



## Quick Reference Guide (QRG) Summary of Changes

**Creation Date: 01-27-2026**

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**Revised Date:**

**Revised By:**

**Changes Made:**

# Running a Proposal Generator

**Step 1:** From the *Proposal Overview*, find the needed *Proposal* and click the **Row Action Menu**.

▼ Proposal Overview			Save	?
Type search criteria or press Enter			Temporary	Showing 50 of 69
Proposal	Type	Descr	0 changed	
180031	0100 - STANDARD PROPOSAL	BRIDGE AND APPROACHES		

**Step 2:** From the *Row Action Menu*, click **Assemble Proposal/Contract**.

Actions

Copy

Copy Proposal and Project

Delete...

Exclude from Search Results

Tasks

Assemble Proposal / Contract

Check Out Proposal To Estimator

Electronic Contracts

Export Proposal To Estimator

Export To Bids

Export To Bids With Gen

Generate Unique Project Line Numbers

Lock Proposal

Validate Proposal

**Step 3:** Now on the *Execute Process* screen, select your needed/desired parameters by checking the checkboxes.

## Execute Process

▼ Execute Process - Assemble P

Settings

Set Parameters

### Proposal

Check For Proposals

☒

### Contracts

Check For Contracts

☐

### Advertisements

Check For Avertisments

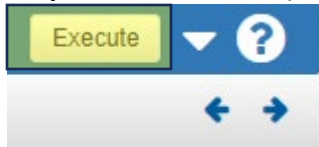
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### Index Sheet

Check For Index Sheets

☐

**Step 4:** Click **Execute** (where the Save button typically is).



**Step 5:** Once you have clicked **Execute**, a new window will appear and should say Complete! If it says Complete then close the Window.

**Note:** If you get anything else - leave the window open and contact your Admin.