, they are not meant to be directly edited as-is.

One of the features of the Wizard software is the ability to load in the text content of any of those hundreds of samples in placed of the boilerplate text content of the chapter templates.

This allows you to create an editable version of any sample in the visual design theme you purchased. In addition, you can apply any other customizations the Wizard supports to create a customized version of the sample.

In the View Samples tab of the Pick Documents screen when you are setting up your project you can click the button Import Content from Selected Sample. When you save the project and build the document the text content of the sample will be imported.

HOW DO I CREATE A PROPOSAL AND CONTRACT TOGETHER?



<https://www.proposalkit.com/htm/videos-how-to-create-proposal-and-contract-together.htm>

If you have only a Proposal Pack set of templates installed, there are a handful of general contract and work order templates included. These are selected and added to your proposal just like any other proposal template.

If you have also purchased a Contract Pack collection of detailed pre-written contracts such as those in Proposal Kit Professional or any of our Contract Packs, you can now manage these documents with Proposal Pack Wizard.

This situation is for when you are creating both a business proposal and a contract at the same time, either combined or as separate documents. You will be able to include the contract in the proposal or you can keep your proposal and contract separate. There are multiple workflows you can use with Proposal Pack Wizard and Contract Packs such as:

- Just creating a business proposal
- Just creating a contract (see the next chapter)
- Creating a proposal with the contract included in the proposal
- Creating a proposal and the contract together but as separate documents.
- Creating a proposal first then creating the contract later (see the next chapter)

This chapter is for using Contract Pack templates with the Wizard (not the general Proposal Pack contract and work order templates).

First your Wizard must have detected and setup the Contract Pack in its database. If you installed Contract Pack after the Wizard has already been setup, use the Preferences > Tools > Search For Installs button. A message will be displayed if it has detected a Contract Pack. You can also click the Preferences > Third Party tab and check the Third Party settings to find which one the Contract Pack has been setup in. There must be an enabled third party setting for the contracts before they can be used by the Wizard.

Now that all your products are installed and setup, go to the Wizard home screen and click the Document Projects button, then click the Add New Project button. Enter a project name and for the type of proposal to create select the General Business Proposal option. Click the Pick Documents button to start selecting templates.

Now select the Add a Contract tab, select a contract from the drop down list and add it to your project.

There are a few option checkboxes to configure how the contract will be created.

If you do not want to have the Proposal Pack graphic header "Contract and Terms" inserted at the top of your contract document, uncheck the box "Use Proposal Pack graphic header".

If you do not want to have the contract document processed and reformatted to match the proposal formatting, uncheck the box "Use Proposal Pack document processing".

If you want the contract included in the proposal, uncheck the box "Create the contract in a separate document". Some people include the contract in the proposal document, other people keep the documents separate. Select the workflow that best suits you.

Continue selecting the rest of the documents that will go into your business proposal from the drop down lists (i.e. a Cover Letter, Title Page, Table of Contents, Executive Summary, etc.).

When you have completed setting up the project click the "OK, Save Project and Build Documents" button on the project screen. When the process is complete click the "Edit Current Document" button on the Wizard home screen.

Click the appropriate document in the list depending on if you created your contract separately or combined with the proposal.

Once a project has been created and our main project documents are created you can add additional pages to your project using the Add Legal Contract button in the Edit Current Document screen. This allows you to add multiple templates from an installed Contract Pack or Proposal Kit Professional.

HOW DO I CREATE JUST A CONTRACT?

If you have only a Proposal Pack set of templates installed, there are a handful of general contract and work order templates included. These are selected and added to your proposal just like any other proposal template.

If you have also purchased a Contract Pack collection of detailed pre-written contracts such as those in Proposal Kit Professional or any of our Contract Packs, you can now manage these documents with Proposal Pack Wizard.

This situation is for when you are just creating a single contract and not a complete business proposal. This also applies to when you have already created a proposal for a client and are creating the contract later. In both cases you need to create a new Document Project.

This chapter is for using Contract Pack templates with the Wizard (not the general Proposal Pack contract and work order templates).

First your Wizard must have detected and setup the Contract Pack in its database. If you installed Contract Pack after the Wizard has already been setup, use the Preferences > Tools > Search For Installs button. A message will be displayed if it has detected a Contract Pack. You can also click the Preferences > Third Party tab and check the Third Party settings to find which one the Contract Pack has been setup in. There must be an enabled third party setting for the contracts before they can be used by the Wizard.

Now that all your products are installed and setup, go to the Wizard home screen and click the Document Projects button, then click the Add New Project button. Enter a project name and select the Contract Pack option (6th item down on the list). Click the Pick Documents button to start selecting templates.

Click the Add a Contract tab, select a contract from the drop down list and add it to your project.

There are a few option checkboxes to configure how the contract will be created.

If you do not want to have the Proposal Pack graphic header "Contract and Terms" inserted at the top of your contract document, uncheck the box "Use Proposal Pack graphic header".

Check the box "Create the contract in a separate document". Some people include the contract in the proposal document, other people keep the documents separate. Select the workflow that best suits you. Since in this situation we are creating a contract all by itself leave the box checked.

When you have completed setting up the project save the project with the "OK, Save Project and Build Documents" button. When the process is complete click the "Edit Current Document" button on the Wizard home screen then select the contract document in the list and open it for editing.

HOW DO I INTEGRATE WITH OUTLOOK?

The Wizard's Microsoft Outlook integration features require an updated version of Microsoft Word that includes the "Microsoft Outlook 16.0 Object Library".

If you have an outdated version of Word with an older Outlook library, it will not work. You will have to upgrade your Office software.

There are multiple copies of the Wizard included. Only one of them includes the Outlook integration feature. Due to many different end user configurations that may or may not be compatible with the 3rd Party integration features the Wizard defaults to opening the Wizard without the integration features.

To use the integration features you need to first ensure your system is compatible. Click the Preferences button then click the Integrations tab. There is a button to perform a compatibility check. This will check to see if the required object library is in your installation of Microsoft Word.

If this check passes you can click the button to create a new desktop shortcut link that will open the version of the Wizard with the 3rd Party integration features.

If your office software is outdated you will have to upgrade to a version of Microsoft Office with an updated Outlook object library.

HOW DO I IMPORT THE CONTENTS OF EXTERNAL FILES?



<https://www.proposalkit.com/htm/videos-how-to-use-data-merge-tags.htm>

There are multiple ways to import files into Proposal Pack Wizard to support different needs. You can include your own documents in the Wizard interface and there are two ways to import the contents of external documents during the document assembly process.

If you want to add your own custom documents so they are available as selectable options in the Wizard interface read this chapter: [How do I Add New Documents to the Interface?](#)

Another method of importing external file is when you have setup the 3rd Party configuration settings to integrate with an external system such as a quoting application. In this situation the text contents of a specified Proposal Pack template are replaced with the contents of an external file when the specified template is part of your project. Read this chapter for details: [How do I Integrate with 3rd Party Quotes/Invoices/Etc.?](#)

The third way to import the contents of an external file is to insert tags into your templates. This can be used to import an externally generated quote or to select from multiple contracts when you generate each new proposal.

There are three predefined tags you can include in your Proposal Pack templates:

<<ImportFile>>


<<ImportExcelFile>>

<<ImportContractFile>>


These tags are like mail merge tags in that they have a similar looking format however they cause the Wizard to display a browse dialog box when your document is being created. When you browse to a Word, RTF, or Text file (i.e. any file that Word can import text from) the contents of the document replace that tag in the exact location the tag was in your template.

These tags will also allow you to import as OLE objects any file type. This allows you to import PDF files or any other file type that Word can import as an OLE object.

For example, you might replace the stock contents of the Proposal Pack's Estimate template (Estimate.docx) leaving just the header and footer information and put the tag <<ImportFile>> as the only text on the page. Then, when building your project documents, browse to and select a quote created in your accounting or quoting software.

 You can include multiple import tags in a document. Each tag will cause a browse box to display allowing you select a document to import. If you cancel the browse box, no file will be imported.

- If you have multiple 3rd Party applications defined for file importing you will be prompted to import multiple times. If you cancel one browse box, the next 3rd Party application defined will be used to browse from.
- The <<ImportContractFile>> tags are used **before** the mail merge process. This means you can include mail merge tags in the imported files. This is useful for importing from a collection of contracts where you still want to merge client data after the import.
- The <<ImportFile>> and <<ImportExcelFile>> tags are used **after** the mail merge process. This is to ensure that complex imported documents do not adversely affect the performance of the Wizard's mail merge process.
- Use these tags when your master proposal is a single document that needs to import external files into it. This is used when the 3rd Party document replacement will not work (as it requires all the templates to be separate and assembled for each new proposal).
- This feature uses Word's "Insert > Text from File" functionality. So only files that Word can import can be selected.
- Do not include the import tags in a document's header or footer.
- Do not include the import tags in a Word shape object.
- Do not include the import tags in the document being imported otherwise the Wizard will loop continuously importing the file into itself.

 You can disable the import file feature as well as configure how the import process works in the Wizard's Preferences > Data and Display > Configure Import Tags screen.

HOW DO I INTEGRATE WITH 3RD PARTY QUOTES/INVOICES/ETC.?

The Proposal Pack Wizard allows you to integrate documents created outside of the Proposal Packs/Wizard framework such as quotes, invoices, contracts, etc.

There are multiple ways to use Proposal Pack with your 3rd party documents. Pick the method(s) that best fit your workflow.

METHOD #1

You can setup the Wizard to replace the contents of a specific template with the contents of a 3rd party document. You can find these settings in the “3rd Party” tab in the “Preferences” screen.

Using this method, whenever you create a new proposal and select that template you will be prompted to select the specific document to include in the proposal when the proposal is created. Browse to the specific 3rd party document and select it. The contents of that document will replace the content of the Proposal Pack template in your proposal.

For example, you can setup the 3rd Party preferences to have the “Estimate” template replaced with the output of your 3rd party quote generation application. Whenever you then create a new proposal and have selected the “Estimate” template, during the proposal generation you will be prompted to browse for and select a quote you have already created in your 3rd party quote application. Your proposal will then be created from the Proposal

Pack templates and the 3rd party quote will be automatically included.

You can also use this feature to include 3rd party invoices, contracts or any other 3rd party document. Imported documents need to be in a format that Word can import text from such as .DOCX, .TXT, .RTF and so on.

If you cancel the browse box during the assembly of the proposal, the default Proposal Pack template will be used.

METHOD #2

This method depends on the features of your 3rd party applications. You may be able to create your proposal framework using the Proposal Pack Wizard. Then use the completed proposal as a document in your 3rd party software.

Your 3rd party software can then be used to fill in remaining information in the proposal such as detailed quotes and filling in merge tags with data pulled from other databases.

The Wizard can automatically remap Proposal Pack mail merge tags to tags defined in other systems to make this process easier. See the chapter [How do I Remap Mail Merge Tags for a 3rd Party System?](#)

METHOD #3

The Wizard can import the contents of files directly into your proposal as it is being generated using the <<ImportFile>> and <<ImportContractFile>> tags. This is like method #1 and sometimes is used in conjunction with method #1.

METHOD #4

You can use a more basic cut-n-paste method to insert the contents of a 3rd party document into your Proposal Pack Wizard created document. This is basic word processing and not a “feature” of the Proposal Pack Wizard. This may come in handy when piecing together a complex proposal where the parts are worked on by different people and/or software.

METHOD #5

If your proposal is being printed and does not have to all be included in a single document, you can print your 3rd party documents separately and then insert them into the printed material.

HOW DO I ADD A LINE ITEM QUOTE?

The Wizard's built-in line item database system is used automatically and nothing extra needs to be setup initially.

See the Line Item Database Manual for all of the details of using the Wizard's line item database for quotes, schedules and business plan financials, etc.

All you need to do is click the Line Item Quote button in the project screen. If you have selected templates for your project that are line item database enabled the Wizard will add those database components to your project.

If you select a premade database or import a Sample Proposal that has a custom database that will be assigned to your project automatically.

Then you can start adding line items to your project which will be automatically output into your documents when you save your project and build your project documents.

HOW DO I INTEGRATE WITH QUOTEWERKS?



<https://www.proposalkit.com/htm/videos-quotewerks.htm>

TLDR – Here is the short version to get started.

The Wizard has its own built-in line item database. If you use QuoteWerks or need a higher end quoting system you can use QuoteWerks along with Proposal Kit.

Click the Wizard's Preferences button and go to the QuoteWerks tab. Check the "Enable QuoteWerks" checkbox and set a folder for where you want to save the QuoteWerks layout files. You do not have to have QuoteWerks installed on the same computer. You can set the Save to Folder to any folder. It can be on your local computer, a networked folder and if you do have QuoteWerks installed or accessible via a network drive you can set it to your actual QuoteWerks layout folder.

If you do have QuoteWerks installed on the same computer, you will have additional functionality available.

While in the Wizard's Preferences click the Data & Display tab then click the Remap Mail Merge Tags button. On this screen check the Turn on mail merge remapping box and then select QuoteWerks from the drop down list next to the checkbox.

These are the minimum setup steps in the Wizard Preferences. The next part is setting up the document projects.

You can also click the **Generate Docs for QuoteWerks** button which will automatically set all the needed options across all Preferences screens needed to setup the Wizard to generate QuoteWerks layout files.

When you create your document project you must make sure the Use Excel Dynamic Links box is unchecked. This is because you will be using QuoteWerks for your quote generation and not our linked Excel spreadsheets. When your document is generated, it will be ready to copy into your QuoteWerks layout folder and finish manually editing to add your QuoteWerks specific tags.

The longer version

The Proposal Pack Wizard integrates with the QuoteWerks quoting application. Multiple workflows are supported so you can import quotes created by QuoteWerks into your proposal, or you can work in QuoteWerks and use your Wizard created document as a Layout template in QuoteWerks.

You can also create QuoteWerks layout files on a computer other than the one you have your QuoteWerks software installed on.

If you look in your Preferences > 3rd Party screen you will see an entry for QuoteWerks listed (if it's been installed and detected by the Wizard).

You will also see a new screen: Preferences > QuoteWerks. This new tab defines additional QuoteWerks configurations settings that allow you to auto-run QuoteWerks and login with a specific user.

If QuoteWerks is installed on the same computer you can set the QuoteWerks Outbox folder for use when importing QuoteWerks created documents into your project during the Wizard's assembly process. It will then save your Wizard created documents into the Layouts\Quotes folder for use when you are working within QuoteWerks.

WORKFLOW #1: IMPORTING A QUOTEWERKS QUOTE INTO A PRE-DEFINED TEMPLATE.

This workflow is used when you are using Proposal Pack Wizard to assemble multiple templates and the contents of one of those templates (i.e. the Estimate or Cost Summary template) is going to be replaced with the contents of a quote document that was created in QuoteWerks.

When you create your project in Proposal Pack Wizard and you have QuoteWerks running at the same time with a current quote loaded, the Wizard will be able to import your logged-in user and current quote data (i.e. the name and address contact information) into your project. The Wizard will then be able to use this data during its mail merge process.

The 3rd Party settings for QuoteWerks will be used which define what template will be imported into, what folder you will be initially shown for searching for the quote in, and if you want to retain the Proposal Pack graphic header, and so on.

In this situation when the Wizard is assembling your proposal and you have added the defined template (in this example the Proposal Pack's Estimate template) you will be prompted to

browse to a file. When you select the file (i.e. a quote document you saved in QuoteWerks in a Word .docx, .doc or .rtf format) the contents of that file will replace the stock contents of the Proposal Pack's Estimate template.

You can configure the 3rd Party settings to change the Estimate template to any other Proposal Pack template.

One catch to this workflow is that it is used when you are assembling multiple documents together for each proposal. If you have pre-assembled a complete master proposal and are reusing it, then this workflow will not work. Use the next workflow when you need to import an external quote into a completely assembled master proposal template.

WORKFLOW #2: IMPORTING A QUOTEWERKS QUOTE INTO AN EXISTING MASTER PROPOSAL THAT ISN'T BEING REASSEMBLED.

This workflow is used when you are using Proposal Pack Wizard with a master proposal template you have previously assembled and combined into a single document. Many people do not want to have to reassemble all the component pieces of their proposal for each new project, especially when the bulk of the proposals for each new client are the same.

It is more efficient to create a master proposal from all the component Proposal Pack templates, make all your custom edits, but leave in the client name/address merge tags. Then import this combined master proposal back into the Wizard so it can be selected as a custom template. Read this chapter on how to do this: [How do I Reuse a Previous Document Over Again?](#)

Because that pre-defined template in the 3rd Party settings is not used anymore as the master proposal isn't being reassembled for future proposals, we need a different method for importing the quote.

In this case you add the <<ImportFile>> tag to your combined master proposal. In our example, the Estimate will still be a topic page within the combined master proposal, so you would replace the content of that page of the proposal document with the <<ImportFile>> tag.

When you create a new project in the Wizard and select this combined master proposal, the Wizard will detect the <<ImportFile>> tag and prompt you for a file to import. Since

QuoteWerks has been detected and configured in the 3rd Party preferences, it will start browsing for the QuoteWerks file in the folder defined in the 3rd Party fields (which should be the folder you typically save your QuoteWerks created documents in).

The contents of the QuoteWerks created document will then be imported into your proposal. Read this chapter on using the <<ImportFile>> tag: [How do I Import the Contents of External Files?](#)

WORKFLOW #3: USING QUOTEWERKS TO GENERATE YOUR FINAL PROPOSAL USING YOUR PROPOSAL PACK CREATED MASTER PROPOSAL.

This workflow is used when you are using Proposal Pack Wizard to create your master proposal document, but you want to switch over to the QuoteWerks application to do the final data mail merging and inserting of the Quote.

The steps for this workflow are laid out in detail in the chapter [5 Minute Quick Start QuoteWerks](#)

One difference in this workflow is that you will need to convert any Proposal Pack mail merge tags in your document to QuoteWerks mail merge tags since both systems use different tags. The Proposal Pack Wizard had an automatic tag remapping feature that will help with this process.

To use this workflow, you need to enable the remapping feature and make sure the QuoteWerks set of remapping tags is selected in the Wizard's Preferences > Data & Display > Remap Mail Merge Tags screen.

Once enabled, when you generate/create your proposal documents in the Wizard, any mail merge tags in the remapping list will not be replaced with the actual client/company data in your Wizard database. Instead, those tags will be remapped to QuoteWerks tags.

For example, the clients company name tag for Proposal Pack will be changed from <<CustCompany>> to <<&DH_SoldToCompany>>, and so on for all defined tags.

Once you have assembled your master proposal document and remapped the tags and completed your editing you will be ready to insert QuoteWerks specific tags into the document to be replaced by the quote generated by QuoteWerks. Since this is specific to the QuoteWerks application and is the same process you would use setting up any Layout document in QuoteWerks to include a quote refer to your QuoteWerks documentation or contact QuoteWerks support for assistance.

The Wizard will replace the contents of our cost related pages with a QuoteWerks compatible table layout. You can control how this table is created in the Preferences > QuoteWerks tab in the Wizard. You can have the Wizard create a single table for all your QuoteWerks line items or you can have it create a separate table for each QuoteWerks Item Type each with its own subtotal. You can also edit the layout of the table before it is inserted if you want to add additional QuoteWerks tags or change the layout.

The Proposal Pack Wizard had an additional screen to make it easier to move your documents over to QuoteWerks. After you have created your proposal documents and you are in the “Edit Current Document” screen you will see an extra tab titled “QuoteWerks”. Using this tab, you can select a document, and have it saved into your QuoteWerks Layout\Quote folder. To avoid duplication of file names you can select how you want your Proposal Kit generated files renamed when it saves them into QuoteWerks.

At this point you would switch over to your QuoteWerks application. Your copied document will be automatically displayed as an available Layout file in QuoteWerks. Your use of the Wizard





and Proposal Pack for this document would end here and you would be operating entirely within your QuoteWerks environment.

KNOWN ISSUES WITH QUOTEWERKS (AT THE TIME OF THIS WRITING):

These are issues found when QuoteWerks was used to perform the document assembly, merge and PDF conversion process and are not related directly to Proposal Pack Wizard. These issues do not occur when using Word's PDF conversion or Adobe Acrobat PDF conversion. If any of these issues are important and cannot be resolved on the QuoteWerks side, you may have to use one of the workflows mentioned above.


We recommend you only use the QuoteWerks Link tab and merge your QuoteWerks data into your layout file into a Word format document. Then use Word's built in Save as PDF option or use Adobe Acrobat to create your PDF files.

If you experience any of these issues, contact QuoteWerks for support with their software.

-  QuoteWerks uses a proprietary PDF conversion engine which does not properly convert all Word features. Some of those Word features are used by Proposal Pack.
-  QuoteWerks does not support transparency of .PNG graphics. Transparent logos against a colored background will display with a white background.
-  ZOrder of layered shape objects may change causing background colored shapes to move in front of text objects rendering them invisible.
-  Some embedded graphics may display artifacts when using the QuoteWerks Save as PDF/Preview.

- ❏ QuoteWerks Save as PDF/Preview does not support the custom bullet point graphics that Proposal Pack Wizard may include in your proposal. Your QuoteWerks saved PDF may show default circle bullet points instead of the custom graphics that Proposal Pack includes.
- ❏ QuoteWerks Save as PDF/Preview does not support the auto-updating Word Table of Contents.
- ❏ QuoteWerks does not allow saving your document as a Word/RTF file when a Word Layout file is used. QuoteWerks saves straight to print or PDF. This means you do not have the ability to make final adjustments to your QuoteWerks created file before delivery.
- ❏ When QuoteWerks creates a document that can be imported, it creates many individual Shape objects for every word and element of the quote. This can be unwieldy to manipulate manually. Make sure to define your quote layout so it does not have to be manually fine-tuned once it is output. Also, setup your output and Proposal Pack templates so when it is imported it does not have to be further manipulated to fix any formatting issues.
- ❏ Another issue with the multiple Shape objects is that this can dramatically reduce the performance of the Proposal Pack Wizard's mail merge processing. This is worked around by disabling the Wizard's mail merge processing on the imported QuoteWerks documents by default. So, you should not include any mail merge tags in the final QuoteWerks output file that is to be imported into your Proposal Pack Wizard project. Also, when using the <<ImportFile>> tag, the Wizard performs this import operation AFTER it has done its own mail merge processing.

This will prevent the performance slow-down importing complex QuoteWerks documents that include many Shape objects.

 Due to a bug in Microsoft Word the reformatting process required to convert Proposal Kit files to QuoteWerks compatible files may cause the ZOrder of a shape object to change in a small number of Proposal Pack design themes. This can be manually fixed by moving the shape object into the correct position and saving the document.

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

HOW DO I SETUP PRODUCTS INSTALLED AFTER THE WIZARD?

The first time the Proposal Pack Wizard is run, it will search for the following externally installed products:

- Proposal Packs (including those found in Proposal Kit Professional)
- Contract Packs (including those found in Proposal Kit Professional)
- Title Page Packs
- 3rd party applications which integrate with Proposal Pack Wizard

If any of these products are installed after the Wizard has already been setup there are 2 ways to have the Wizard search for them.

First, In the Document Styles screen, click the “Search for Styles” button. This option will ask you to select a root folder to search for installed Proposal Packs. By default, they will be installed in C:\ProposalKit on your hard drive.

Second, In the Preferences screen, click the Tools tab, then click the “Search for Installs” button. This will perform the same search as above, except it will not ask for a location to search from, it will use the default installation folder for the Proposal Kit products.

The Wizard will configure itself to integrate with and use any of the found products.

The Proposal Pack Wizard will automatically detect newly installed Proposal Packs each time you run the Wizard.

HOW DO I REMAP MAIL MERGE TAGS FOR A 3RD PARTY SYSTEM?

Proposal Pack Wizard can replace its built in mail merge tags with alternate tags. This feature is intended for use when you are using Proposal Pack and Wizard to create a proposal document which will be further edited by a 3rd party application.

An example of this would be creating a base proposal document with your information that will normally be static such as company and industry information. Then loading the document into a 3rd party application which will be used to insert additional data into the proposal document such as automated pricing and quoting and data pulled from a 3rd party CRM system.

To enable the tag remapping and to edit the tags to be mapped from and to, click the Preferences button on the main Wizard screen, then click the Data & Display tab, then click the Remap Mail Merge Tags button.

If the 3rd party application has its own mail merge tags which are different than Proposal Pack's mail merge tags this feature will allow you to replace Proposal Pack mail merge tags with mail merge tags recognized by a 3rd party application.

You must check the Enable box for Proposal Pack Wizard to do the remapping when it is generating your proposal.

The Name of the application field is for your information only. It is not used by the Wizard, it is descriptive information.

The From fields are the Proposal Pack mail merge tags to be replaced. The To fields are the exact text you want to change the Proposal Pack mail merge tags to. The tag wrappers are not included in the From fields and they are included in the To fields.

In order to remove a Proposal Pack mail merge tag (i.e. remove and not replace it with any data), set the To field to the word **BLANK**

When Mail Merge remapping is enabled, no data from the Proposal Pack Wizard database will be merged to the Proposal Pack mail merge tags listed in the remapping screens. Instead the new mail merge tag will replace the original mail merge tag.

HOW DO I MAKE AN EDIT APPLY TO ALL FUTURE PROPOSALS?



<https://www.proposalkit.com/htm/videos-editing-stock-templates.htm>

In order to have your edits apply to all future proposals you need to edit the source Proposal Pack style documents which are used to create each individual proposal.

These are the documents which were installed on your hard drive when you installed Proposal Kit or a Proposal Pack. If you review the web page organizer that comes with Proposal Kit and each Proposal Pack, the links in the organizer point to the source templates on your hard drive. These are the exact same documents opened by the Manage Templates > Edit Stock Templates option in the Proposal Pack Wizard when editing the style templates. You can also open and edit the stock templates from within the Document Project's Pick Documents screen.

You can edit these documents without using the Wizard by finding and opening the Word documents in the Proposal Kit or Proposal Pack installation folder and editing them like any other Word document.

You can also open the source documents for editing using the Proposal Pack Wizard. First select the style to edit from the "Document Styles" button on the main Wizard screen. Then click the "Edit Style" button after selecting the style. Click the tab that says "Manage Templates" and click the button on that tab that says "Edit Stock Templates". You will then be able to pick

individual documents from the lists and open them. Once you make edits to these documents, every new proposal you create will have your edits included.

This will not change any previously created proposals.

The Proposal Pack templates are designed for use with this Wizard. It is possible to make alterations to the original source templates which will cause the Wizard to not operate as intended. Make a backup copy of your source templates before editing them.

If the Wizard is not able to properly operate on your edited version, you may have to replace the original version and try a different variation on your edits. For example, if you change the font style on the body text the final formatting cleanup operation may not reformat that text; or if you change the name of the document file when saving it, the Wizard will not find your renamed file.

HOW DO I MAKE MY OWN TEMPLATE W/O CHANGING THE ORIGINAL?



<https://www.proposalkit.com/htm/videos-how-to-use-mytemplates.htm>

This feature allows you to make your own custom version of any of our stock templates without having to edit our original template. This would be an alternative to editing our stock templates.

This feature allows you to import your own content into any chapter template by copying your own version of the template into the MyTemplates folder.

This eliminates the need to edit our stock templates if you want to keep your installed Proposal Kit templates untouched. This can also make migrating your system to a new version easier.

This feature also allows you to keep a single copy of your chapter template content for use when switching between Proposal Pack design themes without having to edit the stock templates in each Proposal Pack style you use.

The MyTemplates folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyTemplates

Do not include any headers, footers, chapter page titles/logos or other design elements in the templates you put into the MyTemplates folder.

Some templates are specific to the design theme or are auto generated and are not imported from the MyTemplates folder. These are Title Page, Back Page, Letterhead, Table of Contents, Envelope and Fax Cover Sheet.

Templates in this folder must have file names that exactly match the template file names in the Proposal Pack. For example, if you use the About Us chapter you make a copy of the AboutUs.docx template from your Proposal Pack installation and remove the chapter header in bold text or the logo chapter header that is titled “About Us”.

See the examples in the Examples subfolder for reference.

Whenever you build a new document in the Wizard with any selected Proposal Pack design theme style, and you have the chapter selected that have a matching file in the MyTemplates folder then your copy in the MyTemplates folder will be inserted into the document replacing the stock template.

There are a few different ways for external content to be imported into the templates during assembly in the following order of precedence.

1. 3rd party content from external sources such as QuoteWerks or a Contract Pack. This would typically be a specific cost page or legal contract page.
2. Templates from the MyTemplates folder.
3. Content from a selected sample being imported.

Excel spreadsheets can also be copied into the MyTemplates folder to override the stock spreadsheets. You must have both the .xlsx and .docx files for the cost related template in the MyTemplates folder. For example, if you add the CostSummary.docx template to the MyTemplates folder you can also add a custom version of the CostSummaryCalculator.xlsx spreadsheet.

The stock templates headers/footers, chapter header logo and chapter header text will still be used. Only the body content of the page will be replaced. This allows you to use a single copy of a chapter template such as the About Us page with multiple Proposal Pack design themes.

Another use of this feature is in network setups with a shared template library. The MyTemplates folder allows individual users to have their own customized versions of templates.

HOW TO GET TEMPLATES INTO THE MYTEMPLATES FOLDER?

The best way to get templates into the MyTemplates folder is to use the Wizard screens to copy them from the main template library.

The benefit of doing it this way is that they will be already setup structurally with the Proposal Kit Word Styles and the Wizard will make alterations to them to strip out any design elements when they are copied by the Wizard.

There are two places in the Wizard for copying stock templates into the MyTemplates folder.

First, click Button #1 – Document Styles > Edit Style > Manage Templates > Edit Stock Templates

On this screen when you select any stock template click the Copy To MyTemplates Folder button to make a copy. The copy in the MyTemplates folder will have the header and footer information removed and optionally it can be further modified to remove colors and custom bullet points. If the template is used by the Multiple Choice database system, the associated Multiple Choice tag will also be added. This will put the copy in a state where it can be imported into any project using any Proposal Pack design theme and the design theme elements will be added back during assembly. This allows you to have a single copy of a custom template shared across multiple Proposal Pack design themes.

The second place to copy templates is in the project screen. Click Button #2 – Document Projects > Add New/Edit Selected Project > Pick Documents > Add Templates. Click the Show All Templates button. Use the Copy To MyTemplates Folder button which works as mentioned above.

If you have selected chapters, you will be wanting to make copies of already in your project, the quick way to find them to make copies is click the Only show templates selected in my project checkbox.

One difference when using this button on the Pick Document screen is it also gives you the ability to copy the sample proposals versions of the pages instead of the stock fill-in-the-blank template.

If you have selected a sample from the View Samples tab and selected it to be imported into your project when you click the Copy To MyTemplates Folder button you will be given the option to copy the sample proposals version of the page. This is how you can make your own versions of the sample content for use in your future proposals.

HOW DO I USE THE MYPROJECTFILES FOLDER?

The Wizard allows you to copy your own custom files that are not part of the Proposal Kit system into each of your new projects using the MyProjectFiles folder.

This feature allows you to automatically copy your own content such as worksheets, checklists, letters, spreadsheets, forms, etc. into each of your new Proposal Pack Wizard project folders.

The MyProjectFiles folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyProjectFiles

Whenever you build a new document in the Wizard a copy of all the files in the MyProjectFiles folder will be made into your document's project folder.

You should not name any of your custom files the same file names and extensions as any of Proposal Kit's document file names.

Use the Preferences > Project Settings > Configure MyProjectFiles Settings screen to manage adding files, removing files, and setting attributes for the custom files in the Wizard database.

You can manually copy files into the MyProjectFiles folder however that will not setup any of the attributes such as human readable titles for use in the Wizard drop down menus. Use the Wizard's Preferences tool for managing the attributes.

HOW DO I CHANGE/USE WORD FONT STYLES?



<https://www.proposalkit.com/htm/videos-change-fonts-typography.htm>

There are two types of ways the text of your document is formatted with fonts, colors and sizes. These are both Word features. For more information read your Word manual on the subject of “Styles”.

Direct formatting is mostly used in the Proposal Pack templates and Wizard reformatting process. Direct formatting is nothing more than what most people already do when editing a document. For example, you select a paragraph, and in your Word toolbar you select a font type or change the size or color.

Word Styles are pre-defined font characteristics that defined a font type, size, color, bolding, underlining and other characteristics. You can then select a paragraph and apply a Word Style to it. One benefit is that you can instantly change all text in your document that is set to that “Style” by just changing the Style settings. The downside is that this can introduce unintended formatting changes if done incorrectly.

The Wizard now supports the use of Word “Styles” in your documents as well as direct formatting.

Word has two types of Styles. Built-in Styles are ones that are always part of Word such as the “Normal” or “Heading 1” styles. Custom styles are ones that are created externally. The 50 Styles

supported by the Wizard are custom styles that are inserted into your documents and made available in the Word Quick Styles menu.

While most of the Wizard formatting will be done using the direct formatting method it does apply Word “Styles” in one case. When using a Table of Contents, the Wizard must apply a specific Word “Style” to the text headers on your chapter pages. The stock Proposal Pack templates with text headers (i.e. Proposal Pack for Any Business or Proposal Pack for Government Grants) have text headers set to Arial Black 28 point using direct formatting.

The Wizard will change these headers by applying a Word Style to them. The Style name is “Proposal Kit Page Header” and can be found in your Word Toolbar’s Quick Styles menu. These custom styles will only be found in the documents assembled by the Wizard and saved to your project folder.

The Wizard supports 50 custom pre-defined Word Styles that can be configured in the Wizard’s Preferences > Data & Display > Font Styles screen. By editing these pre-defined styles, you can change the font types, sizes, and colors used when the Wizard creates or reformats your documents.

The following pre-defined Word Styles are as follows:

Proposal Kit Page Header

This is used for the main heading text at the top of each Proposal Pack template (i.e. “Executive Summary”, “Company

History”, and so on). The Wizard sets the text headers to this style to support the auto-updating Table of Contents.

Proposal Kit Faux Page Header

The same font settings as above but is for use in templates that will not be included in the Table of Contents.

Proposal Kit Body Text

This is used for the body text of the document. By default, this is Times New Roman 11 point. This font style is used during the reformat process to reset the body text.

Proposal Kit Important Body Text

Used for the main body text of paragraphs that are highlighted in red text for important notes.

Proposal Kit Sub Header 1

This is used for larger sized bold headers within the body of a page. This style is not currently used by the Wizard.

Proposal Kit Sub Header 2

This is used for smaller sized bold headers within the body of a page. This font style is used during the reformat process to reset the header text within the body of the document.

Proposal Kit Footers

This is used for text contained in the footer of your documents.

Typically, it is a smaller size than the body text. This font style is used by the Wizard to reformat the page footers.

Proposal Kit Fine Print

This is used for fine print paragraphs within the body of your document. This style is currently not used by the Wizard.

Proposal Kit Title Page

This is reserved for use in the Title Page for address blocks and other elements of the title page. This style is currently not used by the Wizard.

Proposal Kit Table Text 1

This is used for text in a table. The intent is to be used when you need text that is applied to a dark colored background. This style is used during the reformat process when white text is located.

Proposal Kit Table Text 2

This is used for text in a table. The intent is to be used when you need text that is applied to a dark colored background. This style is currently not used by the Wizard.

Proposal Kit URL

This is used by the Wizard when it is reformatting all the hyperlinks in your document. You can change the standard blue underlined text to be more creative. Note, if you put a URL in

your footer, the footer styling takes precedence. If this style is disabled, the Wizard will use the built-in Hyperlink style.

Proposal Kit Title Page Sub Header

This is used in the Title Page to define the text of the “Description” element. Typically, you would set to the same font type as the “Proposal Kit Page Header”. This style is not currently used by the Wizard.

Proposal Kit Title Page Header

This is used in the Title Page to define the text of the “Proposal” element. Typically, you would set to the same font type as the “Proposal Kit Page Header”. This style is not currently used by the Wizard.

Proposal Kit Pull Quote Text











Used for text that is larger font type bold and emphasized typically for a short quote or statement that stands out.

Proposal Kit Custom Style 1 to 13

These are for your use to define additional styles you want added to your documents.

The Wizard also allows you to define the settings for built in Word “Styles”. The following styles have settings pre-defined for them. To turn off the resetting of these built-in Word “Styles” you can

disable them in the Wizard's Preferences > Data & Display > Font Styles screen.

-  Normal
-  Heading 1 to Heading 9
-  TOC 1 and TOC 2
-  Title
-  Subtitle
-  Bullet
-  Hyperlink
-  Header
-  Footer
-  Page Number

All these pre-defined Styles are added to your generated documents. You can use them as you see fit. Some Styles are reserved for future use by the Wizard, some are set aside as custom styles for your own use. You can disable any of these styles as well, which will prevent them from being added to your documents. However, that also means any disabled styles used by the Wizard will default to built-in styles, or may disable formatting features in the Wizard.

The Wizard will also automatically add these custom Word Styles to any custom documents you add to the Wizard via the Configure Proposal Files tool. This tool allows you to add the Word Styles to a single external Word document or batch add them to an entire folder of Word documents.

The Font Styles configuration preferences configuration screen also includes a tool to allow you to add all these custom Word Styles to any external Word document. This will allow you to apply

consistent formatting across other documents as well as making it easier to import custom documents into the Wizard all with consistent font styles.

HOW DO I CREATE MY DOCUMENT?



<https://www.proposalkit.com/htm/videos-pack-quick-start.htm>

Once you have selected a document style, added a document project, selected your desired templates and entered your company and client data, then you are ready to create your document framework.

If you skip the creation process at that point you can start it later by editing the current project and saving it again.

From the main Wizard screen click the Document Projects button, click Add New Project then click the Pick Documents button. Once you have chapters selected click the OK, Use Selected Templates button then click the OK, Save Project and Build Documents button. This will start the process of copying your selected templates from the source Proposal Pack style, merging your data and copying the documents to your new client folder. The creation process will also combine all the selected templates into a single document and create a custom Table of Contents (if selected). Once this process starts it may take a few minutes depending on the number of documents selected and features in use.

At this point you can then click the “Edit Current Document” button to finish editing. The automated creation of the framework may require you to manually clean-up some of the templates. For example, there may be a Title Page graphic or footer graphic requiring repositioning, some text requiring the font size to be changed, or in some cases page numbering may be off on a page

or two (caused by extra page breaks inserted during the combine process).

If you turn on page numbering and the creation of a custom Table of Contents, you will still have to manually update the page numbers as pages change as this is a Word object.

Your proposal framework is now ready to complete by filling in the details specific to your proposal. You can review the samples included in your Proposal Pack or Proposal Kit as illustrations of how other companies have created their final proposals using the Proposal Pack and Proposal Kit templates. See your Proposal Kit or Proposal Pack installation for the bundled samples. The samples are not included in the Wizard software.

HOW DO I ADD SUPPORTING DOCUMENTS TO MY PROJECT?



<https://www.proposalkit.com/htm/videos-how-to-add-new-documents-to-project.htm>



<https://www.proposalkit.com/htm/videos-add-linked-invoice.htm>

Many times, there are situations where you could use supporting documents to go along with main document (proposal, business plan, report, etc.).

Using the Wizard's Expert Edition, you can add additional documents to your project right from the Edit Current Document screen button on the Wizard home screen.

You can add an invoice which will also be directly linked to the same spreadsheet as the Cost Summary if you are using the Dynamic Excel Spreadsheet linking feature.

You can add any number of letters or checklists such as customer thank you and follow-up letters.

You can add a legal contract, estimate spreadsheet or a project management document from the libraries of templates contained in the Proposal Kit Professional.

All these supporting documents will be created as additional documents in your project folder.

HOW DO I ADD INVOICE LINKED TO EXISTING COST OR ESTIMATE?



<https://www.proposalkit.com/htm/videos-add-linked-invoice.htm>

The Expert Edition of the Wizard software allows you to add an invoice to an existing project such as a proposal or estimate document.

In the Edit Current Document screen there is an Add Invoice button you can click that will add the invoice template to your project. The Wizard will apply its normal customizations that it would have applied to the original document such as color, font, logo changes. It will also apply the Company Data and Client Data merge fields.

If you do not use the Dynamic Excel Spreadsheet Linking feature the invoice will be copied into your project folder as a separate document that you must manually edit in Word to fill in any line items and prices.

If you are using Dynamic Excel Spreadsheet Linking the Wizard will see if you already have a Cost Summary, Estimate or any of the other standard cost related templates and spreadsheets in your project. If so, it will remap the Invoice templates <<R#C#>> tags to match those of the cost templates and link the new Invoice document directly to the existing cost or estimate calculator spreadsheet.

If you have modified the structure of the stock spreadsheet the remapping may not link to the correct cells. In this case you may

need to manually update the <<R#C#>> tags in the Invoice template to match whatever cells you are now using.

HOW DO I USE MULTIPLE CHOICE FIELDS?



<https://www.proposalkit.com/htm/videos-how-to-use-multiple-choice-database.htm>

The multiple choice features allow you to define lists of multiple choice content you can pick from at the time your document is assembled and have the chosen content inserted into specific locations in the assembled document.

You can hide the multiple choice feature from being seen by the end user by unchecking the Enable box. You can also hide the preview/edit button from the end user if you do not want the end user to be able to change the multiple choice paragraphs from the project screen. Another customization feature is the ability to turn off the auto-selection of templates used with multiple choice tags. By default, whenever you create a new project the Wizard will auto-select any templates you have defined attached to multiple choice tags to help ensure you do not forget what templates you have setup.

This feature is useful for having multiple choice lists of products, services, team members, photographs, spreadsheets, parts lists and so on.

The multiple choice features allow you to not only define custom paragraphs of text to pick from, your multiple choice selections can be images, spreadsheets, PDF files and even complete multi-page documents.

The Project Type field is only for use if you are using custom lists of documents or have added custom templates of your own into the Wizard database and need to change the project type, so your custom templates are visible in the Edit Selected Tag screen.

Previously this type of multiple choice option was performed by having to create multiple copies of entire templates and then pick one of multiple templates for your project. This multiple choice feature allows for much more flexibility in setting up multiple choice lists.

The way the multiple choice feature works is that you can have up to 10 categories which are ways of categorizing your tags into major types of usage. For example, some tags can be for product information, some for services and so on. You can define what all the categories are used for.

Each category has several tags. A tag is added to one or more templates to tell the Wizard that a multiple choice item will need to be inserted into a specific location in one or more templates as they are being assembled.

You can define your tags to be single select or multiple select. A single select (default) tag only will allow you to select a single 'paragraph' to be inserted into that tag. A multiple select tag allows you to pick more than one paragraph from the pick list and all the selections will be inserted one after the other in place of the single tag in the template. If using multiple select tags you can also pick what you want inserted between each paragraph item. A custom file in the ParagraphFiles folder called DefaultDelimiterFile.docx can be used to completely customize what you want inserted between multiple items (this is how you would add custom

separator lines, text, etc.). If you have selected the 'Custom' entry from the drop down list you then must edit the DefaultDelimiterFile.docx file to customize that file.

The piece that defines the actual choices are called 'paragraphs'. A paragraph is any content that the users picks that is then inserted into the assembled document. A paragraph can be as simple as a paragraph of text or it can be as complex as an entire multi-page Word document, spreadsheet, graphic image, PDF file, etc.

You create multiple paragraphs per tag depending on how many choices you need.

If you want a specific item(s) to always be pre-selected when you create new projects, then check the 'Default Selection' checkbox in the paragraph edit screen.

If your external content file is a graphic image you can also define the image wrapping, scaling factor and positioning. The scaling factor '1' will leave the image alone as will setting it to '100%'. You can use fractions or percentages. For example, 1.5 is the same as 150%.

For example, if you want the end user to be able to select 1 of 5 different products to be added to the products template you would setup 1 tag and add 5 paragraphs to it. Each paragraph you will setup for a different product.

If you want the end user to be able to select one of 3 photographs to be inserted into a samples page, you would setup a 2nd tag

with 3 paragraphs. Each paragraph will be linked to a separate image file.

Multiple choice categories are a way for you to organize different tags for different purposes. There are 15 categories. You can change the category names to anything that suits your purposes.

Enabled categories will be displayed in the project screen that the end user uses when making their multiple choice selections. You can reduce the amount of information the end user sees in the project screen by disabling unused categories.

For example, if you are only going to be adding multiple choice options to a products page, you can disable all the other categories.

The names you give the categories are for your use only and will only be used in the Wizard interface screens. The categories do not have any effect on how your proposals are created.

Multiple choice tags are used to tell the Wizard where your multiple choice picked content will be inserted into your document when the Wizard assembles it.

First you pick a Category, then under that category pick one of the tags. Each category has several pre-defined tags ready to use. All you must do is pick the first tag listed under that category to get started.

Once you pick a tag to use you need to tell the Wizard what page (or pages) that tag is being inserted into. It is important to both pick

the templates the tag will be used in and open and edit those templates to insert the tag where you want it.

The tag Label is for your information only. The Label is only used in the Wizard drop down menus, so you can see what each tag means to you. Give the tag a label that has some meaning for how you will be using it. For example, "Catering Menu Options" or "Web Site Design Services", and so on.

The tag field can be kept as the default value or you can modify it to make more sense in your contextual use. For example, the default tag may be "MultipleChoice-1". You might rename it to say "MultipleChoice-MenuOptions" or "MultipleChoice-DesignServices".

You can use the tag in up to 20 different templates. This may come in handy if you want to select from a list of choices and have that choice populated in multiple areas of the proposal. For example, you may select a person's name to be inserted in multiple places, or a list of product codes to be put into both the products page and a contract's deliverables section at the same time.

The most important thing to setup correctly is that you must also open the templates that you selected and edit them to insert the actual tag in the delimiter brackets into the location(s) the Wizard is to insert your custom content into. For example, if you select the tag "MultipleChoice-1" to be assigned to the Products template and the Contract and Terms template you must select both of those templates from the Used In list. Then you must also click the Edit Selected Templates button to open those templates and insert the

text "<<MultipleChoice-1>>" (without the quotes) into the templates and save the edited templates.

The process of selecting 1 or more templates and then adding the tag to the templates is what tells the Wizard that there is a multiple choice selection that will have to be asked of the user to be inserted into that template.

The next step is to add paragraphs to this tag that hold the actual content choices that the end user can pick from that will be inserted into the document as it is being assembled.

Multiple choice paragraphs define what actual content will be inserted into your assembled document. Each 'paragraph' is a piece of content, that content can be as simple as a paragraph of text or it can just as easily be an entire file such as a multi-page Word document, a spreadsheet, a graphic image, a PDF document, and so on.

The Enabled flag allows you to disable a choice without having to completely delete it from the system. Disabling will hide the entry from the end user's lists when selecting project data.

The Title is for your information only. Give each paragraph a title that lets you know what the choice is, so you can locate it in the interface later.

The File is an external file that contains the content that will be inserted for this choice. The simplest use of this feature is to use the default Word .docx file if your choice will be text. In this case you do not need to browse to a different file. All you must do is

click the Open or Edit button and the Wizard will create a file to hold this paragraphs text content.

The OLE field is only for use if you must define the actual custom OLE data type for Word. This may be needed only if you are browsing to other file types than text, spreadsheets, images, or PDF files. This field is set based on your systems configuration and 3rd party software and use of this field assumes you are familiar with embedding custom OLE objects within Word documents.

By default, files are statically inserted into your assembled document. You can choose to link files such as spreadsheets so when the external file is updated the updates will show up in your assembled document. It is your responsibility to make sure links between documents are properly maintained.

You add one 'paragraph' for each choice you want attached to a tag. For example, if you defined a tag as being used for a multiple choice list of products and you want to be able to pick from 3 different choices all you must do is add 3 'paragraphs'. Each paragraph will be assigned to an external file holding the content for a different product choice.

The Wizard does not know what the content of your files are. The Wizard replaces the tag with the contents of the selected file when it inserts your file into the assembled document.

With 150 available tags, each tag can be inserted into multiple places and templates within your document and with 2000 possible paragraphs you can configure anything from a very simple 3 choice product list for use in 1 place or a very complex set of multiple choice options for a wide variety of situations.

For example, you could define one tag for a multiple choice list of products, another tag for a multiple choice list of photographs, another tag for a multiple choice list of linked financial spreadsheets and so on.

You can also change the order in which paragraph content is inserted into a single tag in the Preferences settings. Once paragraph content has been inserted into a Word document the only way to change the order is to copy and paste the content within the Word document.

HOW DO I SPECIFY AN ALTERNATE SPECIAL FILE (COVER LETTER, ETC.)?

There are several special files that are treated differently than the bulk of the Proposal Pack templates when they are selected for use in your document.

These special files are as follows in the Options.ini database:

```
[SPECIAL_FILES]
TOCFile=Table of Contents
CoverLetterFile=Cover Letter
CoverSheetFile=Cover Sheet
InquiryLetterFile=Inquiry Letter
EnvelopeFile=Envelope
LetterheadFile=Letterhead
FaxCoverSheetFile=Fax Cover Sheet
TitlePageFile=Title Page
BackPageFile=Back Page
```

Cover Letter

The Cover Letter is a special file because it does not include a special header such as the graphic header or header used in the table of contents, page numbering or page footer.

If you want to specify an alternate file to be used for the Cover Letter you can use the Preferences > Tools > Configure Proposal Files and change the Special Files setting for the template you want to set as the new Special File.

There is a default setting in the Options.ini database file in the [SPECIAL_FILES] section in the CoverLetterFile entry which sets the Cover Letter template as the default. You can override this for each of the 12 Proposal Types by setting the [SPECIAL_FILES] > CoverLetterFile entry in the FileList.ini file, use the Configure Proposal Files screen mentioned above to set this entry.

An example of the use of this is in the Business Plan proposal type. If you create a new document project and set the type to be a Business Plan, you will see that the Cover Letter (Business Plan) template is now the default Cover Letter template.

The reason for setting a specific template to be the Cover Letter special file is so when it is created, you can easily edit it by clicking the “Edit Cover Letter” button in the edit screen after you have created the entire proposal.

You still must select the template designed as a Cover Letter special file in the set of templates you have selected for the proposal in order for it to be created along with the rest of the proposal.

Cover Sheet

The Cover Sheet is a special file because it does not include a special header such as the graphic header or header used in the table of contents, page numbering or page footer. This file is very similar to a Cover Letter but is modified to be used more for grants.

Inquiry Letter

The Inquiry Letter is a special file because it does not include a special header such as the graphic header or header used in the table of contents, page numbering or page footer. This file is very similar to a Cover Letter, but it is designed to be sent to a prospect prior to sending or writing a full proposal.

Title Page

The Title Page is a special file because it does not include a special header such as the graphic header or header used in the table of contents, page numbering or page footer. The Title Page has a different format than the rest of the templates and is designed to be the first page in the proposal. This template is a special file because there are some components of it that are processed differently than other templates such as the ability to incorporate your own company logo or change the main title graphic to titles such as “Proposal”, “Project”, “Business Plan”, “Resume”, “Presentation”, etc.

Most versions of Proposal Pack’s Title Page use a background watermark graphic to create a visual background for the Title Page. Because of this the Title Page requires special processing to put it in its own section of the document.

Table of Contents

The Table of Contents is a special file because it is processed differently than other templates. Including the creating of a custom table of contents to match the rest of the templates selected for the proposal.

Envelope

The Envelope is a special file because it is a separate document used to print on an envelope in a different size than most other documents.

Fax Cover Sheet

The Fax Cover Sheet is a special file because it is a separate document used to print a fax cover (typically printed on your own letterhead).

Letterhead

The Letterhead is a special file because it is a separate document used to print a blank sheet of paper as a letterhead with a graphic theme that matches the graphic theme of the proposal.

Back Page

The Back Page is a special file because it contains a custom background watermark graphic and must be put into its own section of the document with its headers and footers unlinked from the previous section.

HOW DO I COMBINE THE COVER LETTER INTO A MASTER PROPOSAL?

The Wizard incorporates the Cover Letter into the master proposal using Word document “sections”.

The Cover Letter template is a plain text document (i.e. no graphics or colored borders). Due to the way Microsoft Word works when you append documents together you need to take some extra steps to ensure the formatting of the entire document is maintained.

To maintain the proper formatting of the plain text Cover Letter it must be placed into its own “Section”. Sections are a feature of Microsoft Word that allow a multi-page document to be broken into multiple independent sections, each section having its own unique properties for things such as page borders, page numbers, background watermarks, header and footer information.

The Proposal Pack Wizard will create a new section when it adds the Cover Letter template to a project.

The new section will also have its header and footer unlinked from the previous document section so that it will not inherit any information from the previous section.

HOW DO I ADD PAGES TO A DOCUMENT ALREADY CREATED?



<https://www.proposalkit.com/htm/videos-add-new-chapters.htm>

Once you have created your documents you can edit them. Once you have started editing your documents you can only use the Wizard to make limited changes to an already existing document.

You can safely edit the project and add new chapter templates to the project. When you click the OK, Save Project and Build Documents button the Wizard will update the existing project document by inserting the new pages into your existing documents.

For example, if you need to add a few more chapters that you forgot to add when you first built your document. You can edit your project by selecting the new pages and then saving and building your project again.

When you build the project again the Wizard will make a backup copy of your assembled document (i.e. the FullProposal.docx file). Then it will create and insert the new pages. Once the new pages are added the Wizard will renumber the pages and rebuild the Table of Contents – if you are using the Table of Contents and page numbering.

Any existing pages in your already created documents will not be modified. For example, the Wizard will not change any mail merge data fields and it will not delete any pages if you removed pages from your project. Any other changes you need to make other than

adding new pages you will have to do manually just by editing the document using Word.

It is possible that the Wizard may not be able to figure out how to update your existing document if you have made substantial changes to it that remove elements the Wizard uses to determine how to update the file. If the Wizard cannot figure where to insert new pages, it will default to adding them to the end of the document. Otherwise the Wizard will insert them into the ordering you have defined in the project.

There is a setting in your project called 'Locked for Editing'. This box is checked in your project when the Wizard had detected you have opened a created document. The Wizard assumes you have started editing the document and will place a lock on your project. All this really means is that the Wizard will warn you when you are updating a locked project and will double check with a Yes/No question if you attempt to delete the files for the project to prevent you from deleting all your work.

If you have not actually started editing your documents, it is usually better to uncheck the 'Locked for Editing' box and then delete the project files when making changes to your project. This is meant for when you are experimenting with your project and how the document looks in an iterative process of building the files, making changes to the project, deleting the old files then building them all again from scratch until you are satisfied with them and you are ready to start editing.

Once you have started editing your documents the Wizard is not intended to be used to make changes or manipulate your created documents. This ability to update your existing project to add new

pages is meant to allow you to add pages you may have forgotten to add initially.

Whenever you update a project with existing documents a backup copy of your project's files will be made and stored in a subfolder of your project directory called "backup". If you accidentally overwrite your edited work, you can manually recover the previous copy by looking in the backup folder. A backup of your FullProposal.docx file will also be created in your project folder and can be opened from the Edit screen.

HOW DO I CLEANUP MY DOCUMENT FORMATTING?

Once you create your documents, the automated process may have introduced some formatting that needs to be cleaned up manually. This only happens in some cases, typically with older Proposal Pack styles which differ slightly from our typical designs and with custom created styles (if you have made changes to our default templates).

The process of assembling multiple templates together into a single master document can introduce formatting changes that need to be manually cleaned up. By default, the Wizard will reformat your final assembled document to reset the body text, page headers, subheaders, URLs and footer text to a predefined set of font types, sizes and colors.

The reformatting process is also performed to ensure you have a consistent set of fonts, sizes and colors used throughout your document. Note that the Wizard formats the document on a per-sentence basis. This is a faster process, however is not as precise. Situations such as including multiple font styles in a single sentence can cause one to be changed. You can configure the Wizard to reformat on a per-word basis which is more precise, however much slower. In the Wizard's Preferences > Project Settings > Configure Project Screen tab, check the box labeled "Do document reformatting during assembly by words instead of sentences".

HOW DO I CHANGE THE FONT STYLES?

The reformatting process uses a set of pre-defined fonts, sizes, colors and other attributes for various parts of the document. The documents default to using Times New Roman, Arial and Arial Black for most of the text elements to ensure commonly accepted fonts are used and are available on all users' systems. Read this chapter for how to change the fonts and settings: [How do I use the MyProjectFiles folder?](#)

The Wizard allows you to copy your own custom files that are not part of the Proposal Kit system into each of your new projects using the MyProjectFiles folder.

This feature allows you to automatically copy your own content such as worksheets, checklists, letters, spreadsheets, forms, etc. into each of your new Proposal Pack Wizard project folders.

The MyProjectFiles folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyProjectFiles

Whenever you build a new document in the Wizard a copy of all the files in the MyProjectFiles folder will be made into your document's project folder.

You should not name any of your custom files the same file names and extensions as any of Proposal Kit's document file names.

Use the Preferences > Project Settings > Configure MyProjectFiles Settings screen to manage adding files, removing files, and setting attributes for the custom files in the Wizard database.

You can manually copy files into the MyProjectFiles folder however that will not setup any of the attributes such as human readable titles for use in the Wizard drop down menus. Use the Wizard's Preferences tool for managing the attributes.

How do I Change/Use Word Font Styles?


HOW DO I TURN OFF AUTOMATIC REFORMATTING?

If you only have one file selected in your project for your master document, the reformatting process will not be performed. This also means if you create a combined master document for reuse and it is all contained in a single file (even if it is many pages long), the Wizard will not reformat the text.

You can turn off the reformatting of the text in the Wizard home page > Document Styles > Edit Style > Fonts screen. And check the box labeled “Do not auto-reformat text after combining the proposal documents”.


You can selectively turn off reformatting within the documents by editing the stock Proposal Pack templates and applying custom Word “Styles” to the text. The Wizard will skip reformatting any sentences that have a custom Word “Style” applied to them.

Here are some common formatting issues you may see and how to clean them up quickly. Note that all document cleanup is done with your own Word processor and are Word related issues. Consult your Word manual and help for all Word related issues and questions.

 If the Title Page document is split across 2 different pages and/or the formatting of the primary logo graphic is in the wrong position do the following:

Click the main logo graphic to highlight it, then click the Word

toolbar option “Format” > “Picture”, then click the “Layout” tab. Next, click the “Behind Text” option. This will reposition the graphic and fix the Title Page layout.

 If the accent graphic in the footer is not centered due to turning on Page Numbering do the following:

You can re-center the footer graphic by clicking the Word toolbar option “View” > “Header and Footer”, then select the footer (or just double click on the footer). Then manually reposition the footer as desired. See this chapter - [How do I Import a Custom Page Footer?](#) if needed to precisely define the positioning of everything in the footer.

HOW DO I CREATE A REVISION OF MY DOCUMENT?

The Wizard can help you manage revisions to your document by creating revision documents. Instead of always updating the same Word document for which can lead to mistakes such as accidentally erasing work when everything is contained in a single file you can now easily create archives to preserve your work.

The revision feature works by making a backup copy of your master combined document to a new file. Then the “Proposal Number” field in the Title Page (if used) will be updated with an incremental revision number to help you keep track of each revision.

All your old revision copies are stored in your project folder’s Backup subfolder so you can open any previous revision if you need to find text or compare changes over time.

The Wizard’s Options.ini database has a field labeled ‘RevisionText=Rev’ that is used to update your Proposal Number text in the Title Page. To change the text that is inserted into your Proposal Number text from ‘Rev’ change this field in the Options.ini database file.

The revision feature defaults to using incremental numbers for the revision numbers. You can change the Wizard to use letters A-Z instead by changing the Options.ini database field ‘RevisionType=0’ to ‘RevisionType=1’.

For example. If you are working on your 5th project document the Proposal Number text in the Title Page should say 'Proposal Number: 5'.

Once you create a revision it will be changed to 'Proposal Number: 5 Rev 2'. The next revision you make will change to 'Proposal Number: Rev 3' and so on.

The archived copies will be saved with file names that reflect the revision number such as FullProposal-Rev-1.docx, FullProposal-Rev-2.docx and so on.

HOW DO I PASTE FROM OTHER DOCUMENTS?

Once you have created your project documents you can edit them. Since the final combined document and individual files copied to your client folder are Word documents, anything you can do with Word, you can do with your document framework.

Consult your Word manual and help for all Word related issues and questions.

You can easily copy material from past proposals and other documents by opening the documents and copying and pasting from one to another.

You can paste text from the Acrobat PDF samples into your editable documents if you didn't use the Wizard to create an editable Word version of a sample. Open a PDF document, use your mouse to select a block of text, then copy and paste the text from the PDF into your Word document. You then have an editable version of the sample. Editable Word format versions of the PDF samples are also included in each Proposal Pack.

HOW DO I ADD MY LOGO TO THE TITLE PAGE?



<https://www.proposalkit.com/htm/videos-add-logo.htm>

To insert your own custom logo graphic into the Title Page using the Wizard, first create your logo graphic and save it as a high quality graphic file. Then click the Logos & Graphics tab on the Preferences screen and click the Browse button next to one of the custom logo graphic files. Select your graphic and make sure the Display checkbox is checked, finally click OK and exit the Preferences screen. There are several “Custom #” entries set aside for you to define custom logo files.

When you create a new document project, select your custom entry from the drop down list box for the graphic to include. You can also select from a variety of pre-built logos to change the text from “Proposal” to either “Project” or “Business Plan” and many other phrases. These pre-built logos are not available in the Proposal Pack for Any Business or Proposal Pack for Government Grants which do not include graphic designs.

If you are using any Proposal Pack the Wizard can be used to insert your own logo graphic in the Title Page. The Wizard will find the placeholder text “Proposal” or pre-defined graphic and replace it with your logo. You can also configure the Wizard using the Document Styles > Settings screen to search for a different placeholder if you are editing the stock Proposal Pack Title Page template in a way that changes how the Wizard finds the placeholder text.

Once you have created your documents you can edit them. Since the final combined document and individual files copied to your client folder are Word documents, anything you can do with Word, you can do with your document framework once it is created.

Consult your Word manual and help for all Word related issues and questions.

You can also add your own logo manually anywhere in your proposal by selecting the Word toolbar option “Insert” > “From File” then select your logo graphic. Your logo will be inserted at the position of your cursor. You may have to change the picture formatting layout to be “Behind Text” in order to move the picture around in your document. Consult your Word manual for details as this is a function of your Word processor, not of the Proposal Pack Wizard or templates.

To add your logo to all the body pages of your document read this chapter: [How do I Add My Logo to the Headers of all Pages?](#)

We recommend that you import high quality graphics in PNG format, so they print well. If you import web site files such as GIF or JPG formats, they may not print high quality (even if they appear fine on your computer screen). Consult a graphic designer for details if you need help creating custom graphics.

Newer versions of Microsoft Word automatically convert any graphics you insert into a Word document to PNG format. So, you might as well use the same format for consistency.

If you want to change the stock Proposal Pack graphics to add your own logo, you will have to use a graphics program to create a

custom set of graphics. See your Proposal Pack documentation.pdf file or the section in this manual [Easily Create Your Own Graphic Style](#) for details on how to create your own custom graphics.

You can also specify a custom X/Y coordinate in points from the top and left side of the page where you want your logo inserted. Use the Document Styles setting screen and pick the “Graphics” tab. The fields labeled “Custom Logo X” and “Custom Logo Y” are used to position your custom inserted Title Page logo.

If your logo is not sized exactly you can specify a scaling factor. Be careful scaling up a logo as the quality may diminish. If your scaled logo does not print high quality, consider using a graphics editor to create a new logo file that is already sized properly for high quality printing.

You can also copy your logo into the MyGraphics folder with the file name of MyLogo-TitlePage.png or .jpg to get the Wizard to insert the graphic. See the ReadMe.PDF file in the MyGraphics folder for details. See this chapter for more details: [How to Import Custom Graphics Using the MyGraphics Folder?](#)

HOW DO I ADD MY LOGO TO THE HEADERS OF ALL PAGES?

The Wizard can insert your custom logo into the top of every body page of your assembled document.

The logo will be inserted in front of the large page header titles on every body page of the assembled document (i.e. in front of the text that says, “Executive Summary”, “Cost Summary”, “Company History”, and so on.

Remember when using point values in the positioning field that 1” = 72 points. So, to set the logo 1” from the left and .5” from the top use 72 points and 36 points.

You can use this feature with any of the logo designed Proposal Graphics Packs however inserting your logo right in front of our logos may or may not look visually attractive. Experiment with the options to best design the final look of your documents.

You can copy your logo into the MyGraphics folder with the file name of MyLogo-PageHeader.png or .jpg to get the Wizard to insert the graphic.

See the ReadMe.PDF file in the MyGraphics folder for details. See this chapter for more details: [How to Import Custom Graphics Using the MyGraphics Folder?](#)

HOW DO I IMPORT A CUSTOM PAGE HEADER?

The Wizard can import the header from an external Word document into your assembled document.

This gives you the ability to define a custom header and design it in a Word document as an actual document header (i.e. using Microsoft Word's header features).

When the Wizard assembles your documents the contents of the header in the external file will be imported into the header of your body pages causing it to be replicated through all body pages of your proposal (except for the Cover Letter and Title Page pages).

You can create a CustomHeader.docx file in the Wizard's MyGraphics folder. The Wizard will automatically detect and load the custom header from this file.

Put your text elements in your custom header in text boxes. Including putting your mail merge tags into text boxes that can be exactly positioned in your custom header. Also set any pictures to specific positions so all elements show up in your assembled document in the correct places.

Examples of custom footer and header files are in the MyGraphics folder. See the examples for how various custom headers can be created.

If you include shape objects that include mail merge tags in the header and/or footer you will also have to enable the "Merge tags

into document headers and footers” setting in the Preferences > Project Settings > Document Creation screen. This option is normally disabled due to Word taking much longer to process mail merging into the headers and footers in some cases and normally we do not use tags in the headers and footers. If you can avoid using tags in custom headers and footers will be more efficient.

HOW DO I IMPORT A CUSTOM PAGE FOOTER?

The Wizard can import the footer from an external Word document into your assembled document.

This gives you the ability to define a custom footer and design it in a Word document as an actual document footer (i.e. using Microsoft Word's footer features).

When the Wizard assembles your documents the contents of the footer in the external file will be imported into the footer of your body pages causing it to be replicated through all body pages of your proposal (except for the Cover Letter and Title Page pages).

You can create a CustomFooter.docx file in the Wizard's MyGraphics folder. The Wizard will automatically detect and load the custom footer from this file.

Examples of custom footer and header files are in the MyGraphics folder. See the examples for how various custom footers can be created.

Using a custom footer is also a good way to define a custom styled page number. To do this, edit your custom footer and insert a Word template for the custom styled page numbering you desire (using the Word toolbar Insert > Page Number. Then in the Wizard's Preferences > Data & Display > Auto Table of Contents Display screen pick the "Use My Custom Footer File" from the drop down list. This gives you the most precise formatting ability for items in the footer than using default options. Make sure to put

custom page numbers into your footer (and NOT the header). See this chapter for more details: [How do I Add TOC Sub Headers?](#)

Put your text elements in your custom footer in text boxes. Including putting your mail merge tags into text boxes that can be exactly positioned in your custom footer. Also set any pictures to specific positions so all elements show up in your assembled document in the correct places.

Do not add any extra “frames” to your custom page header as the default page number will be added as the 1st frame to the footer and will be operated on during the processing of the document. Adding additional Word “Frame” objects can interfere with the Wizard processing. Frames are an older component of Word; you can also add your page numbers into a text shape.

If you include shape objects that include mail merge tags in the header and/or footer you will also have to enable the “Merge tags into document headers and footers” setting in the Preferences > Project Settings > Document Creation screen. This option is normally disabled due to Word taking much longer to process mail merging into the headers and footers in some cases and normally we do not use tags in the headers and footers. If you can avoid using tags in custom headers and footers will be more efficient.

HOW DO I USE CUSTOM GRAPHIC BULLET POINTS?

Proposal Packs include custom graphics for use as alternate bullet points. By default, the Proposal Pack templates use standard Word diamond bullet points.

The Wizard can be used to replace the default diamond bullet points (or standard bullet points you have created) with custom graphics that are designed to match the rest of the graphics in the Proposal Pack design theme.

The use of the custom bullet point graphics turned on by default if the graphics exist for the Proposal Pack that is in use. Not all Proposal Packs are designed with custom bullet point graphics.

You can turn this feature on/off by using the Document Styles screen and in the Graphics tab check or uncheck the “Use Custom Graphics for Bullet Points” box.

You can also change the graphic used for the bullet points by editing the Bullet.png file in your Proposal Pack’s PNG_Graphics folder. Replace our stock Bullet.png graphic file with a new graphic and the Wizard will automatically use your new graphic.

It is recommended that you size your custom bullet point graphic as a 150 dpi graphic sized about .1 to .13 inches by .1 to .13 inches in size. This will be about 15x15 to 20x20 pixels.

You can also copy your bullet point graphic into the MyGraphics folder with the file name of Bullet.png or .jpg to get the Wizard to insert the graphic. See the ReadMe.PDF file in the MyGraphics folder for details. See this chapter for more details: [How to Import Custom Graphics Using the MyGraphics Folder?](#)

The Wizard will only replace bulleted lists, it will not replace numbered lists with the custom graphic. If you have a bullet list that is not being updated with the custom bullet point graphics, it is probably stored as a numbered list in your document (but visually uses bullet points). Or you may have originally created the list as a numbered list but then replaced the numbers with bullet points (Word still has it labeled as a numbered list internally). If this happens you can select the list, clear the formatting and then rebuild it as an actual bullet point list.

HOW DO I USE CUSTOM BODY WATERMARK GRAPHICS?

Most Proposal Packs include body background watermark graphics. Body watermark graphics are images that are faded into the background of the body pages of your document.

The body background watermark graphics are designed based on the Title Page and page header graphics to give your entire document a consistent visual design and layout across every page of your proposal.

By default, the body background watermark graphic is not included in the stock Proposal Pack documents. It is only inserted into your documents during the Wizards document assembly process.

The use of the custom body background watermark graphic is turned on by default if the graphics exist for the Proposal Pack that is in use. Note that not all Proposal Packs are designed with custom background watermark graphics.

You can turn this feature on/off by using the Document Styles screen and in the Graphics tab check or uncheck the “Use Custom Background Page Watermark Graphic” box. You can also set the positioning in points from the top and left of the page by changing the “Body Watermark Positioning X” and “Body Watermark Positioning Y” fields.

You can also change the graphic used for the body background watermark by editing the Watermark-Body.png file in your

Proposal Pack's PNG_Graphics folder. Simply replace our stock Watermark-Body.png graphic file with a new graphic and the Wizard will automatically use your new graphic.

It is recommended that you size your custom body background watermark graphic as a 150 dpi graphic sized about 5 inches in size. The width and height will be dependent on the design.

Since background watermark graphics are part of your Word documents headers, once you insert a background watermark into the first page of a document section, it will be replicated into every following page of your document.

You can also copy your background graphic into the MyGraphics folder with the file name of Watermark-Body.png or .jpg to get the Wizard to insert the graphic. See the ReadMe.PDF file in the MyGraphics folder for details. See this chapter for more details: [How to Import Custom Graphics Using the MyGraphics Folder?](#)

HOW DO I USE CUSTOM TITLE PAGE BACKGROUND GRAPHICS?

The Title Pages with background designs are in the TitlePage2.docx template. The cross-platform compatible Title Page designs are in the TitlePage.docx template.

The Title Page designs will give your document a cleaner and more professional look. They are designed using graphics and text in easily repositionable objects which allows you to custom tailor your Title Page.

The use of the custom Title Page background is turned on by default if the graphics exist for the Proposal Pack that is in use. Note that not all Proposal Packs are designed with the new custom Title Page backgrounds.

You can turn this feature on/off by using the Document Styles screen and in the Graphics tab check or uncheck the “Use Custom Title Page with Background” box. If this box is checked, that means your Proposal Pack includes a new Title Pack background graphic design, otherwise it will use the original classic cross-platform compatible version. If you turn off this feature in a Proposal Pack that includes a new custom Title Page background, the Wizard will revert to using the old classic Title Page design (i.e. a plain white background).

You can also create your own customized Title Page background graphic. Either create your own background graphic from scratch or start with one of ours and edit it in a graphics editor.

It is recommended that you size your custom Title Page background graphic as a 150 dpi graphic sized 8.5 x 11 inches in size. Once your graphic background is created you can edit the TitlePage2.docx template, click the document's header section, highlight the existing background graphic and delete it. Then insert your new one using the Word toolbar Insert > From File.

Since background Title Page graphics are part of your Word documents headers, once you insert a background watermark into the first page of a document section, it will be replicated into every following page of your document. This is why the Title Page document is inserted into its own section within your main document.

You can also copy your title page background graphic into the MyGraphics folder with the file name of Watermark-Title.png or .jpg to get the Wizard to insert the graphic. See the ReadMe.PDF file in the MyGraphics folder for details. See this chapter for more details: [How to Import Custom Graphics Using the MyGraphics Folder?](#)

HOW TO IMPORT CUSTOM GRAPHICS USING THE MYGRAPHICS FOLDER?



<https://www.proposalkit.com/htm/videos-replace-photos.htm>

TIP #1

Custom sets of example branding graphics based on our Proposal Kit logo and a photo based design are included in the **MyGraphics** folder.

Use these as guides and replace them with your own using the same file names and dimensions to create your own custom set of graphics more efficiently. We have also included some example custom header and footer files.

Example PDFs are also included that show what the results of these graphics customizations look like when a document is assembled. All you must do is copy the files from any of the example folders up into the **MyGraphics** folder then edit those graphics to replace our logos and photos with your own.

A second set of example images using photographs is included in the **Example-UsingPhotos** folder. The same process is used to customize your documents with your own photos as is to create a logo based design. To create a photo based design of your own copy these example images up into the **MyGraphics** folder and edit them replacing our photos and logos with your own.

TIP #2

Two other quick customizations to help brand your documents is to use the Document Styles > Edit Style > Colors screen and customize the 5-color scheme to match your company colors.

Then use the Preferences > Data & Display > Font Styles screen to customize the font types and font colors to match the colors and font types your company typically uses.

How to Brand Documents Using Your Graphics

The Proposal Pack Wizard – Expert Edition allows you to brand your assembled documents quickly and more efficiently with your own custom graphics (logos and photos) by adding your graphics files directly to the **MyGraphics** folder.

If you installed the Proposal Pack Wizard into the default install folder you will find the folder here:

C:\ProposalKit\ProposalPack\MyGraphics

This feature only works if you are running the Expert Edition of the Wizard. This feature does not replace every graphic in logo versions of the Proposal Packs. Images not replaced are graphic versions of individual page header chapters found in logo versions of Proposal Packs. In this case logo versions of page headers can be replaced with a combination of your logo next to text versions of the page chapter headers. This gives you the ability to then change the font type and font color of the page headers.

The use of the **MyGraphics** folder bypasses all the configuration options in the Wizard for branding your documents. By adding the following specific graphic files to this folder, the Wizard will automatically detect them and insert them into your document as it is being assembled making it much more efficient to custom brand your documents.

A fast way to get started is to run a quick test by copying the graphics from one of the example folders up one level into the main **MyGraphics** folder. Then run the Wizard and create a new project, pick some templates (Cover Letter, Title Page, Executive Summary, Cost Summary, Back Page) and build a document.

You will see our example graphics imported into the document. Then open each of those graphics in a graphics editor and paste in your own logo or photos and save the image in the exact same file name and format. Then rebuild the test project to see your changes applied. Continue tweaking the graphics and the positioning using the GraphicSetup.ini settings until you have it just the way you want it using your own customized design.

When creating a logo based design, the .PNG file format is more commonly used for the graphics to maintain the highest quality image. When creating a photo based design, the full page size graphics for the Title Page, body page watermark and Back Page are usually in .JPG format to reduce the file size.

The Wizard will first look for the full size images in .JPG format and if it finds any will load them first. If no .JPG images are found it will then look for images in .PNG format and if it finds any will load them.

The following graphics files must be put in the **MyGraphics** folder with these exact file names and in the PNG or JPG file format:

Bullet.png (or .jpg)

The Bullet graphic is used as the bullet point symbol in any bullet point lists.

This graphic should be 15x15 up to 20x20 pixels in size and should have a document image size between .1 and .13 inches at 150 DPI. If you set the dimensions differently your bullet point may not be sized correctly in the document.

Watermark-Body.png (or .jpg)

The Watermark-Body graphic is a faded watermark image that is inserted into the body pages of your assembled document. It can also be a full color full size page image which is good for background images you want to cover the full length or width of the page such as using a full color sidebar image.

This graphic is usually around 750x750 pixels in size and sized to about 5”x5” at 150 DPI. Set the fading of the image yourself in your graphics program so that any text that overlaps the watermark will still be readable. 8% to 12% opacity is a good range to start with.

Some design themes use an 11” high sidebar image as the background watermark.

You can manually reposition the background watermark by clicking into the document header, selecting the watermark

graphic and dragging it to a new position.

If you want to fine tune where the Wizard will position the graphic use the Document Styles > Edit Style > Graphics screen and set the Background Watermark Positioning X and Y fields.

Or, you can set the exact positioning and scaling of your custom graphic by setting the Left, Top and Scale in the [Body Page Watermark] section of the GraphicSetup.ini file located in the **MyGraphics** folder.

If you need a more complex body page background design than can be achieved with a single graphic use the Watermark-Body.docx file instead. See the example in the Example-CustomHeaderFooter3 folder for details.

Watermark-Title.png (or .jpg)

The Watermark-Title graphic is a full page background graphic for the Title Page. Just like the background watermark for the body pages, this graphic is inserted into the header of the Title Page as a background watermark. The difference between the faded watermark and the Title Page background is that they are different size graphics and one is faded and one is not.

This graphic should be 1275x1650 pixels in size and sized to 8.5”x11” at 150 DPI.

Some design themes use a smaller size photograph as this image that may or may not have an underlying colored shape object as a frame.

For international page sizes you can size it appropriate to the

page size you are using (Legal, A4, etc.) If you are using a page size different than the default 8.5”x11” Letter size also make sure to set the page size in the Wizard settings. This is found in the Document Styles > Edit Style > Page Setup screen.

Watermark-BackPage.png (or .jpg)

The Watermark-BackPage graphic is a full page background graphic for the Back Page. Just like the background watermark for the body pages, this graphic is inserted into the header of the Back Page as a background watermark. The difference between the faded watermark and the Back Page background is that they are different size graphics and one is faded and one is not.

The Back Page is typically a design that is simpler than the front Title Page design and compliments it.

This graphic should be 1275x1650 pixels in size and sized to 8.5”x11” at 150 DPI.

Some design themes use a smaller size photograph as this image that may or may not have an underlying colored shape object as a frame.

For international page sizes you can size it appropriate to the page size you are using (Legal, A4, etc.) If you are using a page size different than the default 8.5”x11” Letter size also make sure to set the page size in the Wizard settings. This is found in the Document Styles > Edit Style > Page Setup screen.

MyLogo-TitlePage.png (or .jpg)

While the Wizard does allow you to set a custom link in the Preferences to your own logo file and select that logo in your project, you can also get your logo into your document without having to customize the Wizard preferences by dropping your logo into this folder and naming it MyLogo-TitlePage.png or .jpg.

Note that you do have to add the Title Page template to your project in order for the Wizard to insert your logo into it.

This graphic should be sized appropriately for how large you want it to display on the Title Page. A good starting size may be 1” to 2” in height and 1” to 4” in width at 150 DPI.

You can manually reposition logo by clicking the graphic and dragging it to a new position.

If you want to fine tune where the Wizard will position the graphic use the Document Styles > Edit Style > Graphics screen and set the Custom Logo X and Y fields.

Or, you can set the exact positioning and scaling of your custom graphic by setting the Left, Top and Scale in the [Title Page Logo] section of the GraphicSetup.ini file located in the **MyGraphics** folder.

This graphic is also auto-imported into the Envelope, Fax Cover Sheet, Letterhead, Back Page and legal contract pack’s Contract and Terms templates (see below).

MyLogo-PageHeader.png (or .jpg)

This logo is a 2nd version of your logo that can be used in the header of every page of your document (i.e. all the body pages after the Title Page). This may be a smaller version of your logo or a non-text version of your logo and it will be inserted before the titles of each of the pages.

Note that this is mainly used only with the plain text versions of Proposal Pack (i.e. Proposal Pack for Any Business and Proposal Pack for Government Grants). If you use this with a logo design version of Proposal Pack then your logo will be inserted in place of the stock Proposal Pack page chapter header graphics and text versions of the chapter headers will be added.

You can get your logo into your document without having to customize the Wizard preferences by dropping your logo into this folder and naming it MyLogo-PageHeader.png or .jpg.

This graphic should be sized appropriately for how large you want it to display on the body pages at the head of each page. A good starting size may be .5” to 1” in height and .5” to 1” in width at 150 DPI.

You can manually reposition logo by clicking the graphic and dragging it to a new position.

You can set the exact positioning, scaling and text wrapping of your custom graphic by setting the Left, Top, Scale and Wrap values in the [Page Header Logo] section of the GraphicSetup.ini file located in the **MyGraphics** folder.

Letterhead.png (or .jpg)

This graphic is used in 5 possible places by the Wizard. If you have selected the Letterhead, Fax Cover Sheet, Envelope, Back Page and/or a Contract Pack's Contract and Terms templates the Wizard will insert this graphic into these templates.

If you have not created a Letterhead.png graphic but you have created a MyLogo-TitlePage graphic, then the MyLogo-TitlePage graphic will be inserted instead.

This graphic should be sized appropriately for how large you want it to display at the top of these pages. The default size of this graphic is 1"x1" at 150 DPI.

If you size the graphic differently you may have to manually reposition elements on the page.

Or, you can set the exact positioning and scaling of your custom graphic by setting the Left, Top and Scale in the [Back Page Logo] section of the GraphicSetup.ini file located in the **MyGraphics** folder.

If you need a very precise custom layout or positioning, it is always better to manually update the templates and not use the Wizard's auto-importing features.

This feature requires a placeholder graphic in the templates that will be replaced with your custom graphic. This placeholder may not exist in older editions of non-logo versions of templates and will need to be manually added.

Description.png (or .jpg)

This graphic is optionally used in the front Title Page above the text paragraph description of what the document is about. You must have the Title Page selected for the Wizard to import this graphic into it.

This graphic should be sized appropriately for how large you want it to display. A good starting size for this graphic is .5”x2.5” at 150 DPI. If you size the graphic differently you may have to manually reposition elements on the page.

You can set the exact positioning and scaling of your custom graphic by setting the Left, Top and Scale in the [Title Page Description] section of the GraphicSetup.ini file located in the **MyGraphics** folder.

Accent.png (or .jpg)

This graphic is used in the page footers of each body page and at the bottom of the front Title Page. The accent graphic is meant to just give a little bit of color and design to the end of each page.

This graphic should be sized appropriately for how large you want it to display. A good starting size for this graphic is .25”x.25” at 150 DPI.

If you size the graphic differently you may have to manually reposition elements on the page.

Or, you can set the exact positioning and scaling of your custom graphic by setting the Left, Top and Scale in the [Title Page

Accent] and [Footer Accent] sections of the GraphicSetup.ini file located in the **MyGraphics** folder. The [Title Page Accent] section is used to position the accent graphic on the Title Page which can be a different position than when the accent graphic is used in the footers of the body pages which use the [Footer Accent] settings.

TPImage1-4.png (or .jpg)

These images are usually only used in photo designed Proposal Packs where there are additional images used along with the Watermark-Title.jpg/.png image in the TitlePage2.docx template.

These images should be 150 DPI.

If a design theme uses any of these graphics you can make your own copy in the same dimensions and the same file name and put your new copy in the MyGraphics folder.

The Wizard will replace the stock photograph with your new image. It is important to match the dimensions and DPI to ensure the image fits in the exact same location properly.

If a Proposal Pack design theme uses these images you will find the stock ones in the Proposal Pack's Graphics\PNG_Graphics folder.

BPIImage1-4.png (or .jpg)

These images are usually only used in photo designed Proposal Packs where there are additional images used along with the Watermark-BackPage.jpg/.png image in the BackPage.docx template.

These images should be 150 DPI.

If a design theme uses any of these graphics you can make your own copy in the same dimensions and the same file name and put your new copy in the MyGraphics folder.

The Wizard will replace the stock photograph with your new image. It is important to match the dimensions and DPI to ensure the image fits in the exact same location properly.

If a Proposal Pack design theme uses these images you will find the stock ones in the Proposal Pack's Graphics\PNG_Graphics folder.

HOW TO PUT A CUSTOM GRAPHIC INTO THE PAGE FOOTERS

The Proposal Pack logo design packages include small accent logo graphics in the page footers. The plain version “Proposal Pack for Any Business” does not include any logos or graphics in the page footers.

Page footer graphics make use of Word’s footers which causes whatever is in the first page of the section to be replicated down into the footer of all following pages. Because of how Word works that means you need a way to replace the stock page footers with a custom footer (without having to manually change all our stock templates because there is no way to know what the first template any given proposal will use first).

The way to easily accomplish this is to create a blank word document and edit its footer to create your custom footer (such as including your company logo and any other items such as your company name, contact details, a web site address, custom formatted page numbering, etc.)

You can create a file in the MyGraphics folder called CustomFooter.docx and CustomHeader.docx and the Wizard will detect and automatically load the header/footer from those files.

There are some example custom header and footer files in the MyGraphics folder you can use. Just make your edits and rename the examples and remove the “Example-#-“ part of the name.

Now, whenever you create a new document the Wizard will replace the contents of any stock templates footers with the footers from this new file, saving you the time of having to manually edit the footers on all the stock templates individually.

HOW TO IMPORT A COMPLEX TITLE PAGE OR BACK PAGE DESIGN

If you need to create a more complex front cover Title Page or Back Page design than using a single graphic use this feature instead.

Create a file called “Watermark-Title.docx” or “Watermark-BackPage.docx” in the Wizard’s **MyGraphics** folder.

There are example files in the “Example-CustomHeaderFooter4” folder you can use as a guide that will show you how a complex design using multiple shape objects and pictures can be created.

Add all your custom design elements into the header of the document. Do not put any elements in the footer or in the main body of the document. The Wizard will only copy what it finds in the header.

If you see any of your custom elements not being copied but you see them in the Watermark-Title.docx or Watermark-BackPage.docx file move those elements into the header.

Once you have created your custom design run the Wizard and create a new project, select the Title Page and/or Back Page templates along with any other templates, then build your document by saving the project.

You will see the stock background of the Title Page and/or Back Page replaced with your custom design.

HOW TO EDIT PAGE HEADERS THAT ARE GRAPHICS?



<https://www.proposalkit.com/htm/videos-convert-graphic-headers-to-text.htm>

If you are using the brandable packs “Proposal Pack for Any Business” or “Proposal Pack for Government Grants” the page headers are all in editable text and this issue does not apply.

If you are using any of the other Proposal Packs with a graphic design them then the page header titles are all in graphics. The reason page headers are in graphics is due to costs and licensing issues. In order to create the visual look, we use custom font types for the page header graphics however we do not own the licenses for those fonts that would allow us to distribute them as editable font types.

To solve this, we create the page headers as graphics and embed the graphics in the Word document templates. Since we supply over 2200 chapters most people do not need to edit them to create custom chapters.

If you do want to be able to edit the chapter headers in the graphic design themed Proposal Packs the Wizard includes a feature that will replace the graphic chapter headers with editable text.

Click the button #1 Document Styles > Edit Style > Graphics tab. On this screen you can check the box “Replace Page Header Graphics with Text”.

When you create new projects, the documents will be built with text versions however you will lose the custom font types we used in the design.

You can purchase your own license for the same font type we used (or any font type of your choice) and install it on your Windows computer. Fonts can be purchased from many online sources.

Once you have a font type installed you can set that font type in the Wizard's Preferences > Data & Display > Font Styles screen.

Set the Proposal Kit Page Header and Proposal Kit Faux Page Header custom styles to whatever font type you want that is installed on your computer.

Once you have made these customizations the Wizard will generate your project documents using editable Word text that will also look like the original graphic design theme version.

HOW TO CREATE CUSTOM PAGE HEADER GRAPHICS

While the brandable Proposal Pack for Any Business uses text for all the chapter headers and is easily editable, the graphic designed Proposal Packs use graphics in order to create a more customized design without requiring the user to purchase additional font types.

While Proposal Pack includes thousands of chapters sometimes there is a need for a custom titled graphic.

A new graphic header had to be created. Then it must be inserted into the document and if the Table of Contents chapter is being used the hidden TC Field for the text of the chapter header must also be updated.

To create a new graphic Proposal Pack includes the original artwork files in Adobe Photoshop and Adobe Illustrator formats. You may also need to purchase the font type and install the font on your computer first. Fonts can be purchased from many online font vendors and some fonts may be free to download. Proposal Kit does not provide font files and we do not own the licenses to provide any font files.

Open the PageTitle.psd or PageTitle.eps file found in the Proposal Pack, edit the text then save your new graphic in the PNG file format. If you are unable to create your own custom graphic, you can order custom graphic creation services from Proposal Kit.

<https://www.ProposalKit.com/htm/service.htm>

Once the custom graphic is created it must be saved in the MyGraphics subfolder of the Proposal Pack Wizard installation. The same folder you found this Readme.pdf in.

This folder should be:

C:\ProposalKit\ProposalPack\MyGraphics

The Wizard needs to know the template that this graphic will be inserted into and it needs to know what the new chapter header text will be. The Wizard cannot detect what is inside the image. So, this is done by how the file is named.

The format of the file name must be: **[Original Title][New Title].png or .jpg**

The Wizard will look for any files with file names in this format and will assume they are new chapter headers.

For example, you want to replace the Executive Summary graphic header with a new one titled Proposal Summary. If we use the Proposal Pack Architecture #3 design theme as an example here are what the graphics will look like:



New file named: **[Executive Summary][Proposal Summary].png**



Another example is changing the title of the About Us page to Who is Proposal Kit? This is useful when you want to include your name in a chapter header for example. This illustration is to show how to deal with chapter headers that use characters that are not allowed in a file name.

The issue here is that the question mark is one of several characters that cannot be used in the text of the chapter header, but we may still need to include. The file naming solves this by using substitutions to stand in for the unusable characters.

ABOUT US

New file named **[About Us][Who is Proposal Kit{QM}].png**

WHO IS PROPOSAL KIT?

The following substitutions can be used in the file name:

{BS} = \
{FS} = /
{CO} = :
{AS} = *
{QM} = ?
{QU} = “
{LT} = <
{GT} = >
{VB} = |
{LB} = [
{RB} =]
{PD} = #
{DO} = .

Look in the MyGraphics subfolder “**Example-PageHeaderReplacements**” for copies of these custom graphics.

This will show you how to name the files correctly so the Wizard can find them and apply them to the correct page and update the Table of Contents to match the text in the graphic.

HOW DO I USE THE 6-COLOR PALETTE TO MATCH MY LOGO COLORS?



<https://www.proposalkit.com/htm/videos-add-logo.htm>

The Proposal Pack templates are designed around a 6-color palette. These 6 colors are applied to various parts of the documents (page borders, header fonts, tables, pull quotes, full page backgrounds and bullet points).

The Proposal Pack for Any Business pack is set to a default conservative black/grey/white palette.

The Proposal Pack for Government Grants pack is set to a default red/white/blue/grey/black palette.

All the other Proposal Packs with colorful logo designs have color palettes that match the logo graphics. This makes your entire document consistent in design and color across the entire document.

The 6-color palettes are designed for you to be able to customize them to your own company colors so when the Wizard assembles your documents all those page design elements will automatically be created using your custom colors.

To change the colors, click on the Wizard home screen Document Styles > Edit Style > Colors.

Since there are multiple color palettes that can be applied by the Wizard the following is the order of precedence for which palette is used:

- If you have customized the Preferences > Data & Display > Word Styles colors, these will take priority first.
- If you have selected a custom Title Page Pack title page with a specific color scheme, that 6-color palette will be used.
- Otherwise, the 6-color palette defined in the Document Styles > Edit Style > Colors screen will be used.
- Finally, there are custom colors that can be set in the Fonts, Borders and Tables tab that will override the default 6-color palette. You can individually set the overall page border color, the color of non-graphic bullet points and table border colors.

The Color #6 is reserved for use in select Proposal Packs such as the Proposal Pack for Any Business, Proposal Pack for Government Grants and the photo-based Proposal Pack design themes. Other Proposal Packs that use logo designs are typically designed for white page backgrounds.

Most documents look best with light colored backgrounds and dark text. The Wizard can be configured to create dark body pages with light text by changing the color palette and editing the Word font Styles. You will have to experiment with light and dark colors to find a combination that all works together.

If using colored backgrounds with logos and graphics, it is best to use transparent logos in PNG format so that background page colors will seamlessly show through your logo. Otherwise you should stick to adding logos and graphics that are designed to be square so that they still look good against a colored background.

If you are unable to mix your logos and graphics against a colored background, consider using a white background and set Color #6 in the palette to white and turn off the use of the watermark shapes.

Photo based design themes and design themes with solid background colors and lots of dark colors are typically best used for PDF and electronic documents and for high-quality printing on full-bleed printers on stock designed for photos.

Also see these chapters for additional document branding features:

[How to Import Custom Graphics Using the MyGraphics Folder?](#)

[How do I use the MyProjectFiles folder?](#)

The Wizard allows you to copy your own custom files that are not part of the Proposal Kit system into each of your new projects using the MyProjectFiles folder.

This feature allows you to automatically copy your own content such as worksheets, checklists, letters, spreadsheets, forms, etc. into each of your new Proposal Pack Wizard project folders.

The MyProjectFiles folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyProjectFiles

Whenever you build a new document in the Wizard a copy of all the files in the MyProjectFiles folder will be made into your document's project folder.

You should not name any of your custom files the same file names and extensions as any of Proposal Kit's document file names.

Use the Preferences > Project Settings > Configure MyProjectFiles Settings screen to manage adding files, removing files, and setting attributes for the custom files in the Wizard database.

You can manually copy files into the MyProjectFiles folder however that will not setup any of the attributes such as human readable titles for use in the Wizard drop down menus. Use the Wizard's Preferences tool for managing the attributes.

How do I Change/Use Word Font Styles?

HOW DO I USE ADD-ON TITLE PAGE PACKS?



<https://www.proposalkit.com/htm/videos-how-to-use-title-page-packs.htm>

Title Page Packs are a line of products that give you more choices for the design of your Title Page. Each Title Page Pack contains 5 design choices and each of those design choices comes in either 120 color schemes.

That means each Title Page Pack has 600 Title Page templates to pick from.

Your Proposal Pack collection of templates comes with one Title Page volume and Proposal Kit Professional comes with four Title Page volumes.

When you purchase and install one or more Title Page Packs you access them from the Wizard's Pick Documents Screen in the "Title Page" tab.

This tab will allow you to select a specific installed Title Page Pack volume, and a design from that volume and a color scheme for that design.

You will see a thumbnail graphic of the selected Title Page displayed as you select the color scheme.

To make the Wizard use one of these alternate Title Page choices instead of the stock default Title Page click the purple button labeled “Use Selected Title Page”.

If you want to restore the default template, click the purple button labeled “Use Original Title Page”.



If you want to make custom edits to one of your selected alternate Title Pages, click the purple button labeled “Edit Selected Title Page”. If you save your changes, those changes will be applied to all future uses of that specific Title Page template.

You can check the box labeled “Also use this selected Title Page for all future project” and after you click the “Use Selected Title Page” button all future projects you create will use that alternate selected Title Page.

If you create a Preset, any custom selected Title Page Pack document will be added to that Preset.

Proposal Graphics Packs are already designed with custom Title Page graphics with logos. The Title Pages with most Proposal Graphics Packs are already designed with a Title Page background graphic that matches the logos.

If you are using the Title Page Pack with a Proposal Graphics Pack, you have two options for how you want the “Proposal” and “Description” sections of the Title Page to look. This does not apply to the plain text versions Proposal Pack for Any Business or Proposal Pack for Government Grants.

-  You can leave the default “Proposal” and “Description” sections of the alternate Title Page in black text by unchecking the box labeled “Insert Proposal Pack graphics into this Title Page”.
-  You can import the Proposal Graphics Pack’s “Proposal” and “Description” logo graphics into your alternate Title Page by checking the box labeled “Insert Proposal Pack graphics into this Title Page”.

Not all combinations of Title Page Pack design/color schemes will work together visually. Select a visually appealing combination of colors and logos. It may take some experimenting with various combinations to find a good match. Depending on the designs and size of logos you might need to reposition and/or resize some elements on the Title Page.

When you select a custom Title Page and you are using the Back Page, the Wizard will switch to using the “Back Page Generic” template so that the Wizard can apply the same color scheme to the Back Page that is used in the custom Title Page.

HOW DO I USE WORD DOCUMENT SECTIONS?

This chapter describes a feature of Microsoft Word that our Proposal Pack Wizard makes use of. Sections are a feature of Microsoft Word and you can learn more about them by reading your Microsoft Word documentation.

A “Section” is part of a Word document. Every Word document has at least one (1) section. For example, a 10 page word document usually has all its pages in one section. You can see where a document’s section breaks are by using the Draft View mode.

By default, if you create a Word document and type any number of pages, your document will have one section and all pages of that document will be in that section.

The problem this introduces is when you need to incorporate pages of your document with different layout and design features such as page numbers, colored page borders, background watermark graphics, headers and footers.

A typical Proposal Pack Wizard created document will have 1 to 4 sections.

The Cover Letter / Cover Sheet / Inquiry Letter will be in the first section. This first section is setup to turn off page numbers, colored borders and background graphics.

The Title Page will be in the next section (section number 1 or 2 depending if there is a Cover Letter section above it). The Title Page is put into its own section because it has page numbering turned off and may have a custom background graphic design. This requires the Title Page to be in its own section, so the custom background graphic design does not replicate into the rest of the pages below it.

The body of the proposal (i.e. all pages from the Table of Contents, Executive Summary, Products, Services, Project Details, and so on) will be in the next section (section number 1, 2 or 3 depending if there are a Cover Letter and/or Title Page above it). The body of the document is where page numbers are turned on, accent graphics are included in the footer and a body watermark graphic is included in the header. This requires that all pages of the body of the document be in one section, separate from the other sections.

The Back Page will be in the last section (usually section 4 if there is also a Cover Letter, Title Page and other body pages selected). The Back Page is like the Title Page with its own unique background watermark graphic that compliments the Title Page.

This document structure will create a consistently formatted document using Proposal Kit and the Wizard software. However, there are times when a more complex document structure may be needed. Some examples would be if you have additional external documents you want to insert into the generated document, or you were given forms or tables from a 3rd party they want inserted into the document.

This external content may have page layouts that require different page margins, page borders, headers, footers, etc. In this case you need to have a new Word Section created that is unlinked from the sections above and below it. This can be a tedious and more complex task for new Word users.

The Wizard can add up to 100 additional independent Sections to the end of the generated document. Up to 50 can be added before the final Back Page and up to 50 can be added after the final Back Page. Look in the Preferences > Project Settings > Configure Document Creation screen for the settings. Set these before you generate your document and if this is only required for the creation of one document you can set them back to 0 before creating your next project.

Because the Wizard generates documents with a very specific structure of Word Sections it is important to not insert Section Breaks into any documents that you are using to build into the master project document that is assembled from various templates and content files. The Wizard will detect if you have inserted a Section Break into any pages being assembled together and warn that it may cause formatting problems. If the assembled document does not look properly formatted and you have added Section Breaks remove them and rebuild the project.

HOW DO I ADD CUSTOM TITLED PAGES/CHAPTERS?

To add a custom titled section or page that is not in the original list of Proposal Pack templates, you might first need to create a title header graphic if you are using a Proposal Pack with an embedded graphic theme.

If you are using a Proposal Pack that does not use a graphic theme (such as Proposal Pack for Any Business or Proposal Pack for Government Grants), the Wizard will automatically change the page header text for you if you alter the page header text in the database. Changing the titles of the templates is done using the Configure Proposal Files tool in the Preferences.

If you have significantly altered the original Proposal Pack templates such that the text headers positions or font sizes are different you may need to adjust some settings in the Document Style edit screen. The Sentences Till Header is the maximum number of sentences down that the header text is found on a page. Typically, the header is the first sentence. The Minimum Header Text Font Size is the smallest font size that a page header will be, typically this is 24 points. You can also completely disable this feature by unchecking the Replace altered text headers checkbox.

If you are using a Proposal Pack style which includes graphics, you can create custom page title header graphics using the PSD/EPS/PNG artwork files supplied with your Proposal Pack or Proposal Kit. See your Proposal Pack Documentation.pdf file or the section in this manual [Easily Create Your Own Graphic Style](#) for details on how to create your own custom graphics.

Create your new header graphic and save it to the graphics folder. From the Wizard Interface go to Preferences > Tools > Configure Proposal Files. Select the Type of Proposal you are creating this new template for then select Create & Add a New Document. Pick any existing document as a starting point. When you click OK, an Edit New Documents screen pops up. From the list select the new document in the style you want to edit. Once the new document opens, replace the header graphic with the new graphic you created using Word's Insert > Picture > From File and then make any text edits needed for this template.

You will now be able to select your new template from the drop down list boxes when picking your documents for each new proposal.

HOW DO THE EDIT SCREEN DOCUMENT PROCESSING TOOLS WORK?



<https://www.proposalkit.com/htm/videos-how-to-use-batch-processing-tools.htm>

The Wizard has a set of tools you can use to apply changes to any Word documents and those tools are available in both the Preferences and the Edit screens. These tools are an Expert Edition feature.

While the tools are the same, they are typically used on different types of documents. If you have Word documents that were not created by the Wizard, you can apply these document processing tools from the Preferences > Tools > Batch Process Documents screen.

If you want to apply some of these tools to a document already created by the Wizard in one of your projects, you can apply them from the Home screen > Edit Current Document > Document Processing screen.

There are a wide variety tools available you can apply to your documents.

Many of these operations are performed on the documents as they are created by the Wizard initially. However, due to editing of a Word document its possible some things may need to be checked or updated such as making URLs clickable or checking for left over data or instructional text.

TESTING TOOLS

Test for left over << >> tags

This tool will scan the document for any leftover instructional or data merge tags that should be removed.

TEXT TOOLS

Remove Proposal Pack Important Body Text

This tool will remove any text in the document that has the Word Style “Proposal Pack Important Body Text” applied to it. This is a Word Style set to red text that is typically used for important instructional text.

This feature also allows you to create an Editors Version of your documents with instructional or Q&A text that is meant to be finished off by your editor. Once the documents are finished this tool can be used to batch remove any leftover instructional text for the final production version.

Add Proposal Kit defined Word Styles

This tool will add all the predefined Proposal Kit Word Styles to the document. Any document created by the Wizard will have these styles already included. This tool is intended for

use with your external documents to get them ready for use within the Wizard.

Change font styles

This tool will allow you to change all the major header and body Word Styles in the document in a single operation rather than individually modifying all the Styles manually. For example, use this to change all the chapter header, title page header and sub header fonts from Arial to another font. Another way to use it is to set all the body text font types used in the document from Times New Roman to something like Proxima Nova for example. To make these changes before documents are created use the Preferences screen to change the font types.

Convert all URLs to clickable links

This tool will scan all the text in the document and if it finds any text that appear to be a URL or email address it will make it a clickable link.

Remove all clickable hyperlinks

This tool is used to remove all hyperlinks from the document such as email addresses and URLs. Internal document links such as the Table of Contents and references within the document will be retained.

Change URL and email links

This tool will change all the URLs and email links in the document to a specific link or email while retaining the original text version. This is useful for creating fictional documents with fake addresses for the display, but you want them to link to a valid address such as your own web site.

Set all footer text to specific Style

This tool will change all text in the footers of the document to a Word Style you select. For example, if the generated document has normal font sizes and underlined hyperlinks but you just want a more subdued and smaller font type use this tool and pick the Proposal Kit Footers Style.

Merge Data with Tags

This tool will reapply all the data merging into any tags left in the document. Tags that will be merged into include the Company Data and Client Data screen information and Excel spreadsheet linking tags.

This gives you the ability to create a document and skip doing the merging when the document is first created then apply it later.

Another use is to add additional tags into the document that are more difficult to merge than the standard text tags such as adding additional Excel spreadsheet cell links. Using this ability you can customize a spreadsheet and then add

additional <<XLS:[FileName]:R#C#>> tags into a document and then use this tool to easily link the existing document into an existing or a new spreadsheet.

IMAGE TOOLS

Convert graphic headers to text

This tool will convert all the graphic chapter headers to editable text while retaining the design theme logo. You can do this conversion during document creation by checking an option in the Edit Style screen. This tool is to prevent having to rebuild a document after it has been created to convert the chapter headers. You will lose the font styling used in the graphic version of the chapter headers and the editable text version will be set to Arial. You can then modify the header Word Styles to change the font type of the text headers to any font you have installed on your computer. You can also use the Change font styles tool at the same time to do both operations at once. To retain the exact font type used in the original graphic headers you will have to have that font installed on your computer which may require you to purchase the font type from a 3rd party font provider.

Reposition chapter header logos

This tool is used to adjust the position of every chapter header logo after you have used the tool “Convert graphic headers to text” to convert graphic chapter headers to text. Tool “Convert graphic headers to text” can result in the

chapter header logos being too low or high in relation to the text. If you only have a few chapter headers they can easily be repositioned manually however a large number is easier to change all at once using this tool.

Replace title page watermark using .docx file

This tool will swap the title page watermark in the selected document with the header/footer watermark in the Watermark-Title.docx file. This allows you to import a complex design for the title page watermark using multiple images and shape objects.

Replace body watermark using .docx file

This tool will swap the body page watermark in the selected document with the header/footer watermark in the Watermark-Body.docx file. This allows you to import a complex design for the body watermark using multiple images and shape objects.

Replace back page watermark using .docx file

This tool will swap the back page watermark in the selected document with the header/footer watermark in the Watermark-BackPage.docx file. This allows you to import a complex design for the back page watermark using multiple images and shape objects.

Change bullet points

This tool will allow you to change the custom bullet point graphics in generated documents. It is best to use symbols or graphics when changing bullet points in documents created using Proposal Pack for Any Business or Proposal Pack for Government Grants. It is best to use graphic bullet points in all other Proposal Packs. It may not work if trying to change symbol bullet points to graphics in some design themes. Bullet point graphics should be 15x15 up to 20x20 pixels in size.

Change footer accent graphic

This tool will change the graphic in the footer of the body pages to a new accent graphic you can browse to and select.

Change letterhead graphic

This tool will change the letterhead graphic in the Letterhead, Fax Cover Sheet, Contract and Terms and Back Page templates.

Change description graphic

This tool will change the description graphic in the front Title Page. The description graphic is only used in older line art style design themes and is an optional graphic that can also

be removed manually. There is no description graphic used in the photo design themes.

Change title page graphic

This tool will change the title page graphic in the front Title Page. The title page graphic in the Proposal Packs is the graphic with the word Proposal, Business Plan, etc. next to the logo. This is also the placeholder logo that gets replaced when you use your own custom logo.

Change title page watermark graphic

This tool will change the title page watermark graphic in the header of the title page of the document. This is only used for design themes that have graphic in the header used as the watermark. Some design themes use shape objects that do not use a graphic. For more complex watermark designs use the “Replace title page watermark from .docx file” tool instead.

Change body watermark graphic

This tool will change the body watermark graphic in the header of the main body pages of the document. This is only used for design themes that have graphic in the header used as the faded watermark. Some design themes use shape objects that do not use a graphic. For more complex watermark designs use the “Replace body watermark from .docx file” tool instead.

Change back page watermark graphic

This tool will change the back page watermark graphic in the header of the back page of the document. This is only used for design themes that have graphic in the header used as the watermark. Some design themes use shape objects that do not use a graphic. For more complex watermark designs use the “Replace back page watermark from .docx file” tool instead.

Change chapter header logo graphics

This tool will change the chapter header logo graphics. This is the graphic in front of the chapter headers on each body page. This is only used for design themes that use graphics for the page headers.

If the chapter headers have not yet been converted to text that operation will be done first. If you have converted the chapter headers to text already, which replaces the full graphic with embedded text to editable text with just the logo, then this tool will just change the logos.

Since replacement of the graphics usually uses a logo of a different size you may also need to reposition all the chapter header logos. Use the tool "Reposition chapter header logos" to reposition the new logos.

Apply custom header from .docx file

This tool will replace the contents of the header in the body pages of the document with a custom header if you have created one. There are examples in the MyGraphics folder.

Apply custom footer from .docx file

This tool will replace the contents of the footer in the body pages of the document with a custom footer if you have created one. There are examples in the MyGraphics folder.

STRUCTURAL TOOLS

Update Table of Contents

This tool will do a full update of any Word TOC (Table of Contents) objects in the selected documents. You can also manually update TOC objects by right clicking them with your mouse and choosing the update options. If you are unsure how to update a Word TOC object in your Proposal Kit generated documents, you can use this tool.

Update metadata

This tool will update the meta data fields of the document with the data defined in the Wizard's Preferences.

Change table settings

This tool will apply changes to all the tables in the document. Changes you can make include spacing between cells, table border colors, table cell colors. This tool is intended to allow you to easily make all your tables consistent in their visual appearance.

Change entire color scheme

This tool allows you to prescan the document to determine all the colors used in the various parts of the document such as font headers, page borders, table cells, table borders and shape objects. You can then set new colors as replacements. The Wizard will then replace all uses of the original colors with the new colors. This allows you to create a consistent and new color scheme for a document that is not tied to the stock Proposal Pack design theme.

Apply current style color scheme

This tool will apply the color scheme defined in the Document Styles screen. This is usually done to make a color change to a document already created by the Wizard such as to change the colors of table cells or header text across the entire document.

Change document page settings

This tool will change the page settings of the document such as paper size and page margins.

Change page borders

This tool will change the page border of the body section of the document.

Remove page borders

This tool will remove the colored border around the body pages of the document (if there is one). The page borders are only used in some of the older line art design themes by default.

Add new document sections

This tool is used to add section breaks to the start and/or the end of the document. The new sections have the headers and footers unlinked from the other sections. This allows you to insert content that may otherwise alter the page borders, margins, and other formatting without disrupting the formatting of the rest of the document. This is useful when having to include forms supplied by the agency or company you are submitting an RFP response to.

MIGRATION TOOLS

Save legacy .doc files as .docx

This tool is used to save all the old Word 2003 legacy format .doc files in the current .docx format. The files will still look and work the same way as before. Use this tool if you are migrating from an older version of Proposal Kit and you need to move documents into the new system. Copy your old files to a temporary folder and batch update all the files at once. Then copy them to the appropriate folders in the new version of the Wizard and Proposal Kit as needed.

This tool can only be used by itself. Any other tools you have selected will be unselected when this tool is selected.

TROUBLESHOOTING TOOLS

Move full size shapes to back of zorder

This tool is meant to help clean up a possible glitch when Word sometimes gets the zorder (i.e., the layering) of the objects wrong. The layering of objects should be identical between the source and destination documents when the Wizard generates documents and pulls in the background watermarks from a WatermarkBody.docx file however sometimes Word may put a full size shape object in front of the rest of the objects resulting in them appearing to be

missing. You can either manually change the zorder by moving the topmost shape to the back or use this tool.

Delete full size body watermark shapes

This tool will delete any full page size (8.5x11) shape objects in the body pages of the document. Normally these shape objects do not cause any problems except when Word may get the zorder wrong. See the tool “Move full size shapes to back of zorder” for another option for cleaning up these layers when needed. Many Proposal Pack design themes include a full size shape object in white in the header/footer section of the body pages as a way for users to easily change the page color shading using the Wizard’s color palette tools. This tool can remove those full size shape objects if they are causing any issues with the display of other objects in the body page headers/footers.

Rebuild chapter templates (Word bug workaround)

This tool rebuilds Proposal Pack chapter templates as a workaround for a Word bug introduced in the August 3, 2022 build of Microsoft Office that results in a 5097 error when assembling a document in the Wizard.

This tool will rebuild the templates that are to be assembled in a way that Word will be able to insert them without failing.

This tool is only for use on the Proposal Pack chapter templates which are the working templates contained within the proposal project folder. Once rebuilt you can reassemble

the project. This tool will also turn off the Word Insert Bug workaround so the templates will be assembled using the normal Wizard operations.

To rebuild your entire template library use the repair tool in the Wizard Preferences > Tools > Repair Tools > Rebuild Template Library button.

The version of this tool in the project screen will automatically select all convertible chapter templates for that project. When run from the Preferences you can browse and select the chapter templates manually.

HOW DO I FINISH MY PROPOSAL?

Once you have created your proposal documents and cleaned up any formatting issues, you are ready to finish your proposal.

At this point you will have to fill in the details which only you can provide for the proposal specific to your company, the product/service/project being proposed and your client.

Also review the samples included with your Proposal Kit or Proposal Pack for a large collection of actual proposals created using our templates. The samples will show you how other companies and individuals have taken the Proposal Pack templates and filled them in for their own custom proposal. The templates are used for just about any kind of business proposal in any industry.

If you need to include charts, graphs, complex costing, etc. you can find a variety of 3rd party programs to create such content which can then be included in your proposal documents.

You should save your final digital distribution versions in Acrobat PDF format to ensure your end reader can view it as you intended and to prevent misuse and unauthorized editing (as best possible). Read this chapter for more details: [How do I Save in PDF Format?](#)

HOW DO I SAVE IN PDF FORMAT?

The Wizard has PDF creation and management features built into the interface.

The actual saving of documents in PDF format is part of your Word software and you must have this feature available in your version of Word to save documents from the Wizard in PDF format.

Microsoft started supporting this feature in all versions of Word starting with Word 2010.

You can always save any document using Word by clicking the “Save As” option and saving as a PDF format file (or using Adobe Acrobat Pro and using the Word toolbar buttons provided by Word and Acrobat. These features are part of Word already.

The Wizard improves the PDF saving features by giving you a button in the edit screen to save any of your Wizard created documents in PDF format automatically. The Wizard will then display both your Word and PDF files for your project in the interface and will allow you to easily see and open either the Word or PDF versions.

When the Wizard opens the edit screen and sees there are both Word and PDF files it will ask you which ones you want to open. It is presumed that once you have created a PDF version of a Word document that the PDF version is the one you will be delivering.

The Wizard will also scan your Word files before saving PDF versions to see if you may have forgotten to fill in any of the data

merge tags or if you may have forgotten to remove any of the instructional text in the original templates.

If you update your Word documents by adding new pages or regenerating your combined document the Wizard will also check if there are PDF versions and will notify you to update the PDF versions after finishing your edits to the updated Word versions.

You should always send your document as a PDF whenever OLE objects were linked into the document such as when using the dynamic OLE spreadsheet links. The PDF format will ensure your final document is self-contained and rendered in a way that ensures the reader will see it as intended and not be able to edit or view your calculations.

WHAT TYPES OF COST CALCULATION FEATURES ARE AVAILABLE?

Not every document needs to have extensive cost calculations or a line item database to generate quotes. Proposal Kit is designed to scale from a simple text only document to one combined with higher end cost quoting solutions provided by 3rd parties and some options in between.

Word is a text editing and presentation program, so it is not designed to be able to do any calculations by itself. If you need to do calculations, they need to be done externally such as by a 3rd party system or an Excel spreadsheet. That data then needs to be put into a presentable format. The presentation format is generally the final Word document that is then rendered as a PDF document or printed.

With the Novice Edition of the Wizard documents are created as stand-alone text based Word documents. There are also external Excel spreadsheets included you can use to do sales or business plan financial calculations which then must be manually typed into the Word documents. This is the most basic setup and how most people use the Proposal Pack.

The Expert Edition of the Wizard includes features that allow you to dynamically link those Excel spreadsheets into the Word templates so that as you update calculations in the spreadsheets the updated cells will be auto-updated in the Word document. This allows for a more dynamic document. More complex proposals with a lot of costs, business plans and so on that are developed over a longer period and may have their calculations changed

during that time can benefit from using dynamically linked Excel spreadsheets. See this chapter for details: [How do I Add Dynamically Linked Spreadsheet Calculations?](#)

The use of an Excel spreadsheet allows you to do complex calculations and many additional pieces of data that you generally do not want to include in the final presentation document. The dynamically linked Excel spreadsheets allow this by letting you do any level of calculations you need that can be done by Excel but then only link specific cells that you want in the final presentation to the Word document.

Dynamically linked spreadsheets are not meant to be a solution for every document. There are limitations to using OLE links. Too many links can cause performance or stability problems with Word, so it might not be suitable for using hundreds of links for example which can occur if trying to build a quote with many line items or a complex business plan with many financial calculators.

Linking Excel spreadsheets to your Word document can give you additional features you might not get even when using a 3rd party quoting system. A 3rd party quoting system could generate a quote embedded into your document but may not have the dynamic linking features that would allow for having changes made to the calculations auto-update in the Word document as you are developing a detailed or complex proposal or business plan.

This feature has a higher learning curve but still uses all the standard features of Word and Excel and also allows for creating very customized solutions including custom calculations and custom spreadsheets without having to purchase any additional 3rd party software.

The next level up is for companies that have very complex cost calculations that require a large line item database such as companies selling large quantities of products or product resellers who need to import catalogs of items from suppliers to generate sales quotes from. Proposal Pack Wizard integrates with the 3rd party quoting software QuoteWerks as a higher end solution that combines the Proposal Packs, Proposal Pack Wizard and QuoteWerks. See this chapter for more details: [How do I Integrate with QuoteWerks?](#)

WHAT HAPPENS IF DYNAMIC SPREADSHEET LINKING IS DISABLED?

In the Novice Edition of the Wizard the dynamic spreadsheet linking feature is automatically disabled. In the Expert Edition of the Wizard the features can be disabled across the board in the Preferences and it can be disabled on a project basis using the checkbox in the project screen.

In all cases of the feature being disabled the spreadsheets will not have dynamic OLE links added between them and the generated document created for the project.

This is how the Proposal Pack always worked in the past before this feature was added. The spreadsheets will still be copied to the project folders. The Wizard will not convert any of the <<R#C#>> tags into OLE links.

The Wizard will however replace all the known <<R#C#>> tags in the stock Word templates with more readable text related to what kind of information normally goes in those locations. This will put the generated documents in a state matching what the Proposal Pack generated documents looked like before the dynamic spreadsheet linking updates were made to the product.

For example, if a template used a tag such as <<R2C2>> linked to a cell in a spreadsheet that contained the current year, the Wizard will now just replace it with the <<CurrentYear>> tag which will then be converted to the actual year. Another example would be if a range tag was used for line item descriptions like <<R10-30C1>> it would be replaced with 3 lines of << Insert Cost Description >>.

Another example would be a range tag for cost totals like <<R10-30C8>> would be replaced with 3 lines of << \$ >>.

The Expert Edition also allows you to configure how many replacement lines you want to use instead of the default of 3.

The generated project Word document would then be edited as a normal Word document and all this information would be manually retyped with your actual information. This is how all versions of Proposal Pack worked in the past before the dynamic spreadsheet linking features were added and is how most documents are created.

The text that is used to replace the tags in the Word templates is contained in the Wizard's XLSFiles.ini database file. You can edit these text replacements.

The dynamic spreadsheet linking feature is not meant for use in all documents and situations. It is only for use by those who's calculation needs can be met by using Excel spreadsheets who want dynamically updated Word documents and who have the skills to use these advanced Word and Excel features.

HOW DO I ADD DYNAMICALLY LINKED SPREADSHEET CALCULATIONS?

Dynamically linking the Excel spreadsheets into your Word documents via the Wizard is a Wizard Expert Edition feature.

Microsoft Office has a feature called OLE (Object Linking and Embedding) which allows you to insert dynamic links between a Word document and another object so that updates to the external object automatically update inside the Word document.

Proposal Pack Wizard uses this feature of Word and Excel to create dynamic OLE links between individual cells in Excel spreadsheets and the Word documents generated by the Wizard.

The Wizard and our Proposal Pack templates are designed to support this out of the box plus allows you to completely customize our spreadsheets and templates or even add your own into the Proposal Kit system.

The main places this feature is used is for financial calculations in sales proposals and business plans, etc. and for time schedules.

We have premade a large collection of financial and schedule calculator spreadsheets complete with line item, price, quantity, tax, discount and other common fields ready for you to fill in the details. Our Proposal Pack templates are also already designed with tags in our financial and schedule templates, so our Wizard can figure out what spreadsheet cells to link to which parts of the Word documents.

You can customize these tags and cells as well. Many examples are also included in the sample document with product sales, service sales, business plans, grants and other situations with spreadsheets and linked Word documents you can use as guides.

Without having to make any customizations this feature is automatically enabled in the Expert Edition of the Wizard. You should use the stock setup first and create a test document to see how the links work and how updating a Word document from an Excel spreadsheet works before starting to make your own customizations. First create a project in the Wizard and add a template such as the Cost Summary and then build your document. Once opened both a Word document and Excel spreadsheet will open. Word will always ask you if you want to update the Word document that has embedded links. Say Yes and continue opening the document. How it works best is if you make updates to your Excel spreadsheet such as typing in your line item descriptions, prices, taxes, quantities, etc. or if using a scheduling spreadsheet your schedule items, dates and durations. Then save the spreadsheet. Then open your Word document and update the values. If you have the Word document open while making changes to the spreadsheets it will not auto-update on the fly.

Once you understand how spreadsheets are linked to the Word document you can start making customizations if you need more complex calculations or different cells displaying in the Word document.

Since dynamically linked cells is a built in feature of your Microsoft Office software you can manually create your own links as well once our Wizard has generated a document. Learn how to do this by reading more about these features in your Office help or online resources.

The following instructions are only for how to customize how our Wizard builds links between our premade spreadsheets and templates or using your own customized templates and spreadsheets within our system. It is not a complete reference on how OLE linking works in Microsoft Office.

WHERE ARE THE SPREADSHEETS?

The stock spreadsheets that will be copied into your project folder during the creation of each project document and linked to your project document are in the “Spreadsheets” subfolder of your Proposal Pack. There is a large collection of premade spreadsheets. There is nothing special about our premade spreadsheets other than they are standard Excel spreadsheets we have added lines and calculations to ahead of time.

Each time you create a project in the Wizard and build a document any associated spreadsheets will be copied from the stock folder of spreadsheets into your project folder.

For example, you create a project using the Cost Summary template. The Wizard knows that the Cost Summary template also has an associated Cost Summary Calculator spreadsheet. These files are CostSummary.docx and CostSummaryCalculator.xlsx. Our Wizard database has entries that tie all these together, so it knows

that when you add the Cost Summary template it needs to also copy the associated spreadsheet into your project folder.

Once you have created a project and built a document the generated Word document named FullProposal.docx and the spreadsheet CostSummaryCalculator.xlsx will both be in your project folder. When these are linked, if you make changes to the CostSummaryCalculator.xlsx file then open our FullProposal.docx document, the document will be updated with the changes made to the spreadsheet.

This allows you to make changes to your calculations, line items, schedules or any other linked data during the development of your overall proposal without having to manually make changes to totals, etc. in the Word document.

CAN MORE THAN ONE SPREADSHEET BE ASSOCIATED?

Yes. The Wizard allows for up to 9 extra spreadsheets to be associated with a template. By default, each template that has an associated spreadsheet only has one associated spreadsheet.

If you create a copy of any associated spreadsheet with an incremental number without any gaps in the numbering from 2 to 9 it will automatically be copied and opened along with the default spreadsheet.

The Cost Summary template in the CostSummary.docx file has one associated spreadsheet CostSummaryCalculator.xlsx. All Proposal Pack templates with associated spreadsheets follow this rule.

For example, the default Cost Summary spreadsheet is CostSummaryCalculator.xlsx. If you create a CostSummaryCalculator2.xlsx and CostSummaryCalculator3.xlsx file all 3 will be opened and copied whenever the default one is opened or copied by the Wizard

There is usually no reason to have more than one spreadsheet per template for normal use. When the Wizard generates your project document and you have selected multiple templates that have spreadsheets all of them will be combined and linked together. For example, if you have a Cost Summary and a Return on Investment chapter in your project each has its own spreadsheet and both will be linked to in the final generated document. There is no need in normal use to have multiple Cost Summary or Return on Investment spreadsheets for one project.

Where multiple spreadsheets for a single template comes into use is when you have created a custom template assembled from multiple Proposal Pack chapters like the example above. The final generated proposal FullProposal.docx will be linked to both the CostSummaryCalculator.xlsx and ReturnOnInvestment.xlsx spreadsheets in your project document.

To create a custom reusable template that will also be linked to spreadsheets should first disable the Dynamic XLS linking feature and you should also disable the replacing of dynamic XLS tags with replaceable text. Before generating your custom template click the Wizard's Preferences > Tools > Excel Calculators button. Then on the screen uncheck the Enable Excel Dynamic Links to Word Documents box and uncheck the If Excel Dynamic Link is turned off replace XLS tags with meaningful text from XLSFiles.ini file. Then you can build a template in the Wizard, customize the

tags and rename the files to get them ready to import as a custom reusable template.

The Wizard is also capable of using linked Word documents with Excel spreadsheets as reusable templates. This, however, adds more complexity and potentially slower processing to the process. Due to absolute links in the Word documents, every single linked cell must have its path updated. Updating existing OLE paths can be a very time consuming task and should only be done when you have a limited number of pre-linked cells. Whenever a linked template is copied to a project folder the matching spreadsheets are also copied then every cell must have its absolute path changed to the new folder. The Wizard manages all of this for you.

For people who want to optimize the project document generation process who are going to create many documents using the same layout you can import the FullProposal.docx back into the Wizard database as a selected template. To do this however you have to rename all the files, so they do not interfere with any others and to put it into the Wizard database all of the associated spreadsheets need to be renamed to match the rules the Wizard uses for how it knows to associate templates and spreadsheets and link them together. And this process will cause you to have multiple associated spreadsheets for a single template.

In this example you would rename the generated project documents FullProposal.docx to a unique name such as OurCustomProposalLayout.docx then rename the project spreadsheet CostSummaryCalculator.xlsx file to OurCustomProposalLayoutCalculator.xlsx and the project spreadsheet ReturnOnInvestmentCalculator.xlsx file to OurCustomProposalLayoutCalculator2.xlsx

Then you will have to update the <<R#C#>> tags in the OurCustomProposalLayout.docx file so the Wizard will know which spreadsheet each tag is associated with. In this example any tags in the Return On Investment chapter would have to be changed to <<XLS:OurCustomProposalLayoutCalculator2:R#C#>>

Once these customizations are made then you can follow the instructions to add your custom multi-spreadsheet associated template into the Wizard database as a selectable template. You will also have to copy your 2 new spreadsheets into the Proposal Pack's "Documents\Spreadsheets" subfolder.

Read this chapter for details on adding custom templates into the Wizard: [How do I Reuse a Previous Document Over Again?](#)

WHERE ARE THE TEMPLATES WITH OLE LINKS?

There are no OLE links to start with in the Proposal Pack stock templates. The Proposal Pack templates include text tags such as <<R#C#>> which define where the Wizard will insert an actual OLE link to a spreadsheet during the project document assembly process.

Because we use tags in the templates to define where links to specific cells in a spreadsheet will be created this gives you the ability to put your own tags in the templates. This way you can cause different cells or additional cells to be linked wherever you need them. For example, you might want to link quantity cells or different totals or custom calculations.

Once the Wizard has built your project document in your project folder it will have OLE links to the spreadsheets that were also copied into your project folder.

HOW CUSTOMIZABLE ARE THE SPREADSHEETS AND TEMPLATES?

We have premade a large collection of Excel spreadsheets. You can completely customize these spreadsheets as you like. You can also create your own spreadsheets from scratch and use them within our system.

We have pre-added tags to our financial and calculator related Proposal Pack chapter templates that match the cells in our pre-made matching Excel spreadsheets.

The system works by having a Word template with a tag that our Wizard will understand such as <<R2C2>> which our Wizard knows is going to be turned into an OLE link to Row #2 and Column B of the associated spreadsheet. So, if you want to add your own link to a completely different cell you just have to know what cell that will be. For example, you made a custom tax calculation and put that in an empty cell in our spreadsheet which is say row 20 in column c, you just need to put the tag <<R20C3>> in the Word template. See below for a complete description of how to make OLE tags.

We also give you the ability to easily create brand new spreadsheets of your own and our Wizard will link them into templates that never had OLE links setup for them. All you must do is add a new spreadsheet into our Spreadsheets subfolder of the

Proposal Pack that matches the name of one of our Word templates.

Let's say you want to create a custom spreadsheet for the Accessories template which is our Accessories.docx template. This stock template does not have any associated spreadsheet. All you must do is make your own AccessoriesCalculator.xlsx spreadsheet and copy it into our Proposal Pack's Spreadsheets subfolder and the Wizard will find it and copy it into your project folder if you added the Accessories template to your project.

Then you will need to add <<R#C#>> tags into the stock Accessories.docx template to match whatever cells you want to populate in the Word document from your custom spreadsheet. Say you made a spreadsheet with a list of accessories and in Column A rows 10 to 30 you have your list of accessory names and in Column D rows 10 to 30 you have your list of accessory prices.

You could then create a table in the Accessories.docx template and in one cell add a tag <<R10-30C1>> and in the next table cell add a tag <<R10-30C4>> (i.e. column D is the 4th column).

During the Wizard's project document assembly process, it would then build in your customized Accessories.docx template into the generated FullProposal.docx document and copy your custom AccessoriesCalculator.xlsx spreadsheet into your project folder. All you do now is make changes to your custom spreadsheet, save your updates then open the project's FullProposal.docx file and your accessories spreadsheet calculations will be displayed in your table in the Accessories page of the document.

This gives you the ability to completely customize the system by altering our stock templates and spreadsheets and create your own custom spreadsheets and letting our Wizard do the detailed work of linking everything together.

HOW DO I CUSTOMIZE THE SPREADSHEETS?

This is the easiest part of making a custom system tied into the Wizard. You can customize the spreadsheets or make your own as normal Excel spreadsheets. There is nothing special about how the spreadsheets are customized. You just must know which cells are going to be linked to your Word document, so you can add the matching tags to the Word template and have the cell formatting set to how you want it displayed. For example, if you are using financial cells use a currency symbol and either no cents or 2 digits for cents. (i.e. \$100 or \$100.00) as that is the exact value that will be updated into your document. If you are displaying a percentage set the cell to display 100% or 10.4% for example.

If you are making your own custom spreadsheet to go with one of our templates that did not originally have a spreadsheet you just need to name the file in a way the Wizard can find it. Take the file name of the Word template you are intending to link the spreadsheet with and add the word “Calculator” to the end and save it with a “.xlsx” file extension. For example. If you are going to put OLE links into the Accessories chapter, which is in the Accessories.docx template you just create your own custom AccessoriesCalculator.xlsx spreadsheet and put it in the Proposal Pack Spreadsheets subfolder where the rest of our stock spreadsheets are.

If you are editing one of our stock chapters that already has an associated spreadsheet such as the Cost Summary chapter which is in the CostSummary.docx template and already has its own CostSummaryCalculator.xlsx spreadsheet you just edit our stock spreadsheet as needed.

HOW DO I USE AN EXISTING SPREADSHEET?



<https://www.proposalkit.com/html/videos-reuse-existing-excel-spreadsheets.htm>

If you have our own custom spreadsheet you want to use there are a couple options.

First, you could just save your custom spreadsheet over one of our spreadsheets then adjust the <<R#C#>> tags in the related Word template to match the cells in your custom spreadsheet that you want to link into the final generated Word document.

Second, another option would be to open one of our existing spreadsheets and add a new Worksheet to it. Then copy your custom spreadsheet entirely into that new worksheet. Because you can link cells between worksheets in an Excel spreadsheet you can then link the final totals and cells you want to use to the cells in our premade worksheets. This way you can populate our premade cost summary for example with data from your custom worksheet and you then do not have to update the Word templates to change the tags.

This is a good option to use when you have a very customized or detailed spreadsheet for a specialty situation you want to use without having to customize it. Typically, you do not need to make changes to a custom spreadsheet to get it to work with the Proposal Pack Wizard's dynamic XLS linking feature. You just need to have it in the file name the Wizard knows about and have tags in the associated Word template that match the cells you want to show up in your Word document.

HOW ARE TAGS USED TO CREATE OLE SPREADSHEET LINKS?

Tags are inserted into the stock Proposal Pack templates to define the exact cell or range of cells that will be linked to in a specific sheet within an Excel spreadsheet.

The result is that the standard Microsoft Office OLE linking feature will be used to link spreadsheet cells into specific locations within a Word document so that the Word OLE features can be used to update the Word document as changes are made to the linked spreadsheets.

To do this we insert text tags into the Proposal Pack Word templates that the Wizard will then turn into OLE links during the project document generation.

The dynamic Excel link tags are in a similar format to other Wizard tags such as those for the company and client data where we put our tags in << >> brackets.

The complete syntax for our dynamic link tags is:

<<[XLS:XLSFile:]R[S#]#[-#]C#[S#]>>

Examples of this are

-  <<R#C#>>
-  <<R#-#C#>>
-  <<R#C#S#>>
-  <<R#-#C#S#>>
-  <<RS#-#C#>>
-  <<RS#-#C#,#,#>>

 <<XLS:CostSummaryCalculator:R#C#>>

Rows start at 1 and correspond to the numerical row numbering of Excel. Row 1 is R1 and Row 10 is R10.

Columns start at 1 and correspond to the alphabetical column numbering of Excel. Column A is C1 and Column D is C4.

The tags also compress multiple rows of links into a single tag for shorthand. All the rows in the range must be in consecutive order in the spreadsheet. <<R10-30C1>> is the same as having 20 tags in a row in the template <<R10C1>>...<<R20C1>>...<<R30C1>>. The Wizard will expand the tags with ranges into a list of links. In this example the one tag will be expanded and linked to 20 different cells.

Excel spreadsheets can have multiple sheets and the tags allow for calculations to be linked to any sheet. By default, the first sheet “Sheet1” is always linked to if the S# part of the tag is missing. <<R2C2S1>> is the same as <<R2C2>>. <<R2C2S3>> means that Row 2 Column B of sheet #3 will be linked to.

The order of the sheets is not used to determine the first sheet. The first sheet is the one named “Sheet1”. The sheets can be reordered within the spreadsheet. Usually the sheet being used is moved to the front to make it easier to locate. If you are using Sheet3 for your calculations in one of the costing spreadsheets make sure to use S3 in the tags in the Word document. It doesn’t matter if Sheet3 is the topmost sheet viewable in the spreadsheet.

All the tags like this with only rows, columns and sheets are assumed to be linked between that one template and its associated spreadsheet. For example, <<R2C2>> in the CostSummary.docx template will always be linked to Row 2 Column B of the CostSummaryCalculator.xlsx spreadsheet because the Wizard knows to associate which templates with which spreadsheets during the project document generation process.

There are times when you might want to put a dynamic OLE spreadsheet link into a different location within the final assembled document so that is when the **XLS:XLSFile:** part of the tag is used.

This allows you to define which specific spreadsheet to link to when you are using a tag outside of the template the spreadsheet is associated with. One example is if you are doing a business plan funding or grant funding request proposal and you want to put the total amount being requested for funding in the Cover Letter or Title page of the document so it can be auto-updated if the number changes whenever the Funding Request page changes to avoid making mistakes and forgetting to update a value in another part of the overall document.

XLSFile is the name of the Excel spreadsheet file without the file extension. So if you were linking to the CostSummaryCalculator.xlsx file you would use XLS:CostSummaryCalculator:

For this example, say you are using the Funding Request chapter in your document which is in the FundingRequest.docx template and has an associated spreadsheet FundingRequestCalculator.xlsx. All the normal linking rules

mentioned above apply when linking cells from the spreadsheet into the Funding Request chapter.

But now we also want to link the total funding request amount into the Cover Letter and Title Page. What you would do is edit the stock CoverLetter.docx and/or TitlePage2.docx templates and insert the tag <<XLS:FundingRequestCalculator:R74C2>> into the text.

For example you might insert a sentence such as:

“<<Company>> is requesting funding of <<XLS:FundingRequestCalculator:R74C2>>.”

Now when you generate your project which is using the Cover Letter, Title Page and Funding Request among other chapters the funding request calculation cell of the spreadsheet will be dynamically linked to that location of your Cover Letter as well as any cells that are linked into the Funding Request chapter.

The Wizard’s tag to OLE linking system allows you to use the full functionality of Word and Excel’s linking features in a way that lets the Wizard do the more complicated tasks of inserting links and ensuring formatting is correct and letting you concentrate on the actual details of what you need to write.

HOW DO I EXPAND TAGS INTO NEW TABLE ROWS?

Ranges of tags are expanded by default into the same table cell that the tag was in. This means the tag <<R10-20C3>> will be expanded into 10 rows with line breaks after each row all inside the same table cell.

This works well if you have ranges of linked spreadsheet cells where the length of each piece of data does not wrap to a new line. When this happens, and you also have multiple ranges in a single row of your Word table the resulting data can be out of alignment across the cells of the table in that row.

For example, you have a single table row with 3 columns, the first column is the item description and the next column is the quantity and the last column is the amount. If your line item descriptions cause the data to wrap they won't all line up with the quantity and amount columns and you will have to manually reformat or edit the data for everything to line up and look correct.

In cases like this it can be helpful to expand each item in the tag range into its own new row. This way all rows will stay lined up in the table even if the data in one cell of one row wraps to a new line.

There are two ways to make the Wizard expand your range tags into new rows instead of within the same cell as the tag.

The quick and easy way is to check a box in the Preferences. In the Wizard's Preferences > Tools > Excel Calculators screen check the box labeled Expand all ranges into new rows.

Now when you build your project documents all <<R#C#>> range tags will be expanded into new rows. For example, the tag <<R10-20C1>> will have 9 new rows added to the table and the cells of the new rows will be populated with the expanded tag.

That option works well if you know you want every range tag in every table of the entire document to be expanded into new rows.

If you only want specific rows expanded and not others, then you have to edit the stock Word template and use <<RS#C#>> tags. If you use “RS” instead of “R” in the tag the Wizard will know to expand those into new rows. You need to have every range tag in a row using the “RS” version of the tags to get them to all expand correctly. For example, if you have a row with 3 columns for a line item, quantity and amount using tags <<R10-20C1>>, <<R10-20C3>> and <<R10-20C8>> then you need to change all three tags in that row of the stock template table to <<RS10-20C1>>, <<RS10-20C3>> and <<RS10-20C8>>

There are a few rules to keep in mind to ensure ranges are expanded correctly. Use the same numerical range in all range tags on the same row. For example, do not use <<RS10-20C1>> for the description then <<RS10-30C3>> for the quantity tag in the next table cell over.

Expansion of tags into new rows only works when those tags are already within a cell of a Word table.

You cannot use tables where an individual cell in a row has been split into multiple rows within the original row. The Wizard must be able to programmatically step through a Word table row by row and cell by cell and Word will generate errors if it encounters a cell that has been split into new rows within a row.

If you are using the XLS:filename: feature of the tags to identify a specific spreadsheet to link to then all tags on the same row must also use the XLS:filename: in the tag. For example, you cannot use <<RS10-20C1>> for the description column then <<XLS:filename:RS10-20C3>> for the quantity column.

HOW DO I EXPAND A TAG ACROSS MULTIPLE ROWS BUT STILL HAVE MULTIPLE COLUMNS WITHIN THE SAME CELL?

Using an RS tag, you can put multiple linked spreadsheet cells within the same Word table cell when expanding the tag into multiple rows.

There are two delimiters defined in the Wizard Preferences > Tools > Excel Calculators screen for the text to insert between each tag when its expanded. You can define special characters in the delimiter by using “Chr(#)” in the text of the delimiter. Chr(13)Chr(10) for example translates into a paragraph break and Chr(32) translates into a blank space. The default for the 1st delimiter is “Chr(13)Chr(10)Chr(13)Chr(10)” and the default for the 2nd delimiter is “Chr(32)-Chr(32)”. Because the Wizard will strip leading and trailing spaces from data fields in its database using the Chr code for a space gets around this.

This is done using the tag format of <<RS#-#C#,#,#>>.

For example, <<RS5-7C1,3,5>> will cause the Wizard to expand the tag into three different table rows but will put all 3 linked columns one, three and five into the same table cell as follows:

So, if your tags are defined like this in your template:

<<RS5-7C1,3,5>>	<<RS5-7C9>>
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The Wizard will expand them like this before it merges the data into them using the default delimiters:

<<R5C1>> <<R5C3>> - <<R5C5>>	<<R5C9>>
<<R6C1>> <<R6C3>> - <<R6C5>>	<<R6C9>>
<<R7C1>> <<R7C3>> - <<R7C5>>	<<R7C9>>

HOW DO I REMOVE ROWS FROM THE STOCK SPREADSHEETS?

The stock spreadsheets are designed with enough rows already set aside and tag ranges set to accommodate most needs. You do not need to remove anything from the spreadsheets. Just ignore an extra line item rows. The stock tag ranges will match the number of rows set aside in the stock spreadsheets. For example, the first range of line items for the Cost Summary will accommodate up to 20 line items which is enough to cover most proposals.

This will cause additional blank rows to be linked into your Word template which you might want to remove the extra rows. This is done by either editing the tag in the Word template to only use the range of rows you need. This would only be done if you are going to be creating many proposals and you know you will only need a smaller number of rows every time linked from the spreadsheets.

A quick way to reduce the number of linked rows without having to edit the range in the tag is to use the Maximum Rows drop down in the Project screen. By default, it is set to "Use All Available". This means if you have 20 lines in the spreadsheet for rows and a tag that spans that range such as <<R10-30C1>> then 20 rows will be linked regardless of how many you are going to use. You can on a per-project basis set that drop down to a number between 1 and 20 and the Wizard will stop expanding the range at that number. So, if you only needed 5 rows instead of 20 to be linked for a project set the drop down for the Maximum Rows to be linked to 5.

Using the drop down Maximum Rows limiter option will also auto-compress the table to fit only the final number of rows. The idea is

to use the Wizard to do most of the document formatting to reduce the amount of manually updates that need to be done to clean up the final generated document.

If you wind up with more rows than needed you can also delete any extra OLE links from your assembled project document. No changes must be made to the spreadsheet.

HOW DO I ADD MORE ROWS TO THE STOCK SPREADSHEETS?

If you are using the stock premade spreadsheets and templates and need to add more rows you need to edit both the spreadsheet and the tags in the associated spreadsheet.

Before you start editing the stock spreadsheets first see if that spreadsheet has alternate sheets that may cover the changes you need.

For example, if you are using the Cost Summary chapter and need to have more than 20 line items we have added alternate sheets with up to 40 line items. Look at sheets 6 to 10. If this solves the problem, then rename Sheet 6 to Sheet 1 then open and edit the CostSummary.docx template to adjust the tags as needed. So, you don't have to also figure out what to change the tags to we have also created some alternate tables to match the alternate sheets in these spreadsheets in many cases.

To find the alternate table you can copy and paste into your CostSummary.docx template find the Alternates subfolder in your Documents subfolder of your installed Proposal Pack and open the Sheet6.docx file. This will have a table in it with tags that will match

the Sheet #6 of the Cost Summary (or any other cost calculator with multiple alternate sheets). Copy and paste this table in place of the one in your CostSummary.docx template.

Or, you can edit the tags in the CostSummary.docx template to match the cell ranges and locations of the alternate sheet in the spreadsheet.

Finally, you can also edit the first sheet of the spreadsheet to insert new rows. If you make any changes to the spreadsheets like this that also change the locations of other linked cells in the spreadsheet you will have to change check and change any other tags in the template that may have changed locations in the spreadsheet. You will also need to make sure all the spreadsheet calculations are still correct as making structural changes to spreadsheets can cause some cell formulas to not be using the correct rows.

We have created premade spreadsheets and templates that will cover most needs as-is. After that check to see if we have made any alternate versions that will cover your situation. After that you can expand the existing template as needed.

In the end, all you need to do is have a spreadsheet with correct cell calculation formulas and then put in matching tags in the Proposal Pack templates associated with those spreadsheets.

WHAT CONFIGURATION OPTIONS ARE THERE FOR THIS FEATURE?

See the Wizard's Preferences > Tools > Excel Calculators screen for all of this feature's configuration options.

You can completely disable this feature and use static unlinked Word documents by unchecking the Enable Excel Dynamic Links box. The Wizard will then run in the same manner it always did in past versions before dynamic linking features were added.

To make it easier and more intuitive for people to get spreadsheet updates applied to their document by default the Wizard will turn on the Word features to Auto-Update Links when Word documents are both printed and opened. The Wizard is only turning on these options that are part of your Word program. Our Wizard does not control how OLE links work or how they are updated once the documents are built.

To help optimize performance or warn about potential performance issues by using too many OLE links the Wizard will display warnings if tables have over a certain number of cells or if more than a certain number of OLE links are added to a document. You can change these numbers here.

The stock templates and spreadsheets usually have 20 to 40 rows set aside for line items as that covers most needs and if you start trying to use more than this, the number of needed OLE links will turn into a performance problem with Word. A quick way to improve performance and reduce the amount of custom editing without having to edit the stock spreadsheets to reduce the tag ranges is to use the Maximum rows drop down when you know

you will not ever need more than a certain number of linked items in a row. For example, if you are writing product or service sales proposals and you won't ever be using more than 7 line items in your quotes then set the Maximum row drop down to 7. This will cause the Wizard to only expand ranges of cells to 7 items instead of the entire range in the tag. If a tag was set to a range of 20 cells like <<R10-30C1>> but you used a Maximum rows value of 7. Then only R10 to R16 will be linked from the spreadsheet.

By default, the Wizard will open both the generated project document and any associated spreadsheets when you open your project for editing. You can disable the default opening of associated spreadsheets by unchecking the Open Excel Files box. You can still open them from the Edit Current Project > Your Calculator Spreadsheets tab.

By default, the Wizard will create the dynamic OLE links using absolute paths to the spreadsheets that are in the project folder. Absolute links are a requirement of Microsoft Word. This means if you do copy a linked document to a different folder then the paths must be updated. The Wizard will do this for you in many cases such as setting up reusable templates, creating projects and cloning projects.

By default, when the Wizard expands tags that are ranges of linked cells it single spaces between the links. If you want to double space between each expanded line check the Double space checkbox.

There are also some fields for customizing how the Wizard will replace tags with text when the Excel Dynamic Links feature is disabled. <<R#C#>> tags will be replaced with more readable text,

so the user will know what kind of information should go in those locations. For example, if <<R72C8>> is a dollar amount for a total it will be replaced with << \$ >> so the user knows to type in a dollar amount in that location. Ranges are also replaced by 3 lines by default and that number can be changed here. <<R10-30C1>> may be replaced with 3 lines saying << Insert Cost Description >>. If you want a different number of rows such as 1 or 5 then change that number in the field here. The double spacing option also applies to these instructional lines.

The default Proposal Pack costing spreadsheets (i.e. the Cost Summary, Estimate, Quote, etc.) all have multiple worksheets for different situations. Also, any given sheet can have many different table layouts depending on what data you want displayed in the final generated Word documents. This screen has an option that allows you to easily customize the system to pick a specific sheet in a multi-sheet costing spreadsheet and pair it with a matching table layout that may differ from the stock Word template layout. These are called Alternate templates. By selecting an alternate worksheet and alternate table layout here the Wizard will swap in that alternate table and set the alternate worksheet as the topmost visible sheet whenever you generate project documents. This feature is meant to be a quick and easy way to pick one of several premade variations. You can also customize the spreadsheets and tables yourself.

HOW DO I USE THE ALTERNATE COST TABLES AND SHEETS?

When your project documents are finally generated, and you are using a linked Excel spreadsheet the cells of one of those sheets are dynamically linked to the Word document. When you are using one of the cost related spreadsheet such as the Cost Summary, Estimate, Quote or similar spreadsheets those spreadsheets have many different calculators to choose from. For example, the default worksheet has 4 categories with sections for ongoing monthly and yearly line items. There is another sheet with 10 sections defined and another sheet with just one section that has up to 40 line items.

These variations on the calculator spreadsheets means everyone should find a cost calculator that will work for their situation.

In addition to having several calculators to choose from within a single cost spreadsheet there are alternate table layouts to choose from as well.

The default table layout links each line item's description, quantity and total amount to the rows in the Word table. Some people may want to only link the line item description and final totals while others may want to link the line item description, unit price, quantity and final totals.

While you can customize the Word table layouts to suit your needs, we have premade several common variations.

The Wizard allows you to choose an alternate worksheet and an alternate Word table layout from the Preferences > Tools > Excel

Calculators screen.

Click the Alternate worksheet drop down and pick from any one of the alternate worksheets and Word table layouts.

If you set it to the Default setting the Wizard will use Sheet1 of the cost spreadsheets and the Word table layout in the stock Word templates.

If you set it to an alternate worksheet then that worksheet number will be moved to the top worksheet of the spreadsheet and when your project is assembled the Wizard will swap in the alternate Word table layout into the cost page of the generated document. For example, if you select **Sheet #6 (1 long section of line items)** from the drop down the following will happen.

If you selected the Estimate chapter for your project the Estimate Calculator spreadsheet copied into your project folder will have Sheet6 moved to the front of the spreadsheet. Then the Estimate chapter of your document will have its stock table removed and the alternate template (Sheet6.docx) will be inserted in its place. The Wizard will then replace the <<R#C#S6>> tags with links to Sheet6 of the spreadsheet. This all ensures the correct cells are linked into your generated document and is faster and easier than having to manually edit our stock tables, tags and spreadsheets when we have a combination premade that will work for your situation.

The Wizard will first look in the Alternates subfolder within your Wizard's project document folder for the alternate Word tables it will swap in. When you click the Edit Alternate Template button after selecting from the drop down list the Wizard look in its folder

first. Then if it is not found there it will check the Alternates subfolder in your Proposal Pack Documents subfolder. This allows us to provide new alternate tables in future Wizard patches more easily than within Proposal Pack template product updates.

When you click the Edit Alternate Template button the Wizard will also give you the option to open one of the cost related Excel spreadsheets. This is helpful if you want to compare an alternate Word table layout side by side with its matching spreadsheet worksheet.

The Wizard also will open the Alternate Word template if you have set this feature when you use the Edit Template button in either the Document Styles > Edit Style > Edit Template or the Document Project > Pick Document > Add Template screens. This helps ensure you will be editing the Word template that will be built into your project documents. If you set the Alternate template to the Default setting. Then all the screens in the Wizard that open cost templates will revert to opening the stock Proposal Pack chapter templates.

When customizing our spreadsheets, it is important to keep the spreadsheet's worksheets named the same as they are starting out. For example, do not rename Sheet1 to a different name. The links made by the Wizard specifically reference the linked sheet by their default names (i.e. "Sheet1", "Sheet2", etc.). Our stock multi-worksheet cost spreadsheets also put a unique identifier in the "CA1" row that the Wizard looks for to ensure it is working with one of our premade worksheets when using the alternate Worksheet feature. This CA1 cell is set to 100 times the sheet #. So, for worksheet 5 which is named Sheet5, then cell CA1 is set to 500. If you start customizing your own cost worksheet and make changes

that violate any of the rules the Wizard is looking for then you will have to make sure to use Sheet1 and the Word table in the stock Proposal Pack chapter template and do not use the S# code in the <<R#C#>> tags.

The short version is that the Wizard takes care of only showing you the actual Word document and worksheet you have configured and that it will build into your documents when you use this Alternate drop down list. All you must do is make your custom text edits and let the Wizard figure out how to assemble and link everything.

If you are using Sheet #5 make sure you are editing Sheet5 of the cost spreadsheet you choose to use and that the tags in Word table for that cost template use <<R#C#S5>> tags.

If you are using the defaults then everything defaults to Sheet #1 and you will edit the default top worksheet titled Sheet1 and the default tags in the Word table will be <<R#C#>> tags (without the S#).

HOW DO I USE INTERNATIONAL FINANCIAL CALCULATIONS?

Using international data is easy. Change the cell formatting in the spreadsheet to use whatever financial or date format you want, and the Word document will be auto-updated with the new format. This is all done just within the Excel spreadsheet.

HOW DO I SEE THE ACTUAL DYNAMIC OLE LINKS?

Normally you only see the linked data. If you have links to blank cells you will not see anything in your Word document that would indicate there is a linked cell there. Also, if you have many cells with identical data you might not be able to easily tell them apart. Being able to see the actual format of the how the link is made can help diagnose problems.

All you must do is click the Alt-F9 on your keyboard which is the Word command to toggle fields, so you can see what the actual Word field linking looks like:

```
{ LINK Excel.Sheet.8 "C:\ProposalKit\ProposalPack\ProposalProjects_V#\My New Project\CostSummaryCalculator.xlsx" Sheet!R4C1 \a \t \* charformat }
```

This is what the <<R4C1>> text tag will be converted to by the Wizard when used in the Cost Summary template. By knowing how to toggle the field codes you can also edit the links in the generated document or even insert your own to further customize a generated document that is already linked to one or more spreadsheets. The OLE links are editable text as well when you toggle the field codes in the Word document to make them visible.

You can also insert your own OLE links yourself at any time by using the field code features in Word. Read your Word documentation or online help on how to use this feature.

CAN I USE CUSTOM STYLING AND FORMATTING ON LINKED CELLS?

The Wizard will try and apply the formatting used on the text field it is replacing with a link to the link once the link is inserted. This is best done with Word styles.

Because the text tag (i.e. <<R#C#>>) is deleted and replaced with a dynamic link sometimes custom formatting applied to the text tags will not be applied to the linked data.

If any custom formatting disappears from the link create a Word style with your styling settings and apply that Word style to the text tag.

HOW DO I CUSTOM FORMAT DATA IN THE CELLS FOR PRESENTATION?

To custom format what a cell will look like when it shows up in your Word document apply the formatting to the cell in the Excel spreadsheet. This is for how the data is expressed not the font styling. For font styling types of formatting use Word styles and apply that to the link in the Word document.

For data formats such as the currency character, the number of decimal places, rounding of amounts, etc. should be done in the spreadsheet.

One example would be if you are showing a percentage and you want two decimal places with a % sign. Set the cell formatting to show the data in that format.

Another example would be if you want a dollar value rounded up to the nearest \$1,000 dollars. Maybe for a funding request you want to keep the funding value being requested rounded up, but your calculations are showing something like \$100,356.16. Apply a rounding function to the spreadsheet cell to round up the displayed value to the nearest \$1,000 so it displays in the spreadsheet as \$100,000 with no cents and then link that cell into your Word document.

If you want to keep your original calculation in the spreadsheet all you must do is use an empty cell somewhere in the spreadsheet that copies the value in the original cell, then apply your custom formatting to the new cell. Then link that new cell to the Word document. For example, your final calculation is in Row 72 Column B as \$100,356.16 and Row 72 Column D is empty in the spreadsheet. Set the calculation for Row 72 Column D to be =72B. Then apply a rounding function to Row 72 Column D so that it displays as \$100,000. In your Word template instead of linking the Word document to <<R72C2>> you will use the tag for the new calculation which is <<R72C4>>.

HOW CAN I MAKE MULTIPLE COPIES OF A SPREADSHEET?

One of the situations where people make multiple copies of a stock template is when they have multiple sets of products or services they offer and for any given client they want to pick one of multiple premade sets of products or services to add to the proposal.

The Wizard supports this by allowing you to make one or more copies of any existing chapter template. The Wizard will also make

a copy of any associated spreadsheet as well. If you have 3 sets of products for example you can create 2 additional copies of our Cost Summary template which will also create 2 additional copies of the CostSummaryCalculator.xlsx spreadsheet.

See this chapter for more details: [How do I Add New Documents to the Interface?](#)

If you only need one copy of the chapter template but you want to swap between multiple cost calculators and all those cost calculators have the same structure (i.e. the same cells in the same locations). You could also use the one stock chapter template and stock calculator spreadsheet but make multiple sheets within that spreadsheet. Excel allows you to create multiple sheets. You can copy and paste entire sheet such as the default Sheet 1 to another sheet. Then when you generate your document rename which ever sheet you want to be your items for that project to Sheet 1 and then open and update the links in the document. Most of our cost calculators already have 10 sheets for different types of calculations. You can overwrite any of our additional Sheets #2 to #10 or make additional sheets starting at Sheet #11.

If you keep the structure of the cells the same and are only changing line item descriptions and amounts or cell calculations, then you do not need to change the tags in the associated Word document. If you are using spreadsheets with different cells in different locations than what is linked to in the Word templates, then you should use the feature where you create multiple copies of a template each with its own associated spreadsheet and update the document tags appropriately.

ARE THERE SAMPLES OF CUSTOM OR COMPLETED SPREADSHEETS?

There are hundreds of sample proposals included with each Proposal Pack and many of them include associated spreadsheets and financial and scheduler related chapters linked to the spreadsheets you can look at.

Most of them use the stock templates and <<R#C#>> tags and associated spreadsheets. Most of the customization in the samples is done in the calculations of the spreadsheets.

Some samples also include examples of using multiple sheets within the linked spreadsheet. Look at the “Janitorial Services Sample Proposal” for an example of a spreadsheet that uses multiple sheets with calculations spanning the sheets to calculate square footage costs within the main spreadsheet. This is a good example of how the stock spreadsheets can be heavily customized for specialized situations and still work within our system.

Look at the “Commercial Office Real Estate Lease Proposal” sample for an example of a spreadsheet that uses 3 different ROI calculators on different sheets that are all linked into one chapter of the generated Word document.

These samples will give you ideas on how you can create completely custom spreadsheet calculators and calculations to solve your business needs and still link them into our Word templates for the final presentation in the generated documents by adding matching <<R#C#>> tags into the chapter templates.

If you are going to create a custom template that also has linked spreadsheets there are sample files you can look at based on this example. Look in your Wizard install project folder in the CustomizationExamples subfolder. Unless you changed your Wizard's default install location it will be in the folder:

`c:\ProposalKit\ProposalPack\ProposalProjects_V#\CustomizationExamples\ReusableTemplateWithSpreadsheets`

HOW DO I LINK TWO DOCUMENTS TO THE SAME SPREADSHEET?

This is a good example for a situation where you might want to create a proposal and an invoice or contract all at the same time and linked to the same financial information or calculations.

You might send the proposal document first to a client then send the invoice or contract later, but you want to create them all at the same time and using the same data.

This requires some customizing of the templates and Wizard database first, so you can create two separate project documents at the same time both linked to a single spreadsheet.

In this example we'll use the Invoice template to be created separately from the main project document using a Cover Letter, Title Page, Cost Summary and About Us. By default, the Invoice would be assembled into the main project document and would also have its own separate spreadsheet InvoiceCalculator.xlsx where we want to use the CostSummaryCalculator.xlsx cells linked into both the Invoice and generated project document.

We first go to the Wizard's Preferences > Tools > Configure Proposal Files screen and select the Invoice template from the "Pick a Document or Section" drop down. Click the Sort List Alphabetically button to make it easier to locate the template in the list.

Once you have selected the Invoice then click the Edit the Selected Document button. On the next screen uncheck the Combine into Master Document box and uncheck the Enable Matching Spreadsheet box.







This will cause the Invoice to be generated separately from your proposal document in your project folder and the Wizard will not copy the InvoiceCalculator.xlsx spreadsheet into your project folder. You can also change the drop down for which file or section the Invoice will be placed after to either Section 10, Section 11, or Section 12. Any templates in these sections will automatically be generated as documents separate from the main project document.

Save your Preferences changes. Now all that is left is to manually update the stock Proposal Pack's Invoice.docx template to change the <<R#C#>> tags so that the Wizard knows to link them to the CostSummaryCalculator.xlsx spreadsheet.

Find and open the stock Invoice.docx template. You can do this by clicking Button #1 – Document Styles > Edit Style > Manage Templates > Edit Stock Templates. Then select Invoice from the drop downs. Click the Show Lists in Alphabetical Order button to make it easier to locate. Click the Edit Selected Template once you have found and picked it from the drop down list.

All you need to do is add the text XLS:CostSummaryCalculator: to the start of all of the <<R#C#>> tags. A quick way to do this is a mass search and replace across the Invoice.docx template changing “<<R” to “<<XLS:CostSummaryCalculator:R”

Because some of the cell calculations are in different locations of the Invoice vs the Cost Summary calculator spreadsheets some tags will also have to have their cell locations changed such as the cells the sub totals, taxes and grand totals are located in. You can customize the tags and templates as you see fit for whatever cells you want to show in the final documents.

-  Change <<R27C2>> to <<XLS:CostSummaryCalculator:R66C2>>
-  Change <<R28C2>> to <<XLS:CostSummaryCalculator:R67C2>>
-  Change <<R36C2>> to <<XLS:CostSummaryCalculator:R75C2>>
-  Change <<R5-24C1>> to <<XLS:CostSummaryCalculator:R5-24C1>>
-  Change <<R2C2>> to <<XLS:CostSummaryCalculator:R2C2>>
-  And so on for each tag.

Save your edits to the stock Invoice.docx template and now you are ready to create a project with a separate Invoice tied to your project documents Cost Summary spreadsheet.

Go back to the Wizard home screen and click Button #2 – Document Projects > Add New Project > Pick Documents > Add Templates tab. Now select the Invoice, Cover Letter, Title Page, Cost Summary, Company History and Back Page.

Now click the OK, Use Selected Templates button and then click the OK, Save Project and Build Documents button.

Once the Wizard has generated your project documents you will have an Invoice.docx, FullProposal.docx and CostSummaryCalculator.xlsx files created and linked together.

As you make changes to the CostSummaryCalculator.xlsx spreadsheet then you open the Invoice.docx and FullProposal.docx files they will both be updated with the changes made to the spreadsheet.

This situation can also be used for creating contracts with lists of specifications or equipment lists based on the line items in a proposals cost summary. You can customize the templates and spreadsheets to suit your needs.

If you are going to create a custom template that also has linked spreadsheets there are sample files you can look at based on this example. Look in your Wizard install project folder in the CustomizationExamples subfolder. Unless you changed your Wizard's default install location it will be in the folder:

c:\ProposalKit\ProposalPack\ProposalProjects_V#\CustomizationExamples\ReusableTemplateWithSpreadsheets

CAN I COPY DYNAMICALLY LINKED DOCUMENTS TO ANOTHER PC?

Yes, however for Word to find the linked spreadsheets all the Word documents and linked spreadsheets must be copied together and into the same folder.

Word for Windows will automatically find and fix the links and will relink the spreadsheet to the Word document if they have been moved together to another computer.

You do not need to use the Proposal Pack Wizard software with the generated documents and spreadsheets after they are created. The Wizard can help you open and manage your project documents however it is not tied to your Word and Excel files.

This means you can generate a Word document in our Wizard with a linked Excel spreadsheet then move that document and spreadsheet by themselves to a different computer and use them as normal Word and Excel documents.

Microsoft Word requires all the internal OLE links to external files to use absolute paths. This means you will have to fix any of those paths in the Word document after copying your files.

CAN I COPY DYNAMICALLY LINKED DOCUMENTS TO A MAC?

Yes, just like all our generated Word documents and spreadsheets they are standard format, cross-platform and backwards compatible formats that will work in any version of Word on both Windows and Mac.

However, this is one feature we have seen that does not translate over to the Mac as well as most others.

Because this feature by default uses embedded file links and directory structures do not work the same on Mac and Windows your embedded spreadsheet links are most likely going to cause errors or warnings that the documents could not be located.

You will also have to manually change each OLE link in the Word document once you have opened it on the Mac to set the path to a new absolute path on the Mac. Mac versions of Word will be operating differently plus the formatting of linked cells may not display as intended as it does on Windows.

It is your responsibility to fix any path and formatting issues. Contact Microsoft for help using dynamically linked spreadsheets on the Mac platform.

HOW DO I IMPROVE THE LINKING PERFORMANCE?

This depends on what is causing any performance issues. First this could be an issue with how Word applies colors to individual cells.

Most of the dynamic OLE spreadsheet links are linked into cells in Word tables. Also, the Wizard will apply a color scheme to all tables in the document including those that have dynamic OLE links, which are usually also the tables with the most cells.

Word is very slow when it applies colors to individual cells. This might not be noticeable when you are manually changing cell colors by hand using Word's interface screens, but it is extremely slow when Word is stepping through a table cell by cell and applying colors individually to each cell. This is not directly related to the OLE links but is more something that can cause performance issue due to how OLE linked cells are placed in tables that use custom color palettes.

Most of our stock templates are designed with tables that have color palettes that use the same color across entire rows. This will solve the performance issues with applying color schemes. The problem gets introduced if you have a table that has even a single cell that is a different background color than another cell in the same row anywhere in the table. What happens is that the Wizard then must change from applying the color scheme row by row (which is efficient) to cell by cell (which is very inefficient).

You can also manually apply your color scheme to your tables in the Word templates and then turn off the Wizard's feature for applying color schemes to Word tables during document assembly.

If you have checked your tables that OLE links are placed in so that all rows have a single color, then look at how many cells you are linking.

Because OLE links are dynamic links between two documents and Word must manage the interconnections between the documents it can be inefficient to link many cells.

One feature of Word is that you can have your spreadsheet and document open at the same time. As you update the spreadsheet you can mouse over dynamic links in the Word document and right click the Update Link option. This may work fine for small numbers of links but with many links this operation can be extremely slow. It is more efficient to close your Word document while you are updating your spreadsheet, save your spreadsheet changes then open the linked Word document. When opening Word will ask if you want to update the links. Say Yes to this and the document will be updated as it is being opened which is much faster than using the Update Link option.

Normally this is not a big problem if your only linked template is a Cost Summary with a few line items, amounts and totals.

If you are creating a very large proposal or business plan with many linked spreadsheets and hundreds of OLE links the time to generate the document can take longer. If this is a one-off document such as a business plan, then the time to generate a document will not be an ongoing problem.

If you are creating many documents each with hundreds of dynamic OLE links you might want to consider seeing where you can use static text data vs dynamic OLE links.

A dynamically linked Word document with hundreds of OLE links can also take longer to just open in Word and update. These performance issues are all Word and Excel overhead which might only be resolved by using higher end computers with more memory and faster processors or even 64-bit versions of Word. If you have too many OLE links in a Word document, you can also case Word to crash.

HOW DO I ADD CALCULATIONS FROM SPREADSHEETS MANUALLY?

Proposal Packs contain a collection of financial templates for your proposals such as budgets, cost summaries, quotes, return on investments, etc.

In the Novice mode these templates are intended for use as static documents that are manually updated using your word processor. Because the final documents are typically converted to PDF files and sent via email as final quotes you do not want them tied directly to your spreadsheets.

For each financially related template, Proposal Pack also includes a matching calculator spreadsheet.

Use these spreadsheets to calculate your final costs and calculations, then manually enter the numbers into the word templates.

The Proposal Pack Wizard makes this easier by managing your calculator spreadsheets for each project. Each time you create a document project that includes templates that have associated spreadsheets, the spreadsheets will be copied to your new project. You can open the spreadsheets from the “Edit Current Document” screen after our project has been assembled by the Wizard.

If you want to customize the spreadsheets such as adding your own custom line items and costs use the “Edit Styles” button on the main Wizard interface, edit the style and click the “Edit Spreadsheets” tab. Once you edit the base spreadsheets, each

time you create a new proposal, your customized version will be copied for that project.

If you are using the Expert Edition of the Wizard, you can dynamically link the cells in the Excel spreadsheets to your Word documents for a more dynamic solution. [Read the What Types of Cost Calculation Features are Available?](#)

If you require a higher end quoting system with a database management system considering using the QuoteWerks quoting and pricing system which integrates with Proposal Pack Wizard. QuoteWerks manages large databases of line items and will build formatted tables, summaries and totals that can be added to your Proposal Pack templates.

HOW DO I USE PRESET LISTS OF TEMPLATES?





<https://www.proposalkit.com/htm/videos-create-preset.htm>

Many people who write proposals with our Proposal Pack and Proposal Pack Wizard have a specific set of templates that they like to use each time they start a new project. They do not want to go through the process in the Wizard to select the same set of templates each time. They would rather have the selected set predetermined, by them, and ready to go for each new proposal. One way to do this is with the Presets in the Pick Documents screen.

Using preset lists is useful when you also want the ability to alter your default list of chapters and assemble every new document. The Wizard includes other features to add completely assembled documents and finished documents as reusable templates that do not have to be fully assembled from the individual chapter templates each time a new project is created.

USING PRESETS




-  Click the “Document Projects” button on the main Wizard screen. Click the “Add New Project” button then the “Pick Documents” button.
-  You are now in the Pick Documents screen. Use the various tabs to select templates such as the “Add a Template” tab. Select the templates you always want to use for your future proposals.

- Use the “View Selected Templates” button to change the order of the templates (changing the order of templates is an Expert Mode option; it is not available in Novice training mode).
- If you also have a Contract Pack template product installed, you can even add a specific contract template to your list, and it will be saved with in the Preset.
- If you also have a Title Page Pack installed, you can have a custom Title Page added to your Preset.
- Once you have your selections completed, click the Presets tab.
- Enter a descriptive name for your new Preset selection and click the “Create New Preset from Selected Templates” button.
- From now on, for all new projects, every time you select your saved selection from the Presets tab this custom selection of documents will be automatically added to your project.
- You can have up to 40 custom presets to pick from for each of the 12 project types. That is total of 480 possible presets.
- If all your future proposals will be using the same Preset, you can optimize your future project setup even more by setting that preset to auto-populate every future project with automatically. To use this feature, select the desired Preset from the list and click the “Auto-Populate New Projects from Preset” button.

HOW DO I CREATE A CUSTOM SET OF DOCUMENTS?

Many people who write proposals with our Proposal Pack and Proposal Pack Wizard have a specific set of templates that they like to use each time they start a new project. They do not want to go through the process in the Wizard to select the same set of templates each time. They would rather have the selected set predetermined, by them, and ready to go for each new proposal. There are some common ways to do this. You need to have at least one of the Proposal Pack styles or Proposal Kits and the Proposal Pack Wizard installed on your computer first. The steps that follow assume the products were installed into the default folders set by the installers.

METHOD #1 (USING PRESETS)

-  Click the “Document Projects” button on the main Wizard screen. Click the “Add New Project” button then the “Pick Documents” button.
-  You are now in the Pick Documents screen. Use the various tabs to select templates such as the Add a Template tab. Select the templates you always want to use for your future proposals. Once you have your selections click the Presets tab.
-  Enter a custom name for your new saved selection and click the Create New Preset from Selected Templates button. From now on for all new projects, every time you select your saved selection from the Presets tab your custom selection of documents will be automatically added to your project. You can

have up to 40 custom presets to pick from for each of the 12 proposal types.

See this chapter for more details: [How do I Use Preset Lists of Templates?](#)

METHOD #2 (CREATING A PRE-ASSEMBLED REUSABLE PROPOSAL)


Instead of assembling a proposal from separate templates each time, you can reuse a past proposal as your starting point and merge client data into it. Refer to the chapter [How do I Reuse a Previous Document Over Again?](#) for details.

METHOD #3 (CREATING A COMPLETE CUSTOMIZED PROPOSAL PACK)

For Expert Computer Administrators Only

You should not manually edit the INI files unless you know what you are doing. Use the Wizard edit screens if at all possible, instead. Information is only provided for your benefit. Customer service will not be able to assist repairing manually edited database files.

This configuration option is meant for use by administrators or consultants who are setting up customized solutions. It is not meant for use by the average user.


 First, you need to create a new folder with the templates you would like to use copied to the folder. The easiest way to do this is go to My Computer and browse down to the Word folder of your existing Proposal Pack style you would like to use the templates from. If you are using the Pack that came with Proposal Kit Professional, the path will be similar to the following:

C:\ProposalKit\Pro_v#\ProposalPack\Classic_1_v#\Documents\Word


If you are using a Proposal Pack that you purchased separately, the path will be:

C:\ProposalKit\ProposalPack\[STYLE]\Documents\Word


Once you have located the folder titled “Word” in the Proposal Pack style you want to use, make a copy of it and paste it right next to the original. Do this by right clicking on the folder, Copy, then move the cursor over and Paste. This new folder will be automatically named “Copy of Word”. You will now have two folders, one named “Word” and the other named “Copy of Word”. Open the folder “Copy of Word” and delete all the templates you do not want to include in your new set. The only files left should be the exact set of templates you want included in each of your proposals. By creating a new folder containing your custom set of templates, you will not affect the original Proposal Pack and its full set of templates.

 Open your Proposal Pack Wizard. Go to Step 2 of the Main Interface, “Document Styles”. Click Add Style and OK at the pop up message. Browse back to the “Copy of Word” folder you just created with your custom selected group of templates, highlight “Copy of Word” and click OK. Name your new style where it says Style Name. Click the Manage Templates tab and the Edit

Stock Templates button and check that all the templates you want are in the various drop down menus. Click OK all the way back out to the Main Interface.

-  You have now set up your new Style with only the templates you have selected. When creating a new Proposal and you want to use the custom selected set of templates, go to Step 2, “Document Styles”, of the Main Wizard Interface and select that new Style from the drop down menu. Click OK. Go to Step 3, “Document Project”. Click “Add Project”. Give the project a name and go to Pick Documents. At the top of the screen, in Step 1, Pick Size, select Everything. Click Recommend. You should now see all your selected templates. If you want to remove a template for this particular proposal, you can find it in the drop down menus and click the Remove button. Now proceed as normal with setting up and editing your proposal.

The Everything option has to be manually enabled in the Preferences > Project Settings > Configure Document Selection Screen. If you are running Expert mode, you will also have to manually set the Auto Recommendation tab in the Pick Documents screen to “Always Display”. This is done on the same screen using the Configure Tabs on Pick Document Screen settings: See this chapter for details: [How do I Turn On/Off the Various Pick Documents Tabs?](#)

-  If after you set up your selected set of templates you decide you want to add templates to it, go back to the original Word folder, find the templates, copy and paste them into the “Copy of Word” folder. You will now find these added templates in the Everything list of the Auto Recommend screen and the drop down menus for this style.

HOW DO I SETUP MY OWN TOP 40 LIST OF TEMPLATES?



<https://www.proposalkit.com/htm/videos-how-to-create-custom-top-40-lists.htm>

There are 2 different types of “Top 40” lists in the Wizard (however they appear to be the same when using the Wizard interface). Each of the 12 Proposal Types includes its own single default Top 40 list of most used topics. This is the first Top 40 list you will see when you enter the Wizard’s Pick Document screen. As you change between the 12 Proposal Types that list will change. For example, the Top 40 list for product sales proposals is slightly different than for service sales proposals, resumes or business plans.

The entire library of proposal topics is also categorized into many different situational Top 40 lists. For example, there are Top 40 lists for real estate topics, security topics, event planning topics, logistics topics and so on. There are also Top 40 lists for proposal types (product sales, service sales, resumes, business plans, and so on). And finally, there are Top 40 lists for topic usage such as introduction topics, summary topics, financial topics, company information topics, and so on.

Note that these extra Top 40 lists will not be visible in some situations, such as when you are using a custom proposal type that does not include a large collection of templates.

All these Top 40 lists can be customized in the Wizard’s Preferences > Project Settings > Configure Top 40 Lists screen.

You can customize the lists by adding/remove templates, creating your own custom Top 40 lists, putting important lists up top in the Favorites category, as well as disabling lists you do not want displayed in the Wizard interface.

There are 12 different Proposal Types in the Wizard (General Business Proposals, Grant Proposals, Business Plans, Resumes, RFPs, etc.). Each of these 12 Proposal Types has its own Top 40 list of templates.

The point of the Top 40 lists is that with an extensive library of templates available in the full retail Proposal Packs it can be hard to locate the most used templates. The Top 40 lists locate the most used templates in a single screen.

For example, the Cover Letter, Title Page, Executive Summary, Table of Contents templates are very common and some of the most used templates. These are included in the Top 40 list.

Templates such as Exit Strategy, Location Analysis, and Accessories are examples of more specialized templates that are not commonly used. These are examples of templates that won't be shown in the Top 40 lists.

Another issue with showing Top 40 lists of templates is that one person's Top 40 list won't be the same as the next person's Top 40 list. A hundred different Proposal Pack users will all have their own idea of what the most important templates to their situations will be.

The Wizard solves this by creating default commonly used Top 40 lists with the ability for each user to easily configure their own

custom Top 40 list they want to always see displayed when they are selecting templates for their projects.

Go to the Preferences > Project Settings > Configure Top 40 Lists screen. On this screen select one of the 12 Proposal/Project Types you will be configuring. The term Proposal Type and Project Type are used interchangeably, they meant the same thing.

While you can have more than 40 templates in the list while you are in the process of moving templates in and out of your custom Top 40 list, when you finally save the list you cannot have more than 40 templates in the list.

Add templates to the list by selecting them from the lists on the right and clicking the arrow button that points to the left. To remove a template from the Top 40 selections, highlight it in the list on the left and click the arrow button pointing to the right.

When you are done selecting your customized Top 40 list of templates, click the Save button. Once saved, every time you are in the projects Pick Documents screen in the Add Templates tab for the Top 40 templates you will see your customized selections.

You can set any Top 40 list to be the default shown in your Pick Document screen.

The Top 40 lists do not define the order that the templates will be assembled in, read this chapter for how to change the default order of your selected templates: [How do I Change the Order of Documents?](#)

HOW DO I SETUP MY OWN SHORT LIST OF TEMPLATES?

When you first run the Wizard with a full retail Proposal Pack using the default project types (i.e. General Business Proposals, Grant Proposals, etc.) you will have access to the complete library of templates.

If you are going to be writing proposals frequently you might want to have the Wizard startup with a smaller list of templates that are tailored specifically to your type of business situation. This will make the use of the Wizard faster and more efficient than always using the default settings.

Say there are 50 templates you want to frequently have access to for creating your proposals instead of the entire collection. Select the “Custom” proposal type in the Preferences > Project Settings > Configure Project Screen settings.

You can change the title of “Custom” to be anything you like. Change this setting in the Preferences > Edit Table of Contents Labels > Custom tab. Then in the lower right corner change the Project Type Label from “Custom” to “Joel’s List” (for example). Now whenever you add a new project you will see “Joel’s List” in the drop down list of project types and you can set “Joel’s List” as the default list that will be used for all new projects.

Once you have selected one of the custom project types go to the Preferences > Project Settings > Configure Template Lists screen. This screen will let you efficiently change the default template order and add/remove individual templates from the different project types. This is also where you can use the custom project types to setup your own personalized lists of templates.

For example, if you are only going to deal with 50 potential templates in your normal course of writing proposals for situations that apply to you, you do not need to have all of them in your default list to pick from every time you create a project. Instead, configure one of the custom project types and add just the 50 templates that you want quick access to, then add the most common ones to your own custom Top 40 list for that custom project type. Then, whenever you start the Wizard, it will only be loading a small set of templates into its lists and will run much faster. This will be more noticeable on older or slower computers.

HOW DO I CHANGE THE ORDER OF DOCUMENTS?

The Proposal Pack Wizard will append your selected documents using a default predefined ordering. Each of the 12 major type of proposal (i.e. General Business Proposal, Grant, Business Plan, Book, Resume, Business Document, Government Contract, RFP, Custom, etc.) has its own predefined ordering.

These orders are initially setup based on Best Practices and general proposal writing standards. For example, introduction templates come first, templates that talk about your client and project are next, templates that talk about you come next, then appendix templates come last. Within each of these general categories, templates are ordered how they are usually used and how they are used in relation to other templates they are near. Note that with the complete library of templates and countless possible contexts in how they can be used that these are only general starting points for how to order your own templates.

With the Wizard you have multiple options available for changing the order of templates for your projects. You can change the default orderings that all new projects will use, you can change the order of templates for specific projects (overriding the default ordering), and you can create presets with custom orderings that can be reused for new projects.

Once you have completely assembled your final proposal document and have started editing it, you cannot use the Wizard anymore to manage the templates or pages of the project, you will have to use Word to cut and paste your pages to new locations within your document.

METHOD #1

The first way to change the order of your templates without affecting the default settings of the Wizard is to change them on a per-project basis.

You must be in Expert mode to be able to change the templates on a per-project basis. If you are in the Novice training mode, this ability is not available.

As you add templates using the Pick Documents screen you can click the View Selected Templates button at the bottom of the screen at any time. This view screen is also displayed automatically for you when you make changes to your list of selected templates.

You will see a screen split into two lists. The list on the right contains the templates selected for the project that are not going to be combined into your final proposal. These are templates such as letters, checklists, logs and externally created contracts. Since the templates in the right list are individual documents there is no point to allowing them to be reordered so they cannot have their order in the list changed.

The list on the left contains the templates that will be combined into the final combined project document. This list is also shown in the order that they will be assembled. The category headers you see are for information purposes only and you will not see them in the combined project document (except if you add a Table of Contents, then you will see them in that page).

The templates will be shown in the default order that they are defined in your Wizard databases. There are 12 different Proposal Types and each of those proposal types has its own default order the templates are ordered in (see below for how to change this default ordering).

You can select templates in the list (make sure they are highlighted in solid blue) then click the Move Up and Move Down buttons to change the order.

When you create your project documents they will be assembled together in this new order.

PROS: This method is quick and easy and can be migrated to future Wizard releases without having to redo customizations to the Wizard database.

CONS: You must reorder the templates every time you create a new proposal. If you typically use the same templates over and over, create a Preset with this custom ordering.

METHOD #2

Create a Preset you can use to reload a specific set of templates in a custom ordering each time you create a new project.

Start with Method #1 above and select a collection of templates and change the ordering as needed.

Then in the Pick Documents screen click the Presets tab. Give your Preset a unique description and click the Create New Preset from Selected Template button.

Each time you create a new project, come to the Presets tab and select that Preset from the list and click the Load Templates from Preset button. Your project will now be automatically populated with the selected templates in the custom order you predefined earlier.

You can create up to 40 presets for each of the 12 Project Types (a total of 480 possible presets). If it appears your presets have disappeared, make sure you did not change to a different Proposal Type for that project. For example, if your first Presets were created when you were in a “General Business Proposal” project. Then later you create a project and set its Project Type to “Grant Proposal”, “Business Plan Proposal”, “RFP”, “Custom”, etc. then you will not see that preset in the list anymore. To get that old preset back you would have to click back to the project screen, change the proposal type back to “General Business Proposal”, click back into Pick Documents > Presets and load the templates from the Preset. Then you can go back, change the Proposal Type back to your new proposal type and save the Preset again for this project type.

PROS: This method is quick and easy and can be migrated to future Wizard releases without having to redo customizations to the Wizard database.

CONS: You must select the Preset every time you create a new project (this is very minimal effort however). And if you are creating projects with the same set of templates every time you can set the Preset to auto-populate each new project, so you do not even have to manually load the Preset). Also, if you switch between Project Types (i.e. “General Business Proposals” and “Grant Proposals” and you want to use the Preset in each you will have to resave the Preset in each Project Type).

METHOD #3

You can also change the default order of how templates are assembled for all new projects. Use the Preferences > Project Settings > Configure Template Lists screen. This screen will let you efficiently change the default template order and add/remove individual templates from the different project types.

This is also where you can use the custom project type to setup your own personalized lists of templates. We only recommend that you use this method to change the default orderings on the custom Proposal Type that has been set aside for users to customize. This is the “Custom” Proposal Type. Read the chapter [How do I Setup My Own Short List of Templates?](#)

PROS: This method is quick and easy and allows for a highly customized solution.

CONS: This method is not easily migrated to future Wizard releases. Because the Wizard databases change so much between releases (i.e. we add many new entries, sometimes remove entries and change the default orderings between releases) and users can also customize their own databases by adding/removing/editing entries it makes it impossible to automatically integrate all these changes. It is up to you to manually redo any custom orderings and changes you make to the Wizard's default 12 Project Types. It is safe and recommended to make your customizations to the Project Type we have set aside for users titled "Custom".

METHOD #4

Another method of reordering the templates is to use Preferences > Tools > Configure Proposal Files. Click a template to change the order of and click the Edit the Selected Document button. Then select the document that this document is to be placed after and click the OK button. From now on, the new document ordering will be displayed in the Wizard drop down lists and in your proposals. For only changing the order of templates it is much easier to use Method #3 above. This method is an older screen before the other methods were added, now this Configure Proposal Files should only be used for making other customizations to individual database entries.

PROS: There are no benefits anymore for using this screen solely for changing the order of templates. Use Method #3 now. This screen is obsolete for this operation (however it is still used for making other alterations to the database).

CONS: While this method can be used it is an inefficient way to only change the order of templates.

METHOD #5 (FOR EXPERT COMPUTER ADMINISTRATORS ONLY)



You should not manually edit the INI files unless you know what you are doing. Use the Wizard edit screens if at all possible, instead. Information is only provided for your benefit. Customer service will not be able to assist repairing manually edited database files.











The other method is to manually edit the FileList#.ini files. This option can be useful if making large numbers of changes. This method is only recommended for experienced users as it requires manually editing database files which must be done to exact standards. When done it is recommended you run the Preferences > Tools > Test Database Files function to ensure there are no errors or inconsistencies.

You can define your own template order by editing the data files the lists are stored in. There are 12 files which will be found in the following default folder (unless you changed the default install folder for the Wizard or the location of the database files in the Wizard preferences):

“C:\ProposalKit\ProposalPack\Database_V#”

There are 12 files in this folder:

-  FileList1.ini - The ordering of templates for General Business Proposals.
-  FileList2.ini - The ordering of templates for Grant Proposals.

-  FileList3.ini - The ordering of templates for Book Publishing Proposals.
-  FileList4.ini - The ordering of templates for Business Plan Proposals.
-  FileList5.ini - The ordering of templates for Resume Proposals.
-  FileList6.ini - The ordering of templates for Short Form Contracts.
-  FileList7.ini - The ordering of templates for Short Form Quotes.
-  FileList8.ini - The ordering of templates for Government Contracts.
-  FileList9.ini - The ordering of templates for Business Documents.
-  FileList10.ini - The ordering of templates for Research Proposals.
-  FileList11.ini - The ordering of templates for RFPs.
-  FileList12.ini - The ordering of templates for user defined documents.

To change the ordering of the documents as they are displayed in the drop down lists and how the documents are appended edit the sequence of files in the appropriate FileList#.ini file.

The files are ordered based on the File# identifier, which is a sequential number. For example,

```
[SECTION_1]
SectionHeader=Summary
File1=Executive Summary,ExecSummary.docx
File2=Cost Summary,CostSummary.docx
File3=SWOT Analysis,SWOTAnalysis.docx
```

File1 is 1st, File2 is 2nd and File3 is 3rd. To make the SWOT Analysis document come first renumber the files as follows:

```
[SECTION_1]
SectionHeader=Summary
File2=Executive Summary,ExecSummary.docx
File3=Cost Summary,CostSummary.docx
File1=SWOT Analysis,SWOTAnalysis.docx
```

Make a backup copy of your .ini database files before editing them.

PROS: This method allows experts to highly customize the Wizard.

CONS: If you screw this one up you are on your own. Long ago this was an easy way to customize the Wizard. Now there are many cross references between multiple database files that all must be updated exactly for the Wizard to operate.

HOW DO I IMPROVE THE PERFORMANCE OF THE WIZARD?

The Wizard manages a library of thousands of templates (including proposals, business plans, business documents and contract templates). This large library of templates that must be loaded into all the various Wizard interface screens can slow the interface down at times, especially on older and slower computers.

Since most people only use a small subset of templates to create their documents you can define your own custom lists of files with only 50 templates in the list for example. This will dramatically speed up the Wizard.

By default, the Wizard uses the “General Business Proposal” as the proposal type for new documents. This default setting gives you access to the entire library of templates for all types of documents.

By contrast, if you switch to the “Contract” proposal type, the list is much smaller, and the interface will run faster if you change your default project type to be the “Contract” type. You can make this change in the Preferences > Project Settings > Configure Project Screen settings. However, your list of templates you will see in the interface will be very limited.

The preferred method of speeding up the interface is to select the “Custom” proposal type. While you can customize any of the 12 proposal types, the custom one is set aside specifically for you to create your own custom subset of templates out of the entire library.

Say there are 50 templates you want to frequently have access to for creating your documents instead of all of them. Select the “Custom” proposal type in the Preferences > Project Settings > Configure Project Screen settings.

You can change the title of “Custom” to be anything you like. Change this setting in the Preferences > Edit Table of Contents Labels > Custom tab. Then in the lower right corner change the Project Type Label from “Custom” to “Joel’s List” (for example). Now whenever you add a new project you will see “Joel’s List” in the drop down list of project types and you can set “Joel’s List” as the default list that will be used for all new projects.

Once you have selected one of the custom project types go to the Preferences > Project Settings > Configure Template Lists screen. This screen will let you efficiently change the default template order and add/remove individual templates from the different project types. This is also where you can use the custom project types to setup your own personalized lists of templates.

For example, if you are only going to deal with 50 potential templates in your normal course of writing documents for situations that apply to you, you do not need to have the entire collection of thousands of chapters in your default list to pick from every time you create a project. Instead, configure one of the custom project types and add just the 50 templates that you want quick access to, then add the most common ones to your own custom Top 40 list for that custom project type. Then, whenever you start the Wizard, it will only be loading a small set of templates into its lists and will run much faster. This will be more noticeable on older or slower computers.

An efficient way of building up the Custom proposal type is to create a project using the default General Business Proposal type and select all the templates you want to make use of. Then in the Preferences > Project Settings > Configure Template Lists screen switch to the Custom proposal type and click the Select Current Project's Templates button. This will automatically select all those templates in that project and you can move then right over into your Custom proposal type. This saves you the time of having to manually find each template in the master template list.

IMPROVING FILE ACCESS SPEED

Most of the Wizard processing is file based. The Wizard reads/writes from many database files and opens/closes and processes Word documents and Excel spreadsheets during most of its work. The overhead of file processing and the overhead of Microsoft Office and Microsoft Windows are the most time consuming.

The easiest and best way to get more performance is to run the Wizard on a computer with the fastest possible processor and with the fastest possible hard drive.

Using a solid state (SSD) hard drive vs a standard disk (HDD) hard drive is one the easiest ways to improve performance. Install the Proposal Kit template packs and Wizard on a fast SSD drive.

IMPROVING SPEED OF APPLYING COLOR SCHEMES

If applying the color scheme is taking a lot of time it is due to applying colors to table cells and table borders. This is an issue

with Microsoft Word. Word takes a long time to apply colors to individual cells in tables.

By default, we have designed most of the tables in our templates to have the same color across entire rows and the Wizard applies colors to entire rows at a time which is much more efficient when possible. If the Wizard encounters a row with cells that have different colors it has to revert to applying the color scheme cell by cell to the entire table which can be very time consuming for Word.

The Wizard will also turn off the applying of the color scheme to tables when it detects it doesn't have to such as when using a stock Proposal Pack design theme and the user has not changed the default color scheme.

If you are using templates or custom tables with colors that are different in cells across rows we recommend you edit the stock templates and apply all your colors manually then turn off the applying of the color scheme to Tables in the Button #1 - Document Styles > Edit Style > Colors tab.

IMPROVING SPEED OF DOCUMENT FORMATTING

If the time to format documents is taking too long it could be due to just having a very long document that the Wizard must step through sentence by sentence to apply consistent formatting and converting text URLs to hyperlinks.

By default, all our stock templates have Word 'Styles' applied to the text which do not need to be manually reformatted. If you have written in a lot of custom text into the stock templates apply our Proposal Kit defined Word Styles to the text.

You can also try turning off the document reformatting in the Preferences > Project Settings > Configure Project Screen. This will stop the Wizard from scanning the entire document during the assembly process and applying formatting.

IMPROVING SPEED OF DYNAMIC EXCEL LINKING

If adding links to Excel spreadsheets is taking too long it may be due to having too many OLE data links between one or more spreadsheets and the linked documents. Consider using fewer OLE links if possible.

This is a feature of Microsoft Word and Excel where you can put a link between a cell in a spreadsheet and a location in a Word document such that when the Excel spreadsheet is changed the Word document can automatically update. This is useful for things such as quotes or a schedule where costs and dates can be changing during the process of putting the document together. Without the OLE links you must manually edit all your information as plain text in the Word document which can result in errors in calculations.

The flip side is that using dynamically linked spreadsheets can be a higher learning curve with the use of more advanced Microsoft Office features.

Any speed issues with OLE links is due to Microsoft Word and Excel as these are OLE links between Microsoft products. Our Wizard software only makes use of the OLE features in Microsoft Office. The dynamic Excel spreadsheet linking is an optional feature. You can turn off the use of the OLE links in both the

Preferences > Tools > Excel Calculators screen and per individual project on the Project screen.

Too many OLE links will cause performance issues with Word when opening linked documents and it can cause Word to crash as it is very resource intensive. These are issues with the limitations of this feature of Microsoft Word and the capabilities of your computer system. This feature is not intended to be used with hundreds of links.

For many proposals dynamically, linked Excel spreadsheets are not needed.

HOW DO I ADD A WORD AUTO-GENERATE TABLE OF CONTENTS?



<https://www.proposalkit.com/htm/videos-how-to-customize-table-of-contents.htm>




The Wizard defaults to creating a true Word auto-updating Table of Contents. An auto-updating Word Table of Contents is automatically regenerated when you click the object and select one of the update options.

You can configure how your Word Table of Contents will appear by using the Wizard's Preferences > Data & Display > Auto Table of Contents Display screen. All the options on this screen are standard settings for Word's Table of Contents object. See your Word help manual for what these options mean and how they impact the look of your Word Table of Contents. This screen also allows you to define the look of the page numbers as well as the look and settings for the Table of Contents.



You still must manually click the Table of Contents object in your document and select the update option. However, you do not need to manually renumber the pages or add/remove entries, Word will do that for you.

To use a Table of Contents in your project you must add the "Table of Contents" template to your project.

There are multiple references to Table of Contents in this chapter:

-  TableContents.docx is the Proposal Pack template that a Table of Contents is inserted into. There are no special features or TOC object built into the stock default template.
-  Table of Contents generally refers to the Proposal Pack template you add to your project.
-  Word auto-generate Table of Contents is a Word specific object that will be inserted into the Proposal Pack Table of Contents template (i.e. TableContents.docx) by the Wizard when it creates your project files.

There are multiple references to Styles in this chapter:

-  Proposal Pack Styles refer to the Proposal Pack product variations that are graphic skinned versions of our templates.
-  Word Styles refer to the text styles that can be applied to text in a Word document.

The Wizard will add a Word specific auto-generate Table of Contents that will rebuild itself and update its page numbers to your Table of Contents document.

See your Word manual for help with Word auto-generate Table of Contents. While the Wizard will add an auto-updating Table of

Contents to your documents and provide configuration options to control how it appears it is a feature of Microsoft Word and is controlled by your Word program. To understand how auto-updating Table of Contents operate search your Word help for these topics: Table of Contents, Styles, and TC Fields.

The Wizard will also configure all your documents as needed so your chapters will be included in the Table of Contents object. This is done one of two ways, by either applying a Word “Style” (i.e. a collection of font settings) to your page headers if you are using text headers. The other method is to include “TC Fields” (which are hidden fields that define the text to go into the Table of Contents) next to the graphic page headers. The Wizard will automatically detect if you are using text headers or graphic headers and will update them accordingly.

A Word auto-generate Table of Contents requires a couple things. First, all the chapter titles that will be included must be in a specific Word text style (and that text style should not be used in any other text in your documents). If you are using a graphic logo version of a Proposal Pack, then TC Fields inserted next to each page header graphic are needed. Second, your Table of Contents document needs to have a Word auto-generate Table of Contents object inserted into it.

STEP #1

Setup your Proposal Pack templates with headers Word can recognize for its auto-generate Table of Contents. The Wizard will automatically do this as it is generating your documents. The “Proposal Kit Page Header” Word Style will be applied to your page header text.

The Wizard will also automatically insert several pre-defined Word Styles into your documents during the assembly process. You can configure these font styles in the Wizard Preferences > Data & Display > Font Styles screen. If you have disabled the “Proposal Kit Page Header” style, the Wizard will default to using the built-in Word style “Heading 1”.

To prevent any templates above and including the Table of Contents page being included in the Table of Contents, these pages will have their page header fonts set to the same visual look, however, will not using the actual Word style “Proposal Kit Page Header” or “Heading 1”.

For more information on Word Styles read: [How do I use the MyProjectFiles folder?](#)

The Wizard allows you to copy your own custom files that are not part of the Proposal Kit system into each of your new projects using the MyProjectFiles folder.

This feature allows you to automatically copy your own content such as worksheets, checklists, letters, spreadsheets, forms, etc. into each of your new Proposal Pack Wizard project folders.

The MyProjectFiles folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyProjectFiles

Whenever you build a new document in the Wizard a copy of all the files in the MyProjectFiles folder will be made into your document's project folder.

You should not name any of your custom files the same file names and extensions as any of Proposal Kit's document file names.

Use the Preferences > Project Settings > Configure MyProjectFiles Settings screen to manage adding files, removing files, and setting attributes for the custom files in the Wizard database.

You can manually copy files into the MyProjectFiles folder however that will not setup any of the attributes such as human readable titles for use in the Wizard drop down menus. Use the Wizard's Preferences tool for managing the attributes.

How do I Change/Use Word Font Styles?

If you are using a graphic logo version of a Proposal Pack product (i.e. any of the hundreds of Proposal Packs that have graphic images for the chapter headers at the top of each template) then TC Fields will be used instead of Word Styles.

TC Fields are non-printable fields (i.e. they will not be visible when you print or convert your document to PDF). They are inserted right in front of the graphics in the page headers as follows:

{ TC “Executive Summary” \f T }  Executive Summary

You may or may not see the TC Field in your document. If you do not see them you can click the paragraph icon in your Word home menu to turn on paragraph marks and other hidden symbols.

The use of the \f T flag is important as this ties the TC Field tag back to the Table of Contents object. Your Wizard inserted Table of Contents object will also have a matching \f T flag and will look like this if you toggle the field codes in your document: { TOC \f T \h \z \u }

These field codes and Table of Contents setup are all standard features of Microsoft Word.

STEP #2

Setup your Proposal Pack Table of Contents template (TableContents.docx) to add the Word auto-generate Table of Contents object.

The Wizard will also automatically insert the Word auto-updating Table of Contents into your Table of Contents template (i.e. the TableContents.docx file) if one does not already exist in the stock template.

If the Wizard deletes the stock text out of the Proposal Pack Table of Contents template (i.e. the TableContents.docx file) it will insert the following field tag:

{ TOC \f T \h \z \u }

This field tag is not typed text as you see above, it is an inserted Word TOC field with those flags inserted. You can see this by clicking your mouse on the Table of Contents object and toggling the field codes.

This is essentially what happens when you use your Word toolbar to insert a Word Table of Contents into a document.

If you have manually edited the TableContents.docx file to insert your own Table of Contents object and you forgot to add tags to pickup the TC Fields and the Proposal Kit Page Header font style the Wizard will update your Table of Contents object to add these missing tags.

STEP #3

As you make changes to your document you will need to refresh the Table of Contents to update its entries and page numbers. All you must do is right click your mouse on the Table of Contents object and choose one of the update options. This operation is not part of Proposal Pack or the Wizard, it is a Microsoft Word feature.

If your Table of Contents shows the text “No table of contents entries found”. Right click on the empty Word auto-generate Table of Contents object and select the “Update Field” option. The Table of Contents template will now include the Word auto-generate Table of Contents populated with all your chapters and updated page numbers. If you still see the same message, that means your page headers are not setup correctly with Word Styles or TC Fields.

The Wizard does not have any control over the Word auto-generate Table of Contents feature. Any instructions given here are dependent on your version of Word. Since Word changes with each new version consult your Word help manual for information on its version of Table of Contents and where the various screens and features for editing Word styles are located.

The Wizard only facilitates adding a Word specific Table of Contents and has no control over how that Word feature operates.

To change the Page Number styling see these chapters for more details:

[How do I Add TOC Sub Headers?](#)

[How do I Import a Custom Page Footer?](#)

HOW DO I ADD TOC SUB HEADERS?



<https://www.proposalkit.com/htm/videos-how-to-customize-table-of-contents.htm>

If you want to add sub headers into your Table of Contents all you must do is set any text you want added as a sub header to the built-in Word Styles Header 1 to Header 9.

The Word Styles for Heading 1 to Heading 9 are part of Microsoft Word and are built-in Styles however they may not all be visible by default in the Word Styles screen.

The Wizard will make Heading 1 to Heading 5 automatically visible each time it creates a Word document.

This makes it easy for you to then select any text in your Word document to Heading 1 to Heading 5. Then you must click the Word TOC object in the Table of Contents page of the document and update the entire TOC object.

This will rebuild the Table of Contents and any sub header text you selected will become part of the Table of Contents. Depending on which Header # you selected for the Style will determine the indentation level in the Table of Contents.

Because of how Table of Contents are built depending on if you are using a text version of a Proposal Pack or a graphic design theme Proposal Pack you may want to start with either Heading 1 or Heading 2 for your sub headers depending on how you want the indentation to be set.

You can also change the default font Style settings for Heading 1 to Heading 9 in the Wizard's Font Preferences screen if you want specific font styling to be always built into your documents.

HOW DO I CONFIGURE PAGE NUMBERING?

By default, when the Wizard builds a document page numbering is turned on using Word's default settings (i.e. the page number will show up in the bottom right corner in a plain design starting at 1).




At any time after a document is created you can completely customize it and change the page number settings and styling by just using Word's page numbering templates and options.

If you turn off page numbering this may cause a multi-section document that has custom header graphics (like watermarks or Title Page backgrounds) to incorrectly replicate the watermark graphic from the previous section. Such as replicating the Title Page background down into subpages. This is due to how Word manages sections that have blank information in the footers. Try manually adding an object into the footers (such as a blank image or shape object). Having an object in the footer is a workaround for this behavior. The Wizard will try to detect this situation and will try fixing this automatically.

To make changes to how the Wizard initially creates the page numbers you can configure these settings in a couple ways (using the Expert Edition of the Wizard). All the page numbering features offered in the Wizard are the same options that Word provides for page numbering styling and configuration. The Wizard configuration options allow you to change the settings before it builds your document vs. you having to change the settings and styling in Word after a document has been created.

Using the Preferences > Data & Display > Auto Table of Contents Display screen you can configure the page number settings (such as the starting page number and displaying the page number on the first body page or not).

The Page Number Styles drop down incorporates three different styles of page numbering that you can use.

-  The first set of items in the drop down (“Arabic” to “Uppercase Roman”) are the basic Word styling options. This allows you to make minor changes to the formatting of the default page numbers using some built-in Word styling. The default if you do not change anything is to use basic styled “Arabic” page numbers.
-  The “Use My Custom Footer File” option is selected when you are setting up your own custom external file that the Wizard is going to load in the footer information from. This allows you to create your own custom tailored footer. See this chapter for more information: [How do I Import a Custom Page Footer?](#)
-  The rest of the items in the drop down are pulled from Word’s built-in building blocks template (which varies from version to version of Word). This allows you to select a custom page number styling from a template that will be inserted into your page footers. These options give you the most creative options for how you want your page numbers to look. If you cannot get the precise positioning or styling you want from using the drop downs. Use the “Use My Custom Footer” option instead and make a custom footer template.

Some versions of Word do not handle custom page number

positioning correctly and your custom page numbers may change positions. If this happens use the external page footer file to define your custom page numbering.

Use the Horizontal and Vertical position fields to change the position of the page numbers from the default bottom right corner of the footer. These values are set in points (72 points = 1”) from the top left corner of the page. So, to “center” the page numbers set the Horizontal value to 288 (which is 4” over and about centered on an 8.5x11 page). Then set the Vertical value to between 648 to 720 (which is 9” to 10”) depending on where it best fits your pages.

HOW DO I ADD SUBHEADS TO THE TABLE OF CONTENTS?



<https://www.proposalkit.com/htm/videos-how-to-customize-table-of-contents.htm>

This chapter is meant for use with the Word Auto-Generate Table of Contents.

The Wizard is designed to build the top-level Table of Contents based on the large text sentences at the top of each body page of your document (i.e. “Executive Summary”, “Cost Summary”, “Company History”, and so on).

If you want to add additional subheads under those top-level headings in the Table of Contents you must manually set them up as follows (the instructions look long but it is a simple process of adding some text, setting the text to a font ‘Style’ then updating the Table of Contents object):

First, all the Table of Contents building is based on the existing features of the Microsoft Word program. The Wizard makes use of the existing capabilities and features of your Word program. The Wizard does not extend or add any features to Word that do not already exist.

Word uses either ‘Styles’ applied to text or embedded TC Fields that are tied to the Table of Contents. So, to add subheads is a matter of adding text in an appropriate ‘Style’ to your document pages and then rebuilding your Table of Contents.

When you are using a text based version of Proposal Pack such as Proposal Pack for Any Business or Proposal Pack for Government Grants the Table of Contents will be generated using the predefined Word 'Style' labeled "Proposal Kit Page Header".

If you highlight the Table of Contents object in the Table of Content page it will look something like this:

{ TOC \o \h \z \t "Proposal Kit Page Header,1" }

This tells Word to build the Table of Contents only using top-level text in the document that has been set to the "Proposal Kit Page Header" font 'Style'.

Now for example, say we want to add a more descriptive sentence under our text in each page with a fuller description that we also want to show up in the Table of Contents.

Add a sentence to your document and set it to a pre-defined Word 'Style' such as "TOC 2" or "Heading 2". These are usually pre-defined in Word already.

Then highlight the Table of Contents object in the Table of Contents page and toggle the field codes. In the example above we are going to use the "TOC 2" 'Style', so we will have to add it to the Table of Contents object as a 2nd level header as follows:

{ TOC \o \h \z \t "Proposal Kit Page Header,1,TOC 2,2" }

Now all you have to do is untoggle the Table of Contents field code, so you see the actual text of your Table of Contents again.

Then update the Table of Contents to update the entire Table of Contents.

Your 2nd level text that you added to your documents pages will now appear indented under the top level text.

If you are using a Proposal Pack with graphics in the header of each page the field code used for the Table of Contents will be slightly different. It may look like this:

```
{ TOC \f T \h \z \u }
```

This is because the text of the graphics cannot be used to build the text in the Table of Contents. The Proposal Pack Wizard will insert field codes in front of all the page graphics that will define the text to be used in the actual Table of Contents. This text in the individual page's field codes will match the text seen in the page header graphics.

To add a 2nd level header is the same as before with text based page headers. Simply add your 2nd level header text to your document and set it to a pre-defined Word 'Style' such as "TOC 2" or "Heading 2". Then change the Table of Contents field code to. In this example we will use the "Heading 2" font 'Style':

```
{ TOC \f T \h \z \u \t "Heading 2,2" }
```

Then rebuild the Table of Contents object and your 2nd level subheads will appear.

Highlight objects in your document that use field codes and use your right mouse button to pick the 'toggle field codes' option.

Read your Word manual or contact Microsoft Support for help with field codes, Word 'Styles' and Tables of Contents questions.

HOW DO I CHANGE THE DOCUMENT NAMES?

The Proposal Pack Wizard will append your selected documents using a predefined ordering and will create a Table of Contents using pre-defined document titles. Each major type of proposal (i.e. general, grant, business plan, book, and resume) has its own predefined document titles. These document titles are also what you see in the drop down list boxes when selecting files in the Wizard.

METHOD #1

The preferred method of editing a document's name is to use Preferences > Tools > Configure Proposal Files. Select a template to change the name of and click the Edit the Selected Document button. Here you can change the Short Title of the document and the file or document it will be placed after. You can also change the description of the document. This will not change the title graphic on the actual template. From now on, the new document name and ordering will be displayed in the Wizard drop down lists and in your proposals.

METHOD #2 (FOR EXPERT COMPUTER ADMINISTRATORS ONLY)

You should not manually edit the .ini files unless you know what you are doing. Use the Wizard edit screens if at all possible, instead. Information is only provided for your benefit. Customer service will not be able to assist repairing manually edited database files.

It is not recommend changing document names by directly editing the INI database files. There are cross references between the FileList#.ini, Recommend#1.ini PackDesc.ini and Options.ini files. If you change a file name description you must also make sure all of the .ini files are changed consistently. Using Method #1 above will ensure all .ini file cross references are updated consistently. If you do manually edit any .ini files, make sure to run the Preferences tool Test Data Files to check for any errors or inconsistencies.

You can define your own document titles by editing the data files the titles are stored in. There are 12 files which will be found in the following default folder (unless you changed the default install folder for the Wizard or the location of the database files in the Wizard preferences):

C:\ProposalKit\ProposalPack\Database_V#

There are 12 files in this folder:

- | | |
|--|--|
|  FileList1.ini | - The templates for General Business Proposals. |
|  FileList2.ini | - The templates for Grant Proposals. |
|  FileList3.ini | - The templates for Book Publishing Proposals. |
|  FileList4.ini | - The templates for Business Plan Proposals. |
|  FileList5.ini | - The templates for Resume Proposals. |
|  FileList6.ini | - The templates for Short Form Contracts. |
|  FileList7.ini | - The templates for Short Form Quotes. |
|  FileList8.ini | - The templates for Government Contracts. |
|  FileList9.ini | - The templates for Business Documents. |
|  FileList10.ini | - The templates for Research Proposals. |
|  FileList11.ini | - The templates for RFPs. |
|  FileList12.ini | - The templates for Custom Proposals (user defined). |

To change the titles of the documents as they are displayed in the Wizard drop down list boxes and how the documents are listed in the Table of Contents edit the appropriate FileList#.ini file.

For example, starting with the default settings,

```
[SECTION_8]
SectionHeader=Qualifications
File1=Company History,CompanyHistory.docx
```

To change “Company History” to “XYZ, Inc’s Company Background”

```
[SECTION_1]
SectionHeader=Summary
File1= XYZ, Inc’s Company Background,CompanyHistory.docx
```

You are only changing the descriptive title for display purposes; you are not changing the actual document.

Make a backup copy of your .ini database files before editing them.

HOW DO I ADD THE SAME TEMPLATE MULTIPLE TIMES?



<https://www.proposalkit.com/htm/videos-make-copies-of-templates.htm>

The Pick Documents screen only allows each selected template from the drop down lists to be added once to the proposal, and in the pre-defined order of the drop down lists.

Some templates are designed to be used more than once in a proposal such as the Tab, Supplied Forms and Worksheet templates used for writing government grant proposals. If you are writing a proposal which requires adding the same template more than once you will have to make some configuration changes to the Wizard first.

The preferred method of adding templates to the Wizard menus is to use Preferences > Tools > Configure Proposal Files screen.

Click the “Create & Add a New Document” button. Select a template to use as a starting point (i.e. Worksheet). Fill in the details of your new document and select where in the ordering of the templates it will be located and click the OK button.

This will update all the appropriate Wizard data files with your new document and the new document will be selectable as a template in all the Wizard menus when creating a new proposal, etc. When the operation is complete you can then edit the new templates.

This operation will make a new copy of the selected template since using the same template multiple times in the same proposal typically means each template will be different. For example, if you selected Worksheet to be added again as Worksheet_A, you can now go to your Document Project and when selecting documents for the proposal add the Worksheet twice by selecting “Worksheet” and “Worksheet_A”.

Using this method, you can create multiple copies of any template. Once the copies are created you can then edit them to make each one unique. A good use of this would be having multiple Product, Price List or Services templates.

See the chapter [How do I Add New Documents to the Interface?](#) for additional information.

HOW DO I REMOVE TEMPLATES FROM THE INTERFACE?

The Proposal Pack Wizard displays all available Proposal Pack documents in the drop down lists for use when choosing which documents to add to your proposal. Each major type of proposal (i.e. general, grant, business plan, book, and resume) has its own predefined list. The 12 lists all contain the same actual documents; they are just in different orderings.

METHOD #1

The preferred method of removing templates from the Wizard menus is to use Preferences > Tools > Configure Proposal Files. Select a template or an entire section of templates and click the Remove Selected Document or Section button. This will remove the template(s) from the Wizard menus, however the actual document template file(s) on your hard drive will not be deleted.

METHOD #2 (FOR EXPERT COMPUTER ADMINISTRATORS ONLY)

You should not manually edit the INI files unless you know what you are doing. Use the Wizard edit screens if at all possible, instead. Information is only provided for your benefit. Customer service will not be able to assist repairing manually edited database files.

If you wish to trim down the lists to only a set of documents, you typically will use you can do so by editing the files the lists are stored in. This will only affect the list of available files you can

select from in the Wizard. The actual Proposal Pack documents installed on your hard drive are not affected.

There are 12 files which will be found in the following default folder (unless you changed the default install folder for the Wizard or the location of the database files in the Wizard preferences):

C:\ProposalKit\ProposalPack\Database_V#

There are 12 files in this folder:

- | | |
|--|--|
|  FileList1.ini | - The templates for General Business Proposals. |
|  FileList2.ini | - The templates for Grant Proposals. |
|  FileList3.ini | - The templates for Book Publishing Proposals. |
|  FileList4.ini | - The templates for Business Plan Proposals. |
|  FileList5.ini | - The templates for Resume Proposals. |
|  FileList6.ini | - The templates for Short Form Contracts. |
|  FileList7.ini | - The templates for Short Form Quotes. |
|  FileList8.ini | - The templates for Government Contracts. |
|  FileList9.ini | - The templates for Business Documents. |
|  FileList10.ini | - The templates for Research Proposals. |
|  FileList11.ini | - The templates for RFPs. |
|  FileList12.ini | - The templates for Custom Proposals (user defined). |

To remove documents so they will not be displayed in the Wizard drop down list boxes edit the sequence of files in the appropriate FileList#.ini file.

The files are ordered based on the File# identifier, which is a sequential number. For example,

```
[SECTION_8]
SectionHeader=Qualifications
File1=Mission Statement,MissionStatement.docx
File2=Qualifications,Qualifications.docx
File3=Quality Control,QualityControl.docx
...
```

To remove the Qualifications document from the lists, delete the entire line from the file. The result is as follows:

```
[SECTION_8]
SectionHeader=Qualifications
File1=Mission Statement,MissionStatement.docx
File3=Quality Control,QualityControl.docx
...
```

It is not required that you renumber all of the File sequence numbers, so they are sequential without gaps in the sequence, however it is recommended as follows:

```
[SECTION_8]
SectionHeader=Qualifications
File1=Mission Statement,MissionStatement.docx
File2=Quality Control,QualityControl.docx
...
```

Make a backup copy of your .ini database files before editing them.

HOW DO I USE MIXED LANDSCAPE AND PORTRAIT PAGES?

The Wizard can detect if you have pages in landscape orientation mixed in with the normal Portrait orientation pages.

The Wizard will add extra sections to the document which are required for Word to have different page orientations in the same document.

Normally all body pages of your document are in a single section while the Cover Letter, Title Page and Back Page are in separate sections. This helps control the headers/footers and page numbering.

Word can only apply page orientations to an entire section. So, the Wizard will break up the body section of the document as needed.

All you need to do to make use of this feature is your templates that will be assembled into the final document have to be saved in landscape orientation.

If you need to use this feature with the Team Editing feature where pages are assembled manually you will have to enable the Keep Orientation feature in the Wizard Preferences -> Project Settings -> Configure Project Screen tab.

Once a document is assembled with the body section broken into multiple sections there may be post-processing tools in the Wizard that will not work on the document when they assume all the body pages are in a single section.

HOW DO I ADD NEW DOCUMENTS TO THE INTERFACE?



<https://www.proposalkit.com/htm/video-add-new-documents-to-wizard.htm>

This method is useful for creating multiple product, service and contract documents which you can pick and choose from for each new proposal.

For example, if you want to have 3 different product documents to pick from depending on who you are writing a proposal to, create 2 new product templates and edit the templates appropriately with your product selections. Then whenever you create a new proposal, you will now see 3 different product templates to pick from.

If you need to make formatting changes or updates to your new documents to help transition them to work better within the Proposal Kit system you can use the batch processing tool. Read this chapter for more details:

METHOD #1 (MAKING EXTRA COPIES OF EXISTING DOCUMENTS)

The preferred method of adding templates to the Wizard menus is to use Preferences > Tools > Configure Proposal Files. Click the Create & Add a New Document button. Select a template to use as a starting point (i.e. Products). Fill in the details of your new document and click the OK button. This will update all the appropriate .ini data files with your new document and the new

document will be selectable as a template in all of the Wizard menus when creating a new proposal, etc. If the new template documents do not exist, refer to the section in this documentation on [How do I Add Custom Titled Pages/Chapters?](#) When the operation is complete you can then edit the new templates.

This method will also make a copy of any Excel spreadsheet that is associated with the copied chapter template. For example, if you made a copy of the Cost Summary chapter which is CostSummary.docx and has an associated CostSummaryCalculator.xlsx spreadsheet and your copy was named Cost Summary #2 and the new file was CostSummary2.docx the Wizard will also make a copy of CostSummaryCalculator.xlsx to CostSummaryCalculator2.xlsx. This allows you to have separate cost calculators for each copied template which also will work with the dynamic Excel linking feature.

METHOD #2 (IMPORTING EXTERNAL DOCUMENTS INTO THE WIZARD)

The preferred method of adding templates to the Wizard menus is to use Preferences > Tools > Configure Proposal Files. Click the Create & Add a New Document button. In the first drop down list for selecting an existing file, choose the 2nd item down in the list titled “Browse to a new custom file not in this list”. Then browse your hard drive to locate the file you want to import.

Then give your file a unique document name, title and description. The title is what you will see in the Wizard interface screens once the new file is imported. The file name must be unique and not a file that is already in the Proposal Pack library. If your new

document is meant to be incorporated as a chapter in a larger proposal, check the boxes for Add to Table of Contents, Uses Page Number and Combine into Master Proposal. If you want your new document to be listed in the Top 40 list, check that box. You must have space available in the Top 40 List. You can also use the Preferences > Project Settings > Configure Top 40 Lists screen to put your new file in one or more Top 40 lists later.

The Wizard will also automatically add the default set of Proposal Kit Word Styles to the new document when it is copied into the library of Proposal Pack templates.

Once you finish this operation, your custom document will be copied into your Proposal Pack's document folder along with all our stock templates and all of the entries will be made into the Wizard database so that your imported file will be available for selection in the Wizard interface screens.

You can also configure your templates to cause the contents of external file to be imported during the assembly process (which does not require setting up the file in the Wizard interface). Read this chapter for details: [How do I Import the Contents of External Files?](#)

METHOD #3 (FOR EXPERT COMPUTER ADMINISTRATORS ONLY)

You should not manually edit the .ini files unless you know what you are doing. Use the Wizard edit screens if at all possible, instead. Information is only provided for your benefit. Customer service will not be able to assist repairing manually edited database files.

There are cross references between the FileList#.ini, Recommend#.ini, Options.ini and PackDesc.ini data files. It is not recommended to manually add new templates unless you really know what you are doing. You should use the Method #1 above to ensure all the database cross references are correct. If you do manually edit the .ini data files, make sure to run the Preferences Test Data Files option when done to test for errors and inconsistencies.

You can add your own documents by editing the data files the lists are stored in. There are 12 files which will be found in the following default folder (unless you changed the default install folder for the Wizard or the location of the database files in the Wizard preferences):

C:\ProposalKit\ProposalPack\Database_V#

There are 12 files in this folder:

-  FileList1.ini - The templates for General Business Proposals.
-  FileList2.ini - The templates for Grant Proposals.
-  FileList3.ini - The templates for Book Publishing Proposals.
-  FileList4.ini - The templates for Business Plan Proposals.
-  FileList5.ini - The templates for Resume Proposals.
-  FileList6.ini - The templates for Short Form Contracts.
-  FileList7.ini - The templates for Short Form Quotes.
-  FileList8.ini - The templates for Government Contracts.
-  FileList9.ini - The templates for Business Documents.
-  FileList10.ini - The templates for Research Proposals.
-  FileList11.ini - The templates for RFPs.
-  FileList12.ini - The templates for Custom Proposals (user defined).

To add new documents so they will be displayed in the Wizard drop down list boxes and be appended together in your final proposal edit the sequence of files in the appropriate FileList#.ini file.

The files are ordered based on the File# identifier, which is a sequential number. For example,

```
[SECTION_8]
SectionHeader=Qualifications
File1=Mission Statement,MissionStatement.docx
File2=Qualifications,Qualifications.docx
File3=Quality Control,QualityControl.docx
File4=Case Study,CaseStudy.docx
File5=Company History,CompanyHistory.docx
File6=Services Provided,Services.docx
File7=Products,Products.docx
File8=Product Visuals,ProductVisuals.docx
...
```

To add a new documents, you have created yourself which did not come with the Proposal Pack collection of templates add new lines for the documents. For example, if you have multiple product lists and want to be able to choose from different product lists for different proposals put each product list in a new document such as (“ProductList2.docx” and “ProductList3.docx”) and then insert them into the list as follows:

```
[SECTION_8]
SectionHeader=Qualifications
File1=Mission Statement,MissionStatement.docx
File2=Qualifications,Qualifications.docx
File3=Quality Control,QualityControl.docx
File4=Case Study,CaseStudy.docx
File5=Company History,CompanyHistory.docx
File6=Services Provided,Services.docx
File7=Products,Products.docx
```


File8=Products (Hardware),ProductList2.docx

File9=Products (Software),ProductList3.docx

File10=Product Visuals,ProductVisuals.docx

...

Documents added to SECTION_10 (Presentation), SECTION_11 (Misc.) and SECTION_12 (Custom) will not be part of the FullProposal.docx combined project document. These sections are reserved for miscellaneous documents, letters, checklists, custom assembled reusable templates, etc. which are part of the document project, just not part of the main proposal document. These are good sections to add custom documents such as contracts, letters, checklists, etc. which are dealt with separately from the proposal.

When adding new documents to the middle of a list of existing documents you will have to renumber the File# sequence of files. Make sure that each row has a unique and sequential number.

In the example above Product Visuals was renumbered from 8 to 10, and all entries in the section below it must be renumbered as well.

The documents you are adding must be Word documents ending in the “.docx” file extension and you must add your new Word documents to the Proposal Pack folder where the original set of Proposal Pack Word documents is stored. If you do not copy your new Word documents to the same folder as all the existing Proposal Pack documents, you will not see your new documents you just added to the FileList#.ini files in the Proposal Pack Wizard drop down list boxes.

For example, if you have Proposal Pack Classic #1 you will find the Word documents folder on your hard drive at:

C:\ProposalKit\ProposalPack\Classic_1_v#\Documents\Word

Copy any new documents to this folder making sure not to overwrite any existing Proposal Pack documents.

Make a backup copy of your .ini database files before editing them.

HOW DO I IMPORT CONTACTS FOR BATCHING DOCUMENTS?



<https://www.proposalkit.com/htm/videos-how-to-use-batch-system.htm>

The Batch Processing feature allows you to generate the documents for multiple Document Projects at the same time.

Before you can start importing data or batching documents you must click the button to start the overall batch. This will assign a new batch number that will be used to identify all the imported data and projects as related to this batch. This will allow you to manage the results of the batch more easily.

Typically, the contact information for multiple documents being generated is different so the first part of setting up the batch is getting all the projects created. The Wizard can batch created multiple projects by importing contact data from several data sources. Each contact imported will create one Document Project in the Wizard's database. All those Document Projects will then be batched to create all their documents at once.

Look in the Wizard Preferences > Project Settings > Configure Batch Processing screen for configuration options. There are settings to control how duplicate records are handled and how the data is imported into the Wizard's database.

The Wizard can import data from external files and Microsoft Outlook. There are configuration screens for those systems in the Wizard Preferences > Integrations screen.

External Files

The Wizard can import contact data from .xlsx, .txt, .csv and .xml files. Whichever file format is used the files must essentially be in a row/column format and contain a header row that identifies which columns contain which types of fields. If you can export your contact data from a 3rd party system you can get it in a format that can be imported into the Wizard usually with some minor editing of the file such as creating a header row and maybe massaging some of the data as needed.

There are several examples of import files in the ProposalProjects_V#\BatchImport folder. Look at these samples to see what your header row must contain and how to structure the data. If you are using duplicate row checking based on the company name and/or first name and last name you must have those columns defined (CustCompany, CustFirst, CustLastName). All other columns are optional. The example .xlsx file will show all the tags that can be used. You can also get the list of tags from the chapters that talk about mail merge tags.

Using files to import your data also allows you to use all of the Wizard's predefined tags so you can add your own custom columns, contract data columns and company information columns in addition to the client data columns.

There are 2 special case columns that can be used in the import files.

CompanyNickName – This column header allows you to use a single nick name to pull in all the fields for a company data record. This would only be used if you added company data records to the Wizard's CRM database and then put those nick names into the

import file. One use for this would be if you have many documents to batch but they are for different sales reps and its one person creating all the batched documents. For example, if you have Ian and Joel as Company CRM database record nicknames you can enter Ian or Joel into this cell and it will pull in all of the company fields from that record (title, salutation, first name, last name and so on).

StyleName – This column header allows you to set the graphic design theme. This is only used if you have multiple design themes purchased and installed and you want to change design themes during the batch process. The StyleName must be set to the exact style name as shown in the Wizard's style database including the version number.

The only difference between .csv and .txt files is that one is tab delimited and one is comma delimited. Excel can be used to save your file in either of these formats or if you have a system that can create export files you can create them in these formats directly.

.xlsx files are standard Excel files. You can add formatting to the Excel spreadsheet however when the data is imported only the raw text data will be imported. No formatting will be imported (cell colors, bolding, underlines, font sizes or styles, etc.).

If any data is blank in a column that is defined in the spreadsheet it will overwrite any default data in the Wizard's database or your Project Template. To retain any data in the template if a cell in the spreadsheet is empty use the text DEFAULT in the cell of the spreadsheet. This will cause the import to not copy over any default in the Project Template.

Each imported row will be used to create a new Document Project copied from the Batch Project Template.

It is recommended that you use the Dry Run test first to identify any problems with the data. A dry run will perform all the operations of importing the data including error checking and duplicate checking and will produce a detailed report. The Dry Run test will not actually make any changes to the Wizard's databases.

Microsoft Outlook

If you have Microsoft Outlook enabled in the Wizard's Integration preferences the Wizard will load all your address book records into a pick list. Select the records you want to load, and the Wizard will import each row into a new Document Project.

Each imported row will be used to create a new Document Project copied from the Batch Project Template.

Select the records you want to load from the pick list you have built, and the Wizard will import each row into a new Document Project.

Each imported row will be used to create a new Document Project copied from the Batch Project Template.

Once all your contact data is imported and the projects created you will be ready to start the batch process to create all the documents. You can also make manual edits to any of the imported projects if you need to make custom changes to any of them before starting the document batching.

For more information on the actual batch creation of the documents for the projects see the chapter: [How do I Batch Multiple Projects at Once?](#)

HOW DO I BATCH MULTIPLE PROJECTS AT ONCE?



<https://www.proposalkit.com/htm/videos-how-to-use-batch-system.htm>

The Batch Processing feature allows you to generate the documents for multiple Document Projects at the same time.

Normally you create one project at a time and generate the documents for that project. Batching lets you create the projects first then generate the documents for all of them in a single operation.

An example for how to use the batch feature is to create a bunch of form letters to send to prospects from a list of leads as a batch. Then, for any of those that turn into prospects go back to those projects and generate a proposal. Then for any of those projects that are accepted you can go back and add additional documents to the project such as letters or contracts.

You can control some of the Batch Processing using the Preferences > Project Settings > Configure Batch Processing screen options.

The batch process works by first adding Document Projects to the database. These are the same projects as you normally create. Once you have projects in the database ready to create documents for you can enter the Batch Projects screen. All projects in the database that are in the default "Work in Progress" or "Ready to Batch" status are available. Any projects in "Ready to Batch" status will also be automatically selected.

In addition to manually creating the projects one at a time you can also import contact data from a variety of data sources and automate creating the projects to be batched. See this chapter for details: [How do I Import Contacts for Batching Documents?](#)

Once you have all the projects you want to run in the batch selected click the OK, Start Batch button. This will run the normal document creation process on all the selected projects saving you the time of manually doing it for each individual project.

To save additional time locating all the documents created during a batch process you can specify a folder in the Preferences for the final generated documents. As each batched project is completed the documents for that project will be copied into the external folder and prefixed with either the project name or project number. The original copies of the documents will still exist in the normal project folders.

As each project is completed in the batch its status is set to "Batch Completed" or you can specify a specific status. The "Batch Completed" status will cause batched project to disappear from the main project drop downs as those normally show projects in "Work in Progress" status. So, one trick to keep your batched projects showing up in the project drop down lists is to set the final status to "Work in Progress" in the Preferences screen. Another way to accomplish this is to check the box to combine both "Batch Completed" and "Work in Progress" projects in the project drop downs. Use whichever option works best for your needs.

Every time you run a batch a batch number is incremented and assigned to each project in the batch. This allows you to control

viewing and operating on all projects used in a batch to help manage projects in bulk operations.

The Wizard can recover from batches that are either stopped manually or due to Word stopping or a computer being turned off. When the Wizard is restarted it will take you back to the Batch Projects screen with options to continue where the batch left off, stop and cleanup the batch and possibly restart it or remove all traces of the failed batch.

The currently selected style at the time each project was created will be used as the design theme. This gives you the ability to set specific design themes for individual projects in the batch.

TROUBLESHOOTING

Batching lots of projects at once where you are also assembling documents from the template library each time can be time consuming. If you are using the same layout of chapters for each batched document, consider creating a reusable template. A reusable template is a single document copied for each project that does not have to be completely assembled from scratch each time.

If Word crashes or otherwise stops processing the batch in progress Word may ask you a Yes/No question when restarting about how to open a document that was open previously. If Word asks this Yes/No question it can cause the batch to not be able to be properly restarted. You can stop the Wizard and restart it again to keep Word from asking that question again and then restart the batch.

HOW DO I BATCH UPDATE OLD OR EXTERNAL DOCUMENTS?

The batch processing tool is used to help you update a collection of old documents or to help get your external documents ready to integrate into the Proposal Kit system. For example, if you have made changes to the footers or headers you used in the past you can update your documents with new headers and footers. Or, if you are preparing a set of custom external templates you want to add to the Proposal Kit system you can use the batch tool to add the Proposal Kit Word Styles to make your fonts consistent or to change all your page margins and page sizes to match ours.







There are a wide variety of batch updates that can be made to your documents (headers, footers, font styles, meta data, color schemes, page settings, URLs and page borders).

The batch tool will use the settings already in place in the Wizard's Preferences, MyGraphics folder and the currently selected 'Style' depending on which type of updates you have selected.

The Wizard will apply the updates to every Word format document it finds in the selected folder. So, if you have a mix of documents you need different types of formatting applied to then split them up into multiple folders and batch process each one separately.

If you are updating documents that were generated by the Wizard in the past check the box to tell the Wizard, they are Proposal Kit generated files so the batch process can tailor the updates appropriately. For example, our Wizard generated documents use multiple sections within each document and sections that hold the

Cover Letter, Title Page and Back Page need to be processed differently than the section holding all the body pages. If you process external documents the batch process will assume that there is only one section in the entire document and will make its updates to the entire document.

-  To use custom headers and footers you have to setup the CustomHeader.docx and/or CustomFooter.docx file in the MyGraphics folder.
-  Word Styles are defined in the Preferences > Data & Display > Font Styles screen.
-  Meta Data is defined in the Preferences > Project Settings > Configure Document Creation screen.
-  The color scheme is defined in the Document Styles > Edit Style > Colors and also the Tables screens.
-  The page settings are defined in the Document Styles > Edit Style > Page Setup screen.
-  The page border settings are defined in the Document Styles > Edit Style > Borders screen.

First make the updates to the settings in whichever Wizard screens apply to the batch processing you need to do. For example, to apply a custom header make sure you have the CustomHeader.docx file updated in the c:\ProposalKit\ProposalPack\MyGraphics folder. Or to change the color scheme make sure to set the desired colors in the Edit Styles' Color tab. Then return to the batch processing screen check those boxes and start processing your documents.

The Wizard will make a backup copy in a new folder of all your documents so if the batch process did not work as anticipated you can copy the backups and try again after adjusting the settings.

HOW DO I CLONE A PROJECT?



<https://www.proposalkit.com/htm/videos-clone-project-documents.htm>

Cloning a project is a way to make a new document more efficiently for an existing client so you can reuse the name/address contact data from the past project and perhaps the template list. Or you can use it to quickly make a copy of a past projects documents, so you can reuse a proposal you have already created.

In the first situation, creating a new document for a past client, you just clone the project settings. If there are documents created or the past project you do not have to also clone the documents. After the project is cloned the new project will have a new name and folder created for it and all the name/address and template data will be copied. Now just edit the project settings and change the title and change the selected templates as needed.

If you want to quickly reuse a past proposal by making a copy and editing the completed past proposal, then also clone the project documents. In this situation you can change the cloned projects title (just to make it easier to locate in the project lists later). If you are only planning on editing the past projects completed documents all you must do is go straight to the Edit Current Document screen and open and edit the documents. In this situation you will not be using the Wizard to build new documents. You would only change the name/address contact data in the cloned project if you are going to delete and recreate documents or create all new documents to use with the cloned documents.

If you are using dynamically linked spreadsheets (or any other dynamic OLE links) in your project documents the links need to be updated to the new folder. The Wizard will scan and update any fields in the project documents that are OLE links and will update the paths from the source folder to the new cloned folder.

Another way of reusing past proposals so you can use an entire document created previously as a selectable template for use in the Wizard interface. This is different than cloning past projects. For this type of document reuse see the manual chapter: [How do I Reuse a Previous Document Over Again?](#)

HOW DO I REUSE A PREVIOUS DOCUMENT OVER AGAIN?

The Wizard is initially used to create a complete document by assembling several individual chapter templates and mail merging data into them to create a complete master document.

While the Wizard can be used in its default configuration for all your document projects there are situations where this becomes inefficient. The Wizard is meant to be customized to suit each user's unique workflow and business situation.

One of the ways you can optimize the use of the Wizard and the Proposal Pack template collections is to pre-assemble one or more multi-page documents then reuse them for future documents (usually this is done for client proposals where only client specific changes are made such as contact information, prices, etc.)

For example, if you will always be selecting the same set of 10 templates and assembling them in the same order it is easier to do it once, then reuse the assembled 10 page document for your future documents. Or you might have 5 different variations of your multi-page proposal with different services or price lists. You can save each copy of your pre-assembled document with the mail merge tags and instead of taking the time to assemble them every time, do it once.

Another option could be that the first 5 pages of your document and the last 5 pages are always the same but the middle pages with products, services or other variable information change. In this case you can setup multiple pre-assembled documents then just

reassemble 3 documents each time you create a new project instead of assembling 10+ pages every time.

There are many ways to setup the Wizard and multiple ways the same task can be performed to best suit different business situations and workflows.

If you are just using Proposal Packs and the Wizard to create a late night proposal, report or business plan for the first time, you don't need to use any of the optimization features, you can use it right out of the box with the default settings, then customize it later when you figure out your workflow for writing future documents.

Some users want to start with a complete written and combined master document with mail merge tags and have the Wizard copy that master document and merge data with it.

This is relatively easy to accomplish with the Wizard using the following steps.

You can create a reusable template either with an already linked Excel spreadsheet or unlinked with either the original <<R#C#>> tags or with plain text data. If using dynamically linked spreadsheets you should remove any unneeded links. Too many OLE links in a Word document will lead to slow performance.

METHOD #1 (DIRECT FROM EDIT DOCUMENT SCREEN)

This is the easiest and most efficient method to add a reusable template to the Wizard database and make it easily available without any extra work. This method does most of the work for you however, it uses as many default settings and is not as customizable.

From the Edit Current Document screen click the Create Reusable Template button.

The Wizard will automatically fill in as many details and load the Preferences screen for you with all the settings properly set. From that screen add the reusable template. The Wizard can also automatically set it up in the Custom Top 40 list and will also make the Custom Top 40 list the default.

This way your newly added reusable template can be selected for your next document project right from the first page of the Add Templates tab.

METHOD #2 (MANUALLY CUSTOMIZE)

If you are using any chapters with dynamically linked spreadsheets you can first turn off a couple settings in the Wizard's preferences so that your generated template that will be reused gets built with the <<R#C#>> tags still intact. This is for when you do not want your reusable template to have OLE links already embedded in it.

First, to create a custom reusable template that will also be linked to spreadsheets later during assembly of new project documents, make sure to disable the Dynamic XLS linking feature and you also

must disable the replacing of dynamic XLS tags with replaceable text. Before generating your custom reusable template click the Wizard's Preferences > Tools > Excel Calculators button. Then on the screen uncheck the Enable Excel Dynamic Links to Word Documents box and uncheck the If Excel Dynamic Link is turned off replace XLS tags with meaningful text from XLSFiles.ini file. Then you can build a template in the Wizard, customize the tags and rename the files to get them ready to import as a custom reusable template.

Second, from the main Wizard screen click Document Projects > Add New Project and name it something like Master Proposal or a name you will recognize as this document. Select your templates using the various tabs in the Pick Documents screen.

Set all the mail merge data fields in the Company Data, Client Data and Other Data screens to blank fields (zero length empty data). This will cause the Wizard to not remove or replace the mail merge tags when you create the document, leaving you with a completely assembled document that still has all the mail merge tags in it. Also uncheck the box to use dynamic XLS file linking as you do not want OLE spreadsheet links in your new master template.

Click "OK, Save Project and Build Documents" to build the project documents. Note that you will see a popup message about all the mail merge tags that were found without data. This message is correct and is what you want to see in this situation.

Third, after the create process has completed click the "Edit Current Document" button and complete all your custom edits to this master Combined Project Document until it is complete to the point of being able to be used for your future documents. Do not

replace any of the mail merge tags at this time as that will be done by the Wizard for each new project you use this master template for.

To associate linked spreadsheets to your Word document in a way that the Wizard will recognize them rename the Excel (.xlsx) files in your project folder to the same name as the renamed FullProposal.docx file and put the word “Calculator” at the end. If there are more than one spreadsheet all others must have an incremental number starting with 2 after the word “Calculator”.

For example, if the project used both the Cost Summary and Return on Investment templates it would have copied the CostSummaryCalculator.xlsx and ReturnOnInvestmentCalculator.xlsx spreadsheets into your project folder.

In this example you would rename the generated project documents FullProposal.docx to a unique name such as OurCustomProposalLayout.docx then rename the project spreadsheet CostSummaryCalculator.xlsx file to OurCustomProposalLayoutCalculator.xlsx and the project spreadsheet ReturnOnInvestmentCalculator.xlsx file to OurCustomProposalLayoutCalculator2.xlsx

If you are going to create a custom template that also has linked spreadsheets there are sample files you can look at based on this example. Look in your Wizard install project folder in the CustomizationExamples subfolder. Unless you changed your Wizard’s default install location it will be in the folder:

c:\ProposalKit\ProposalPack\ProposalProjects_V#\CustomizationExamples\ReusableTemplateWithSpreadsheets

Then you will have to update the <<R#C#>> tags in the renamed OurCustomProposalLayout.docx file so the Wizard will know which spreadsheet each tag is associated with. In this example any tags in the Return On Investment chapter would have to be changed to <<XLS:OurCustomProposalLayoutCalculator2:R#C#>>

Once these customizations are made then you can follow the instructions to add your custom multi-spreadsheet associated template into the Wizard database as a selectable template.

Fourth, from the main Wizard interface click Preferences > Tools > Configure Proposal Files button. Select Proposal Type “Custom” from the end of the list. Then, click the Create & Add a New Document button.

Click the top drop down that says Pick a Document or Section and select “Browse to a new custom file not in this list” then when shown the browse file screen locate your master document you were editing in the first step above. Based on this example (and if you did not install your products in a different location than the defaults) you will find your master document in the file:

C:\ProposalKit\ProposalPack\ProposalProjects_V#\Master Proposal\FullProposal.docx

In our dynamically linked spreadsheet example above you would select the OurCustomProposalLayout.docx file as the custom template to be added into the Wizard database.

If you titled the project differently or if you installed the Wizard in a different folder locate it wherever you saved it to. If you cannot find it, run the Preferences > Tools > File Location Report and look in the log file for where your project is stored on your hard drive.

Change the rest of the fields as you see fit such as the name of the document file, short title and long description. You must use unique names for the document file and title that are not already in use in the Wizard. Enter a custom name and file name such as “My Master Proposal #1” and a file name like “OurCustomProposalLayout.docx”. These are only examples, use any meaningful names. Enter a description of the new document, you must replace the default description with our own.

For the file or section that the file will be placed after drop down list, select “Section 10”, “Section 11” or “Section 12” as the section to place the new document under then click the OK button. The reason for putting your reusable template in Section 10, Section 11 or Section 12 is that any templates located in these sections will not be put through the process of being recombined; they will only be copied into your new project folder as stand-alone documents (however they will still be processed to replace mail merge tags with your custom data, etc.). Depending on your business situation and workflow, you could setup a reusable document and place it in Sections 1 to 9 which gives you the ability to prepend or append additional templates to it. Set up the options as your situation dictates.

Check the Show on Top 40 Tab box if you want quick access to this template. If you are adding this file to a Proposal Type that already has 40 templates in its Top 40 list, you will have to go to the Preferences > Project Settings > Configure Top 40 Lists screen

and remove one of the other Top 40 templates otherwise there will not be room on the Pick Documents Top 40 tab for this one.

Remember to switch to the appropriate Proposal/Project Type in the Top 40 configuration screen to see your new reusable template. If you added your new reusable template to the Custom type, you must select the Custom type when you get to the Top 40 configuration screen, and you will also need to change your proposal type to Custom when creating a new document.

Set the Custom type as your default for all new proposals in the Preferences > Project Settings > Configure Project Screen and change the drop down for the default document project type to Custom. By default, it is set to General Business Proposals. This will also give you the benefit of optimizing the performance of the Wizard while it is running since the Custom type will only be working with a very small set of templates vs. the default setting which has to manage the entire library of templates. You can switch back to using the General Business Proposal type when you want access to all the templates to create new reusable templates.

When the custom template is added to the Wizard database the Wizard will copy it into the documents folder where the rest of the stock Proposal Pack templates are located. The Wizard will also copy any associated spreadsheets it finds in the same folder into the Proposal Pack stock spreadsheets folder. Therefore, you must follow the naming rules, so the Wizard knows to copy them and make the database associations otherwise only the Word document will be added to the system.

Once the add process is complete you will see a list of files to edit. For every Proposal Pack style, you have purchased you will see a new file. If you have purchased more than one Proposal Pack style, your document will have been copied into every Proposal Pack style's document folder. Note this is only a management issue for users who have installed multiple sets of our Proposal Pack templates. You might want to delete the extra copies and just use one copy in one of your Proposal Pack styles. You do not need to edit the master template currently. Click OK and go back out to the Wizard home screen.

If you have selected a Cover Letter and will be creating a Master Cover letter that you want to use with the Master Proposal, do the same steps as above starting with the second step. In step 3 you will select the coverletter.docx rather than the fullproposal.docx.

Fifth, remember to turn back on the dynamic Excel linking feature if you disabled it in the Wizard's Preferences > Tools > Excel Calculators screen. Save the Wizard preferences and exit back to the Wizard home screen.

Your complete master template is now selectable as a new document in the Proposal Pack Wizard menus as follows:

Sixth, Click the Document Projects button on the main Wizard screen and click Add New Project. Give the project a name such the name of the company you are submitting the proposal to. Select "Custom" as the project type (unless you have already set "Custom" as your default project type.

Next click the Pick Documents button and select from the "Stock Proposals" menu your newly created master template "My Master

Proposal #1” (or whatever you titled it). If you added this as a Top 40 selection you will see it on the Top 40 page as well.

Fill out the mail merge data for this project and click OK, Save Project and Build Documents. Your new document will now have been created more efficiently using your reusable master template.

Steps 1 to 3 above only need to be done once. Every time you create a new document reusing this master template you only need to repeat this fourth step.

If you used the “General Business Proposal” type instead of the “Custom” for example, make sure to select that proposal type to find your custom document and look in appropriate section (presumably you put it in “Section 10”, “Section 11” or “Section 12”).

For each new document repeat this step. You can also create multiple complete templates to choose from or even completely independent documents such as individual custom contracts using this method.

If you are using the dynamic Excel linking feature and have associated one or more Excel spreadsheets in the database with your custom template, they will all be copied into your project folder just by selecting your custom named template from the Wizard interface. If you added <<R#C#>> tags to the custom template the Wizard will replace them with OLE links to the spreadsheets when you generate your project documents.

This does have implications for upgrading to future versions of Proposal Packs and the Wizard. Because the databases are so

configurable, and you are making complex changes to the system you will have to manually copy your reusable templates to new Wizard versions in the future and you will have to go through the steps above to add them back to future Wizard databases. The only step you will not have to redo migrating to a future release is that you do not have to rebuild the reusable templates again. The Wizard does include a migration tool that will assist in finding custom documents and where they should be copied to. See the migration documentation for details: [How do I Migrate from a Previous Version?](#)

HOW DO I TEST MY MANUAL INI DATABASE EDITS?

Most of the Wizard data resides in a collection of INI database files. While you can edit the data manually by editing the INI files, it is recommended you use the Wizard Preferences screens.

Some edits are relatively easy, others such as those involving proposal document names use cross references between multiple files which must all match.

You can test the integrity of the Wizard database files for errors and inconsistencies by running the Test Data Files in the Tools tab of the Wizard Preferences screen.

This tool will perform extensive checks on the database and will create a report outlining its findings.

Use this report to help repair your INI files or to send to our technical support department if assistance is required.

You can repair many settings by using the “Reset to Default” buttons on the various Wizard Preferences screens.

Some settings such as those related to the lists of proposal files and file attributes may require manually editing the INI files to repair the problems. As a last resort you can try to manually copy the FileList*.ini and Recommend*.ini files from the backup folder located on your hard drive. This is a manual operation you need to perform using your Windows desktop.

If the damage is too extensive or difficult to repair, you may have to uninstall and reinstall the Wizard.

HOW DO I CREATE MULTIPLE (PRODUCT, ETC) TEMPLATES?



<https://www.proposalkit.com/htm/videos-make-copies-of-templates.htm>

Many people have different product selections, service plans, contracts, etc. they want to pick from depending on who they are writing a proposal for.

The Proposal Packs come with a single template for Products, a single template for Services, a single template for Contract and Terms, etc.

You can make multiple copies of any template with new names and populate the new templates with your custom text, images, etc. Then, for each new proposal you can select which of your Products, Services or other templates to use.

For example, you have 3 products templates unique to your company, Software Products, Hardware Products and Distributor Product List. Our Proposal Pack has a single template called Products.

Run the Wizard and click Preferences >Tools > Configure Proposal Files button. Click the Create & Add a New Document button. Now click the first list box and select the “Products” template as the source document. The Wizard will now be populated with the information from the default Products template and given a unique name. Change the file name to “SoftwareProducts.docx” and the title to “Software Products” and click the OK button. You will then

be given the option to edit the new template. Open the template and edit it like you would any Word document, if you have text for your own custom template already written you can paste it in and save the file. Repeat these steps adding the other 2 new product templates.

Now, when you create a new proposal you will see your new product templates as selectable documents in the Wizard.

You can use this method to create multiple copies of any template and name them as you see fit.

For example, if you have a standard web site development contract, software development contract and web site hosting contract you can create multiple proposal contract templates by copying the standard “Contract and Terms” proposal template and pasting in your contract text.

HOW DO I DO PROJECT TRACKING AND REPORTING?



<https://www.proposalkit.com/htm/videos-how-to-use-tracking-reporting.htm>

The Project Status tracking feature allows you to further manage your document projects by updating the status through the various stages of the process.

The default status for each new project is "Work in Progress" and is set to the date that the project was added to the system. The fields in this form are only used for your convenience to help keep track of your projects. The data is not used anywhere else.

For example, when you have finished writing your document and have submitted it, set the project status to "Submitted" and update the date field. Later if the proposal is accepted update the status to "Accepted" and update the date field. Each of these status dates is individually stored in the project database.

Moving completed projects to different statuses will also reduce the clutter of having many open projects to pick from in your work in progress projects.

If you have only selected one project, then all its fields will be filled in the project status form. If you have selected multiple projects then all fields on the form will be blank unless the data is the same in every selected project, in which case it will be displayed on the form. Only fields you change on the form will be updated back to the selected project(s). If you change a field on this form and you

have selected more than one project, then that field will be updated into every selected project.

The status fields are set in the Project Status screen which is a button on the Manage Projects screen.

To generate a report in an Excel compatible XML file you can select one or more records from the Manage Project screen and click the Output to Report button.

This will generate a report of your selected projects and all tracking status dates for those projects.

HOW DO MULTIPLE PEOPLE EDIT THE SAME DOCUMENT?



<https://www.proposalkit.com/htm/videos-how-to-use-team-editing-mode.htm>

The Wizard is installed by default in single person editing mode. This means when a proposal is created all the individually selected templates are combined into a single master proposal. The single master proposal titled FullProposal.docx is then edited by a single person typically.

THERE IS NO PROTECTION AGAINST MULTIPLE PEOPLE ACCESSING THE DOCUMENTS OR DATA AT THE SAME TIME AND OVERWRITING EACH OTHERS WORK.

If you are going to setup the Proposal Packs and/or Proposal Pack Wizard, you are responsible for setting up procedures to ensure users will not cause problems such as not allowing the ability to change the Wizard database or not allowing edits to root documents.

You must have the appropriate number of licenses for the number of users and type of environment (single user or networked).

Proposal Pack Wizard also supports team editing where multiple people can be editing the same proposal at the same time. This is done by leaving the individual proposal templates as separate documents and each person is assigned to work on specific templates. For example, one person edits the Executive Summary

and Cost Summary, and another person edits the Products and Services.

To enable Team Editing mode, turn on the option in the Preferences screens under the General Settings tab.

Then, after you create your proposals, do not edit the combined master proposal (FullProposal.docx). Instead click the Team Editing tab. When all the editing is done, click the Recombine ALL Templates button. When the process is complete, you can then view, edit and print the FullProposal.docx by clicking the Open Document(s) button on the Edit Your Current Documents screen.

When you combine the individual templates into a new master proposal, the original master proposal will be overwritten. Do not edit both the master proposal and the individual templates at the same time.

Another important safety feature built into the Wizard to prevent your edits from being overwritten is if you add more templates and create your proposal again, any existing templates will not be overwritten. This also means that if you have changed document styles or mail merge data, the new data or style will not overwrite or affect any existing templates. If you have not started editing any of your proposal documents, you can clear out the old files and start the proposal generation over completely by clicking the Delete Old Files button in the Document Project screen.

HOW DO I INSTALL AND CONFIGURE FOR USE ON A NETWORK?

First you need to have purchased enough licenses to cover the number of individual users and computers the software will be used by. Each purchased license will cover 5 users/computers.

Once you have the appropriate licenses and serial numbers it is important that while Proposal Packs and Proposal Pack Wizard can be used in a networked environment with multiple people operating on the same set of documents and a common database for the Wizard the software is not specifically designed as a client/server or other specially designed multi-user system.

You must grant full read/write permission to the files and folders being used to hold the Proposal Kit templates and document projects.

THERE IS NO PROTECTION AGAINST MULTIPLE PEOPLE ACCESSING THE DOCUMENTS OR DATA AT THE SAME TIME AND OVERWRITING EACH OTHERS WORK. IT IS YOUR RESPONSIBILITY TO SETUP POLICIES AND PROCEDURES TO SUPPORT HOW MULTIPLE USERS WILL ACCESS SHARED FILES.



If you are going to setup the Proposal Packs and/or Proposal Pack Wizard, you are responsible for setting up procedures to ensure users will not cause problems such as not allowing the ability to change the Wizard database or not allowing edits to root documents.

We only offer suggestions on setting up the software to help point you in the right direction and do not guarantee they will always work in all environments or configurations and there are many ways to setup the system depending on where you want the various files located.

There are several paths stored in the Wizard's Windows registry and in the Wizard's INI database files. Double check all the paths to ensure everything is pointing to the proper location.

SUGGESTION #1

Proposal Pack installed on Server, Wizard installed on each user's computer. Each user has their own project folder for new proposals.

-  First ensure you have one license for every (5) five users. For the first license you will number the users 1 to 5, for the 2nd license 6 to 10 and so on.
-  On each computer map a network drive letter to the location on the server so you can access the Proposal Pack installation folder on the network via a mapped network drive (i.e. "Z:\ProposalKit").

- From the first computer, install the Proposal Pack on the network server to the mapped drive.
- Install the Wizard on each user's computer. In the Wizard's Preferences > General Settings screen enter the multi-user serial number to enable the "User ID Number" field. Make sure each Wizard has a unique User Id generated.
- In each users Wizard, go to the main screen and click the "Document Styles" button, click the "Search for Styles" button, then browse to the folder on the network where you installed the Proposal Pack(s) (i.e. "Z:\ProposalKit"). Note on the first computer that the Proposal Pack/Pro kit was installed on this will happen automatically. All other computers will use the Search for Style button.

If your mapped drive letter does not show up in the list of drives in the Proposal Pack installer's browse screen you may have to configure your Windows operating system to show the mapped drive letters. There can be multiple things that cause mapped drive letters to not show up so if the following tip does not work consult your Windows help or search for other solutions online.

Run the Windows regedit utility program and in the HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\Current Version\Policies\System key add a DWORD entry of EnabledLinkedConnections and set it to 1 then restart your computer. This should cause your mapped drive letters to show up in the installers. Rerun the installer and select your mapped drive and a folder to install into.

Proposal Pack Wizard must be configured to use drive letters (i.e. use a mapped network drive such as Z:\ProposalKit instead of \\MYNETWORKEDCOMPUTER\My C Drive\ProposalKit). The Wizard will not operate properly with UNC or HTTP paths.







In this configuration each user has their own copy of the Wizard database and their own project folder that each new proposal will be created in. The only part that is accessed via the network are the Proposal Pack templates.

The administrator can set Wizard preferences to enable Novice mode and disable editing of the default project settings as you see fit.


Proposal Kit does not offer technical support for individual users when you are setting up a networked environment. Contact your network administrator for assistance.

SUGGESTION #2

Proposal Pack installed on Server, Wizard installed on each user's computer. All users use a common network folder for new document projects.

-  First ensure you have one license for every (5) five users. For the first license you will number the users 1 to 5, for the 2nd license 6 to 10 and so on.
-  On each computer map a network drive letter to the location on the server so you can access the Proposal Pack installation folder on the network via a mapped network drive (i.e. "Z:\ProposalKit").
-  From the first computer, install the Proposal Pack on the network server to the mapped drive.
-  Install the Wizard on each user's computer. In the Wizard's Preferences > General Settings screen enter the multi-user serial number to enable the "User ID Number" field. Make sure each Wizard has a unique User Id generated.
-  In each users Wizard Preferences > Files and Folders screen, change the "Default Project Folder" to a location on your network (i.e. "Z:\ProposalKit\ProposalProjects").
-  In each users Wizard Preferences > Files and Folders screen check the box "Disable Archive Orphaned Project Folders option in Manage Projects delete screen". This is required to ensure one user doesn't accidentally archive another user's project folders. This is also why this configuration is not

recommended anymore. It is preferable for each users to have a unique project folder on the network.

 In each users Wizard, go to the main screen and click the “Document Styles” button, click the “Search for Styles” button, then browse to the folder on the network where you installed the Proposal Pack(s) (i.e. “Z:\ProposalKit”). Note on the first computer that the Proposal Pack/Pro kit was installed on this will happen automatically. All other computers will use the Search for Style button.

Proposal Pack Wizard must be configured to use drive letters (i.e. use a mapped network drive such as Z:\ProposalKit instead of \\MYNETWORKEDCOMPUTER\My C Drive\ProposalKit). The Wizard will not operate properly with UNC or HTTP paths.

In this configuration each user has their own copy of the Wizard database. The only part that is accessed via the network are the Proposal Pack templates and the created project documents.

Users will also have to ensure that they do not create new projects with the same folder names as someone else in this configuration.

If you are working in a team environment where multiple people are working on parts of the same proposal, then set all their root project folders to the same place. You should put your own procedures in place to ensure that only one person creates project folders and ensure that multiple people don't work on editing the same files at the same time (remember there are no protections in place in the Proposal Pack or Proposal Pack Wizard to prevent this). This situation comes in handy when a team is working on a

large proposal and different people are assigned to work on different parts of the proposal. Each part of the proposal is maintained in separate templates, and you wait to combine them into a single document until everyone is finished with their parts.

The administrator can set Wizard preferences to enable Novice mode and disable editing of the default project settings as you see fit.




Proposal Kit does not offer technical support for individual users when you are setting up a networked environment. Contact your network administrator for assistance.

SUGGESTION #3


Proposal Pack installed on Server, Wizard databases and project folders to be setup on the Server. All users use a common network folder for new document projects.

This option is better used by a single person using multiple computers or when only one person at a time will be generating documents in the Wizard software.

The Wizard software is not a real-time multi-user system. It can be used by multiple people at once with some caveats. When making changes to the shared databases and files such as adding new projects, configuring Preferences, etc. all other copies of the Wizard should be restarted to ensure they pick up the changes and do not overwrite each other.

-  First ensure you have one license for every (5) five users. For the first license you will number the users 1 to 5, for the 2nd license 6 to 10 and so on.
-  On each computer map a network drive letter to the location on the server so you can access the Proposal Pack installation folder on the network via a mapped network drive (i.e. “Z:\ProposalKit”). Because paths are set in the server side databases and files this will only work for multiple users if each user has the same mapped drive letter and directory structure.
-  From the first computer, install the Proposal Pack on the network server to the mapped drive.

- ❏ Install the Wizard on each user's computer. In the Wizard's Preferences > General Settings screen enter the multi-user serial number to enable the "User ID Number" field. Make sure each Wizard has a unique User Id generated.
- ❏ In each users Wizard Preferences > Files and Folders screen, change the "Default Project Folder" to a location on your network (i.e. "Z:\ProposalKit\ProposalProjects").
- ❏ Also change the "Settings Database Folder" and "Project Database Folder" folders to be the database folder created during the Wizard installation on the server (i.e. "Z:\ProposalKit\ProposalPack\Database_V###").
- ❏ In each users Wizard Preferences > Files and Folders screen check the box "Disable Archive Orphaned Project Folders option in Manage Projects delete screen". This is required to ensure one user doesn't accidentally archive another user's project folders. This is also why this configuration is not recommended anymore. It is preferable for each users to have a unique project folder on the network.
- ❏ Close all the individual user's Wizards if they are still running.
- ❏ In the first user's Wizard, go to the main screen and click the "Document Styles" button, click the "Search for Styles" button, then browse to the folder on the network where you installed the Proposal Pack(s) (i.e. "Z:\ProposalKit"). Note on the first computer that the Proposal Pack/Pro kit was installed on this will happen automatically. All other computers will use the Search for Style button.





 Run the Wizard on each user's computer and they should now all be initializing with common set of networked database files and templates.

SUGGESTION #4




Proposal Pack installed on Server, each user with their own database settings. Project folders to be setup on the Server. All users use a common network folder for new document projects with their own personal subfolder.

This option is better used by a multiple people where all projects are kept in a master server folder, but each user has their own subfolder to prevent any projects from interfering with each other.

This is the easiest setup to manage multiple users at once without risking people having multi-user conflicts. The Wizard software is not a real-time multi-user system. It can be used by multiple people at once with some caveats.

-  First ensure you have one license for every (5) five users. For the first license you will number the users 1 to 5, for the 2nd license 6 to 10 and so on.
-  Each user installs the Wizard to their default C:\ProposalKit folder.
-  The first user changes the Preferences > Files and Folders screen “Default Project Folder” path to the networked drive. This must not be the root of the drive. For example, Z:\ProposalKit\ProposalProjects. Note this first user is not creating a subfolder for themselves in this step. This is required so the Wizard can create the starting directory structure.
-  The 2nd, 3rd and so on users set the Preferences > Files and Folders screen “Default Project Folder” path to the networked

drive with a subfolder added. For example,
Z:\ProposalKit\ProposalProjects\Bob,
Z:\ProposalKit\ProposalProjects\Sue, etc.

-  The 1st user can then set their Preferences project path to a subfolder such as Z:\ProposalKit\ProposalProjects\John
-  In the Wizard's Preferences > General Settings screen enter the multi-user serial number to enable the "User ID Number" field. Make sure each Wizard has a unique User Id generated.
-  In each user's Wizard, go to the main screen and click the "Document Styles" button, click the "Search for Styles" button, then browse to the folder on the network where you installed the Proposal Pack(s) (i.e. "Z:\ProposalKit"). Note on the first computer that the Proposal Pack/Pro kit was installed on this will happen automatically. All other computers will use the Search for Style button.

Run the Wizard on each user's computer and they should now all be initializing with common set of networked database files and templates and each will have their own individual workspace on the network.

Proposal Pack Wizard must be configured to use drive letters (i.e. use a mapped network drive such as Z:\ProposalKit instead of \\MYNETWORKEDCOMPUTER\My C Drive\ProposalKit). The Wizard will not operate properly with UNC or HTTP paths.

In this configuration each user is using a common database (i.e. lists of available templates, document projects created by any user, etc.).

If you are working in a team environment where multiple people are working on parts of the same proposal, then set all their root project folders to the same place. You should put your own procedures in place to ensure that only one person creates project folders and ensure that multiple people don't work on editing the same files at the same time (remember there are no protections in place in the Proposal Pack or Proposal Pack Wizard to prevent this). This situation comes in handy when a team is working on a large proposal and different people are assigned to work on different parts of the proposal. Each part of the proposal is maintained in separate templates, and you wait to combine them into a single document until everyone is finished with their parts.

The administrator can set Wizard preferences to enable Novice mode and disable editing of the default project settings as you see fit.

Proposal Kit does not offer technical support for individual users when you are setting up a networked environment. Contact your network administrator for assistance.

SUGGESTION #5

Proposal Pack installed on cloud drive (i.e. OneDrive), only one copy of the installer files and database exists on cloud drive. Wizard setup on other computer using the same cloud drive files.

This option is better used by a single person with multiple devices using a cloud drive so they can work from different devices and maintain a single copy of their files.

The Wizard software is not a real-time multi-user system. It can be used by multiple people at once with some caveats.

-  First ensure you have one license for every (5) five devices. For the first license you will number the devices 1 to 5, for the 2nd license 6 to 10 and so on.
-  During install of the Proposal Pack product(s) and Wizard change the install folder to the cloud drive using a path that will be the same across all devices the Wizard will be run on (i.e. C:\Users\UserName\OneDrive\ProposalKit).
-  On your other devices make sure they have Office installed and that the OneDrive folder has synced and you see all of the installed Proposal Kit files. It may take awhile before all the files show up on the other devices. You must be able to see all the files before running the Wizard otherwise file not found errors will occur.
-  Open the Windows S Mode copy of the Wizard document “ProposalPackWizard_Win_V#.docm” and enable the macros

then click the Add-Ins tab and the Run Wizard button. This will start the Wizard manually. Since the EXE version of the installer was not run on the other computers there will not be components yet setup for running the full version of the Wizard so you must run the S Mode copy first. The Wizard will detect that the registry settings do not exist and will set them up the first time as well as double checking that the root install path matches. Once setup you can run the Wizard from the OneDrive from multiple computers using these steps.

Proposal Pack Wizard must be configured to use drive letters (i.e. use a mapped network drive such as Z:\ProposalKit instead of \\MYNETWORKEDCOMPUTER\My C Drive\ProposalKit). The Wizard will not operate properly with UNC or HTTP paths.

With OneDrive or other cloud drives you may have to wait for files to sync to the computer which may cause delays.

In this configuration each user is using a common database (i.e. lists of available templates, document projects created by any user, etc.).

If you are working in a team environment where multiple people are working on parts of the same proposal, then set all their root project folders to the same place. You should put your own procedures in place to ensure that only one person creates project folders and ensure that multiple people don't work on editing the same files at the same time (remember there are no protections in place in the Proposal Pack or Proposal Pack Wizard to prevent this). This situation comes in handy when a team is working on a

large proposal and different people are assigned to work on different parts of the proposal. Each part of the proposal is maintained in separate templates, and you wait to combine them into a single document until everyone is finished with their parts.

The administrator can set Wizard preferences to enable Novice mode and disable editing of the default project settings as you see fit.

Proposal Kit does not offer technical support for individual users when you are setting up a networked environment. Contact your network administrator for assistance.

HOW DO I USE THE CLOUD OR ONEDRIVE?

If you use a desktop and laptop/tablet computer for your proposal writing there is a good chance you need to work efficiently both in the office and while traveling.

One method is to transfer your working documents to your laptop/tablet every time you leave – this can be a nuisance if you must do this often. Or you can store your working files on a USB flash drive, this can be problematic as well since you can risk losing the USB drive or forget to take it with you.

One solution is to leave your working files on a cloud drive such as Windows OneDrive. Since a OneDrive is mapped to a standard drive letter this makes it easy to setup your Proposal Pack Wizard and Proposal Kit products on multiple computers and keep your working files in a central location accessible from anywhere you have an Internet connection.

Any cloud based storage solution will work if you can map a Windows drive letter to the storage system. OneDrive does this automatically by letting you use the C:\Users\Your Name\OneDrive\Documents folder.

While the Wizard allows you to set the paths to many components of the Proposal Kit system (your database files, your working projects, your source templates and graphics) it is usually easiest to only move your projects folder onto the cloud drive.

If you move your Wizard database files onto the cloud drive this also requires that every computer using that cloud version of the database has all the exact same Proposal Kit products installed in the exact same locations. While you can also move your Proposal Kit products onto the cloud drive as well this can introduce additional problems. Such as if you wind up working somewhere without an Internet connection you would be unable to work.

If you only put your working database on the cloud drive, you still can create new projects and proposals without access to the Internet by changing the project folder in the Wizard preferences back to a local drive. If you customize any of the stock Proposal Kit product templates, you just must make sure to sync those manually between multiple computers to ensure when you build projects, they are consistently created using the same templates.

To move your project folder onto a cloud drive first create a new folder in your cloud drive such as “ProposalProjects” and then edit the Wizard’s Preferences > Files and Folders screen and change the “Default Project Folder” to the new folder in your cloud drive such as:

C:\Users\YourName\OneDrive\Documents\ProposalProjects

Do this on each computer that the Wizard and other Proposal Kit products are installed on.

Now, every time you create a proposal it will be created on your cloud drive. When you switch to working on your other computer such as your laptop/tablet and run the Wizard you will be able to open and work on the project files and proposals created from the first computer. This will ensure you won't forget to take files or sync folders before you leave the office. All you need is an Internet connection to access the cloud drive (so it is wise to periodically backup your working files to a local copy on your travel computer in case you wind up having to work without a cloud connection).

The Wizard does not automatically reload its database lists while it is running. This method of using a cloud drive to allow someone to access the same files from multiple computers requires that only one Wizard is running at a time to access the files. For example, if you are working on a proposal in the office first close that Wizard then run the Wizard on your remote computer to ensure it loads all the changes you applied to the files located on the cloud drive.

If you have multiple people working on the same cloud drive, it is best to have each person using their own subfolder in the cloud drive project folder to ensure nobody interferes with another person's work. If multiple people are working on the same project you need to setup your own protocol for managing multiple people writing to the same files. The Wizard does not lock files or in any way manage multi-user access to files at the same time.

If you move all your stock templates to your cloud drive, you should also keep a backup copy on your local hard drive on your travel computer. If you lose your cloud drive access you will still be able to build new proposals and documents from your local copy of the templates. This can be helpful when working during flights or other times when your cloud drive is not available.

Read the chapter [How do I Install and Configure for Use on a Network?](#) for additional details on setting up Proposal Kit products for use on a network.

While the Wizard does its best to detect inaccessible drives and files, the Wizard does not treat cloud or network drives any differently than local drives. It is your responsibility to make sure drives are available and files are properly synced when working locally then later the cloud drive.

HOW DO I INSTALL ON A REMOVABLE DRIVE (USB)?

Proposal Kit products can be installed on a removable drive such as a USB stick or removable USB drive.

This allows you to take your entire Proposal Kit installation including the Wizard software on a portable drive and plug it into other computers.

Due to path names stored in the Wizard databases that will be on the portable drive it is a requirement that the exact same drive letter is used on every computer you will plug the drive into. Because drive letters in use will vary from computer to computer and the lower drive letters are the most used you should map a new drive letter before you install Proposal Kit products to the removable drive and pick a drive letter that is higher in the alphabet.

For example, if your default drive letter for your removable drive is E:\ that is a lower drive letter that may already be in use on other computers. Change your removable drive letter higher in the alphabet like R:\ or X:\ for example using your Windows system tools.

It is important to note that you may just be guessing that these drive letters will be available on unknown computers you may be planning on plugging your removable drive into. If this happens you may have to rename a drive on a new computer you plug your removable drive into to run the Wizard.

The other requirement is that any computer you plan on running the Wizard on from your removable drive must also have Microsoft Office installed.

Once you determine your drive letter run the Proposal Kit product installers and change the drive letter from the default C:\ProposalKit\ProposalPack to your removable drive such as R:\ProposalKit\ProposalPack.

Note that the Proposal Kit product installers won't allow installation into the root of a drive so only change the drive letter in the folder to install into.

Once installed on the first computer and you have run the setup and your Wizard is running properly you can unplug the removable drive and plug it into another computer.

When plugging into a new computer there will be a couple things missing that are normally done by the Windows exe installers.

The Windows desktop shortcut icons won't exist on the new computer so you will have to manually open the Wizard's Word document on the removable drive and run it from the Add-Ins tab.

Find the ProposalPackWizard_Win_V###.docm file and open it in Word on the new computer. Click the Enable Content button to enable the macros. Then click the Add-Ins tab and then click the RunWizard button.

Once you have the Wizard running you can use the Preferences features for setting up the DLLs on the new computer if you need the 3rd party integration features.

The Wizard will startup and it will detect its being run from a removable drive on a new computer. It will double check the drive mapping is correct and it will recreate the Windows registry key settings from a backup copy that is stored on the removable drive.

It will also ask if you want to create the Windows desktop shortcut icons. If you will use this computer frequently you can create the shortcuts to save time. Otherwise, if this is a temporary use on this computer you may want to skip creating the shortcut icons as they will not work once you disconnect the removable drive.

If you will be adding your own content such as links to logos, the Multiple Choice database content, etc. make sure to locate all your content on the removable drive.

With a removable drive installation you can travel without the need of carrying a computer and keep all of your proposals and documents securely on your own portable hard drive.

Because the Wizard performs a lot of read/write operations while processing documents and while running the highest speed removable drive you can use the better. For example, a high speed USB SSD drive will perform much faster than a USB 2.0 flash stick.

HOW DO I TURN ON/OFF THE VARIOUS PICK DOCUMENTS TABS?

When you add templates to a project you use the Pick Documents screen. This screen has several tabs for different types of operations involved in adding or removing templates from the project.

Regardless of which tabs and options you use in this screen, the result is having a selection of templates in an order that will be used to create the documents for the project.

This is a handy configuration tool for an administrator or consultant setting up the Wizard for specialized situations. You can restrict access to certain screens and ensure the end user only has access to what they need.

Some of the tabs are always displayed, others are dynamic and only displayed in appropriate situations. You can always override the default tab displays in the Wizard preferences to turn on a tab at all times or turn off a tab. Depending on what mode the Wizard is in (Demo, Novice, Expert) and which template products are installed (Contract Packs, Proposal Packs, limited versions) different tabs will be displayed depending on the circumstances.

Using the Wizard Preferences > Project Settings > Configure Document Selection Screen options in the Configure Tabs on Pick Documents Screen section you can override these defaults to always turn on/off a particular tab.

First, select the Proposal Type you want to edit the screen display for. There are 12 Proposal Types (General Business Proposals, Grant Proposals, Business Plan Proposals, RFP, Custom, etc.). You can change the settings for all 12 types at once or just a single type.

Second, pick the tab you want to change the display behavior for. The various tabs and what they are used for are listed below.

Third, pick the desired behavior. You can turn the display of a tab on or off completely, or let it be displayed dynamically (the default behavior). For example, since the Auto Recommend tab disappears in certain situations, you can force it to always be displayed by changing it to “Always Display”. If you do not ever want to see the Presets tab, you can set it to “Never Display”.

There is one special case for the Add Template tabs. Since these are really 3 tabs in 1, you can define which one you want to be shown first on entry into the Pick Documents screen. For example, if you always want the Top 40 tab to show first when you click the Add Templates tab you can set its behavior to “Always Display (Top Add Tab)”.

Here is the list of all available tabs and what they are used for:

Remove Templates

This tab is very straight forward. It contains all the currently selected templates. You can remove templates by selecting them from the list and removing them.

Add Templates – By Category

There are three different Add Templates tabs, but only one is displayed at a time. This version shows you all available templates broken up into major categories. Templates are displayed in the lists in a general order of how they usually fit together.

Add Templates – By Top 40

This version shows you the Top 40 most commonly used templates all on one screen with checkboxes. This makes it more efficient to quickly select the most common templates. Note that you can also customize the Top 40 lists to show your own custom tailored Top 40 set of templates.

Add Templates – By Alphabetical

This version shows you all available templates in alphabetical order. This can make it easier to locate a specific template out of a large collection than using the category listing.

Search by Name

This tab allows you to search for a specific template out of the all that are available in the library. This may be the most efficient way to locate a template when you might only know one word to describe it. Such as searching for “summary” to locate the Product Cost Summary or searching for “history” to locate the “Company History” template. This tab can also be used to show you other templates that are related to this one or that are alternative versions that might be more suited to your specific situation. This tab may be turned off in some situations, such as

if you are using a very small collection of templates that doesn't make sense to need search options to find templates in that small of a list.

View Samples

This tab allows you to select one of the completed samples and build a list of templates for your project using the same templates that were used to create that sample. This only adds the same templates to your project that were used to create the sample, it does not copy any of the actual text from the sample into your project unless you click the button to import the content of the sample. This can make it more efficient to setup a proposal for a specific situation. For example, if you are selling accounting services you can select the “Accounting and Payroll Services Proposal” from the samples list then click the “Import Content from Selected Sample” button and all 9 templates used in that sample will automatically be added to your project. You can also build up your list by adding templates from multiple samples to your project. This tab may be turned off in some situations, such as using custom project types with small collections of templates.

Auto Recommend

This tab is primarily used as a training tool. It is similar to the View Samples tab, but it is simpler and more generic. Beginners can use it to get a general idea of what kinds of templates could be used for a variety of types and sizes of projects. Once you switch from Novice training mode to Expert mode this tab is turned off by default.

Add a Contract

This tab is used when you have a Contract Pack template collection installed. Contract Packs and Proposal Packs are separate products. While Proposal Pack template products do include a handful of basic and generic contracts and work orders, the Contract Pack template products contain large collections of very specialized contract documents. Use this tab to add a detailed contract to your project. There are also options to have the contract inserted into your main proposal or to have the contract created as a separate document from the main proposal. If this tab has been disabled and you later purchase and install a Contract Pack template product, this tab will be turned back on automatically.

Presets

This tab is used to create and load preset collections of templates you have created. You can select a collection of templates, organize them in any order you like, even add a Contract Pack contract and save them all as a preset. You can even set one of your presets to auto-populate every new project with. For example, if every one of your proposals is virtually the same you can save time even having to come to the Presets tab and load the files from the preset by setting that preset to auto-populate new project with. Then, every time you add a new project it will already have those templates pre-selected. You can have 40 different Presets for each of the 12 project types (i.e. General Business Proposals, Grant Proposals, Business Plan Proposals, RFP, Custom, etc.).

Title Page

This tab is used to manage the add-on Title Page Pack products. You can select an alternate Title Page design and color theme from multiple installed Title Page Packs.

Quick Start

This tab is used to quickly load your project with a set of templates already pre-selected for hundreds of business situations.

HOW DO I CONFIGURE THE AUTO RECOMMEND SCREEN?

When you create a new proposal and are selecting templates you are using the Pick Documents screen and the Auto Recommend tab on that screen. This screen allows you to have the system select templates for you based on the type of the proposal (grant vs. business plan, etc.) and the size of the proposal (3-4 pages vs. 20-30 pages, etc.).

The Auto Recommend tab in the Pick Documents screen is primarily intended for use as a training tool for beginners. This tab is disabled in some of the proposal types and it is hidden once you switch from Novice training mode to Expert mode. You can override the default tab hiding in the Wizard Preferences to turn back on this tab in Expert mode if you have need for it.

By default, the Auto Recommend uses preset selections of templates, these settings are contained in the database files Recommend#.ini.

There are a few ways to configure how the Auto Recommend tab operates.

First, you can preset what options the screen will open with every time by editing the Project Settings tab of the Preferences screen. This will save you time by always having the screen open with your most commonly used settings.

Second, you can alter the default system selections for the Auto Recommend by editing the Proposal Pack files attributes. For

example, if you want to alter the templates in the General Business Proposal “Small” recommendation list by adding a new file. Go to Preferences > Tools > Configure Proposal Files. Then select the template you want to add to the Auto Recommend selections and click the Edit the Selected Document button. On the edit screen check the Auto Recommend attributes for Small proposals and click the OK button to save the edits. Now, whenever you create a new proposal and select the default “Small” proposal size, that new template will be part of the selection list. You can also remove recommended templates from any category by un-checking the attribute for that file.

Third, if you are using the custom project type (i.e. “Custom”) and you have included a smaller selection of templates into that project type that you want to always select (similar to the use of the Presets), you can enable the “Everything” recommendation setting in the Wizard Preferences. Then for a new project you can select the “Everything” auto-recommendation size and have all templates for that project type automatically added to your project. This capability is disabled by default to prevent people from automatically adding every template in the library to a project and bogging down the Wizard with an unmanageable project that would take a very long time to build. This is only meant for use in customized Wizard configurations for specialized situations. Note that if you are using the Custom project type you will also have to turn back on the display settings for the Auto Recommendation tab as that tab is not displayed by default.

The Auto Recommend screen is primarily meant for use by beginners to get a general idea of what kinds of templates can be used for different types of projects. These selections are very general and are mostly used as a training tool.

For more specialized recommendations use the other tabs such as “View Samples” and “Quick Start”.

HOW DO I CHANGE THE DATE FORMAT?

The Wizard allows you to merge dates into your proposals when you create them. This is part of the mail merge feature. See the chapter on using mail merge tags for more information.

The steps for using automated date formats in your proposals are as follows:

First, go to Preferences > Data & Display tab, then click the Edit Mail Merge Fields button. Next, click the Dates tab which is the last tab on the screen.

Here is where you configure how the date will be formatted and merged into your proposal. The screen supports international translation of months and days as well as configuring the actual date format as follows:

The date format can be any combination of M,MM,MMM,MMMM D,DD,DDD,DDDD and Y,YY,YYYY separated by / (slash), - (dash), . (period) or a blank space or a space with a comma.

Note that you can only include the M, D or Y strings once each.

D = single digit (1), DD = 2 digits (01), DDD = short day (Mon), DDDD = full name (Monday)

M = single digit (3), MM = 2 digits (03), MMM = short month (Mar), MMMM = full name (March)

Y or YYYY = 4 digits (2006), YY = 2 digits (06)

Examples

☰ M/D/Y	becomes 3/1/2006
☰ YYYY-MM-DD	becomes 2006-03-01
☰ YYYY.M.D	becomes 2006.3.1
☰ YY-M-D	becomes 06-3-1
☰ YYYY-M-DDDD	becomes 2006-3-Monday
☰ MMMM DD, YYYY	becomes January 01, 2006

Second, you have to setup the mail merge data in your document project to use the dates. You can have all new proposals pre-populated with date data by using the Default fields in the mail merge label edit screen.

Use the following values in the Default fields

☰ CURRENTDATE	- Defaults to the custom date format set above.
☰ SYSTEMDATE	- Uses your computers system date format.
☰ CURRENTDAYSTR	- Uses only the current day name (i.e. Monday)
☰ CURRENTDAYNUM	- Uses only the current day number (i.e. 1)
☰ CURRENTDAYNUMSTR	- Uses the current day number as a string (i.e. 1st)
☰ CURRENTMONTHSTR	- Uses only the current month name (i.e. June)
☰ CURRENTMONTHNUM	- Uses only the current month number (i.e. 6)
☰ CURRENTYEARYY	- Uses only the current year number (i.e. 06)
☰ CURRENTYEARYYYY	- Uses only the current year number (i.e. 2006)

When you create a new proposal and you have set the Preferences customer field for the current date to be “CURRENTDATE”, your actual data value in your proposal mail

merge fields will be set to the current date (i.e. 3/1/2006), or whatever date format you have defined.

Third, to have the current date embedded in your proposal, there must be a mail merge tag embedded in your document. Some Proposal Pack documents are pre-defined with the current date mail merge tag. For example, the Title Page document (TitlePage.docx) has the tag <<CurrentDate>> embedded in the document.

When the Wizard creates the proposal and you have selected the Title Page, the tag <<CurrentDate>> will be replaced with the actual date (i.e. 3/1/2006)

You can also embed date tags into any of your proposal templates as needed. This can come in handy for contract start dates and end dates using the contract mail merge tags.

HOW DO I CHANGE MY FINAL DOCUMENT'S PROPERTIES?

Word documents have properties such as the Author, Subject, Company, Keywords, Title, Comments, etc.

Document properties are also referred to as meta-data and are usually hidden in the document. You can view these properties in Word by clicking your Word toolbar File > Properties. Note that different versions of Word may have properties located in different places. Refer to your Word documentation on where to find the document properties as this is a feature of Word, not our Wizard.

There are many different properties that can be set in a document. The Wizard allows you to set the six most common and relevant properties with your own custom data.

If you do not enter any data into these fields they will be filled in with default data or will retain the default properties of the original Proposal Pack templates.

In the Wizard go to Preferences > Project Settings > Configure Document Creation

On this screen fill in the six fields with any information you want inserted into your proposal and contract documents. Note that this information will be inserted into every document the Wizard creates for you. You cannot customize the properties to be different for specific documents (unless you manually edit them yourself after the Wizard creates the documents).

Author

Author is typically the person writing or owning the created documents such as “Jane Doe”. If you do not enter anything in this screen it will default to the first/last name used in each projects company data. So, this field will be filled in for you on a per-project basis if you do not override it here.

Subject

Subject is typically a general subject such as “Proposal by Widgets, Inc.”. If you do not enter anything in this screen it will default to a generic Proposal Pack subject.

Company

Company is typically the company writing the proposals such as “Widgets, Inc.”. If you do not enter anything in this screen it will default to the company name used in each projects company data. So, this field will be filled in for you on a per-project basis if you do not override it here.

Keywords

Keywords can be any keywords relevant to your company or proposals you want embedded in the document to assist in searching for documents in the future. If you do not enter anything in this screen it will default to a generic Proposal Pack keyword.

Title

Title is typically the title of this document. If you do not enter anything in this screen it will default to the title used in each projects data. So, this field will be filled in for you on a per-project basis if you do not override it here.

Comments

Comments can be any general comments you want included in all your documents. If you do not enter anything in this screen it will default to a generic Created by Proposal Pack Wizard comment.

HOW DO I CHANGE THE URL IN THE PROPOSAL FOOTERS?

By default, the <<Domain>> tag is used in the footers of all the stock Proposal Pack templates. When the Proposal Pack Wizard assembles your proposal, this tag is replaced with your URL.

You can configure the Wizard to use alternate text in the page footer.
















First, go to the main Wizard screen and click the “Preferences” button. Then click the “Project Settings Tab”. Type in your alternate text into the “Alternate Footer Text” field then click the OK button to save the settings.

Your alternate text can be your company name or other contact information for example.

HOW DO I TRANSLATE INTO FOREIGN LANGUAGES?

Proposal Pack Wizard includes translation support features that assist in creating your proposals and documents in foreign languages.

The following languages are currently supported:

-  Canadian English
-  British (UK) English
-  Australian English
-  Spanish
-  Portuguese
-  Dutch
-  Italian
-  French
-  German
-  Romanian
-  Russian
-  Chinese
-  Korean
-  Japanese
-  Arabic

The translation features do not translate the entire body of text of the documents. Only page headers, table of contents and a variety of short phrases with the documents are translated. The body text of the templates is primarily fill-in-the-blank instructional text and

example text that you will replace with your own language when you are editing the assembled document.

The Wizard is only replacing strings using search and replace and performing double-byte Unicode encoding and decoding of strings. This is all natively supported by Word and should work for any Unicode languages. The Wizard does not manage display issues. It is your responsibility to ensure you are using font types that can support proper display of translated text. All the currently supported languages should work with the default settings and font types. The Proposal Kit does not include any extra fonts or system files for supporting foreign languages. It makes use of the existing fonts and system settings that you have configured on your Windows operating system and Word/Office software. Your final document look in a foreign language may depend on how your system is configured and you may need to further customize and reformat the document.

INCLUDED TRANSLATED SAMPLES

The Proposal Pack template collections also include a completed sample of one of our proposals that has been translated into a variety of languages. These samples were created by a combination of these Wizard translation features and human translation of the body text. Reference the translated samples to see the results of how the same Proposal Pack and Wizard can be used to create documents in many languages.

HOW TO START TRANSLATING YOUR DOCUMENTS

To turn on translation during your document assembly process all you must do is select the translation language in your document project screen (the screen you see when you add a new document

project or edit an existing project). Change the default American English to another language in the project screen. When the Wizard assembles your document, it will perform the translation on the appropriate terms and short phrases.

WHAT HAPPENS WITH GRAPHIC PAGE HEADERS?

The Wizard can only operate on actual text, just as Word can only operate on actual text. Neither Word nor the Wizard can edit graphics.

Because of this the plain text versions of Proposal Pack (i.e. Proposal Pack for Any Business and Proposal Pack for Government Grants) are the recommend Proposal Packs to use for foreign language translations since they are the most customizable.

All the other Proposal Packs (i.e. the Proposal Graphics Packs) use custom graphics for the page headers and the Title Page “Proposal” and “Description”. These graphics visually look like text, but they are imported graphics.

The Wizard’s translation feature will delete these graphics and replace them with actual text, and that actual text will be translated into the foreign language.

What you will be missing after the translation is complete is the custom logo graphics that were part of the page headers and the Title Page words that went with the “Proposal” and “Description” graphics. Also, the translated text will be in the default Word Style defined in the Wizard which will be a black font using a common font type such as Arial or Arial Black.

Since the custom graphic headers in American English use font types that do not support many foreign language character sets you may not be able to replicate the custom “look” of the graphic header exactly as you may have to use different font types that support your foreign language character set. You can still match the original colors by editing the Word Style settings.

To replace the look of the logo from the graphics versions of the Proposal Pack is possible with a little extra manual work. Each Proposal Pack includes a version of the page header logo that does not have any text. You can manually position this logo in your page headers by inserting into your document and setting the graphic positioning to be “Behind Text” and then drag it to the correct position in your page headers.

Another option is that Proposal Kit does have a custom design service where we can create custom versions of our Proposal Graphics Packs (for a fee). We can create custom versions of our Proposal Packs in foreign languages. See this page for details: <https://www.proposalkit.com/htm/service.htm>

AFTER THE TRANSLATIONS ARE COMPLETE

Since foreign language translations may cause phrases to become longer than the original American English phrase you may have to modify the font of the page headers. For example, German phrases tend to be longer and may cause page headers to overflow onto a 2nd line.

You can easily modify the font settings consistently across all pages by changing the Word Style settings. Since all text in

Proposal Pack documents uses Word Styles click the Modify button on the Word style such as “Proposal Kit Page Header” and change the font size. You can also modify other font settings such as colors and font types to further customize your document.

Due to sizing differences in logos and text fonts you may also need to reposition page header logos and translated text on the document pages to improve the look of the layout. This is all basic word processing using Word to move the objects.

You can have the Wizard always apply the desired font Style settings by editing the Word Style settings in the Wizard Preferences > Data & Display > Font Styles screen. See this chapter for details: [How do I use the MyProjectFiles folder?](#)

The Wizard allows you to copy your own custom files that are not part of the Proposal Kit system into each of your new projects using the MyProjectFiles folder.

This feature allows you to automatically copy your own content such as worksheets, checklists, letters, spreadsheets, forms, etc. into each of your new Proposal Pack Wizard project folders.

The MyProjectFiles folder is in the root install folder where the Proposal Pack Wizard is installed. This folder by default is:

C:\ProposalKit\ProposalPack\MyProjectFiles

Whenever you build a new document in the Wizard a copy of all the files in the MyProjectFiles folder will be made into your document’s project folder.

You should not name any of your custom files the same file names and extensions as any of Proposal Kit's document file names.

Use the Preferences > Project Settings > Configure MyProjectFiles Settings screen to manage adding files, removing files, and setting attributes for the custom files in the Wizard database.

You can manually copy files into the MyProjectFiles folder however that will not setup any of the attributes such as human readable titles for use in the Wizard drop down menus. Use the Wizard's Preferences tool for managing the attributes.

How do I Change/Use Word Font Styles?

CONFIGURING TRANSLATION SETTINGS

The translation features can be configured in the Preferences > Translations screen.

You can completely disable the translation features which can help speed up the build process as well as hide the translation drop down from the project screen. This is useful for administrators who want to configure the Wizard and remove certain features from use by end users.

You can change the default language that will always be applied to each new project. The default is American English.

Some languages have different phrases for use when a masculine or feminine wording is needed. For example, Spanish has different phrases for the “Prepared By” and “Prepared For” text in the Title Page. The Wizard will let you pick what the default usage will be for each new project (which you can always change for each new project).

Arabic is typically formatted to read right-to-left. The Wizard will reformat some sections as it is translating text to be left justified and set to a Left to Right reading order. One example is the Table of Contents page.

When page headers need to be translated in a Proposal Pack that uses graphics, the graphic headers must be deleted and replaced with text. The Wizard can be configured how it handles dealing with the graphic page headers.

The Title Page uses text objects for holding the “Proposal” and “Description” text. Since translations of these terms can result in larger text blocks the Wizard allows you to configure the size of these text blocks. Increase the sizes here if the translated Title Page terms for these 2 phrases need to be larger. You can manually drag the object corners to enlarge the text objects after a document has been assembled.

THE DATA ENTRY FIELDS

The Wizard interface has also been updated to display foreign language characters (in Unicode) in the data entry fields. This way you can enter data for your project such as names and addresses in any language.

Not every screen or database file is designed for working with Unicode data. Only the screens that would contain data that would make its way into your document are designed for use with Unicode data. Such screens are the project data entry screens for name and address contact data.

RIGHT-TO-LEFT LANGUAGES

Languages such as Arabic are typically formatted to read right to left. The Wizard will reformat some parts of the document as it is translating to Right-to-Left. One example is when the Table of Contents is being created. For Arabic it will be created right justified in R-to-L paragraph formatting. You will have to manually reformat the rest of the document as you are filling in the templates as needed.

TRANSLATIONS SUPPORTED IN OTHER WIZARD FEATURES

The foreign language translations have also been supported in other Wizard features dealing with importing and exporting data.

When you export project tracking data to an external spreadsheet the data will be exported in Unicode format so foreign language text will display properly in the spreadsheet.

The Presets in the Document Project screen support saving which language translation was used in the project. This way you can predefine presets for different language translations.

CUSTOMIZING THE TRANSLATIONS

All the translations are stored in the Wizard database folder in a series of Translations#.ini files. Each language is stored in its own file. You must keep the American English versions of the phrases as-is, otherwise the Wizard will not locate the matching American English phrases in the documents while it is processing them.

You can modify the foreign language text if you want to alter the translations. Make sure when you save the file that the file is encoded in the “UTF-8-No-BOM” encoding. Any translations stored in UTF-8 format will already have this encoding set in the text file.

You can also extend the translations by adding your own items to the database lists.

You can add your own custom language translation as well by creating a new Translation#.ini file (change # to the next sequential number available) and add an entry for it into the Translations.ini file.

DATABASE ENCODING

All the Wizard database files must be encoded with “UTF-8-No-BOM” encoding. If you manually edit any of the Wizard’s INI database files with foreign language text you must ensure that this is the encoding used otherwise the foreign language text may not be readable. If you do see non-displayable or incorrect characters displayed in the interface or documents make sure the appropriate Translations#.ini file and PackDst.ini file is properly encoded.

CURRENCY TRANSLATION

The Wizard can also translate the United States Dollar (\$) symbols used in the templates to international currency codes or Unicode symbols.

See this chapter for more details: [How do I Translate Currency Symbols?](#)

HOW DO I TRANSLATE CURRENCY SYMBOLS?

The Expert Edition of the Wizard can translate currency symbols to make conversion of the templates to international use easier.

The system defaults to leaving the United States Dollar (\$) currency symbols in any templates and spreadsheets that use them (such as many of the financial templates and calculators).

When you create a project, you can set the currency symbol to any number of international symbols or 3 character currency codes by selecting the currency symbol drop down.

When a different currency symbol than the default United States Dollar is selected the Wizard will search and replace any \$ symbols in the Word templates being assembled and will replace them with the selected symbol.

Using the Wizard Preferences, you can also set the default currency symbol to be used for every new project as well as changing the replacement from using symbols to using 3 character codes.

For example, you can choose between replacing the (\$) symbol in the templates with the United Kingdom Pound symbol (£) or the code (GBP), the Euro symbol (€), etc.

All the currency codes are also configurable if you need to change the list of codes or symbols. Open the Translations.ini database file and edit the list of currency values as needed.

Since the symbols are all standard Unicode characters the symbol translation should always work with the default fonts. If a currency symbol does not display correctly make sure the font type you have selected for your text supports that symbol.

The currency codes settings are also supported in the Presets and Import Lists features.

This feature replaces any instances of the \$ character found in the text as the templates are being assembled. It does not perform any financial calculations or currency conversions on any numbers.

If you are using the Expert Edition the Wizard will change the currency symbol and format of any currency cells in Excel Spreadsheets for the project being created. If Dynamic Excel Spreadsheet linking is being used this will allow your documents to display alternate currencies from the linked cells.

You will have to have the proper font types installed to see foreign language currency symbols. If you see a question mark (?) character in place of a currency symbol it is due to not having compatible font types installed in your Windows OS or due to a limitation of Words OLE linking not supporting some currency symbols. One fix is to turn on the 3 character codes instead of using the currency symbols (i.e. BTC instead of ₿).

Due to the many variations of Microsoft Word, Windows, language packs, foreign language editions, typefaces, etc. not all symbols may display properly on all systems without some customization.

A quick fix for symbols that do not display are to switch to using 3 character currency symbols in the Wizard's Preferences.

If you have manually edited the stock spreadsheets to change the currency formats you should turn off the conversion of currency symbols for Excel spreadsheets in the Preferences.

HOW DOES THE WIZARD USE THE WINDOWS REGISTRY?

The Wizard stores some information in the Windows registry in the following key:

HKEY_CURRENT_USER\Software\ProposalPackWizV#

Note that the # in the key is replaced with the major version number of the Wizard you have installed.

This key is created by the Wizard installer program and must be accessible to any user who is running the Wizard. The Wizard is also able to build the registry key itself if it is missing.

If you experience any errors reading or writing to the registry such as profile string read or write error messages this is most likely due to not getting your user permissions configured correctly.

If you installed the Wizard under one user login then try to run the Wizard from a different user login that does not have read/write access to this registry key can cause this type of problem.

If this happens you can run the Windows regedit program, find that key in the registry then grant the other user the appropriate access rights to that key. The access rights can be found by right clicking your mouse on the registry key in the regedit program.

Consult your Windows help for how to use the regedit program and how user access rights are managed.

WHAT ADMINISTRATOR FEATURES ARE IN THE WIZARD?

The Wizard has several settings meant for administrators or consultants setting up the Wizard for sales or office staff. Enter the Preferences screen to access all the Wizard configuration settings.

There are also a wide variety of customizations possible that are not available via the Preferences screens and tools. It is possible to further customize the Wizard by manually editing the various database files. Database files are in INI format text files. Consulting services are available to assist in specialized customizations of the Wizard: [How do I get Help Configuring the Wizard?](#)

There are 3 administrator features for setting default settings and then locking the other users out of altering those settings.

The first major setting is Expert vs. Novice Mode. In Novice Mode the more advanced configuration settings are disabled to prevent accidental changes or confusion over which features to use. As an administrator you can temporarily enable Expert Mode, configure the Wizard with the settings your staff are supposed to always use then enable Novice Mode again to lock in the settings.

In the Project Settings tab there is a checkbox to turn off the ability of the user to alter the default project settings for each new proposal. An administrator can set the default project settings then lock those settings by checking the “Do not allow editing...” checkbox.

In the General Settings tab the Enable Team Editing is disabled by default, if your users will have multiple people editing the same proposal, turn on the Enable Team Editing checkbox, and read the chapter [How do I do Project Tracking and Reporting?](#)

<https://www.proposalkit.com/htm/videos-how-to-use-tracking-reporting.htm>

The Project Status tracking feature allows you to further manage your document projects by updating the status through the various stages of the process.

The default status for each new project is "Work in Progress" and is set to the date that the project was added to the system. The fields in this form are only used for your convenience to help keep track of your projects. The data is not used anywhere else.

For example, when you have finished writing your document and have submitted it, set the project status to "Submitted" and update the date field. Later if the proposal is accepted update the status to "Accepted" and update the date field. Each of these status dates is individually stored in the project database.

Moving completed projects to different statuses will also reduce the clutter of having many open projects to pick from in your work in progress projects.

If you have only selected one project, then all its fields will be filled in the project status form. If you have selected multiple projects then all fields on the form will be blank unless the data is the same in every selected project, in which case it will be displayed on the form. Only fields you change on the form will be updated back to the selected project(s). If you change a field on this form and you

have selected more than one project, then that field will be updated into every selected project.

The status fields are set in the Project Status screen which is a button on the Manage Projects screen.

To generate a report in an Excel compatible XML file you can select one or more records from the Manage Project screen and click the Output to Report button.

This will generate a report of your selected projects and all tracking status dates for those projects.

How do Multiple People Edit the Same Document?

Use the rest of the Preferences screens to configure all aspects of the Wizard such as the default settings to use for new proposals, how the Auto Recommend screen selects templates for different types and sizes of proposals, custom graphic logos to be embedded in your proposals Title Pages, mail merge tags and labels, date formats, Table of Contents headers, changing the ordering of templates in the proposals and Table of Contents, removing templates, adding your own custom templates, etc.

HOW DO I DISABLE ACCESS TO FEATURES AS AN ADMIN?

If you are customizing the Wizard to be used in a more controlled environment, such as setting up a team of salespeople or other end users and you do not want them changing the Wizard preferences or other configuration settings. These features will only be disabled in the Expert edition of the Wizard.

You can completely disable the user's ability to access those major configuration and Preferences screens by setting the following flags in the Wizard's Options.ini database file. This must be done manually as once you disable access to the Wizard preferences; you will not be able to use the Wizard configuration screens to change that access. These flags are special flags that cannot be changed via the Wizard Preferences screens. You must manually edit the Options.ini file. These flags are found in the [SETTINGS] section:

DisableStyles=1

When you disable the Styles the "Document Styles" button on the Wizard home screen will be disabled and the user will not be able to change the Proposal Pack style or edit the preferences for the selected style. If you only have 1 Proposal Pack style enabled, you can use this flag to prevent users from entering that screen. If you have multiple Proposal Pack styles but you want to completely disable access to the Preferences screen and restrict access to the "Edit Style" configuration screen you can leave the Styles enabled but disable the Preferences (below).

DisablePreferences=1

When you disable the Preferences the “Preferences” button on the Wizard home screen will be disabled. Also, any other Wizard configuration screens such as editing mail merge tag labels in the Project screen and the various “Edit Style” and “Delete Style” buttons will be disabled in the Document Styles screen. This setting will also turn off the links in the Document Styles screen for purchasing additional styles from our web site.

DisableUpdates=1

When you disable the updates, this only disables the “Check for Updates” button on the Wizard home screen to prevent your end users from checking for new Wizard release on our web site.

DisableProducts=1

This option will cause the lists of add-on Proposal Kit products to not be displayed in the Document Styles screens and in the Pick Documents tabs for Add a Contract and Title Pages. Also, the product comments and links to the product pages will be turned off on the Pick Documents tabs.

DisableAutoBuild=1

This option will cause the Yes/No popup question that asks if you want to start the build process immediately upon saving your proposal to be disabled. The Wizard will return to how past versions operated by the user having to manually click the Build button and then the Edit button.

DisableHelp=1

This option will cause the 3 help related buttons on the Wizard home screen to be hidden. These are the “Help”, “View Manual” and “Read How-To Articles” buttons.

Another administrator setting that can be used to restrict access to certain features is in the Preferences > Project Settings > Configure Project Screen settings.













The “Do not allow editing of the default document project settings by the user when creating a new document project” can be checked. When checked this will lock the various drop down lists and checkboxes on the Project screen. The user will not be able to change them, and you can force them to use specific preset defaults you have setup.

You can also remove specific screens from being displayed in the Pick Documents screen using the Preferences > Project Settings > Configure Document Selection Screen settings. Using this screen, you can turn on/off the display of specific screens when the user is in the Pick Documents screen.

This gives an administrator the ability to create a very customized Wizard to suit their specific business needs, then lock down the changes and prevent end users from changing them by using the registry flags above.

WHAT ARE THE 12 PROPOSAL/PROJECT TYPES?

The Wizard supports 12 different types of projects (also referred to as proposal types, even though not all projects are for proposals, you can also create business documents, contracts, etc., with the Wizard). Each type of proposal is for a different purpose and may have a different organization and selection of documents than another proposal type. In the past Proposal Packs and Proposal Pack Wizard were only used for writing proposals, over the years it has been expanded to cover other situations such as contracts, reports, studies, plans and other complex business reports. While there are many references to “Proposals” and “Proposal Types” there are also references to “Projects” and “Project Types”. These terms in this context (i.e. the Wizard interface and documentation) all mean the same thing.

-  1 - General Business Proposals.
-  2 - Grant Proposals.
-  3 - Book Publishing Proposals.
-  4 - Business Plan Proposals.
-  5 - Resume Proposals.
-  6 - Contracts.
-  7 - Short Form Quotes.
-  8 - Government Contracts.
-  9 - Business Documents.
-  10 - Research Proposals.
-  11 - RFPs.
-  12 - Custom Proposals (for you to customize for your unique situation).

For example, grant proposals and business plan proposals typically include more financial related templates than a general business proposal. A short form contract or quote will have very few templates compared to a general business proposal. Business documents include studies, plans, reports, etc.

Most of the Proposal Pack templates are applicable to any proposal type such as the Title Page, Executive Summary, Cost Summary, etc.

Some of the Proposal Pack templates are very specific to a proposal type such as the Cover Sheet meant for grant proposals and the Author's Bio meant for book publishing proposals.

When you are creating a new proposal select the proposal type which best matches the type of proposal you are writing. The Wizard will then order the templates and show you specific templates for that type of proposal.

While you can customize any of the 12 project types, there are 2 custom types specially set aside for you to configure for your own unique situation, these are the 2 custom types at the end of the list. It is much easier to start with the custom projects types and add just the templates you want vs. starting with say the General Business Proposal type and must remove a very large set of templates.

The Proposal Pack Wizard has default orderings and selections already setup for you. You can edit the order of templates and which ones are shown for any of the 12 proposal types by using the Preferences screens.

Project Types are nothing more than 12 different ways of showing you the same collection of underlying documents. For example, when you see Executive Summary in both the General Business Proposals type and the Business Plan Proposal type, they are both referring to the exact same ExecSummary.docx template.

One of the purposes of the 12 Project Types is that it tailors the full collection of templates you see for a more specialized situation. For example, there are multiple cover letter templates. The General Business Proposal type will show you the general Cover Letter; the Government Grant Proposal type will show you the Cover Sheet instead of the more generic Cover Letter. The Business Plan Proposal type will show you the Cover Letter (Business Plan) instead of the more generic Cover Letter, and so on.

The Custom type is set aside for you to customize as much as you want to create your own personalized organization of the underlying collection of available templates.

A hundred different people using Proposal Packs and the Wizard will have a hundred different ideas on what templates are most important to their specific situation. The Wizard is designed to show you everything available in 10 different general types of situations (General Business, Grants, Business Plans, Resumes, etc.) then allow you to optimize and tailor your own lists that are specific to you.

WHAT IS MAIL MERGE AND TAGS?



<https://www.proposalkit.com/html/videos-how-to-use-data-merge-tags.htm>

The Proposal Pack documents are plain text documents with common information in plain text tags (i.e. <<FirstName>>, <<Company>>, etc.).

This means that there are tags in the documents such as <<FirstName>>, which are replaced with your own personalized information.

Only tags enclosed in <<>> brackets are intended to be replaced with data. Some contracts and agreements include text such as “Company”, which is not a mail merge tag and is intended to be left as-is.

Automating the process using the mail merge feature will help keep common information consistent across multiple documents. Every word processor has a proprietary mail merge system which may or may not be compatible with other systems. Proposal Pack templates use plain text tags which will be viewable and editable in any word processor. You can convert our tags to proprietary tags yourself and tie them to a database, your email address book, contact manager, etc. Consult your word processor help for setting up a database for mail merge.

The number of tags in our documents is minimal, so manually replacing them is quick and easy. Just search the document for any occurrence of “<<” to find the tags and replace them. You can

either replace the tags by applying a merge data file or manually type over them. There is no need to learn complex software. If you use our add-on Proposal Pack Wizard software the wizard will automatically update all your documents in a single operation.

There are two types of tags in the Proposal Pack documents.

Data Tags

These are common tags for contact information.

For example, <<Domain>>, <<FirstName>>, <<Company>>.

Standard Text Tags























These are easily replaced by manually over-typing. Using the example of, <<Insert company history here>>, this type of tag will be replaced with details about your company. This can be done as easily as cutting and pasting it from other existing collateral material. Such tags are generally meant to be free form text specific to your situation (company, client, project, contract, etc.).

Dynamic Spreadsheet Linking Tags






















Any tags in the format <<R#C#[S#]>> are used by the dynamic spreadsheet linking features and are replaced by the Wizard with OLE links to spreadsheet cells. These types of tags are typically found in templates with financial or scheduling calculations. See this chapter for more details: [How do I Add Dynamically Linked Spreadsheet Calculations?](#)

The following is a list of the actual mail merge tags used in Proposal Packs and Proposal Kit documents:






YOUR COMPANY'S TAGS

 <<Salutation>>	Your title (Mr., Mrs.)
 <<FirstName>>	Your first name
 <<LastName>>	Your last name
 <<JobTitle>>	Your job title (President, Project Manager)
 <<Company>>	Your company name
 <<Address1>>	Your address
 <<Address2>>	Your address
 <<Address3>>	Your address
 <<City>>	Your city
 <<State>>	Your state
 <<PostalCode>>	Your zip or postal code
 <<Country>>	Your country
 <<County>>	Your county
 <<Fax>>	Your fax number
 <<WorkPhone>>	Your work phone
 <<MobilePhone>>	Your mobile phone
 <<Email>>	Your e-mail address
 <<Domain>>	Your website URL
 <<SocialMedia1>>	A social media link (Facebook, LinkedIn, etc.)
 <<SocialMedia2>>	A social media link (Facebook, LinkedIn, etc.)
 ...	
 <<SocialMedia10>>	A social media link (Facebook, LinkedIn, etc.)





YOUR CUSTOMER'S TAGS

 <<CustTitle>>	Customer job title (President, Project Manager)
 <<CustFirst>>	Customer first name
 <<CustLastName>>	Customer last name
 <<CustDomain>>	Customer domain (new or existing URL)
 <<CustCompany>>	Customer company name
 <<CustAddress1>>	Customer address
 <<CustAddress2>>	Customer address
 <<CustAddress3>>	Customer address
 <<CustCity>>	Customer city
 <<CustState>>	Customer state
 <<CustPostalCode>>	Customer zip or postal code
 <<CustCountry>>	Customer country
 <<CustCounty>>	Customer county
 <<CustFax>>	Customer fax
 <<CustWorkPhone>>	Customer phone
 <<CustMobilePhone>>	Customer mobile phone
 <<CustEmail>>	Customer e-mail
 <<CustSalutation>>	Customer title (Mr., Mrs.)
 <<ProposalNumber>>	The unique identifier for each proposal you send
 <<ProposalTitle>>	The title of this proposal
 <<CurrentDate>>	Date the proposal was created

CONTRACT RELATED TAGS

 <<HourlyRate>>	Your hourly service billing rate
 <<FixedRate>>	Your fixed billing rate
 <<HostCompany>>	Company hosting client's website
 <<HostSetupFee>>	Setup fee for website host account
 <<HostMonthlyFee>>	Monthly ISP charges

•• <<DomainRegFee>>	Domain registration fee
•• <<RegisteredWith>>	Company URL registered with
•• <<YearlyDomainFee>>	Yearly fee for domain name
•• <<Reference>>	Unique contract reference number
•• <<WorkOrder>>	Contract or work order unique identifier code
•• <<StartDate>>	Contract start date
•• <<EndDate>>	Contract end date
•• <<CurrentYear>>	Current year
•• <<CurrentDay>>	Current day
•• <<CurrentMonth>>	Current month
•• <<DeliveryDate>>	Date contract is to be delivered by
•• <<ContractCompany>>	Company name on the contract document
•• <<ContractFirstName>>	First name of person on the contract document
•• <<ContractLastName>>	Last name of person on the contract document
•• <<ContractJobTitle>>	Job title of person on the contract document
•• <<InsuranceCoverageAmount>>	Amount of insurance coverage required
•• <<Credits>>	Photographers or authors credits
•• <<SSN>>	Social Security Number
•• <<Approver>>	Person authorized to make approvals
•• <<Supervisor>>	Employee or contractor supervisor name
•• <<Department>>	Employee or contractor company department
•• <<Month>>	A month
•• <<Amount>>	A dollar amount
•• <<HREmail>>	Email address of the Human Resources department
•• <<HRPhone>>	Phone number of the Human Resources department
•• <<HRContactName>>	Persons contact name in the HR department
•• <<TimeZone>>	Time zone that the contract applies to
•• <<Date>>	A date as applies in the context of the used clause
•• <<Minutes>>	A time in minutes
•• <<Hours>>	A time in hours
•• <<Days>>	A time in days

 <<Months>>	A time in months
 <<Years>>	A time in years
 <<Weeks>>	A time in weeks
 <<EffectiveDate>>	Effective date that an agreement is entered into

CUSTOM DEFINED TAGS

 <<Custom1>>	Reserved for any use
 <<Custom2>>	Reserved for any use
 <<Custom3>>	Reserved for any use
 <<Custom4>>	Reserved for any use
 <<Custom5>>	Reserved for any use
 ...	
 <<Custom50>>	Reserved for any use

You can alter the labels and tags for the custom fields from the Project screen. For example, you can change the default <<Custom1>> to <<work order #>>. Then, type the text <<work order #>> into the document. Then, in your Project data enter a number (12345 for example) in the data field for your custom merge information. When you run the configuration operation, your data (12345) will replace the merge tag (<<work order #>>).

While you can reconfigure all the mail merge tags there are some that are required for certain features to work properly. The <<CustFirst>>, <<CustLastName>>, <<CustCompany>>, <<FirstName>>, <<LastName>>, <<Company>> are required for the Client and Company CRM database feature. If any of these tags are renamed that feature will be disabled.

Tags used for email addresses and web site domains such as <<Domain>>, <<Email>>, <<CustDomain>>, <<CustEmail>> will be converted to clickable hyperlinks when the data is merged if the data appears to be a URL or email format. The Wizard will apply the Proposal Kit URL Style to the inserted hyperlink. If the data for a URL does not include a preceding http: or https: then the Wizard will add https:// to the beginning of the clickable URL but will display the original data in the text. If your domains do not use https:// you can change the Wizard's default prefix in the Preferences.

WHY DIDN'T MY MAIL MERGE UPDATES WORK?

The symptom

You created a proposal the first time. Then you decided to change the mail merge data and ran the generation option a second time, but your mail merge data changes did not show up in the proposal.

The reason

This is a safety feature built into the Wizard to prevent people from losing their edits when they create a proposal, edit a template, then recreate the proposal again. The Wizard will only overwrite your proposal and templates if the files do not exist.

This allows you to add new templates to an existing proposal without losing any previous edits to your work.

The one unavoidable issue that this can create is if you change the mail merge data and recreate the proposal. Since the templates have already been created once for your proposal they will not be overwritten, hence the data changes will not be applied.

The solution

If you have not started editing the templates after creating the project documents, you can go back to your Document Project and click the Edit Current Project button. Click the button to “Delete Old Files” and all the templates for this project will be deleted. Then save the project and build the documents again. Your document will be recreated, and all your changed mail merge data will be applied.

The Wizard was not intended to be used much after you have started editing your proposal. The Wizard is used to help you setup the proposal and create the documents. After that you use Word to edit and complete the proposal.

WHERE ARE THE FILES ON MY HARD DRIVE?

The Proposal Pack Wizard makes use of many files installed on your hard drive (or a network drive).






By default (if you did not change any of the default install options) when you installed your products all will be in this root folder on your hard drive:

c:\ProposalKit

Since the Wizard can be configured to store files in many locations outside of this (or alternately to this) folder there is a Wizard tool for helping you locate all the files.

From the main Wizard screen click the “Preferences” button. Then click the “Tools” tab and then click the “File Location Report” button.

A report will be created which will show you the locations of all the folders the various files used by the Wizard are located, including:




-  The locations of each of your created projects.
-  The locations of the stock templates for each Proposal Pack style
-  The locations of any detected Contract Pack documents
-  The locations of the Wizard database files
-  The Windows registry key used by the Wizard.

ADJUSTING PAGE BORDERS IF NOT PRINTING

Some Proposal Pack styles have a colored page border included in the style. The page borders are completely optional to use depending on the look and feel you want to create for your own company. For example, the "Entertainment #1" style has a thin red border around every template page while the "Classic #1" style has no border.

On some computers, your printer may not be able to print the lower part of the page border due to the unprintable border area defined by individual printer drivers. All page border issues are related to Word and your printer driver. See your Word help manual and your printer driver for details on the unprintable border area of your printer.

To edit page borders in Word

-  Click the "Format" menu option
-  Click the "Borders and Shading" menu option
-  Click the "Page Border" tab in the dialog box

There are a few options to alter the templates to change the page borders. Depending on your printer, the style of page border, accent graphic sizes, etc. you may need to try several adjustments. The easiest option is to turn off the page borders as it will not detract from your proposal.

Other options would be to

- Remove the page borders by clicking the "None" option in the dialog box.
- Remove the bottom page border, or both the top and bottom borders (only keeping the side borders).
- Click the "Options" button and change the "Measure From" setting to measure from the text instead of the edge of the page. Also turn off the option to "Surround Footer". This may require manually adjusting the positioning of the page footer graphic. Use the "View > Header and Footer" option in Word to make changes to the document footer.
- Remove the document footer accent graphic and text (it may pull the border up into the printable area)

ADJUSTING PAGE FOOTERS IF NOT PRINTING

Most Proposal Pack templates have a footer which includes an accent graphic and your company URL. These are designed to be changed if you so desire. There is no rule that this information must be in the footer. For example, you can remove the footer, change the accent graphic to your own company logo, change the URL to your company name or remove it.

Various combinations of accent graphics, URLs and fonts as well as the addition of a page border (see previous page) can cause parts of the footer to not be printed. This is dependent on the printer driver as the printer driver on your computer defines the non-printable border.

After you have finished adjusting the footers to suit your needs check to see if the footers fall in the printable area. If any part of the footer is cut off, you can try readjusting the footer.

In Word, select the “Page Setup” option. Click the “Layout” tab. Then change the “From Footer” setting. For example, if it is set to .25 inches from the edge, try setting it to .3, .4, .5 or .6 inches.

You can also try adjusting the settings in the “Format > Borders and Shading > Page Border” Word dialog box options.

These settings can also be set for each style in the Proposal Pack Wizard style settings to be applied to each proposal automatically.

CHANGING THE PAPER SIZE

You can have the Wizard change the paper size as it is copying and combining your documents. The available paper sizes are: Letter, Legal, Executive, A4, B5, Letter (landscape) and A4 (landscape). In the Style settings click the page setup tab then select the paper size. Each Proposal Pack style can have a different paper size setting. This performs the same operation as manually selecting the paper size from the Word > Page Setup screen.

The Proposal Pack templates are designed using the Letter format (8.5 x 11). If you change the paper size, you may have to manually cleanup some formatting. Due to the margins being resized some header graphics may not fit depending on the Proposal Pack style. Some Proposal Pack styles also include page borders which may fall outside of the printable area of the page. In these cases, you may have to experiment with border settings, turn off borders or edit the graphic headers to resize them.

The Wizard uses points by default in all its calculations and page settings to avoid use of floating point numbers (1 inch = 72 points, so a page width of 8.5 inches is defined as 612 points).

The Wizard will automatically resize the Title Page background graphic and reposition the body watermark background graphics based on the page size as best possible. You may still have to reposition some objects in the document manually when using different page sizes.

COMBINING TEMPLATES INTO A MASTER DOCUMENT

Automating Combining files using the Wizard

- By default, the Proposal Pack Wizard will combine all your selected files into a single master proposal document (FullProposal.docx). You may use the individually copied and merged documents or the combined document once the configuration process is complete. If you need to manually insert additional documents, see the instructions below.
- To change the order of templates, see this chapter for details: [How do I Change the Order of Documents?](#)

Manually Combining files in Word by Inserting from File

- Position your cursor where you want to insert the new file.
- Click Insert > Break > Page Break > OK
- Click Insert > File, then browse to the Word folder containing all the Proposal Pack templates, select your file to insert, click “Insert”
- Note that Word may change the formatting of parts of the document
- Edit final document manually

- ❏ Set the page numbers and update the Table of Contents (if being used) This method is not recommended for large proposals as it can cause a lot of manual editing of the final combined document. See this chapter for how to create a Word auto-generated Table of Contents: [How do I Add a Word Auto-Generate Table of Contents?](#)
- ❏ If you purchase the full version of Adobe Acrobat, you can convert your final proposal to a PDF file and save and even e-mail it right from within Word.

If you are only printing your proposal in-house for delivery you do not need to combine the individual proposal documents into a single file. Simply print each individual document separately. You only need to combine them into a master file if you are delivering your proposal digitally. If you are delivering your proposal digitally you should use a PDF format to prevent easy manipulation of the document, efficient transfer speed and for cross-platform compatibility (Word documents with embedded graphics can be extremely large and may not display the same on your prospect's computer).

HOW DO I CONFIGURE THE ARTICLES DATABASE?

The Wizard now includes a screen that displays lists of online articles you can open and search right from the Wizard home screen.

The database and fields that the articles screen is built from can be completely customized for your own use.

One example would be to remove all the pre-loaded Proposal Kit articles and load the database with links to your own internal company resource pages that your end user who is running the Wizard can make use of from the Wizard interface.

The articles database is stored in the Wizard's default database folder and is titled "Articles.ini"

The database file is in text format and can be manually edited.

You can change the default text fields and text of the buttons by adding custom text to the appropriate database fields.

There are 4 drop down lists that are loaded with the contents of the database fields.

The file format is self-explanatory and easy to edit.

Simply replace our URL's, titles, summaries and images with your own.

The important part to get right is that the name tags must be sequentially numbered. The Wizard will stop scanning when it sees a gap in the sequential numbering of the entries.

EASILY CREATE YOUR OWN GRAPHIC STYLE

The Proposal Packs are designed to be used as-is with pre-designed layouts and graphics. If you are in a hurry to create a proposal (as many of our users are) you do not need to create your own custom graphics to use the Proposal Pack materials. However, you can also modify our styles for your own personal use by creating your own custom variations on the graphics as follows:

All our template material is copyrighted and on file with the US Copyright Office. You may only create custom variations of this material for your own business or personal use. Templates may not be distributed, resold or otherwise posted. Only your final proposals may be distributed to your clients or internally within your company using Proposal Kit material.

Creating your own custom version of the graphics is an optional and advanced feature of the Proposal Packs. If you do not have any experience using a graphics program, we recommend that you have a graphic designer create the custom versions of the graphics. While it is a simple task as far as graphic design work goes (for some tasks such as editing text), it requires the use of your own graphics program and may involve the separate purchase and installation of a new font if you do not have the font type already installed.




The following is a recommended method used to create custom graphics. Use the following tips as you see fit.

- ❏ Open any one of the existing Adobe Photoshop (.PSD) or Adobe Illustrator (.EPS) graphics to start with (for example, "PageTitle.PSD". If you do not have either of these programs, just open the PNG version of the "Blank Template Header (without text)" graphic from the graphics list below. The file name installed on your hard drive is "PageHeader_NOTEXT.png".
- ❏ From within your graphics editor with the select graphic opened, edit or erase our default graphic and replace it with your own company logo or graphic of your choice.
- ❏ Resize the graphic (if needed) to fit. Do not make it too large, otherwise it will be too large when embedded back in Word. Also remember to keep the file at least 150 dpi resolution so it prints clean and crisp. Do not paste in low resolution .JPG or .GIF files as they may look fine on the screen but may not print very well.
- ❏ Save your default graphic, without any text as a backup before you make changes.
- ❏ Create a text element in your graphic, pick a font, font size and color to match your own style and adjust the layout until it is exactly what you want. Save your layered image as a backup.
- ❏ Save a copy as a 150 dpi PNG file (.PNG extension). You should save all your custom created graphics in a new folder using the same file names as the documents they will be inserted into.

For example, for the ExecSummary.docx Word document, you need to make a graphic header with text such as "Executive Summary" and save it as ExecSummary.png

For the Products.docx Word document, you need to make a graphic header with text such as “Products” and save it as Products.png

Repeat for each document you want to replace the header graphics in. You do not need to replace the graphics in every template in the library, only create custom graphics for the templates you will be using.

-  Print a paper copy of the .PNG version as a test to make sure it prints high quality.
-  Now you are done creating your header graphics.
-  In your Word documents highlight the header graphic, delete it, then click "Import from File" in Word's toolbar, pick the new graphic you just created, and your new header will be inserted. Do this for each of the stock templates you will be using. At the same time, you may also change other elements such as colors of bullet points, colors of the page border and/or remove the page borders.

This covers creating brand new graphic headers and manually inserting them into the templates.

Another method of branding the documents with your own custom logos and graphics is to use the MyGraphics folder and create a complete set of graphics that the Wizard will automatically load into your documents. Read this chapter for details: [How to Import Custom Graphics Using the MyGraphics Folder?](#)

HOW DO I CREATE A 2ND COPY OF THE PROPOSAL PACK?



<https://www.proposalkit.com/htm/videos-how-to-clone-proposal-pack.htm>

Normally you install one copy of the Proposal Pack templates and all your proposals and documents are created from that one library of templates.

In some situations, you may want to have more than one set of our Proposal Pack templates (without purchasing a whole new Proposal Pack with a different design theme).

You can clone one of your existing installed Proposal Packs creating a 2nd set of all its templates as a new selectable style in the Wizard's Document Styles screen.

The clone feature is found in the Document Styles > Edit Style > Manage Templates tab. Click the Clone Proposal Pack button. The clone feature is only available in the Expert Edition of the Wizard.

Once you have cloned your existing Proposal Pack you will have a duplicate set of its library of templates that you can completely customize differently than the original set.

This feature is useful if you want to create different visual design themes or other customizations to many different templates that would be too cumbersome to manage using just the original set of templates.

REPAIR THE 'RUN PROPOSAL PACK WIZARD' DESKTOP SHORTCUT



<https://www.proposalkit.com/htm/videos-how-to-repair-desktop-shortcut.htm>

The Proposal Pack Wizard installer program creates a shortcut link on your Windows desktop labeled “Run Proposal Pack Wizard”.

This shortcut opens the Wizard’s Word document and runs the Wizard program that is contained within that Word document.

The shortcut icon’s properties are specific to the version of Microsoft Word you have installed and where your Word executable program is installed on your computer.

If you upgrade your version of Word, the Wizard desktop shortcut will still be pointing to your old version of Word. Which also may not exist anymore if you uninstalled your old version of Word.

The Wizard can rebuild this desktop shortcut if it was deleted or is not operable anymore due to system changes you made to your Word software.

Run the Proposal Pack Wizard and click the Preferences > Tools > Repair Tools buttons. On the Repair Tools screen click the button to repair your desktop shortcut and answer Yes to the prompt.

The Wizard will check your system for what version of Word you are running now and will create a new shortcut icon based on the most recent version of Word it locates.

TROUBLESHOOTING

We do not provide technical support for 3rd party applications such as Microsoft Word or your graphics program. Please consult your Word manual and our on-line tutorials for mail merge use. Consult your Word manual for all other word processing issues. Consult your graphics program for text editing and graphics help.

For up-to-date troubleshooting information see the troubleshooting web page at

<https://www.proposalkit.com/html/troubleshooting.htm>

Q: The Wizard does not run!

A: If you are experiencing error messages running the Wizard it is possible that your Microsoft Office / Microsoft Word installation has been corrupted. Most cases of error messages occurring while trying to run the Wizard can be resolved by reinstalling your Word or Office software using the “repair” feature or doing a custom install and just reinstalling the VBA component of Word/Office. Most likely something else that was installed on your computer after you installed Word or Office overwrote part of your software with an outdated version of a DLL or other component. First, insert your Office or Word CD-ROM and run the setup program. Choose the “repair” option. Also check to make sure you have a full installation and that all the Visual Basic for Applications components are installed. If there are any Service Packs for your version of Word from Microsoft, make sure to install them as well.

Q: Where are the files on my computer?

A: When first installing the Proposal Pack Wizard, you were prompted to choose a location for installation and all associated files. This is where files are located. No desktop icon or application is launched during installation. All files are contained on your hard drive in the original folder you chose. The default install folder is “C:\Proposal Kit\Proposal Pack”. Run the Preferences tool “File Location Report” to get a detailed report of where all the Wizard related files are located on your hard drive.

Q: Why is the border not printing?

A: Your printer has a non-printable border. The size of the border is defined by your printer and driver and can be adjusted in the Word templates. The borders in the templates (if used) are standard Word borders (see your “Borders and Shading” option in Word). Your options are to turn off the borders, adjust the border settings and/or adjust the page footer accent graphic and other trailer tags and positioning.

Another option is to (in Word) click “Borders and Shading”, then “Page Border”, then click “Options”. In the Options dialog, pick “Measure from Text” from the drop down measure field, then uncheck the “Surround Footer” box. This will cause the page border to fit closer in on the page and on top of the footer. If the border is now too close to the text, adjust the top/bottom/left/right fields to higher numbers until the border prints on your printer on all sides without overlapping the footer or anything else.

Q: What if I don't have an Internet connection?

A: The materials are all installed on your hard drive and there is no need to have an Internet connection when using the Proposal Pack Wizard. Any web site links included in the material are either optional or for information purposes only.

Q: Why is my computer locking up when using the Proposal Pack Wizard?

A: Over time your computer may be having its memory fragmented by running numerous programs. This can happen very frequently or over the course of hours depending on the system. Low memory conditions caused by fragmentation (regardless of how much RAM you have installed) can cause problems with any running software (such as your word processor). Simply close everything and reboot your computer to free up resources lost to memory leaks caused by the various software running on your computer.

Low memory conditions on your system can also cause unexpected and unpredictable behavior. If you experience such behavior, first try rebooting your computer and running the Wizard again.

Another possible cause is clicking a link to a Word document from a web page. In some cases, a web browser version is run which may have memory problems. Run Word by itself first instead of clicking the document links in the web browser interface, and then open the Proposal Pack documents. You may want to do this anyway as you will have access to all of Word's features.

If you are creating a very large proposal using many documents the document creation operation can take several minutes to complete and may appear to be locked up. Be patient and wait for the process to complete. If your system appears to have locked up, stop the Wizard and restart. Pick a small collection of templates and rerun the document creation process. A smaller collection will run faster and help determine if your system is just running slowly or has encountered a problem.

Q: The option to replace the Title Page graphic does not work?

A: Make sure you are not using the Proposal Pack for Any Business or Proposal Pack for Government Grants. These are the only Proposal Packs which does not use graphics. If you are using one of these styles, manually edit the text of the Title Page.

If you have edited the original Proposal Pack Title Page document and have made changes to the structure of the document, it is possible the Wizard cannot locate the Project graphic. This could happen if you have inserted a new graphic or a “shape” into the Title Page.

Q: When I create the proposal my changes are not showing up?

A: This can happen if you have previously created a proposal for the same project and are now trying to make changes such as selecting a different Proposal Pack style, adding or removing documents, changing the Title Page project graphic and/or changing the mail merge database fields.

Proposal Pack has a safety feature built into the proposal creation process because many people mistakenly try to add new

documents to an existing proposal they are currently editing by re-running the creation process. The current version of Proposal Pack will not overwrite any existing files in your document project's folder when you run the creation process multiple times.

This means if you are making changes that could affect existing documents such as changing your name in the database form, or changing the graphic theme, etc. you will not see the changes in any existing documents. The only change that is allowed in this case is if you have added new documents to the proposal. The new documents will be copied to your document project folder, however since your existing FullProposal.docx combined project document counts as an existing document, the safety feature will not add those templates to your current document.

Only if you have not started to manually edit this project, you can go to the Document Project form from the Wizard main interface, then Edit the proposal and click the "Delete Old Files" button. This will delete all the documents from the previous configuration process. Do not click the delete button if you have existing work you have been editing for this proposal, otherwise it will be deleted.

Q: Page numbers are showing up in the front Cover Letter and/or Title Page that should not be there?

A: If you have edited any of the stock templates and completely removed the stock footer information, this can cause page numbers to show up in your introduction pages (i.e. the Cover Letter and/or Title Page). This is caused by how Word processes empty page footers vs. page footers that have something in them (like a picture, text tag, text box, etc). Word is seeing a blank footer

when it inserts the first body page of your document and it relinks the section footers together, causing page numbers to show up.

This can be fixed easily by inserting anything back into the template page footer. If you removed the stock “<<Domain>>” tag, just replace it with some different text, or if you want the page footers to be empty, just insert a blank text box into the footer instead of the “<<Domain>>” tag.

PROPOSAL WRITING RESOURCES

Successful proposal writing requires much more than just filling out some documents. There are many issues that can affect how successful you are, such as:

- Using just the right wording
- Pitching to the right person
- Making the pitch at the right time
- Using proper spelling and grammar
- Addressing the prospect's fears and objections
- Personal appearance and presentation
- Internal politics at the prospect's company
- Hidden agendas at the prospect's company
- How many proposals you send out
- Having a right price, not necessarily the lowest price
- How persistent you are with the same prospect
- How you stack up against the competition on various levels
- Miscommunication between parties
- Competitors trashing your solution in their proposals
- A consultant at the client with ties to one of your competitors
- The prospect wants the "safe" choice, not the "best" choice
- And so on...

See our appendix of resources page for recommended books on proposal writing that cover these topics and more in detail at:

<https://www.proposalkit.com/html/append.htm>

PROPOSAL DISTRIBUTION

Print, e-mail and web-based delivery are several ways in which to distribute a proposal. Proposals should always be delivered in print and then optionally followed up with an e-mailed version in PDF format. Digital delivery may be fast and convenient, but it still does not beat a high quality printed and hard bound copy delivered directly to the client.

Print your proposals on high quality paper using a quality printer. Insert into a quality binder and ship priority overnight unless personally delivering it. Never use cheap, flimsy paper or staples. Also print and bind enough copies to give each person reviewing your proposal his/her own copy.

If you cannot avoid sending a digital proposal, save your full proposal as a single Adobe PDF file which can be easily e-mailed. Your client will be able to view it on any platform and can print it out as well.





We do not recommend sending Word documents to clients for your proposal. The documents are typically too large to send by e-mail and are prone to not display as intended.

You should save your final digital distribution versions in Acrobat PDF format to ensure your end reader can view it as you intended and to prevent misuse and unauthorized editing (as best possible). Read this chapter for more details: [How do I Save in PDF Format?](#)

TIPS AND TRICKS

- You will stand a better chance of winning proposals if you take the time to create client-centered proposals specific to each client rather than recycling old proposals and just changing the client contact information.
- Avoid writing a lot of fluff without saying anything. Keep the proposal easy to read. Our templates are designed to use lots of bullet points for easy reading and is a major reason why we do not include a lot of generic pre-written content. This is especially important when submitting a proposal where there are many bidders. Yours should stand out as being easy to read and understandable.
- Try filling out all or most of the relevant templates for each proposal even if the final proposal will not include all of them. This exercise will help uncover things that may have been missed and can help improve the final proposal.
- Spell and grammar check your proposal, and have it reviewed, if possible, by someone not close to the chalkboard. If it is in your budget, hire an editor.
- Judge your proposal size by the size of the project and prospective client. For example, a \$300 Mom & Pop static web site might only be 2-3 pages for the proposal. Do not hand them a 30-page proposal. A larger corporate or government project may require a 40 to 100 page proposal or more. Handing them a 5 page proposal will most likely not get you the job. There are no rules as to the size of the proposal or what sections to use. Let common sense, study and experience be your guide. You


may also consider hiring an experienced proposal writer to assist.


-  What if you don't get the job? It is to be expected. The more proposals you write the more you will lose. You must be able to fine-tune your proposals over time. Whenever possible, interview the prospect when he/she declines the proposal to find out why you were not chosen. Adjust your business and proposal writing as needed to improve your chances on the next proposal.
-  Do not include extraneous information. If you have multiple products or services, include only those that relate to the client's needs. If responding to an RFP, follow their guidelines and only include the proposal sections requested. If you need to add sections or change section titles, use the original graphics supplied with the Proposal Pack to create new graphic headers.
-  If you are responding to an RFP which includes instructions on how to submit the proposal, you must follow the instructions to the letter. If you deviate from the instructions even the most minor alteration can cause your entire proposal to be disqualified. If the instructions say there is a 10 page limit, do not send 11 pages. If the instructions say not to include collateral material, do not send your product brochures. Strive to make it very easy for the proposal reviewers to find all of the information required in the RFP and make that information easy to read and understand.
-  Don't give away the farm in the project section of the proposal. If you give up too much specialized knowledge in the proposal and design, your prospect could take your upfront design and give it to a lower bidder. Keep the proposal manageable. You


may have pages of development checklists and steps; keep the actual steps short and digestible in the proposal. See our Proposal Kits for pre-contract agreements for web professionals to protect your upfront proposal designs if they are very involved. The Proposal Pack come with non-disclosure forms you can use to help protect your work.


- ❏ Make sure to include a financial incentive in the proposal for choosing you for the job. Use the templates to demonstrate how using you will have positive financial effects on the client's business. There are sections in various templates to add this information (e.g. the Executive Summary, Cost/Benefit Analysis or Expected Results).
- ❏ Do not underbid a project. Do not bid on projects you cannot complete. You may be responsible for completing them regardless of your capabilities. Learn when to pass on a project and when to accept projects that will allow you to make a profit.
- ❏ Your odds of success may increase as you specialize and specifically target a niche. See the various Proposal Packs for styles and designs tailored to appeal to specific niches.
- ❏ Pick a style and design for the Proposal based on the prospective client's preferences. For example, if you have a very conservative prospect, use one of the Classic styles, not an Artsy style. If you are not sure, play it safe: use a Classic style.
- ❏ Be persistent – some of our biggest deals took six 'not interested' brush-offs by the prospect before they became a client on the seventh try. Many times, a "no" is really just "no – not right now". The more expensive or complex the service or

product, the more you need multiple follow-ups to clinch the sale.

-  If possible, sell yourself to the “right” person such as a C-Level, VP or President. Managers and gatekeepers may screen you for many reasons.

-  The Proposal Pack templates are purposely designed with minimal pre-written text as most of what needs to be entered is content specific to your company, your project and your client. The templates are designed with many bullet points and clearly defined sections of information. This approach minimizes the “fluff” content and helps you create an easy to read and more importantly an easy to skim document. Make as much use of the bullet points as possible and keep the generic fluff to a minimum. Make your point clear, concise and do not waste the reader’s time with a lot of “words” that really don’t say anything. Time is more precious than ever for busy executives and decision makers. Your proposal will be more appreciated if it comes to the point quickly, is easy to follow and easy to read.

-  Focus on the key benefits to the client and back them up with the reasons why your proposal should be chosen. The proposal should be predominately focused on the client, not on yourself. Our layouts are designed to put the client information first, the project information second and your company information last.

-  Use a lot of summaries and bullet points in the proposal. Summarize what you will say in the Executive Summary, provide details in sections that follow, and then use the Project Summary to summarize what you told them. If there are multiple layers of people between you and the ultimate authority who will accept the proposal, you will have to write in a way to get

past each layer. Gatekeepers and busy executives may only read the summaries. If it passes the first reviews it may be turned over to other individuals who will read the details.

- Repeat the most important selling points outlined in the Executive Summary throughout the proposal. Repetition will make the point stick. However, do not just type the same sentences over and over. Repeat your key points by rephrasing them in the context of each section of the proposal. The key points should revolve around the client's needs, your benefits and how your benefits will meet or exceed those needs.