

Fast Track Proposal Writer

Table of Contents

Overview	2
Markers	4
Customize	6
Fill-In Tables.....	7
Phrases	
Phrases	12
Add New Language	15
Setup	17
Creating and Editing Proposals	
Creating a New Proposal	19
Import from Fast Track Estimating	22
Edit an Existing Proposal	25
Other Functions	
Search.....	27
Printing	28
Backup Your Database	30

Fast Track Proposal Writer Overview

The Fast Track Proposal Writing software offers a fast and efficient method of building a detailed contract or proposal that is specific to your project.

The program contains hundreds of paragraphs of standard language, separated into three groups: Proposal, Work, and Contract. Language is added using the "Add" function; it is edited using the "Edit" function, and the "Zoom" function makes it easier to view each group. Fast Track Proposal Writer uses a simple but effective marker method of editing text within the paragraphs.

The screenshot shows the Fast Track Proposal Writer software interface. The window title is "Fast Track Proposal Writer" and the menu bar includes "File", "Format", "Customize", "Search", "Print", and "Help". The interface features a logo for "CONSTRUCTION PROGRAMS & RESULTS" (CPR) and the title "Fast Track Proposal Writer". On the right side, there are input fields for "Name" (Benjamin Smith), "Description" (Kitchen, bath, deck, etc.), "Address" (2818 NE 292 Avenue), "City, State Zip" (Camas, WA 98607), and "Date" (01/26/2011). The main area is divided into three sections: "Proposal", "Work", and "Contract". Each section has a large text area and three buttons: "Add", "Edit", and "Zoom".

Proposal

The Proposal Section is the beginning of the contract. The paragraphs in this section cover the basics, defining the client, the contractor, and what type of agreement this contract will be.

Work

The Work Section is where the details of the contract are written. Most of the contract language resides in the Work section. Details on the plans, permits, surveys, appraisals, licenses, demo/tear-out, excavation, concrete, masonry, framing, roofing, siding, windows, doors, sheet

metal, plumbing, electrical, HVAC, insulation, drywall, cabinets, surfacing, floor covering, kitchen/bath accessories, finish carpentry, hardware, metalwork, light fixtures, paint/decor, debris removal and more are outlined in this section. The Work Section of a contract can run 20-30 pages, depending on the project.

Contract

The Contract Section is the final legalese. It covers Terms and Conditions, CYA (cover your assets) language, payment schedules, etc.

IMPORTANT: *The language in the Fast Track Proposal Writer software is presented as a beginning point. We cannot cover all situations in all states. We are not legal counsel. You must consult an attorney for approval of all content before you rely upon, use or distribute any content contained in this software program. Construction Programs & Results, Inc., makes no representations about the suitability of the content of this software for any purpose whatsoever. All content is provided "as is" and without any warranty of any kind. Construction Programs & Results, Inc., hereby disclaims all warranties and conditions with regard to the content, including but not limited to all implied warranties and conditions of merchantability, fitness for a particular purpose, title and non-infringement. In no event shall Construction Programs & Results, Inc. be liable for any damages whatsoever, including, but not limited to, any general, special, indirect, exemplary, or consequential damages, whether or not arising out of or in connection with the use, copying, or display of the content. .*

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Markers

Markers are the method of replacing text within the paragraphs, or phrases. A MARKER is a term that has a # sign in front and at the end, and a number (either 0, 1, or 2) just before the last # sign. There are three types of markers:

0 = Reserved Markers

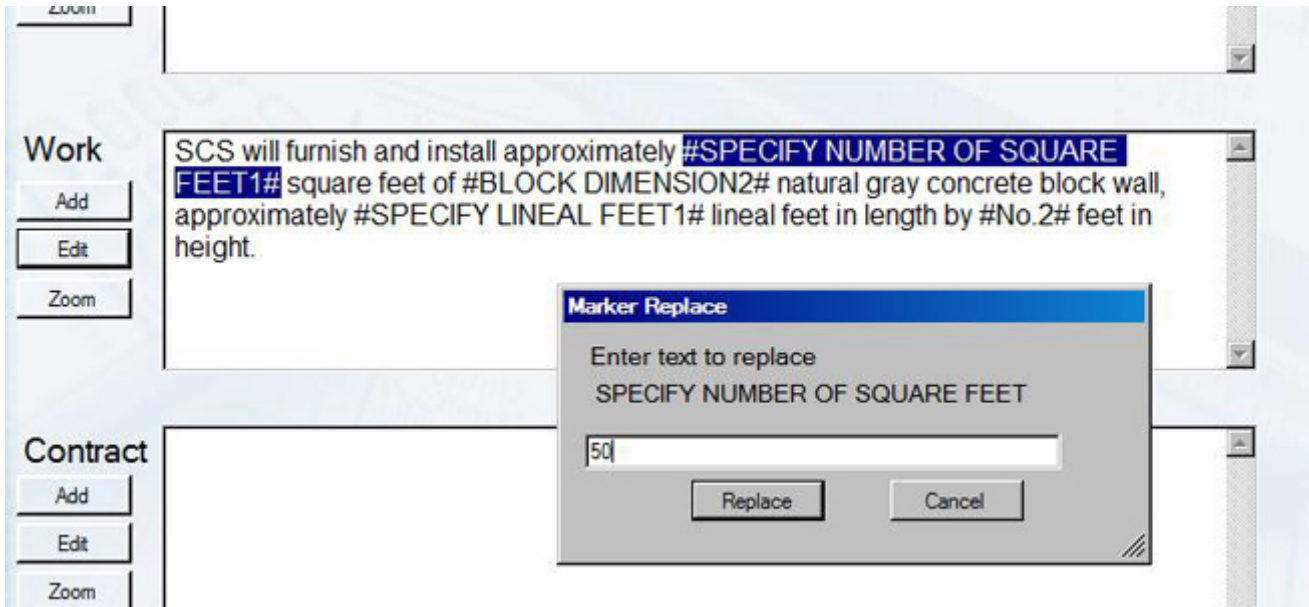
Markers ending in a 0 are reserved markers. Only the following words can be used in a marker ending in a 0. The words that are used to replace each of those words is also shown.

#CONTRACTOR0#	-	Your company's full name
#CONTRACTOR20#	-	Your company's abbreviated name
#CONTRACTOR ADDRESS0#	-	Your company's address
#CONTRACTOR CITY0#	-	Your company's city
#CONTRACTOR STATE0#	-	Your company's state
#CONTRACTOR ZIP0#	-	Your company's zip code
#CUSTOMER0#	-	The client name
#CUSTOMER ADDRESSA0#	-	The client address
#CUSTOMER ADDRESSB0#	-	The client city, state, zip

1 = User Input

Markers ending in a 1 are user input. You can add almost anything between the first # sign and the closing # sign, as long as there is a 1 in front of the closing #.

When editing, whatever is between the two # signs will appear as the request for input:



2 = Fill In Table

Markers ending in a 2 will invoke the fill in table. The words between the first # sign and the closing # sign must match (exactly) a Category in the Fill In Table.

For more, see Fill In Tables.

Customize

There are three functions available under the Customize menu.



[Fill In Table](#)

The fill in table holds the data for Markers ending in a 2. Add, edit and delete categories and descriptions for the fill in table here.

[Phrases](#)

This is where the paragraphs of language can be viewed. This is also where to add, edit and/or delete.

[Setup](#)

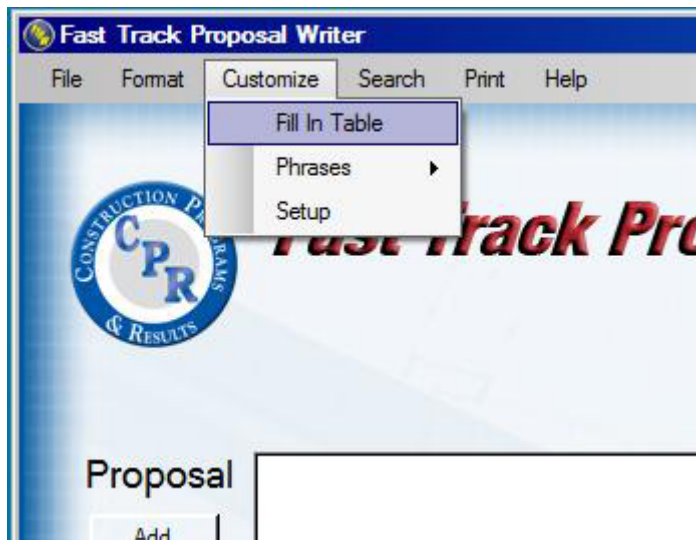
Basic information about your company. It is filled in when you open the program the first time, and can be edited here.

Fill In Table

The Fill In Table is the source of the selections for all Markers that end with a 2.

How It Works

You can see the Fill In Table from the Customize Option:



Notice the category "BLOCK DIMENSION" in the Fill In Table. There are 6 Descriptions in the column on the right for the Category "BLOCK DIMENSION".

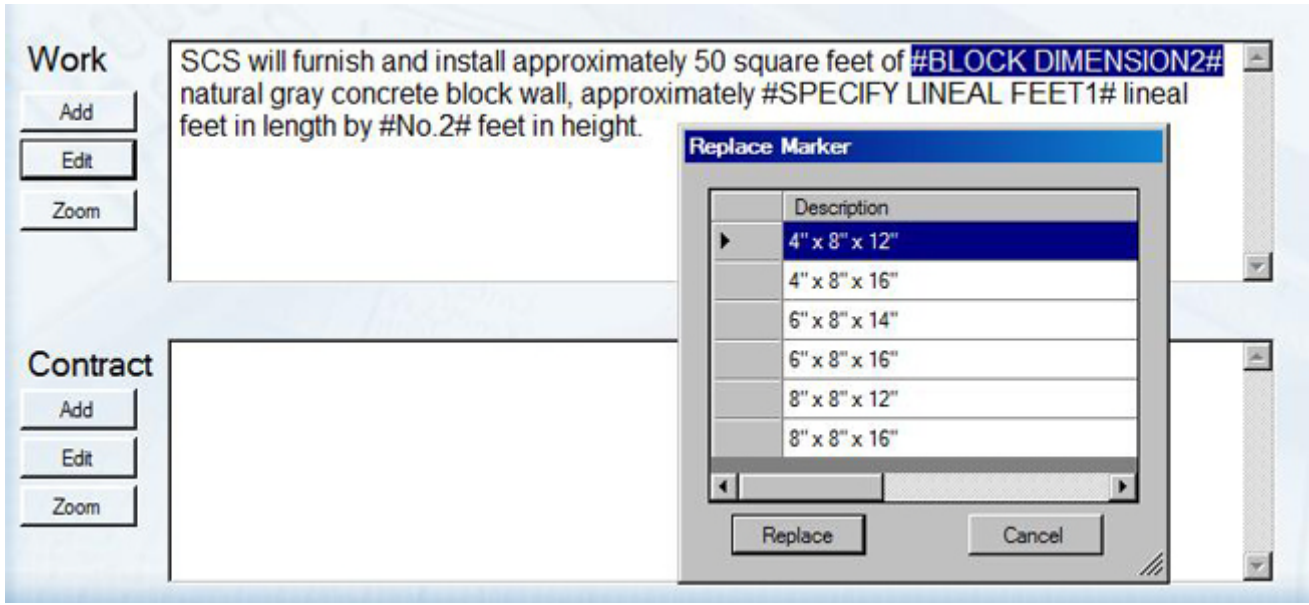
Category	Description
BAY/BOW	bow
BEARING/NON-BEARING	bearing
BEARING/NON-BEARING	non-bearing
BLOCK DIMENSION	4" x 8" x 12"
BLOCK DIMENSION	4" x 8" x 16"
BLOCK DIMENSION	6" x 8" x 14"
BLOCK DIMENSION	6" x 8" x 16"
BLOCK DIMENSION	8" x 8" x 12"
BLOCK DIMENSION	8" x 8" x 16"
BOLLARD SIZE	3" in diameter
BOLLARD SIZE	4" in diameter
BOLLARD SIZE	4" x 4" square
BOLLARD SIZE	5" in diameter
BOLLARD SIZE	6" in diameter
BOLLARD SIZE	6" x 6" square
BOLLARD SIZE	8" x 8" square
BTU	100,000 BTU
BTU	110,000 BTU
BTU	120,000 BTU

Add + | 1 of 1737 | Help

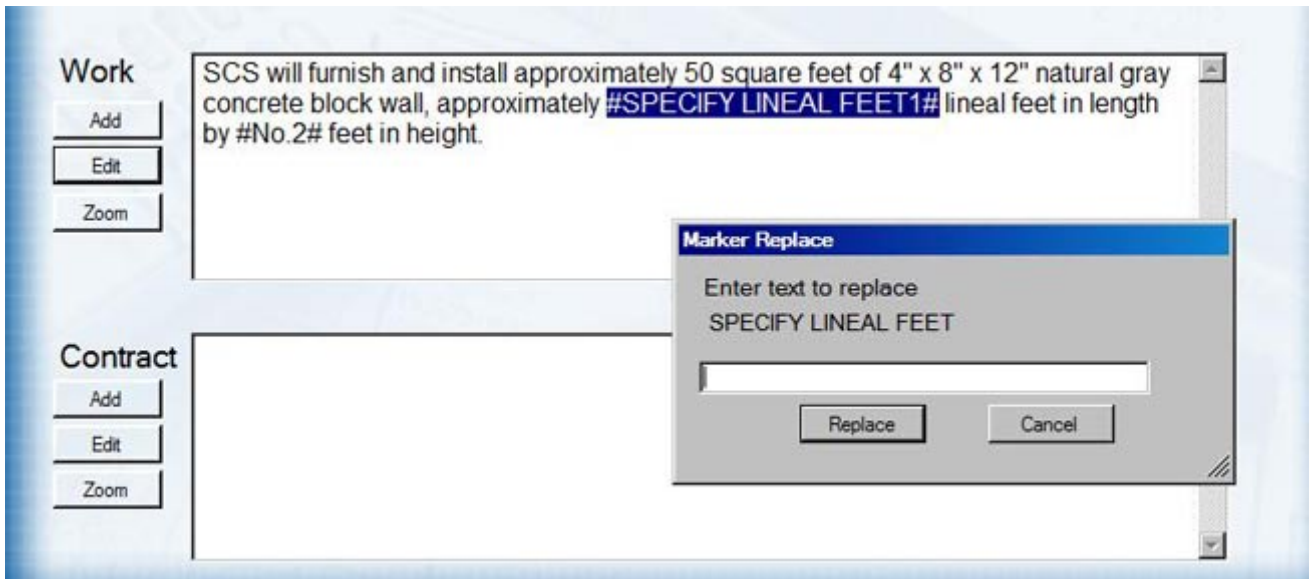
Now let's look at this sample language:

#CONTRACTOR20# will furnish and install approximately #SPECIFY NUMBER OF SQUARE FEET1# square feet of #BLOCK DIMENSION2# natural gray concrete block wall, approximately #SPECIFY LINEAL FEET1# lineal feet in length by #No.2# feet in height.

When the sample language is added to a contract and the Edit function chosen, a pop-up box appears for the Marker #BLOCK DIMENSION2#:



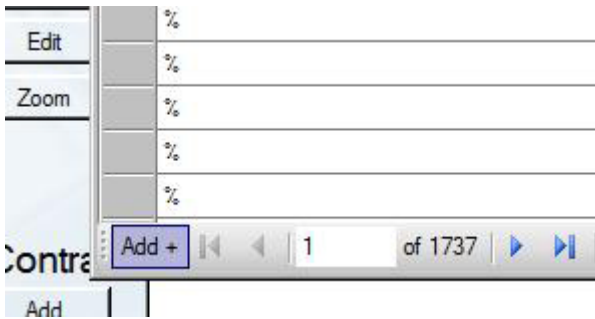
with the six selections. Choose one and either double-click it or click on "Replace", and the Marker is replaced with the selection.



The next Marker is ready to be replaced.

Adding to the Table

You can add additional selections to the table with the "Add" selection at the bottom of the table.



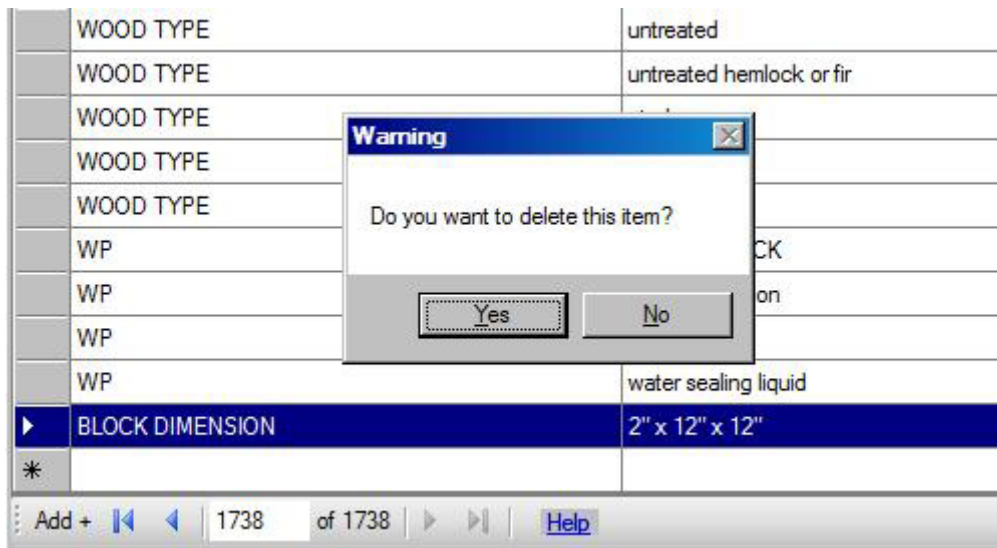
A new row will appear - type in the Category and the Dimensions.

	WOOD TYPE	untreated hemlock or fir
	WOOD TYPE	vinyl
	WOOD TYPE	vinyl coated
	WOOD TYPE	white oak
	WP	UGL DRYLOCK
	WP	asphalt emulsion
	WP	bentonite
	WP	water sealing liquid
	BLOCK DIMENSION	2" x 12" x 12"

Add + | 1738 of 1738 | Help

NOTE: It is critical that the category MATCH the existing category, or the selections will not appear.

You can also delete or edit any selections within the table. You will be asked to confirm before deleting:

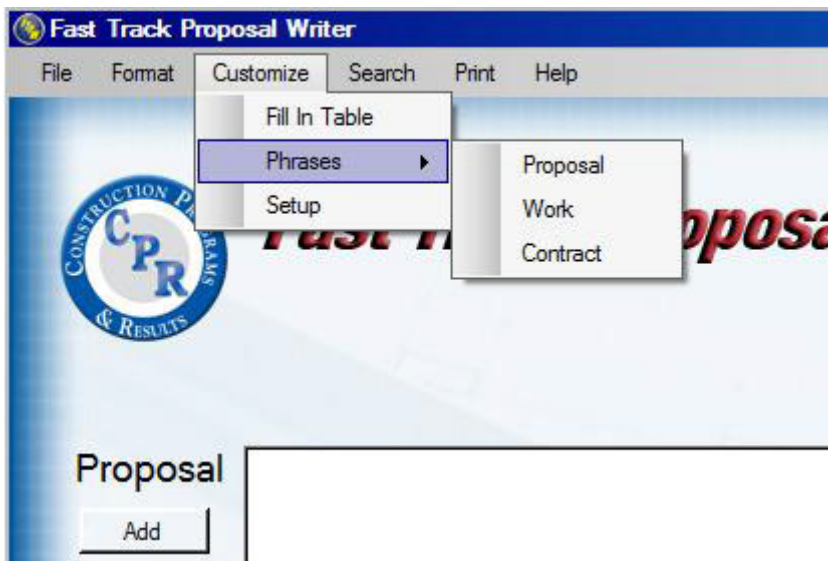


The categories are unlimited - if you wish to add a new category to the table you can at any time. To use it in the language, simply use the # sign in front of and behind the category, with a 2 just before the last # sign:

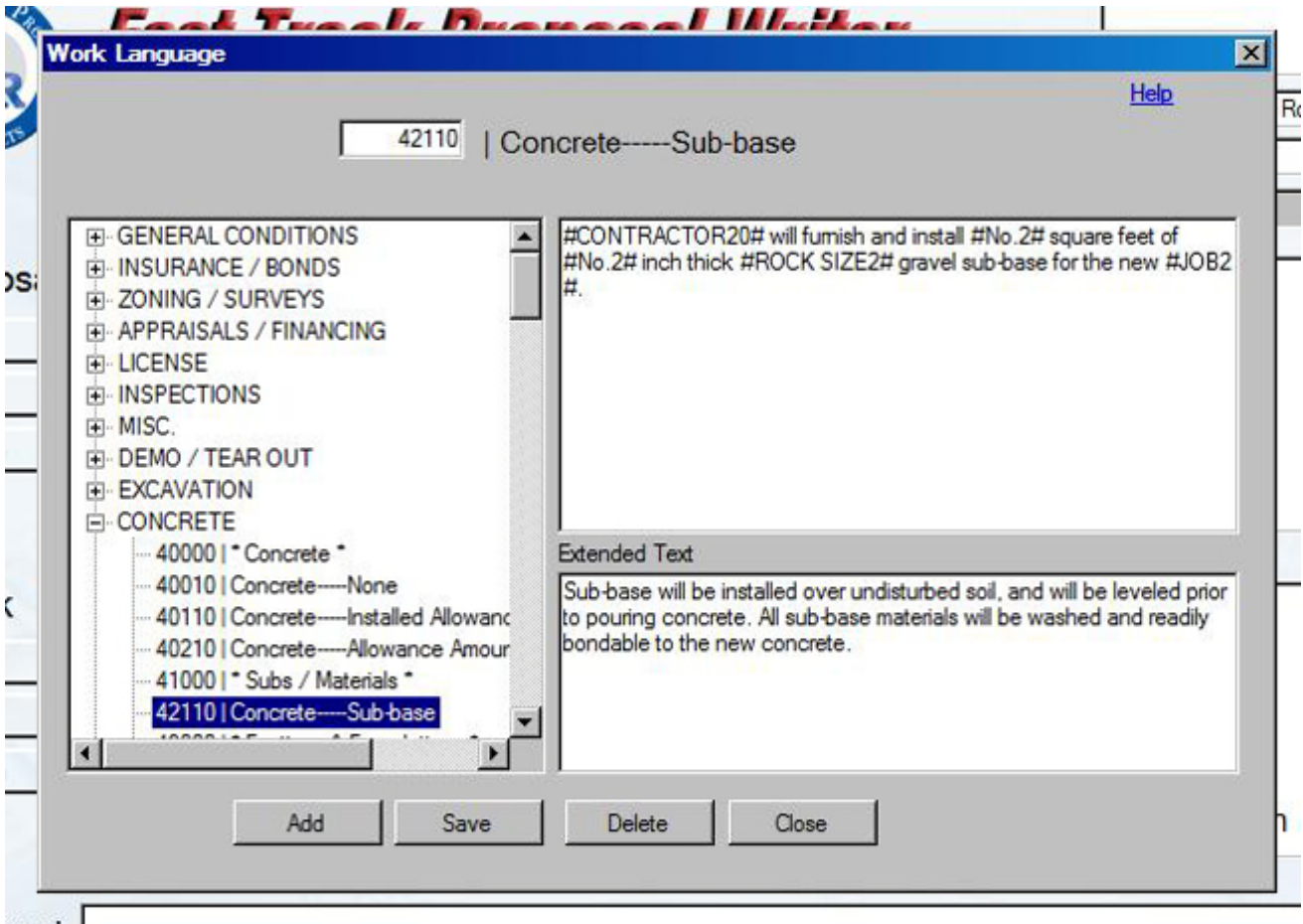
#New Category2#

Phrases

Phrases are the paragraphs of standard language. To view, add or edit the phrases, use the Customize function:



The phrases are organized by Category on the left - click on the + sign to open each section. Edit or delete any phrases here.



The Extended Text is optional language that can be added to the contract or proposal if desired. If not selected, only the basic text (in the top block) is added to the contract or proposal.

To Add new phrases, use the Add function at the bottom, and the following appears:

(*) Required input field

Category (*)

Section Number (*)

Title (*)

Text (*)

Extended Text

Save Cancel

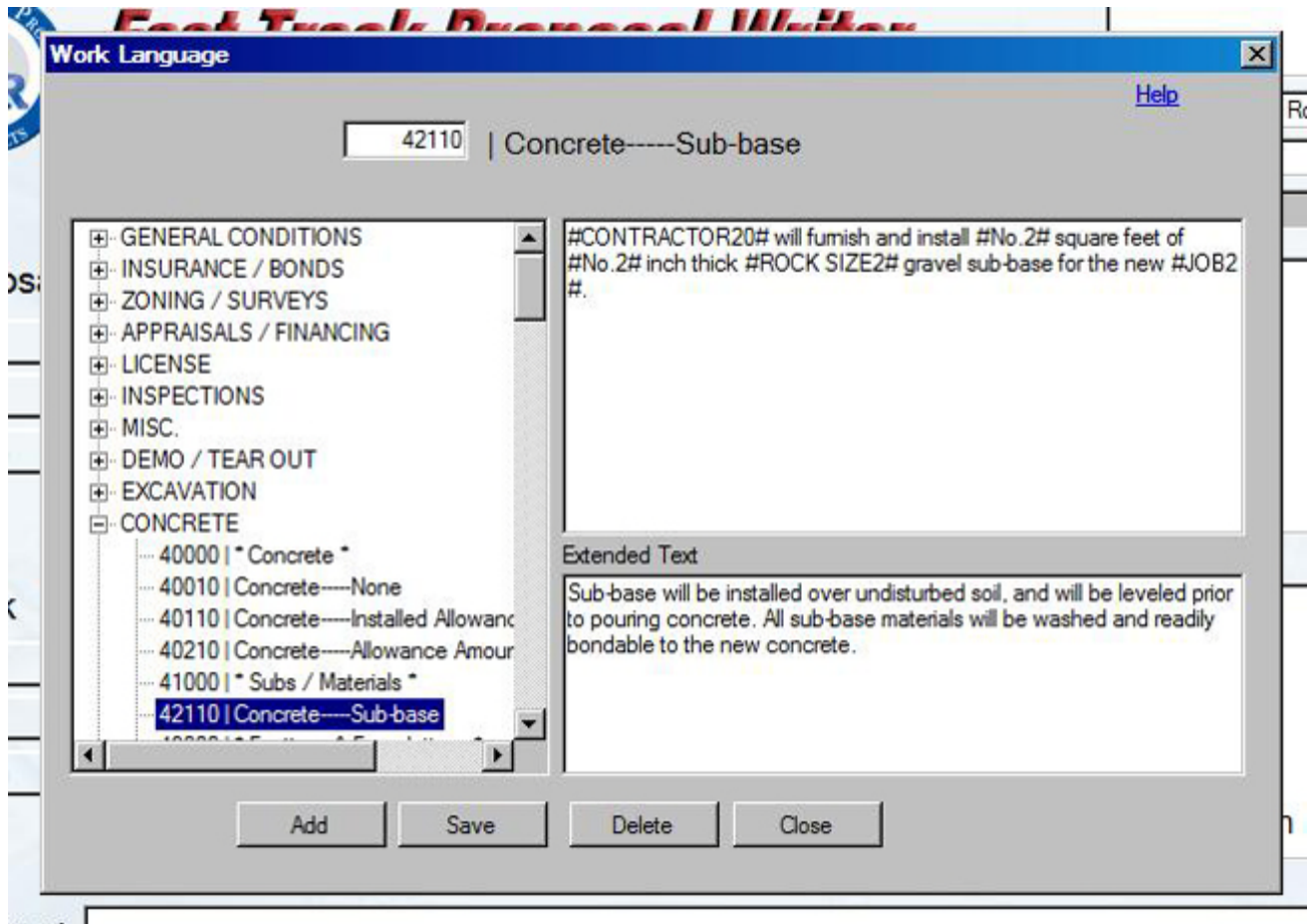
Select the Category for the phrase, input a Section number, Title and Text. Add Extended Text if applicable. Choose "Save", and the new phrase is now available for use in a contract.

When adding a Marker, be sure to

1. Use a # at the beginning and end of the phrase
2. Include the 0, 1 or 2 just before the closing #
3. Make sure the Marker language is applicable.
 - If using a 0, spell the Reserved Word correctly
 - If using a 2, spell the Category correctly to match the Fill In Table
 - If using a 1, there are no limits, this will be the prompt for the user input

Add New Language

Phrases are the paragraphs of standard language. To add new language, use the [Customize](#) function.



Use the Add function at the bottom, and the following appears:

(*) Required input field

Category (*)

Section Number (*)

Title (*)

Text (*)

Extended Text

Save Cancel

Select the Category for the phrase, input a Section number, Title and Text. Add Extended Text if applicable. Choose "Save", and the new phrase is now available for use in a contract.

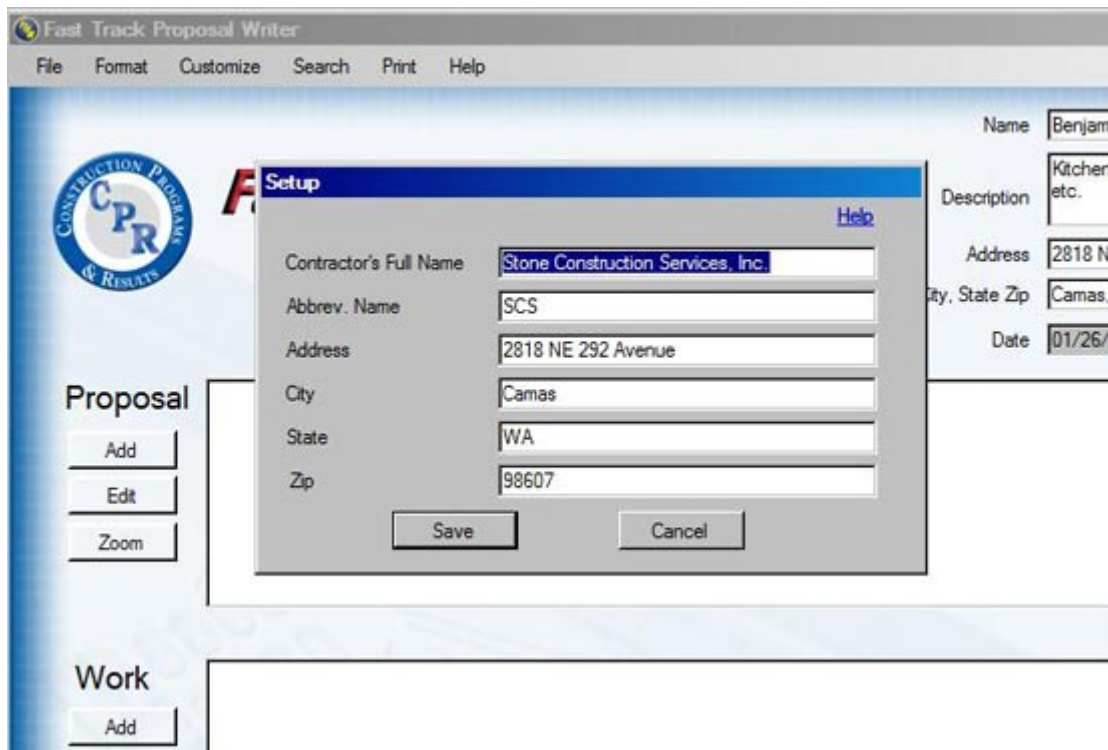
When adding a Marker, be sure to

1. Use a # at the beginning and end of the phrase
2. Include the 0, 1 or 2 just before the closing #
3. Make sure the Marker language is applicable.
 - If using a 0, spell the Reserved Word correctly
 - If using a 2, spell the Category correctly to match the Fill In Table
 - If using a 1, there are no limits, this will be the prompt for the user input

Setup

When you first open the Fast Track Proposal Writer software, you will be asked to fill in the Setup Information.

Fill in your company's full name, abbreviated name (the shortened name you will use in the documents - if you don't use an abbreviation, repeat your full company name), address, city, state, zip. This information is used to customize each contract during the Edit process.

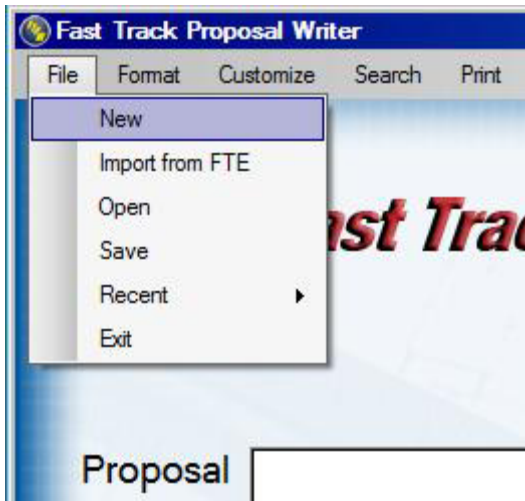


If you need to change this information in the future, the table is available under Customize – Setup.

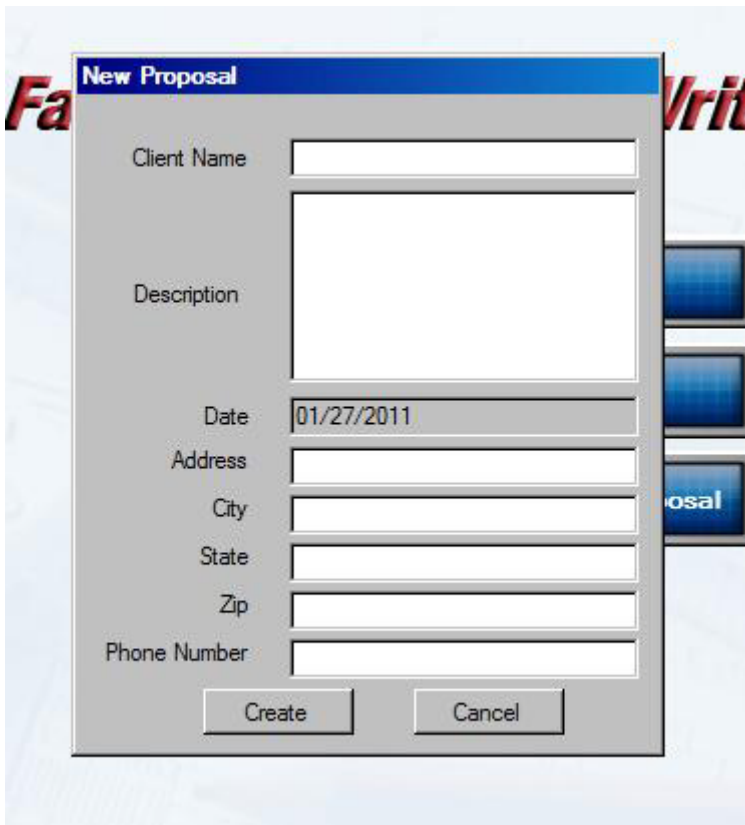


Creating a New Contract or Proposal

To create a new contract or proposal, start by selecting File, New:



The following box will appear. After filling in the boxes, select "Create".

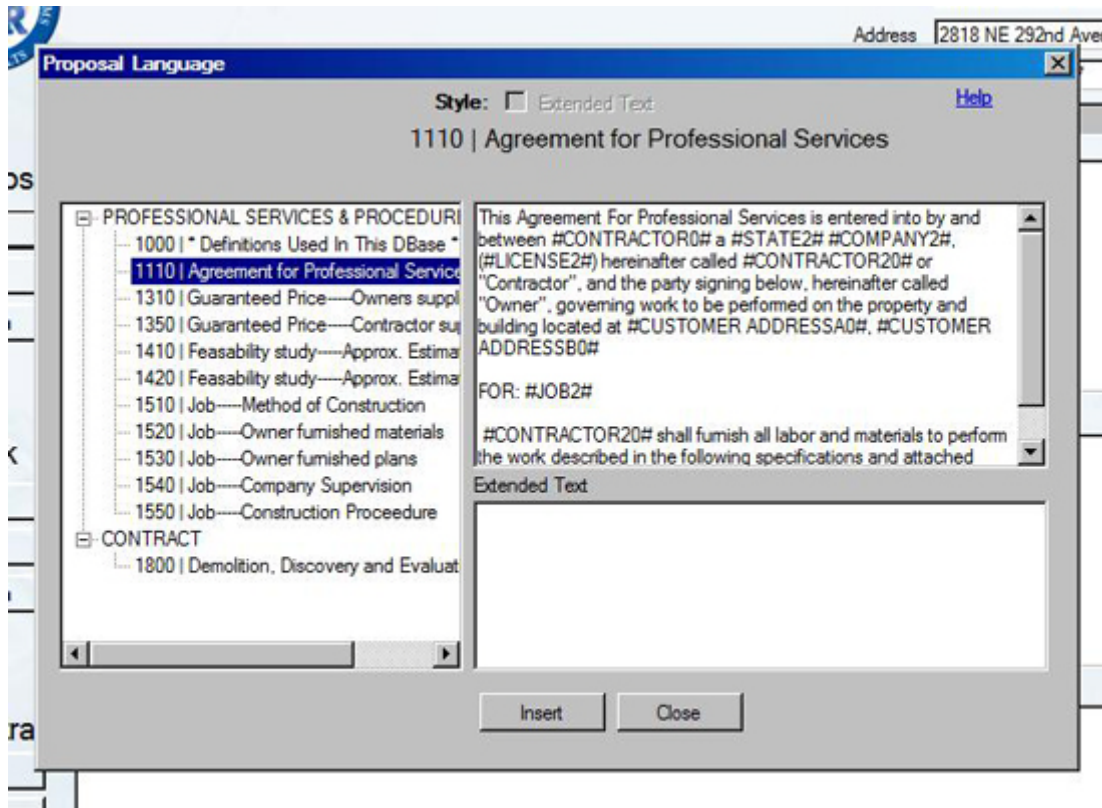
A screenshot of the 'New Proposal' dialog box. The title bar reads 'New Proposal'. The dialog contains the following fields:

- Client Name: A single-line text input field.
- Description: A multi-line text area.
- Date: A text input field containing '01/27/2011'.
- Address: A single-line text input field.
- City: A single-line text input field.
- State: A single-line text input field.
- Zip: A single-line text input field.
- Phone Number: A single-line text input field.

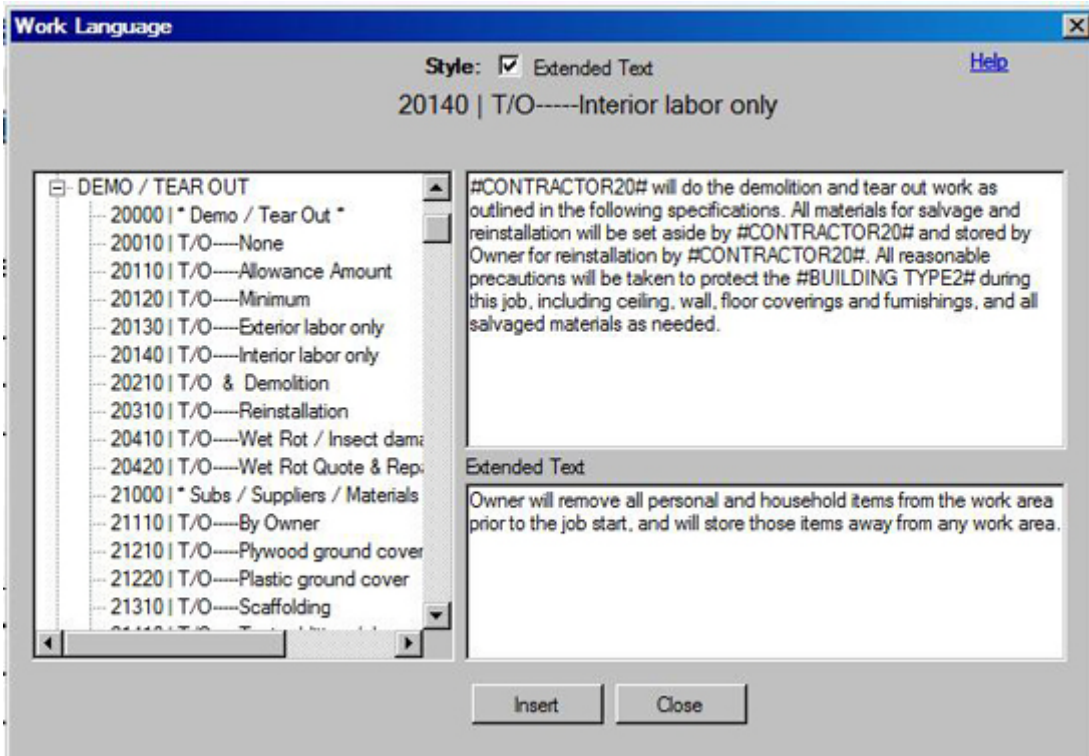
At the bottom of the dialog are two buttons: 'Create' and 'Cancel'.

Within each section (Proposal, Work, Contract), use the Add function to select and add

paragraphs to the proposal. Paragraphs will be added by double-clicking on the paragraph title, and by using the "Insert". If both are done (the paragraph title is double-clicked AND the Insert is pressed) the paragraph will be added twice.



If Extended Text is available, and you want it added to the proposal or contract, select the "Extended Text" box at the top:



Close this box. Edit each section, review it, and print.

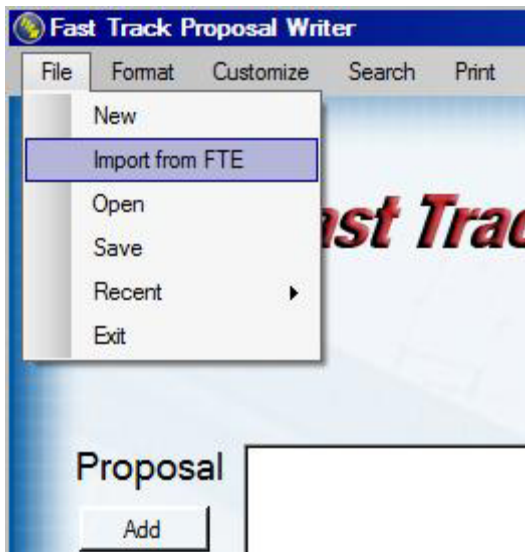
You can return to add paragraphs to a proposal or contract at any time.

Importing from Fast Track Estimating

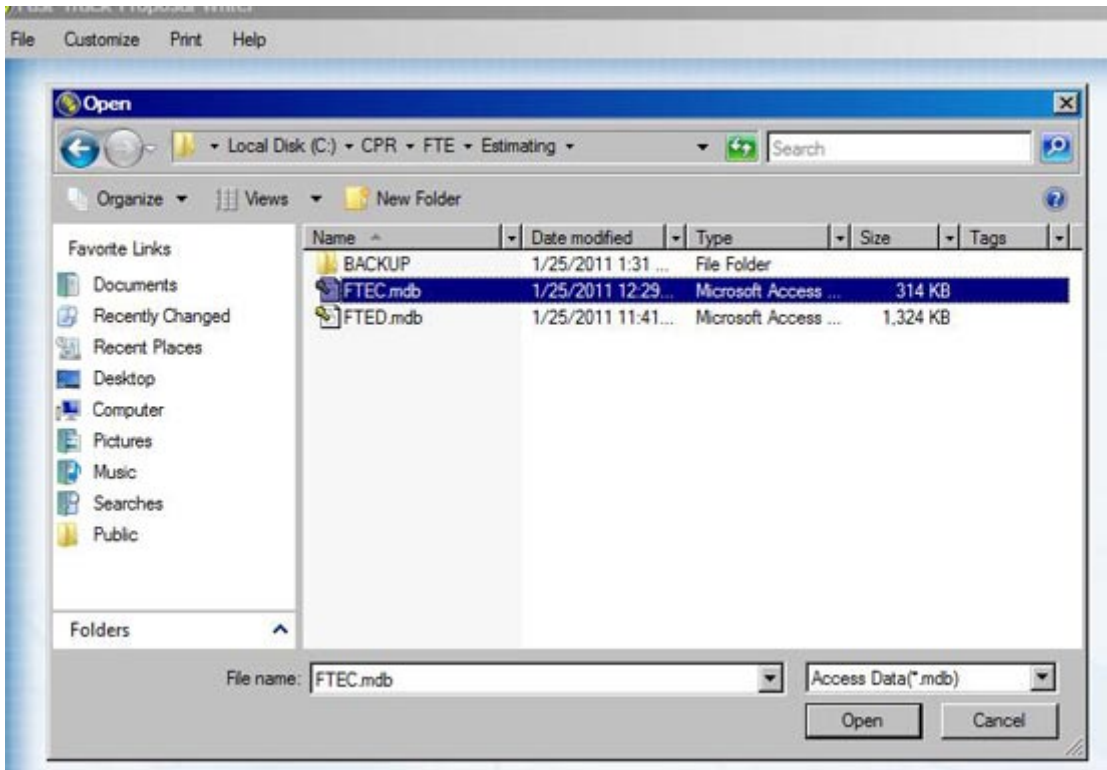
If an estimate has been created in the Fast Track Estimating software, it is possible to use that estimate to begin the Work section of a contract or proposal.

NOTE: This function will match the Paragraph Number for each assembly in the Fast Track Estimating estimate with the Paragraph number in Fast Track Proposal Writer. If these numbers are not in sync, the wrong paragraphs will be added to the proposal or contract. Review each proposal when it is created to make sure the proposal, as it reads, matches the estimate.

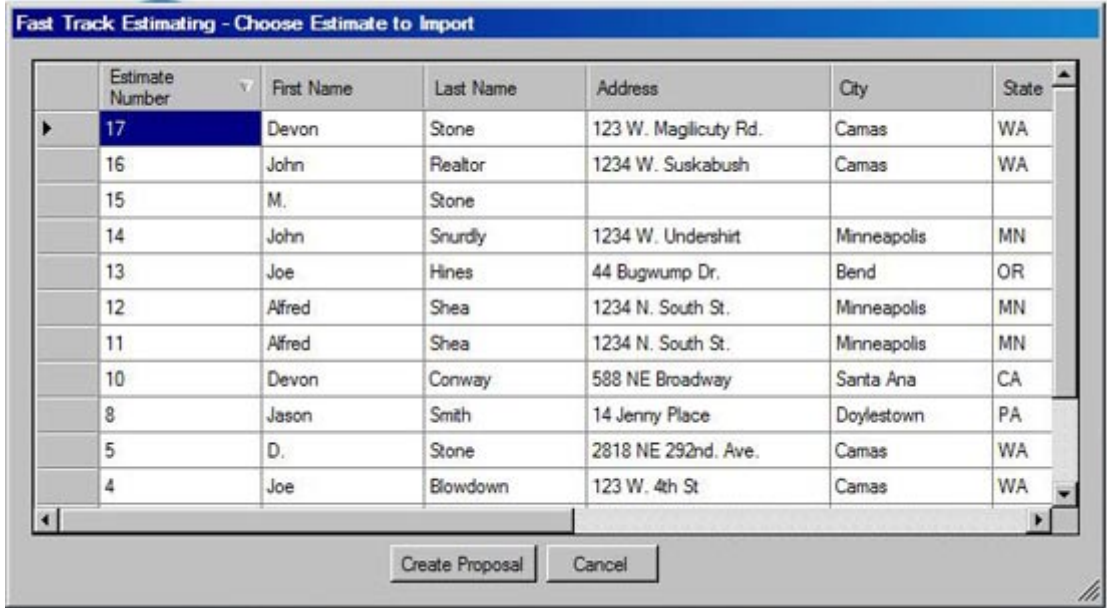
Begin by using the Import from FTE in the file menu, or on the Home Page of the software:



The software will search for the FTEC.mdb (or FTEC) database from Fast Track Estimating, which is the database that stores all created estimates. (It is best if the Fast Track Estimating software is closed when using this function.) The Fast Track Estimating Software should be installed in the C:\CPR\FTE directory. Make sure the date on the FTEC database (or FTEC) matches the last date changes were made to any estimate.



After selecting the correct database, the Fast Track Proposal Writer will open the database, search for the estimates, and present them as follows:



Choose the estimate to be imported, and select Create Proposal. (You can only import one estimate at a time.) You will be given the opportunity to change any of the Client data if you wish. The paragraphs will be selected and added to the proposal/contract, based on the paragraph numbers in the estimate.

The paragraphs will still need to be Edited. Add the remaining Proposal, Work and Contract language as desired.

Editing an Existing Proposal

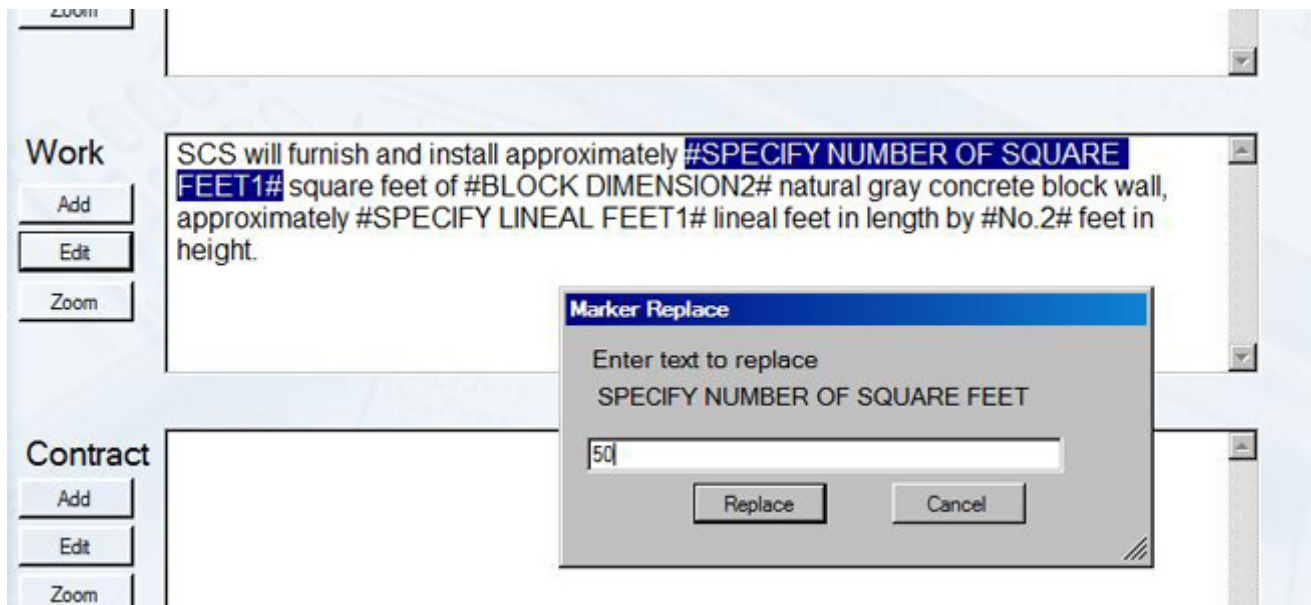
The Edit function will replace all Markers with the appropriate language.

#Marker0#

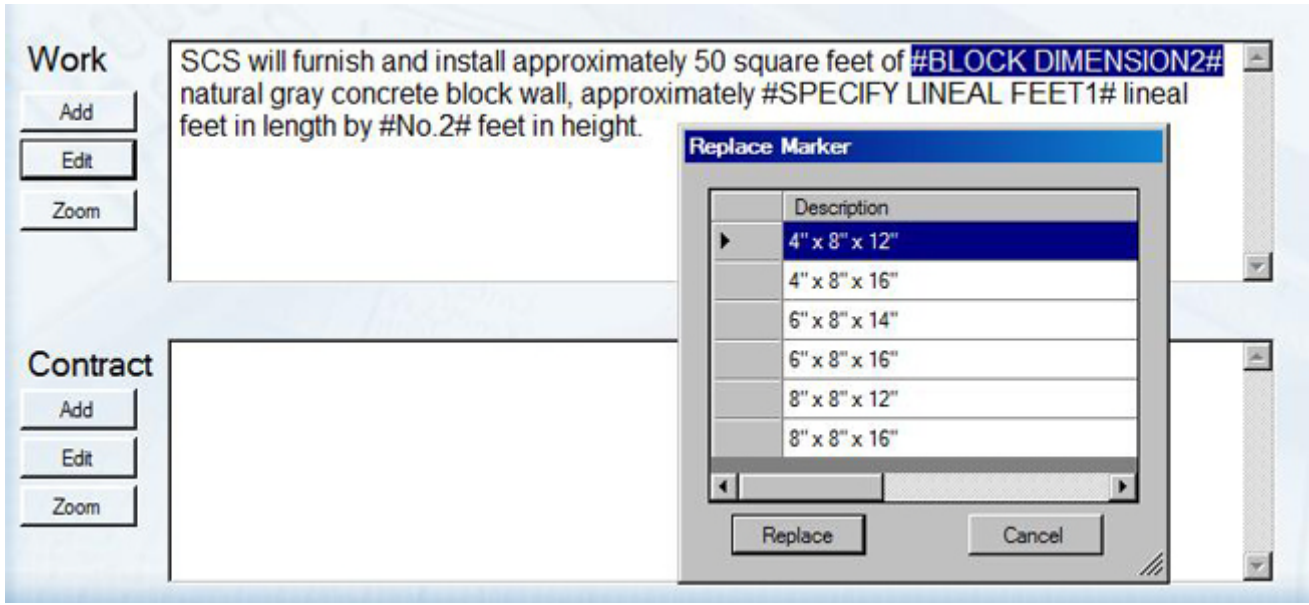
Markers ending in a 0 are Reserved Markers, and will be replaced with the information provided about the company in the Setup table, and about the Client when the contract or proposal was started.

#Marker1#

Markers ending in a 1 will request user input, as shown below:



The Marker is #SPECIFY NUMBER OF SQUARE FEET1#. The input box states "Specify Number of Square Feet", taken directly from the Marker. The number 50 has been input in the box - when the Replace is selected, it is added to the proposal and the Edit function moves to the next marker. You can see this below:



#Marker2#

Markers ending in a 2 will open a list of selections, taken from the Fill In Table.

Freehand Editing

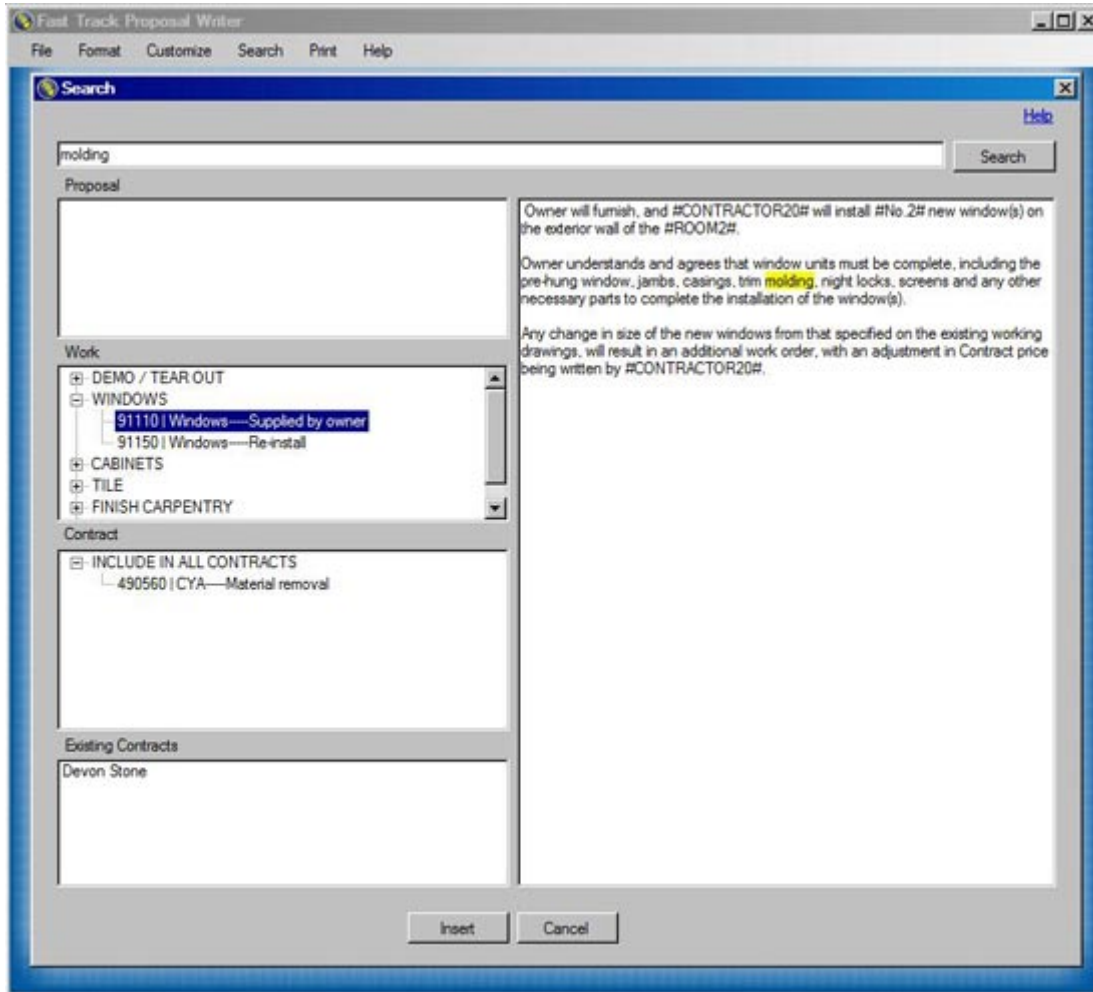
The proposal is not limited to phrases in the software - you can freehand type anything in any field, and it will be added to the proposal or contract.

To copy any phrase, highlight it and use the CTRL-C to copy - use CTRL-V to paste it elsewhere in the proposal or contract.

Search Function

The Search function makes it easy to find any instances of a word or phrase in the Phrases or in an existing contract.

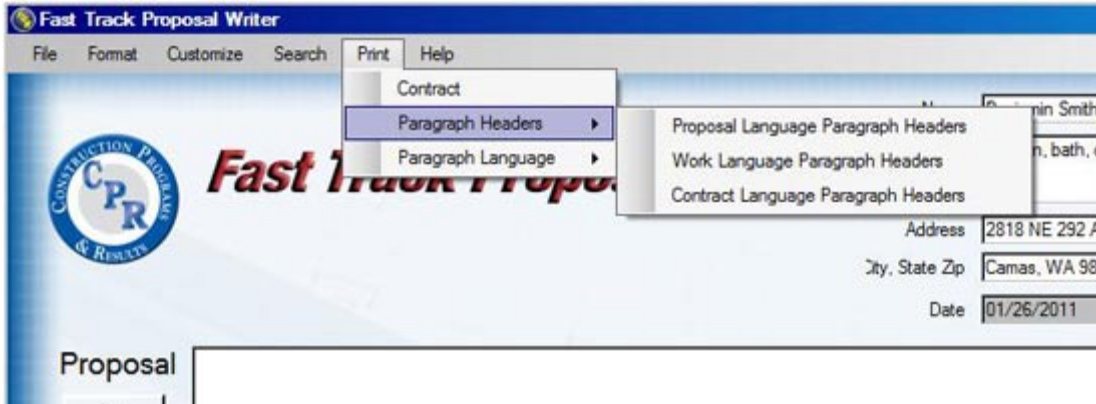
The example below shows the Phrases found when searching for the word "molding":



If the Search function is utilized while creating a proposal or contract, the language can be added to a contract by choosing the "Insert" function.

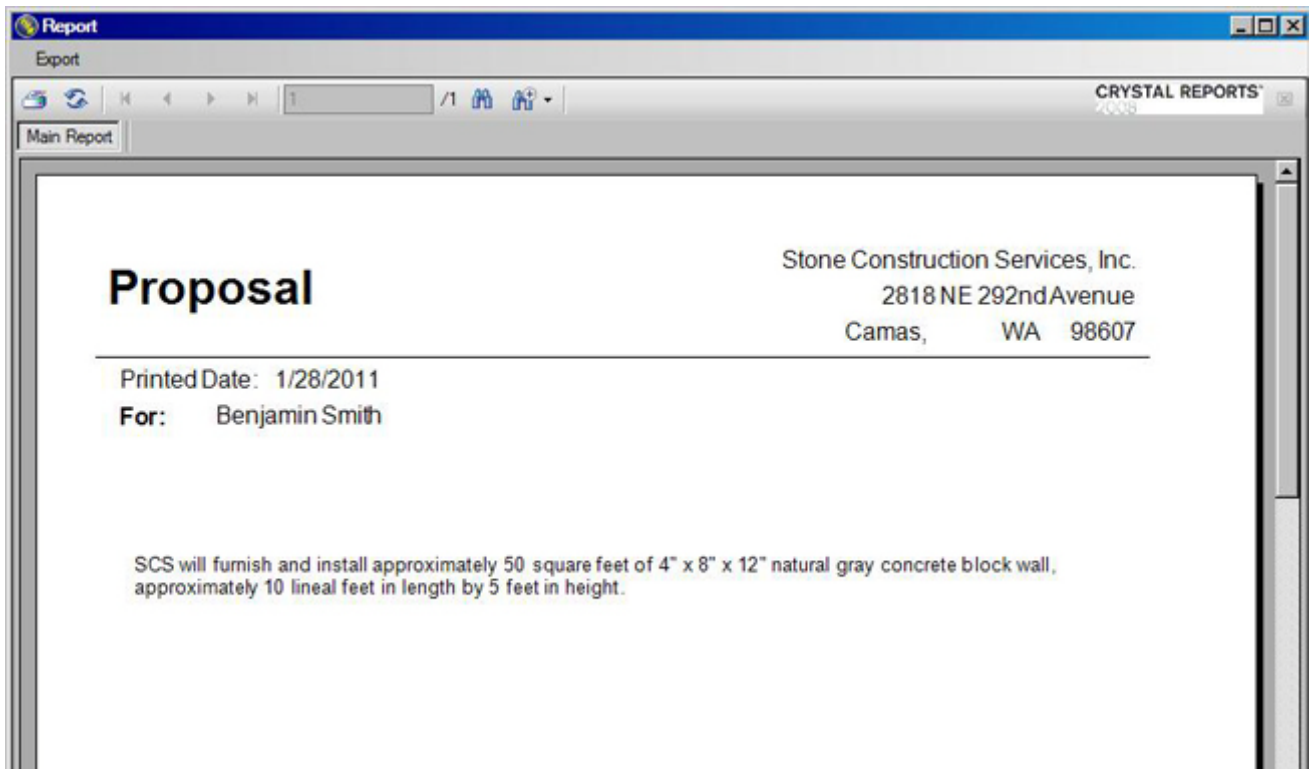
Printing

Using the Print function in the menu, you can print the current contract or the Phrases (paragraph language). In all instances, when using Print, the report will be available for preview prior to printing.



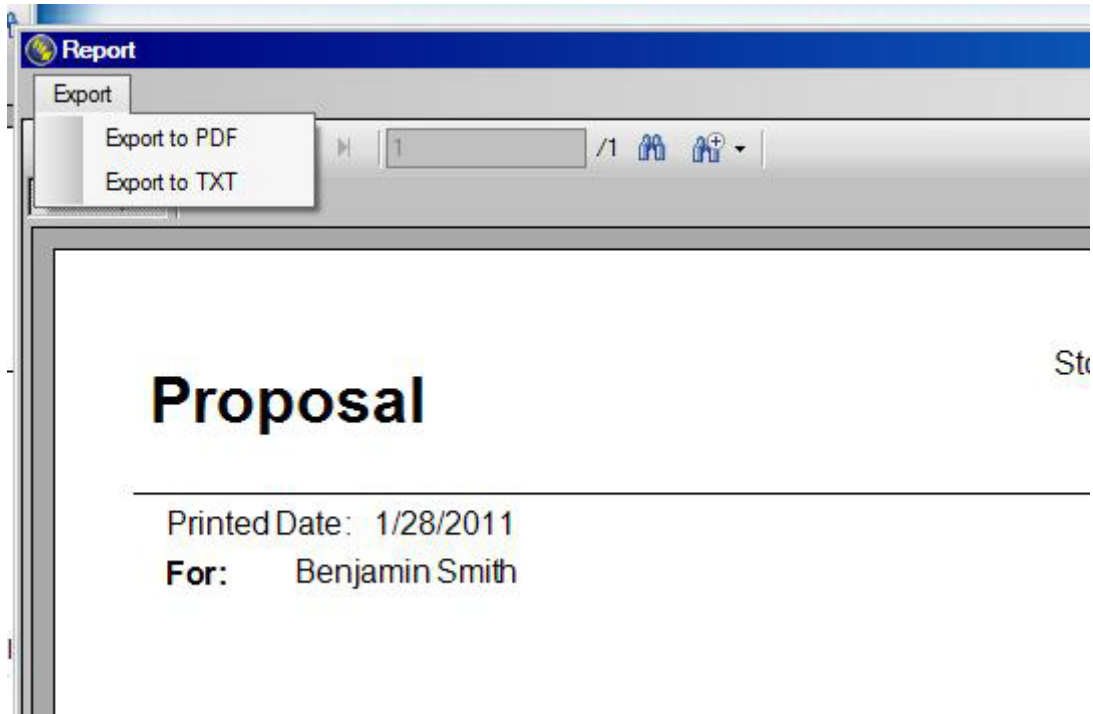
CONTRACT

There are four options available for printing a contract or proposal. The first 3 are accessed by using the Print, Contract option above. You'll see the following preview:



1. Using the Printer Icon in the top left corner, print the report as is.

Using the Export function, you'll see two more options:



2. Using "Export to PDF" will create a PDF file of the report as it appears.
3. Using "Export to TXT" will create a text file of the report as it appears. From the text file, you can open the report in your Word Processor and format it as needed.

The fourth option doesn't use the Print function at all:

4. The language in each section can be transferred to your word processing software by using the CTRL-C to copy the language, and CTRL-V to paste it. Beginning in the Proposal section, select all language (by highlighting it), hold down the CTRL key and press the letter C one time. Move to your word processing software, place the cursor on a new page, hold down the CTRL key and press the letter V one time. The language in the Proposal section will be transferred to your word processor. Repeat with the Work and Contract sections.

PARAGRAPH HEADERS / PARAGRAPH LANGUAGE

Printing the Paragraph Headers (Titles) and Paragraph Language can only be done using the Print function. A preview report will always open before printing.

Backup Your Database

The Fast Track Proposal Writer software database resides in a SQL database named "ftpwsqllite.db". This database is in a folder named Resources. The Resources folder is in the same directory as the FTPW.exe program; the default directory is C:\CPR\FTPW.

This database holds all proposals and contracts created, as well as all paragraph language. Periodically making a copy of this database as a backup is strongly recommended.

Index

#

Sign, 7

A

Add, 19

Adding Language, 6, 12, 15

Adding Phrases, 15, 6, 12

B

Backup, 30

C

Category, 7

Company Info, 17

Company Name, 17

Contract, 2

Copy, 25

Customize, 12, 6, 7, 15, 17

E

Edit, 15, 4, 7, 25

Export, 28

Extended Language, 19

Extended Text, 12, 19

F

Fast Track Estimating, 22

Fill In Table, 4, 6, 7

I

Import, 22

M

Markers, 4, 7, 15

N

New, 19

P

Paste, 25

Phrases, 12, 15, 27

Print, 28

Printing, 28

Proposal, 2

S

Search, 27

Setup, 6, 17

W

Work, 2