

Bid Proposals: Quick Start Guide

🌟 What's New

Your bid proposal system now generates **professional, elegant PDFs** with:

- ✓ Branded cover pages
 - ✓ Properly formatted tables (pricing, schedules)
 - ✓ Professional color scheme
 - ✓ Clear email upload workflow
-

🚀 How to Create a Professional Bid Proposal

Step 1: Navigate to Bid Proposals

Dashboard → Bid Proposals → Create New Bid Proposal

Step 2: Upload Your Documents

What to Upload:

- 📄 RFP documents (PDF, Word, Text)
- 📧 **Preliminary emails** (.eml, .msg files)
- 📎 Any attachments from the RFP

Pro Tip:

Always include preliminary email correspondence! The AI uses it to:

- Match your communication tone
- Understand context and expectations
- Extract budget hints and requirements

Visual Feedback:

- Email files will have a blue background
- "Preliminary Email" badge appears on emails
- Color-coded icons show file types

Step 3: AI Processing

The system automatically:

1. **Extracts information** from RFP documents

- Solicitation number and deadlines
- Budget ranges and payment terms
- Technical requirements
- Contact information

1. **Categorizes files**

- RFP documents vs. preliminary emails
- Stores separately for proper context

2. Generates proposals

- Technical proposal (Envelope 1)
- Cost proposal (Envelope 2) with pricing tables

Step 4: Review & Download

Review the proposals:

- Edit content as needed
- Verify pricing accuracy
- Add custom notes

Download professional PDFs:

- Click "Download PDF" for each envelope
- PDFs include:
 - Branded cover page
 - Formatted pricing tables
 - Professional styling
 - Page numbers and footers



What the PDFs Look Like

Cover Page Features:

- **Dark blue branded header** with company name
- **Large, prominent title** for the proposal
- **Information box** with solicitation details
- **Professional layout** that makes strong first impression

Content Pages Include:

- **Section headers** with orange accent bars
- **Formatted tables** for pricing and schedules
- **Professional typography** with proper spacing
- **Page footers** with company name, page numbers, solicitation #

Table Examples:

Pricing Table:

Phase/Deliverable	Description	Cost
Design	UI/UX	\$25,000
Development	Full Stack	\$60,000
Testing	QA	\$15,000
TOTAL		\$100,000

Payment Schedule:

Milestone	Deliverables	Payment	Week	
Kickoff	Plan ready	30%	1	
Design	Approved	25%	4	
Launch	Live site	20%	12	



Tips for Best Results

1. Upload Complete Documentation

- Include all RFP attachments
- Don't skip supplementary documents
- Add cost templates if provided

2. Include Email Correspondence

- Export emails as .eml or .msg files
- Include your initial response if sent
- Helps AI understand your relationship with client

3. Review Before Sending

- Verify pricing matches budget
- Check that all requirements are addressed
- Customize technical approach if needed
- Ensure timeline is realistic

4. Use Both Envelopes

- Generate both technical and cost proposals
- They work together as a complete package
- Both will have matching professional formatting



Brand Colors Used

Your proposals use CDM Suite's professional color scheme:

- **Dark Blue (#1D2B53)** - Headers, important text
- **Orange (#ED8522)** - Accent bars, highlights
- **Dark Gray (#333)** - Body text
- **Light Gray (#E5E5E5)** - Alternating table rows

This creates a cohesive, professional look that builds trust with clients.



What AI Extracts from Your Documents

From RFP Documents:

- Solicitation/RFP number
- Project title and description
- Issuing organization details
- Submission deadlines
- Technical requirements
- **Budget information** (ranges, maximums)
- Contact information
- Key deliverables

From Preliminary Emails:

- Communication tone
- Relationship context
- Budget hints or expectations
- Specific concerns or priorities
- Project timeline clues



Quick Workflow Summary

- | | | | |
|---|--|--|-------------------------------|
| 1. Create New Bid 
(1 minute) | 2. Upload Files 
(2 minutes) | 3. AI Processes 
(30-60 sec) | 4. Download PDFs
(instant) |
|---|--|--|-------------------------------|

Total Time: ~5 minutes to professional proposal

Manual Formatting: Zero - AI handles everything

Result: Professional, branded, table-formatted proposals ready to send



Need Help?

Common Questions:

Q: Can I edit the generated content?

A: Yes! Edit proposals directly in the editor before downloading PDFs.

Q: What if I don't have preliminary emails?

A: No problem! AI will still generate proposals, just without tone matching.

Q: Can I change the pricing?

A: Yes, edit the cost proposal content and regenerate the PDF.

Q: How do I export emails as .eml or .msg?

A:

- **Outlook:** Drag email to desktop → saves as .msg
- **Gmail:** Open email → More (⋮) → Download message → saves as .eml
- **Apple Mail:** Select email → File → Save As → .eml format

Q: What if the PDF doesn't look right?

A: Make sure your proposal content includes properly formatted markdown tables using `|` pipes.

Final Checklist Before Sending

- ☐ All RFP requirements addressed
 - ☐ Pricing tables are accurate
 - ☐ Timeline is realistic
 - ☐ Contact information is correct
 - ☐ Both envelopes downloaded
 - ☐ PDFs reviewed for quality
 - ☐ Ready to submit! 🎉
-

Your proposals now look professional, are properly formatted, and ready to help you win more bids!

For detailed technical documentation, see:

- `BID_PROPOSALS_PROFESSIONAL_ENHANCEMENT.md`
- `BID_PROPOSALS_VISUAL_GUIDE.md`