



Quick Reference Guide (QRG) Summary of Changes

Creation Date: 01-27-2026

Revised Date:

Revised By:

Changes Made:

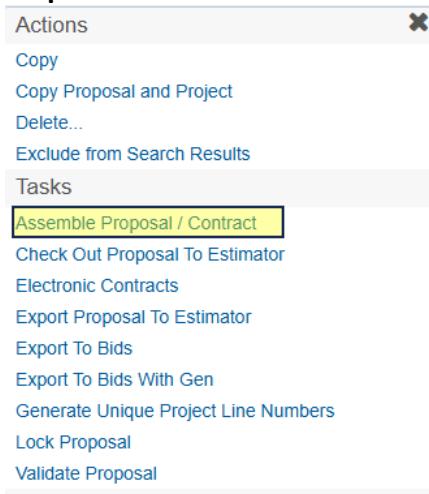
Running a Proposal Generator

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



The screenshot shows a list of proposals in a table. The first proposal, '180031', is selected. A Row Action Menu is open over this row, listing various actions: '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). The 'Assemble Proposal / Contract' option is highlighted with a yellow box.

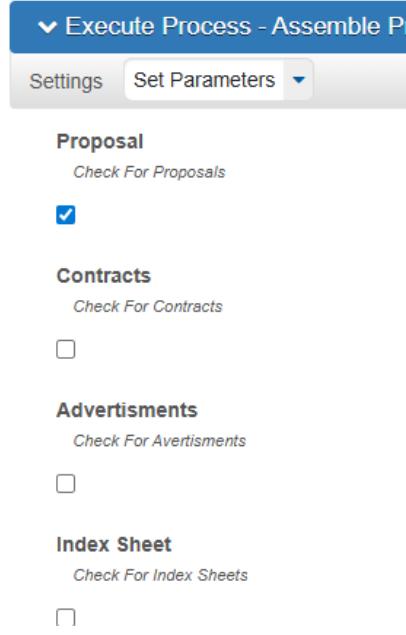
Step 2: From the **Row Action Menu**, click **Assemble Proposal/Contract**.



The screenshot shows the 'Tasks' section of the Row Action Menu. The 'Assemble Proposal / Contract' option is highlighted with a yellow box.

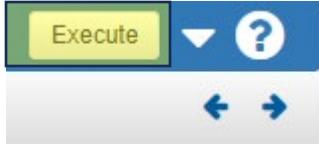
Step 3: Now on the *Execute Process* screen, select your needed/desired parameters by checking the checkboxes.

Execute Process



The screenshot shows the 'Execute Process - Assemble Process' screen. It has sections for 'Proposal' (Check For Proposals checked), 'Contracts' (Check For Contracts), 'Advertisements' (Check For Avertisments), and 'Index Sheet' (Check For Index Sheets). Each section has a checkbox that is checked for the 'Proposal' section.

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.