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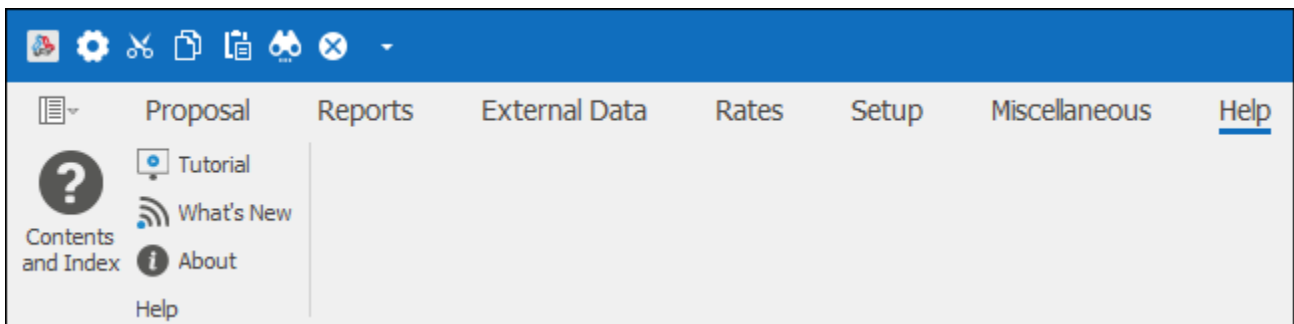
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About this guide

The Quick Start Guide for ProPricer Contractor Edition Express is designed for people who have no experience with the application. It provides the core concepts and instructions that a beginner needs to build and save a complete ProPricer proposal.

The [online ProPricer tutorial](#) is highly recommended to supplement the information you learn from the Quick Start Guide. The tutorial briefly covers the user interface and key features such as pricing algorithms and rate tables.

Additionally, you can press **F1** on your keyboard anytime for a context-sensitive ProPricer Help topic. To access the tutorial and all the ProPricer Help contents, click the **Help** ribbon tab.



Learning objectives

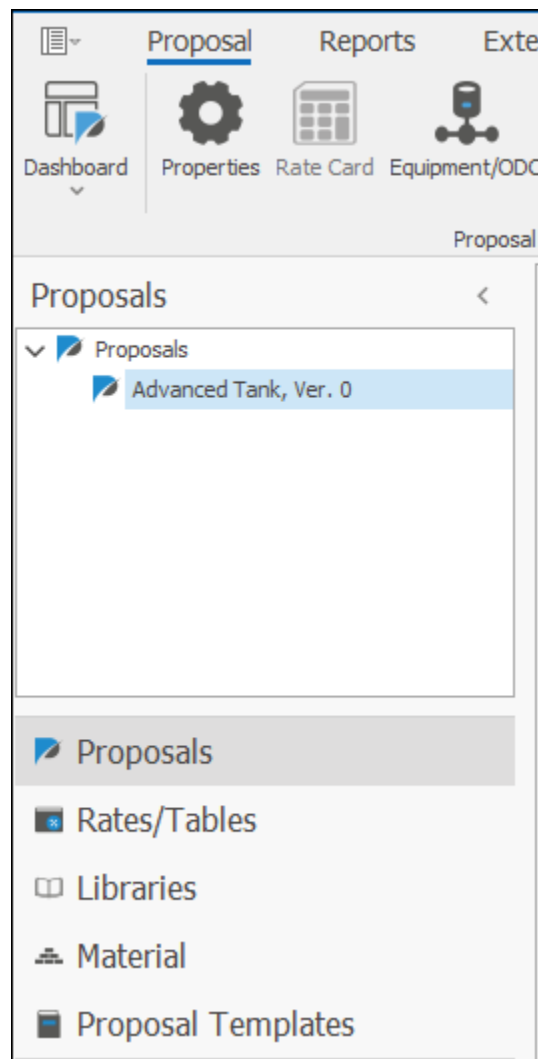
By reading and following along with the Quick Start Guide, you will:

- Become familiar with the ProPricer user interface and the preloaded example data.
- Understand the main components of a ProPricer proposal.
- Learn to create a proposal and enter resource estimates in tasks.
- Learn to submit a proposal using the Prepare for Government feature or the Archive Proposal feature.

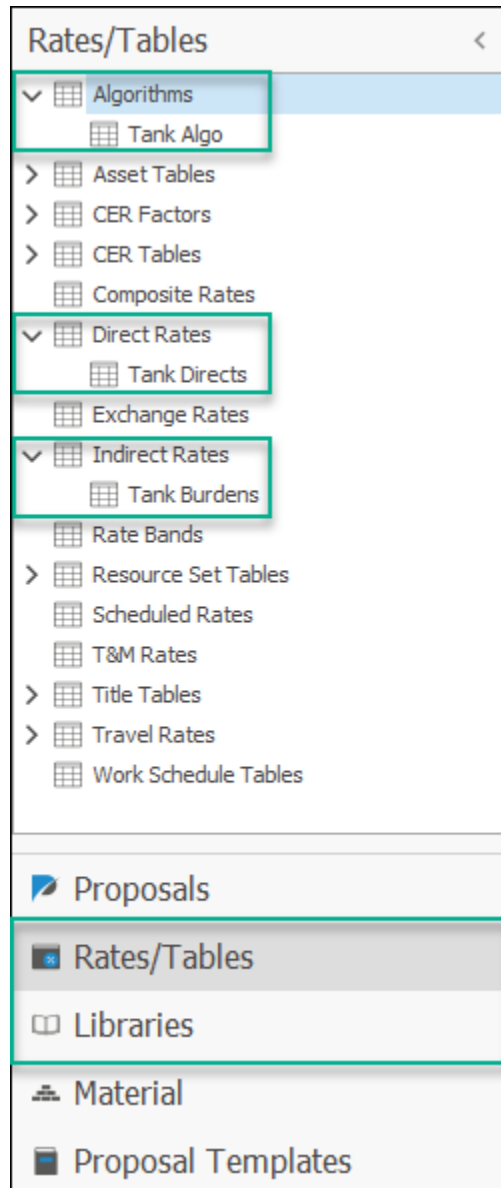
ProPricer overview

ProPricer Contractor Edition Express is a trimmed down build of Contractor Edition Enterprise. The applications are identical in appearance, but Express offers fewer features. However, the features included in Express still provide everything you need to create and submit a proposal in ProPricer format.

Contractor Edition Express is preloaded with global and proposal data for the **Advanced Tank, Ver. 0** example proposal. The proposal is located in the Navigation Pane inside the expandable **Proposals** folder.



The proposal and its accompanying pricing algorithm, rate tables, and libraries are simple examples that provide some context for understanding the user interface. Most importantly, you can copy and adjust the preloaded pricing algorithm instead of creating one from scratch.



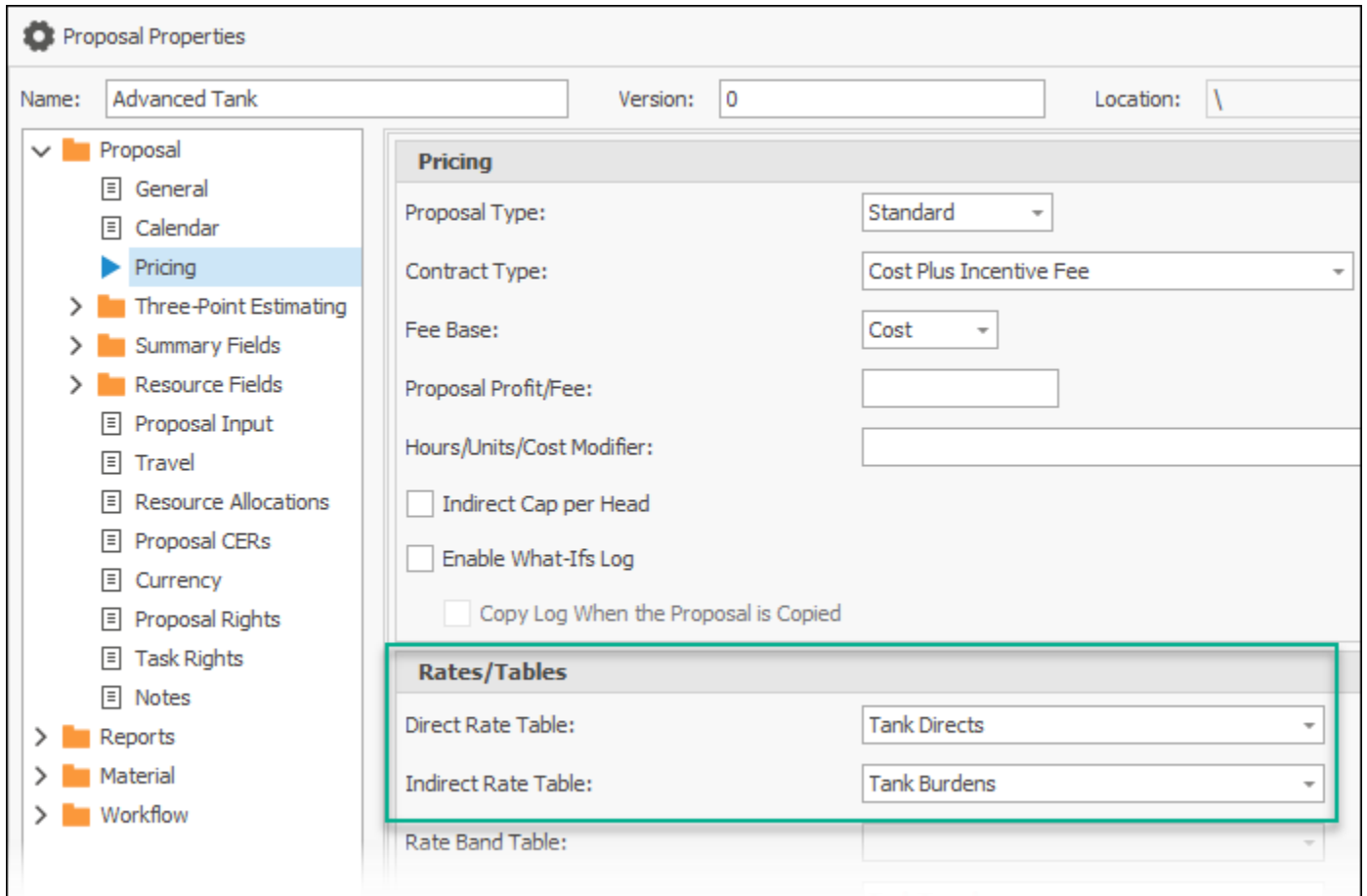
Before adding any new data in ProPricer, use the preloaded data to create a practice proposal while following the Quick Start Guide. When you are comfortable navigating ProPricer and using its key features, you can follow the same steps to create and submit a real proposal containing your own data.

What is a ProPricer proposal?

In its most basic form, a ProPricer proposal has any amount of tasks that contain estimated amounts of resource hours, units, or cost. The proposal uses your global data to help you enter task and resource information, and the global data ensure consistency across multiple proposals.

Task View - Advanced Tank, Ver. 0												
Tasks												
TASK ID ▲	Description	Start Date	End Date	BIDDER	WBS	OBS	CLIN	SUMMARY				
TANK 001 01	Program Management	01/2020	03/2022	OSBOURNE	1.1.A	EMD	2015AC	TOTAL				
▶ TANK 001 02	Financial Mangement	01/2020	09/2021	OSBOURNE	1.2.A	EMD	2015AC	TOTAL ▼				
TANK 001 03	Planning & Scheduling	01/2020	03/2022	OSBOURNE	1.2.A.1	EMD	2015AA	TOTAL				
TANK 001 04	Contracts & Pricing	04/2020	06/2020	OSBOURNE	1.2.A.1.1	EMD	2015AC	TOTAL				
Record 2 of 25												
Resource Input (Monthly) (Hours/Units/Cost)												
Resource ▲	Department	Acct Calendar	Curve	Start Date	End Date	Spread Amt.	Jan 20	Feb 20	Mar 20	Apr 20	May	
▶ Engineering Aide ▼	Finance	4-4-5	Load	01/2020	09/2021	1,000	1,000	1,000	1,000	1,000	1,	
IntDiv Xfr @ Cost	Misc		EVEN	01/2020	09/2021	30,000	1,429	1,428	1,429	1,428	1,	
Program Manager	Finance	4-4-5	Load	01/2020	09/2021	200	200	200	200	200		
Record 1 of 3												

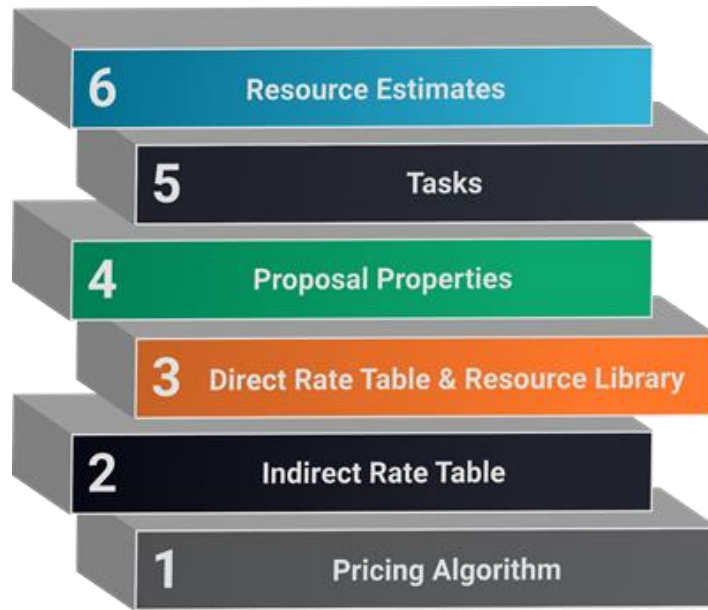
A proposal's properties determine the data you use to enter estimates in tasks. There is a wide variety of proposal properties, but many are optional or prepopulated with default settings. In the properties of any proposal, a direct rate table and an indirect rate table are always required. Without these tables and the pricing algorithm attached to the indirect rate table, completing a proposal is impossible.



While estimating labor resources in a proposal's tasks, you can automatically distribute hours or full-time equivalent heads with a spread curve. If you don't need a spread curve, you can enter hours or heads discretely in each period instead.

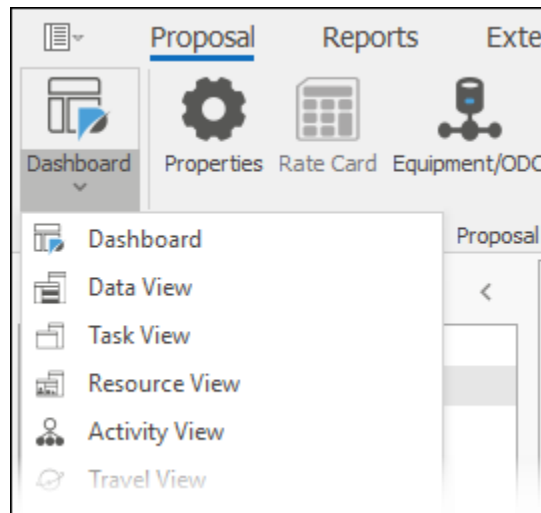
Resource Input (Monthly) (Hours/Units/Cost)											
Resource	Department	Acct Calendar	Curve	Start Date	End Date	Spread Amt.	Jan 20	Feb 20	Mar 20	Apr 20	Total
Engineering Aide	Finance	4-4-5	Load	01/2020	09/2021	1,000	1,000	1,000	1,000	1,000	
IntDiv Xfr @ Cost	Misc		EVEN	01/2020	09/2021	30,000	1,429	1,428	1,429	1,428	
Program Manager	Finance	4-4-5	Load	01/2020	09/2021	200	200	200	200	200	
			Curve			Description			Type		
			(None)			Discrete Input			System		
			05/95			5% Front - 95% Back			System		
			10/90			10% Front - 90% Back			System		

Building blocks of a ProPricer proposal



Proposal views

ProPricer has many different ways to view a proposal and enter data in it.



As a beginner working on a new ProPricer proposal, The primary view you should focus on is **Task View**. It divides your workspace into three grids so you can see all your task and resource information at once.

Create a ProPricer proposal

1. In the Navigation Pane, right-click the **Proposals** folder > **New Proposal**. The Proposal Properties window will appear.
2. At the top of the Proposal Properties window, enter the proposal's **Name** and **Version**.
3. In the **General** properties, select the proposal's **Timescale**, **Start Date**, and **End Date**.
4. In the **Pricing** properties, select the proposal's **Direct Rate Table** and **Indirect Rate Table**. ProPricer will automatically select the indirect rate table attached to the direct rate table.
5. Click **OK** to save your changes and close the Proposal Properties window. You can return to the properties later to change any optional settings you may need.

Enter estimates in tasks

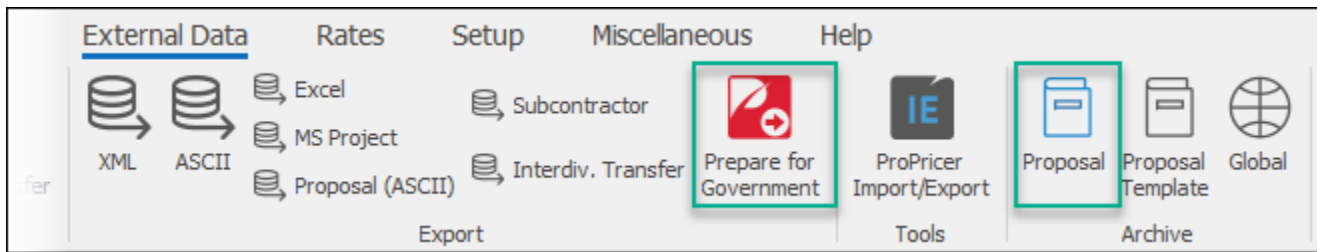
1. In the Navigation Pane, click a proposal once to select and highlight it.
2. On the **Proposal** ribbon, expand the menu under the **Dashboard** button. In the menu, select **Task View** to open the proposal in your workspace.
3. In the **Tasks** grid, enter each task in a separate row. The default **Start Date** and **End Date** of every new task match the proposal's period of performance.
4. In the **Resource Input** grid, enter each resource estimate in a separate row.
 - a. In the **Resource** column, select a resource from the proposal's direct rate table.
 - b. In the **Curve** column, select a spread curve to automatically distribute the resource's spread amount. Or select **(None)** to enter discrete amounts in the spread period on your own.
 - c. In the **Start Date** and **End Date** columns, enter the resource's spread period if you previously selected a curve. Without a curve, the dates are blank so you can enter spread amounts discretely.
 - d. In the **Spread Amt.** column, enter the resource's total estimated hours, units, or cost to distribute the amount with a spread curve. If you are entering discrete amounts instead, skip the **Spread Amt.** column.
 - e. To manually save your changes, click the **Edit** icon before the row. To save automatically, click out of the edited row.
5. In the **Resource Summary** grid, you can review all the resource estimates in a selected task. The data in this grid are read-only.

Tip: You can enter labor estimates as hours or equivalent heads. To switch the input at the top of the Resource Input grid, click **Hours/Units/Cost** and select an option.

Submit a ProPricer proposal

When you are ready to submit your proposal to a government agency that uses ProPricer Government Edition, or share it with a colleague who uses ProPricer Contractor Edition, you can save it as a .zip file.



On the **External Data** ribbon, select either the **Prepare for Government** feature or the **Archive Proposal** feature.



Prepare for Government

Prepare for Government exports your proposal as a .zip file for ProPricer Government Edition. The file contains the rate tables, global data, and materials used in the proposal.

When you set up the Prepare for Government process, you can control the information that is visible to the reviewing agency, predominantly by selecting a **Cost Level** option. You can also choose to include or exclude any proposal notes and task notes you created.



1. On the **External Data** ribbon, click **Prepare for Government**. The Prepare for Government window will open.
2. The **Export Folder** field may show the location of the last file you exported. Click  to browse to a different folder. Click  to clear it.
3. In the **Export File** field, enter a name for the export file, or accept the name suggested.
4. In the **Version** menu, select the ProPricer Government Edition version number that you want the file to be compatible with. The most recent version is selected by default.

5. In the **Cost Level** menu, you can select **Direct Cost** for any of the available versions of ProPricer Government Edition. If you select a different cost level, the proposal can only be compatible with the most recent version.
 - The cost levels you can select are determined by the proposal's algorithm elements.
 - To sanitize the rates in the proposal, select your Total Price cost level. Once restored in ProPricer Government Edition, only the input costs and calculated total price of resources are visible. All rates and other costs are hidden.
6. (Optional) Select **Include Proposal and Task Notes** to include any Notes text, images, or attachments in the proposal's properties and tasks.
7. Select how much global data to include. You can include only the global data that the proposal used, or include all global data from the libraries and rate tables used by the proposal.
8. Click **Process**. ProPricer will save the .zip file in your selected export folder.

Archive Proposal

Archive Proposal exports your proposal as a .zip file for ProPricer Contractor Edition. The file contains the rate tables, global data, and materials used in the proposal.

When you set up the Archive Proposal process, you can choose what to include in the archive, and how to handle the proposal while it is being archived. You can also determine what will happen if an archive with the same file name already exists.

1. On the **External Data** ribbon, in the **Archive** group, select **Proposal**. The Archive Proposal window will open.
2. The **Archive Folder** field may show the location of the last file you exported. Click  to browse to a different folder. Click  to clear it.
3. Click **Add** to select a proposal to archive.
4. In the **Version** menu, select the ProPricer Contractor Edition version number that you want the file to be compatible with. The most recent version is selected by default.
5. In the **Action if file exists** menu, select what ProPricer does if your archive folder contains a file with the same name.
6. (Optional) Select **Include folder information** to include the path to the proposal.
7. (Optional) Select **Lock proposal(s) in archive file** to lock the proposal in the .zip file. When the archive is later restored, the proposal remains locked.
8. (Optional) Select **Delete successfully archived proposal(s)** to remove the proposal from your ProPricer database after it is archived.
9. Select how much global data to include. You can include only the global data that the proposal used, or include all global data from the libraries and rate tables used by the proposal.
10. Click **Process**. ProPricer will save the .zip file in your selected archive folder.