

### Installing Sales Proposal Architect

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To install Sales Proposal Architect

1. Start Microsoft Windows
2. Insert the disk in the CD-ROM drive (D or E).
3. From the **Start** menu on your **Windows Desktop**, select **Run** and type **d:\setup** or **e:\setup** and press ENTER.
4. Follow the instructions on the screen.

The setup program creates the following subdirectory: C:\Program Files\Sales Proposal Architect on your hard drive, unless you choose otherwise, and places all the programs in the new subdirectory.

### Create a Proposal in Four Easy Steps

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#### 1. Complete the Design Items

Complete the Design Items for each of the five proposal sections and the Title Page. Press the Design Items button and the appropriate Section button (1–5, or Title Page) to design your proposal. Press the Comments and Suggestions button in the lower right corner of the main screen to get hints and examples that can help you decide what to enter for each design Item.

#### 2. Preview the Proposal

Use the Preview function to review your proposal's content and the flow of information and ideas. Preview your proposal after completing each section or after completing all design items for the entire proposal,. Press the Preview Section button and the appropriate Section button (1–5, or the Title Page) to preview the proposal.

Note: The Preview function only provides a representation of how your proposal will appear when it is generated as a Microsoft Word document. For example, some information displayed in tables in the generated proposal is truncated in the preview.

#### 3. Generate the Proposal as a Microsoft Word™ Document

Generate your proposal as a Microsoft Word document after completing the design items and previewing each proposal section,. Press the Generate icon on the Tool Bar or select Generate Document from the File Menu on the Menu Bar.

#### 4. Add Your Finishing Touches

After reviewing your proposal as a Microsoft Word document, you are ready to add your finishing touches. If you need to make major changes such as reordering features and benefits you may want to make the changes in Sales Proposal Architect and then generate another proposal in Microsoft Word.

### Opening a New or Existing Proposal

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When you start SALES PROPOSAL ARCHITECT the **Open Dialogue** box appears. Use the tabs at the top of the screen to complete one of three actions

- **Recent** Select a recently created or edited proposal.
- **Browse** Select a hard or floppy drive and directory or subdirectory to open an existing proposal.
- **New Proposal** Create a new proposal; the system displays a screen that asks you to enter a name for the new proposal file.

**Note:** Placing the cursor on each file listed on this screen displays the entire path name.

## Main Screen Layout

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SALES PROPOSAL ARCHITECT provides a simple-to-use screen layout that makes it easy for you to design a winning proposal. The main screen has two principal components:

- **Design Dialogue Box:** select options and enter information to design your proposal.
- **Action Bar:** move between proposal sections to complete design items and preview the proposal. Note: The “Green Man” icons define two things, the current:
  - Action (view Design Items, Preview Section, or View Item List)
  - Section (1–5 or the Title Page).

You also can access two other components from the main screen:

- **Comments and Suggestions:** design expertise for each item.
- **Design Item List:** view all the proposal design item names and actual design items by clicking the View Design Item List button on the Action Bar.

## Finding Help

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SALES PROPOSAL ARCHITECT includes extensive expertise and help accessible from the **Help Menu** and from most locations in the program.

If you need help with your proposal's content, check the system's **Comments and Suggestions** for the design item. Access this information by clicking the button located in the bottom right corner of your screen.

The proposal structure and design items in SALES PROPOSAL ARCHITECT are based on the book **Sales Proposals Kit for Dummies** by Bob Kantin (Hungry Minds, Inc., 2001). This book provides guidelines and examples for writing sales proposals that get results.