

**Basic, but important instructions:**

To save a lot of time in the future, I suggest going over each and every document and changing whatever needs to be changed to fit your needs. I also suggest changing each field that says [Your Company], [Your Email], etc to your company information. I will tell you more information on these clickable markers below. Be sure to review each document carefully, you do not want to send a client a document with the words [Client Company]. Save the documents after you have changed all of the necessary information. Keep the [Client Company] markers intact, so that when you get ready to create a document for a client, it'll make creating the document much faster.

So, what are the [Your Company] markers exactly? They are one clickable macro buttons created in Microsoft Word. All you have to do is click once, and start typing the necessary information. This makes it much easier then highlighting a word and then typing the information you want. Listed below are all of the markers that were used in the documents, and a brief explanation.

[Your Company]	Your Website Design Company Name
[Your Name]	Your Full Name
[Your Title]	Your Title, (CEO, Director, etc)
[Your Address]	Your Mailing Address
[Your City]	Your City
[Your ST]	Your State
[Your Zip]	Your Zip Code
[Your Phone]	Your Phone Number
[Your Fax]	Your Fax Number
[Your Email]	Your Email Address
[Client Company]	Your Clients Business Name
[Client Name]	Clients Full Name
[Client Address]	Clients Address
[Client City]	Clients City
[Client ST]	Clients State
[Client Zip]	Clients Zip Code
[Client Email]	Clients Email
[Client Phone]	Client Phone Number
[Client Fax]	Client Fax
[Corporation Type]	Your Corporation Type (Sole Proprietorship, LLC, etc)
[Project Type]	(Website Design, Graphic Design, etc) Can include many.
[AMT]	Usually a fee amount, but can also mean number of hours.
[CURRENCY]	Currency Type (US, EUR, etc)
[NUM]	Usually a document number
[Site Title]	Used In Proposal (Title of Site)
[Description of Site]	Used In Proposal (Description of Site)

Anywhere you see **red** text in a document; it's usually an important note that you need to review and then delete.

**Editing the Website Planner Workbook Digital Version**

The Digital Version of the Website Planner is locked so that your clients may fill out the form fields without accidentally erasing the questions. Although you do need to edit it to change things around to your preferences, and of course basic things like change the logos to yours. To unlock it in Microsoft Word, Go to View --> Toolbars --> Forms, then click The Lock Button to Unlock the form so you may edit any of the fields. Be sure to re-lock it before saving it or sending it to a customer.

**Any other ideas to add or to improve the Website Proposal Documents?**

There are so many other ideas to place in your proposals. Here are two more ideas that I can think of that were not placed in the proposals because I felt that most people would not use them.

- Add mockup template screen shots
- Information on competitors, and how your client can improve upon them.

## Instructions on editing the flowchart diagrams

Editing the flowchart diagrams is very easy once you get used to using the Microsoft Word tools. I use Microsoft 2003, so hopefully the tools in your version are also included. If not I suggest upgrading to a newer version or make your flowchart diagrams in your preferred graphic design software.

The flowchart diagrams are made by using the drawing tools in Microsoft Word. To open the Drawing Tools in Microsoft Word 2003 go to View → Toolbars → Drawing. The toolbar will usually open up at the bottom of your Microsoft Word software. You will see this tool bar:



As you can see, there are many options on this tool bar. I will describe what each of these options do, starting with the slanted line after the "AutoShapes" option.

The line tool, of course makes lines, use these to connect each of your text boxes in your flowchart diagram. I've noticed a bug in Microsoft Word 2003, that when you move a line that has already been made, it will make it thicker than the line thickness you've already chosen. The best thing to do is to make the line exactly where you want it, without moving it. Also, to get the line center with one of the text boxes, the text box has to be an even size. You'll get the hang of how everything works once you mess around in it though.

The arrow tool is nice to point to specific objects in your flowchart diagram.

The next two options are a rectangle and oval option. I haven't yet found a useful way of using these in the flowchart diagram. Do not use the rectangle option to make squares that you will be placing text in, you can not place text within these objects.

The next option is for adding text boxes. Select this to make a new box for your flowchart diagram. Double click the text boxes to change certain options such as fill color, size, etc. You can resize these text boxes by clicking the corner and dragging it to make it bigger or smaller.

The next four options are not necessarily needed; they are for WordArt, adding pictures, etc.

The next option is a fill color. You can select a text box and click this option to change the fill color of it.

The next option changes the color of your lines.

The next option is your text color.

The next two options are for your lines. You can use these options to change the thickness and the dash style of your lines.

The next option is your arrow style. I did not use any arrows in the examples, so if you are going to use the same layout as my examples, you will not need this.

The next two options are your box styles. You can add shadows to your text boxes and such. You can see an example of a shadow by opening up the "New Design Proposal" document and you will find that there is a shadow on the "Home Page" box. If you do not want a shadow on this box, just click the text box and select the shadow option and click "No Shadow".

That pretty much sums it up. Creating flowcharts can be fun. Feel free to use different colors to make it colorful. If you do not want any color in the flowchart, just make all of the text boxes a white fill color, and be sure to change the font text to all black.

**Important Note:**

To save time, you can copy and paste your text boxes instead of creating a new one each time, here's some instructions on doing so:

**Instructions on copying and pasting text boxes to save time:**

You can copy and paste text boxes to make duplicates of them, this will save you a lot of time. When doing so, select the text box you would like to copy, press Ctrl+C on your keyboard, and then select a blank spot on the drawing board to de-select the box. Now press Ctrl+V to paste the text box. If you do not de-select the text box that you are trying to copy before you try to paste it, you will paste the new textbox inside the old one. If you make a move that you want to undo, you can use the shortcut key Ctrl+Z to undo the last move you made. You can also copy and paste by going to the edit menu and selecting copy or paste from there if you do not feel comfortable using shortcut keys.

**Other Frequently Asked Questions****What is the images folder for?**

All of the images that I used within the documents have also been placed in the images folder. They are not linked to the documents, so you may erase them.

**What are the flowchart images for?**

These are flowcharts were used in some of my proposals when I designed websites for businesses, feel free to look them over whenever you need some inspiration on flowchart design, as almost every website you develop will need a different flowchart layout. Of course you can't edit them, (There are 4 editable flowcharts in the flowchart diagrams document) but I didn't think it would hurt to include them.

**What format are these documents in?**

All documents are in Microsoft Word (\*.doc) format. If you do not have Microsoft Word, you may download OpenOffice.org, which is a free open source software. We chose the Microsoft Word format because it is the most widely used format for documents. If you do not want your files in this format, or would like them in a different format, please contact us before ordering and tell us which format you want and we will see what we can do. Please note that the documents may not come out as formatted using the OpenOffice.org software. To be able to use the full extent of the documents, Microsoft Word XP and higher is preferred.

**Did you find an error?**

Although we have looked through these documents hundreds of times, and have even had a few experts look them over for proofreading errors, sometimes it's hard to find every little mistake. Even published books or newspapers have errors that just aren't noticed. Just use the contact form on our site at [webdevdocs.com](http://webdevdocs.com) or email us at [sales@webdevdocs.com](mailto:sales@webdevdocs.com) to notify us. We appreciate any and all error reports. Any suggestions or comments are welcome.

Have a question not listed here? Just ask for help at [webdevdocs.com](http://webdevdocs.com)