

Proposal Craft

What is Proposal Craft - Proposal Authoring Tool?

Imagine you're part of a team that needs to respond to customer requests with detailed documents called proposals. These proposals explain who your company is, what your strengths are, what the customer's problem is, and how your company plans to solve it. Creating these documents takes a lot of time, especially when you have to start from scratch every time.

The Proposal Authoring Tool is like your intelligent assistant that helps you write these proposals faster and better.

How Does It Help?

1. Reuse What You Already Have

Instead of starting fresh, you can bring in useful content from:

- Past proposals you've written (in PDF or Word format)
- Your company's website or blog

2. Pick and Choose the Good Stuff

The tool lets you highlight and mark only the parts you want — like a copy-paste, but smarter.

3. Keep Everything in One Place

It gathers all your selected content into a “Workspace” — a digital folder for your current proposal.

4. Get Help Writing

With just a short instruction or question, the tool uses AI to draft sections of your proposal — such as company introduction, capabilities, or your proposed solution.

5. Export and Go

Once your proposal is ready, you can export it as a professional Word document — ready to send to your customer.

Why Is It Smart?

- It saves time by reusing and summarizing past work.
- It helps maintain consistency and quality across all proposals.
- It ensures that the latest, most relevant content is used — automatically traced back to its original source.

Who Is It For?

This tool is built for sales teams, pre-sales consultants, solution architects, or anyone involved in preparing proposals. Even if you're not a great writer, the tool gives you a great starting point — so you can focus on fine-tuning the message, not formatting the document.

Features

1. Content Ingestion

- Sources:
 - Upload DOCX/PDF proposals.
 - Fetch web content from URLs (company site, blogs, case studies).
- Parsing:
 - Support for intelligent chunking by section headings or semantic breaks.
 - Manual marking: UI allows selection and tagging of useful sections.

2. Content Curation

- Workspace View:
 - All extracted content resides here.
 - Users can tag content (e.g., Capability: Cloud, Industry: Retail).
 - Maintain source metadata (e.g., file name, URL, section title, date).
- Tagging Engine:
 - Allow freeform and pre-configured tags.
 - Enable filters (e.g., show only GenAI-related extracts).

3. Prompt & Content Generation

- Prompt Window:
 - One per section (About Company, Capabilities, etc.).
 - MVP: Freeform prompting.
 - Future: Predefined prompt templates (e.g., “Summarize solution fit using this input”).
- Workspace Integration:
 - Prompts can pull content from tagged extracts or full workspace.

- LLM Integration:
 - Use Azure OpenAI / Bedrock, with future support for grounding (RAG-like behavior).

4. Versioning & Traceability

- Versioning:
 - Each export is saved with timestamp/version suffix.
 - Ability to list and restore older versions.
- Attribution:
 - Store source links for each reused/generated section.
 - Option to embed attribution in exported DOCX (e.g., footnotes or appendix).

5. Export

- Format:
 - DOCX file with structured sections (predefined or user-defined).
 - MVP: Use a base template with company logo, headers, footers.
 - Future: Client-specific templates.

6. User and Workspace Management

- Users: Single-role support in MVP (e.g., “Author”).
- Workspace: Tied to a specific proposal. All curated content, LLM-generated text, and metadata are scoped within this.
- Collaboration (Planned): Future versions may support multi-role, collaborative editing.

Frontend (React-based Web App)

- Upload Center: Upload docs, enter URLs.
- Content Extractor UI: Render parsed content, allow section marking & tagging.
- Workspace Dashboard: Tag, filter, view extracts.
- Prompt Section Editor: Interact with LLM per section.
- Export Center: Show generated proposal, version history, export options.

Backend (Python / FastAPI / Flask)

1. File Parser:

- PDF & DOCX extractors (e.g., pdfminer, docx, or unstructured).
- TOC and semantic chunking logic.

2. Web Scraper:

- Readability-based HTML cleaner (e.g., newspaper3k, BeautifulSoup).

3. Content Store:

- SQLite or lightweight DB for MVP.
- Store workspaces, extracts, tags, source info.

4. Prompt Handler:

- Interface with LLM (e.g., Azure OpenAI, Anthropic via Bedrock).

5. Exporter:

- Compose sections → generate formatted DOCX using python-docx.

1. Proposal Workspace Setup

Field / Control	Type	Description
Proposal Name	Text Input	Name or title of the proposal.
Client / Opportunity Name	Text Input	Who is the proposal being prepared for?
Industry / Domain	Dropdown / Multi-select	E.g., BFSI, Healthcare, Manufacturing.
Capabilities in Scope	Multi-select	E.g., GenAI, Cloud, Data Engineering.
Tags / Keywords	Tag input	Used for filtering or categorization.
Assigned Users (future)	User select	For collaboration – not needed in MVP.
Create Workspace	Button	Initializes the proposal workspace.

2. Content Ingestion

A. Upload Past Proposals

Field / Control	Type	Description
Upload Files	File Upload (PDF, DOCX)	Upload previous proposals.
File Name / Display Name	Auto or editable text	Friendly label for each uploaded file.

B. Add Web Content

Field / Control	Type	Description
URL	Text Input	Paste company website or blog URL.
Fetch Content	Button	Triggers web content extraction and preview.

1. 3. Content Preview and Extraction

Field / Control	Type	Description
Document Viewer	Scrollable pane	Shows parsed content by section or page.
Mark Content*	Highlight + Tag	Select content block(s) to include.
Section Name (Optional)	Text input	Label the content you're marking.
Apply Tags	Tag input	E.g., Legacy Modernization, Data, GenAI, Cloud, etc.
Add to Workspace	Button	Saves marked content to the proposal workspace.

A comprehensive proposal authoring tool with workspace setup, content ingestion from files/URLs, and curated content management

Proposal Workspace Setup:

- Complete form with Proposal Name, Client/Opportunity Name, Industry/Domain dropdown, Capabilities multi-select, Tags/Keywords input
- Form validation and "Create Workspace" functionality
- Dashboard view of existing workspaces

Content Ingestion:

- File upload for PDF/DOCX with auto/editable display names
- URL input with "Fetch Content" capability (mocked for MVP)
- Document viewer with scrollable content preview

Content Preview & Extraction:

- Interactive content marking with highlight and tagging
- Section naming and tag application
- "Add to Workspace" functionality to save curated content

Workspace Management:

- Display curated content sections in organized workspace
- Search and filter workspace content
- Content preview and basic editing capabilities

1. Ingest Content

ProposalCraft
Intelligent Authoring

Content Ingestion > Document Upload

Save Progress Preview

Content Ingestion

Upload documents or fetch web content to extract reusable sections for your proposals.

Upload Documents

Drop files here or click to browse
Supports DOCX, PDF files up to 50MB

Select Files

Fetch Web Content

Website URL

https://example.com/case-study

Fetch Content

Content Preview & Selection

Select document

Upload documents or fetch web content to see sections here

2.



2. Create Workspace

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Workspace > Content Library

Save Progress Preview

Workspace

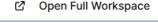
Manage and organize your collected content sections for proposal authoring.

Filter by Tags: All, Cloud Migration, AI/ML, Strategy, Technical, Implementation, Executive Summary

Financial Services, Healthcare, Retail

0 Total Items	0 Filtered Items	9 Total Tags	0 Source Documents
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No items in your workspace yet. Add content from the ingestion view.



3. Proposal Authoring

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Proposal Authoring > Content Generation

Proposal Authoring

Create and generate content for your proposal sections using AI and workspace content.

Proposal Sections

-
-
-
-
-

Generate Content

Content Generation Prompt

Describe our company's background, expertise, and relevant experience.

Reference Content (0 selected)

Quick Workspace
Recently added content

Filter by Tags

No workspace items

Workspace Stats

Content Items: 0
Tags: 12

4. Templates

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Content Ingestion > Document Upload

Content Ingestion

Upload documents or fetch web content to extract reusable sections for your proposals.

Upload Documents

Drop files here or click to browse
Supports DOCX, PDF files up to 50MB

Fetch Web Content

Website URL

Content Preview & Selection

Select document

Quick Workspace
Recently added content

Filter by Tags

No workspace items

Workspace Stats

Content Items: 0
Tags: 12

Task breakdown

Feature	Priority	Notes
Upload PDFs/DOCX & parse content	High	Chunk by sections
Extract web content by URL	High	Strip boilerplate
Workspace for content aggregation	High	Tag + source info
Freeform prompt window	High	One per proposal section
DOCX Export with simple template	High	Include section titles
Version naming & history	Medium	Simple timestamp-based versioning
Content tagging & filtering	Medium	Start with manual tags
Attribution logging	Medium	Show original source
Prompt templates	Medium	Typical queries to be templated
Multi-user roles	Low	Optional upgrade
Custom export templates	Low	Future client need

Additional page – Create Template

Create New Template ×

Create templates to help guide the AI with FAQs, templates, or examples.

Content Type

FAQ

Example Content

```
Here's how to integrate with our API: const response = await
fetch('/api/endpoint')...
```

[+ Associate a File \(Optional\)](#)

Create Template

API End points:

Page	Endpoint	Method
Documents	/api/documents/upload	POST
	/api/documents/fetch-url	POST
	/api/documents	GET
	/api/documents/<doc_id>/sections	GET
Workspace	/api/workspace	GET/POST
	/api/workspace/<item_id>	DELETE
Proposals	/api/proposal-sections	GET
	/api/proposal-sections/<id>/generate	POST
Tags	/api/tags	GET/POST
	/api/sections/<section_id>/tags	POST
	/api/sections/<section_id>/tags/<tag_id>	DELETE

Document Management

POST /api/documents/upload

- Upload multiple documents (PDF/DOCX)
- multipart/form-data
- Triggers processing pipeline

```
# Expected request
files = request.files.getlist("files")

# Response example
return jsonify({ "message": "Upload successful", "documentIds": [...] }), 200
```

POST /api/documents/fetch-url

- Fetch content from a URL and save as document
- application/json { "url": "<string>" }

GET /api/documents

- List all uploaded documents with metadata

```
[
  {
    "id": 12,
    "fileName": "Proposal.pdf",
    "uploadedAt": "2024-07-01T10:00:00Z",
    "status": "completed"
  }
]
```

GET /api/documents/<doc_id>/sections

- 📄 Return extracted sections from a specific document

```
{
  "sections": [
    {
      "id": 101,
      "title": "Executive Summary",
      "content": "...",
      "pageNumber": 1,
      "wordCount": 120,
      "tags": [...]
    }
  ]
}
```

Workspace Management

POST /api/workspace

- ➕ Add a section to the workspace
- application/json { "contentSectionId": <int> }

DELETE /api/workspace/<item_id>

- 🗑 Remove an item from the workspace

GET /api/workspace

- 📅 Fetch all workspace items

```
{
  "items": [
    {
      "id": 23,
      "contentSection": { "id": 101, "title": "...", "content": "...", "documentId": 12 },
      "tags": [...],
      ...
    }
  ]
}
```

```
        "addedAt": "2024-07-01T12:00:00Z"
    }
]
```

Proposal Authoring

GET /api/proposal-sections

- List all proposal sections (e.g., "About Us", "Capabilities")

POST /api/proposal-sections/<section_id>/generate

- Generate content using a prompt and selected workspace references

```
{
  "prompt": "Summarize our core services",
  "workspaceItemIds": [12, 15]
}
```

Tag Management

GET /api/tags

- List all existing tags

POST /api/tags

- Create a new tag
- application/json: { "name": "<string>", "category": "<optional string>" }

POST /api/sections/<section_id>/tags

- Assign a tag to a content section
- { "tagId": <int> }

DELETE /api/sections/<section_id>/tags/<tag_id>

- Remove a tag from a section

Table Definitions

1. documents

Column	Type	Description
id	BIGINT (PK)	Primary key
file_name	TEXT	Original file name
uploaded_at	TIMESTAMP	Upload timestamp
uploaded_by	UUID / TEXT	User identifier (FK if user table exists)
status	TEXT	processing, completed, failed
source_url	TEXT	Nullable — used if fetched from URL
deleted	BOOLEAN	Soft delete flag
created_at	TIMESTAMP	Auto-filled
updated_at	TIMESTAMP	Auto-filled

2. content_sections

Column	Type	Description
id	BIGINT (PK)	
document_id	BIGINT (FK)	FK to documents.id
title	TEXT	Optional heading
content	TEXT	Main extracted text
page_number	INTEGER	If document was paginated
word_count	INTEGER	Auto-calculated
created_at	TIMESTAMP	
updated_at	TIMESTAMP	

3. tags table

Column	Type	Description
id	BIGINT (PK)	
name	TEXT	Must be unique
category	TEXT	industry, capability, etc.
created_at	TIMESTAMP	

4. section_tags (Join Table: many-to-many)

Column	Type	Description
section_id	BIGINT (FK)	FK to content_sections.id
tag_id	BIGINT (FK)	FK to tags.id
created_at	TIMESTAMP	Optional (for history/audit)
PK	(section_id, tag_id)	Composite primary key

5. workspace_items table

Column	Type	Description
id	BIGINT (PK)	
section_id	BIGINT (FK)	FK to content_sections.id
user_id	UUID / TEXT	Owner of the workspace item
custom_notes	TEXT	Optional
added_at	TIMESTAMP	

Column	Type	Description
deleted	BOOLEAN	Soft delete

6. proposal_sections table

Column	Type	Description
id	BIGINT (PK)	
user_id	UUID / TEXT	Authoring user
name	TEXT	Display label
content	TEXT	Generated text
prompt_template	TEXT	Saved prompt if any
last_generated	TIMESTAMP	
created_at	TIMESTAMP	
updated_at	TIMESTAMP	

7. document_metadata Table

Purpose

Captures descriptive attributes **extracted** or **supplied** for each document, such as industry, origin, content type, and custom labels.

Table Definition

Column	Type	Description
id	INTEGER (PK)	Unique metadata entry ID
document_id	INTEGER (FK)	FK to documents.id
industry	TEXT	e.g., Banking, Healthcare
source_system	TEXT	e.g., SharePoint, CRM, WebScraper
document_type	TEXT	e.g., Case Study, RFP, Whitepaper
language	TEXT	ISO code, e.g., en, fr, es
summary	TEXT	Short model-generated summary of the document

Column	Type	Description
author	TEXT	Optional field if extracted
tags	TEXT[]	Array of text-based tags (for unstructured usage)
created_at	DATETIME	Timestamp when metadata was created
updated_at	DATETIME	Timestamp of last metadata update