



# PROPOSAL KIT SAMPLE

## SAMPLE ESTIMATE PACK DOCUMENT

Scroll down to read the first part of this sample estimate document. When purchased, the complete document is included in an editable format.

Estimate Pack is a set of pre-designed spreadsheets for estimating a variety of projects. The collection as a whole will meet many of your needs.

The spreadsheets are designed to facilitate fast and easy calculations for project estimates. These estimates can then be fine-tuned over time to become more and more accurate.



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Work Order Calculator														
Tax Rate #1:	0.0%		Tax Rate #2:	0.0%	Tax Rate #3:	0.0%								
Description	Price	Qty	Taxed	Tax #1	Tax #2	Tax #3	Amount	Unit Weight	Total Weight	Custom #1	Custom #2	Custom #3	Custom #4	Custom #5
<< Cost #1 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #2 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #3 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #4 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #5 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #6 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #7 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #8 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #9 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #10 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #11 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #12 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #13 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #14 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #15 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #16 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #17 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #18 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #19 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
<< Cost #20 >>	\$0.00	1	1	\$0.00	\$0.00	\$0.00	\$0.00	0.00	0.00					
Total Costs:				\$0.00	\$0.00	\$0.00	\$0.00		0.00					
Subtotal	\$0.00						\$0.00							
Sales Tax	\$0.00													
Tax #2 Total	\$0.00													
Tax #3 Total	\$0.00	S&H Cost	S&H Taxed?											
Shipping	\$0.00	\$0.00	0											
Handling	\$0.00	\$0.00	1											
Credits Due	\$0.00													
Discount on Subtotal	0%	Discount Total:	\$0.00											
Grand Total	\$0.00													
Amount Paid	\$0.00													
Total Due	\$0.00													
Deposit Required %	0%													
Deposit Required	\$0.00													

Notes: If costs are taxed enter the tax rate in B2, then enter either a 0 or 1 in the Taxed column. 0 = No tax, 1 = Yes calculate the tax).

Fields in white are data entry fields

Fields in green contain calculations

Fields in blue are dynamically linked to the Word template. These fields may be data entry fields or may contain calculations.

If you use the dynamic linking to your Word template feature the tags in the Word template will be replaced with dynamic links to the cells in blue.

For example, in the Word template Invoice.doc the <<R10C6>> corresponds to cell row 10 and column F. F is the 6th column over.

If you customize the spreadsheet and Word template all you have to ensure is the <<R#C#>> tags match up with the correct cells and the Wizard

will do the work of turning them into dynamic links. When you save your spreadsheet the Word template will update when it is opened.

Use the Tax Rate #2 field when you need 2 tax rates such as countries with PST and GST or government proposals with multiple taxes.

Use the Tax Rate #3 field when you need 3 tax rates such calculating costs for a government RFP and you need FICA, Social Security and Medicare taxes calculated.

Tip: If you want a combined "Shipping and Handling" just change "Handling" to say "Shipping & Handling" and dynamically link your document to <<R70C2>>

Tip: If you want to change the wording that displays in your Word document edit the text in the blue fields in Column A. For example, change "Sales Tax" to "GST" and "Tax #2 Total" to "PST"

Tip: If you need a custom calculation you can create a calculation in any unused cells and also add them to your Word document. For example add a rounded up calculation to

D77 to the nearest round number. Then in the Invoice.doc template add a field <<R77C4>> (R77 is row 77 and C4 is column 4 which is the D column). If you want to add this custom calculation to a different page of the document such as the Cover Letter then edit the CoverLetter.doc template and add the tag <<XLS:InvoiceCalculat

The spreadsheets are designed to work with the Word templates so that only the fields you want displayed in the Word document are linked. This way you can control how much detail is shown in the final Word document.

NOTE: There are multiple types of Cost Summaries included in this spreadsheet in the other Sheets. Make the type of Cost Summary you want to use the first Sheet.

This estimate document is only included in the [Proposal Kit Professional](#) product.

This sample has been truncated to only show the first part. The complete editable version of this document is included in the Proposal Kit Professional product found at:

[ProposalKit.com/htm/proposal-software-products.htm](http://ProposalKit.com/htm/proposal-software-products.htm)

