the proposal

How To:

Table of Contents

The Home (Welcome) Screen

This screen is where you can start a new proposal by selecting "create a new proposal". You can also open previously saved proposals for review or further editing.

You can also delete a proposal by swiping/dragging its title to the left. A red delete button will appear beside its title.

Touch the sort button and select an order to rearrange the list. Repeat the same choice to reverse the order.

Enter text in the search box, to find proposals containing a specific word or phrase. Text in each proposal's title, summary, scope, provider, provider company, client, client company, and proposal item name and description will be searched. In the search text, you can use an asterisk (*) to match any text, or ? to match any single character.

The Main Screen

This screen is your main work area. The tab buttons on the left side of the screen access various areas within your proposal for reviewing or editing, or special screens for changing settings, managing your price lists, or previewing the entire proposal.

You'll notice the GPS switch at the bottom of the screen. When GPS is switched ON, The Proposal displays a small map with the user's location and the client's location (if known). This map may assist a traveling user in locating the client.

The question mark icon in the top right opens this help document.

If you tap the blank area in the center of the screen, a menu is displayed which allows you to set or remove a logo image. Options are provided to select a photo, web image, or Dropbox file, and to rotate it and set a transparency level.
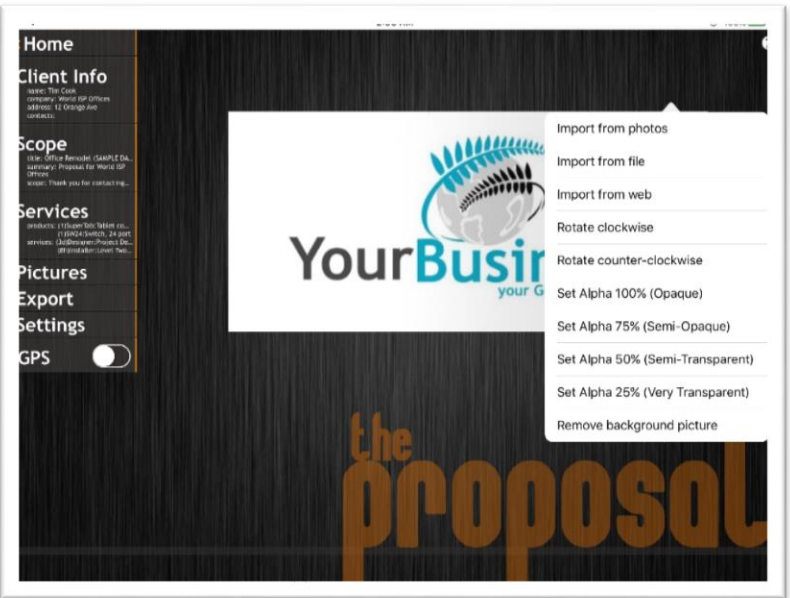
The Client Info Screen

Use this screen to enter all of your client's information. There are a few ways you can perform this task.

- You can select the blue chevron (**>**) to import an entry from your iPad contact list.

- You can select the "Locate Me" button to import the address that you are currently at. This is a great feature if you are at the client's site.

- You can manually type the address as well.

- Import your Client's logo from the web or your iPad's photos. If present, the logo will be shown on the cover page of the proposal.

- The Tax Exempt button is an easy way to classify a client as tax exempt. If ON, the app will ignore all other sales tax settings in this proposal.

The Scope Screen

This screen accesses the written portion of your proposal. You will first title the proposal and then provide a summary (optional). The summary will be displayed on the cover page. The main body of the scope of work is where you will describe the services, materials, or products you plan to provide to your client.

The presets area provides a simple method to save a block of text which you plan to reuse in other proposals. To save a preset, highlight selected scope text and choose "Save as Preset". A window will pop up and ask you to choose a type of preset (Opening, Body, Terms or Closing) for the statement.
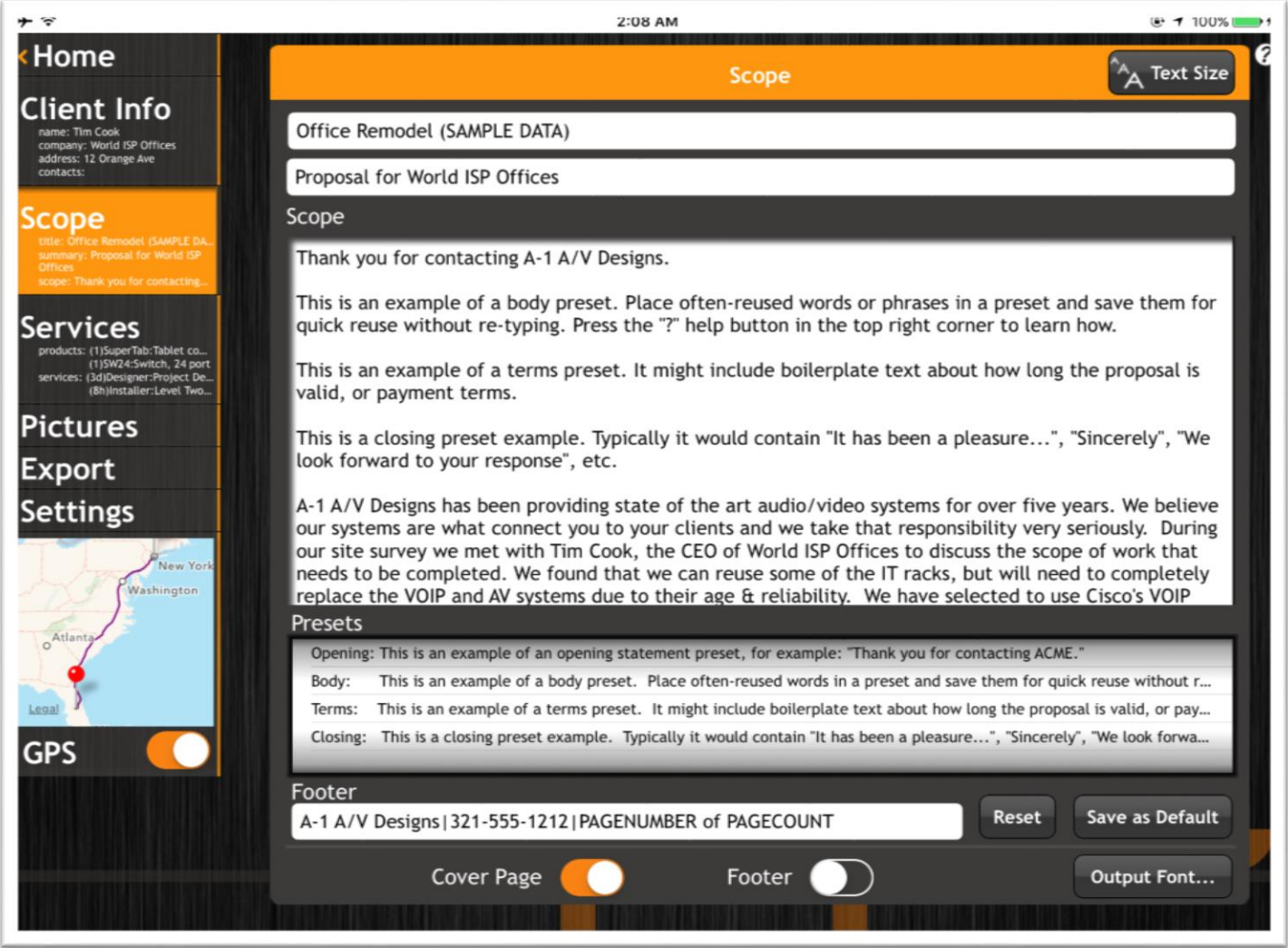
Footer text is displayed at the bottom of each page of the proposal except the cover page. Use Save as Default to keep this as the default footer for future proposals. Reset replaces the footer for the current proposal with the default setting.

Use a "|" character to separate the footer into columns. When output, the | becomes whitespace, evenly distributed between columns. You can also use certain KEYWORDS in the footer text to insert proposal fields. These keywords are TITLE, CLIENTNAME, CLIENTCOMPANY, PROVIDERNAME, PROVIDERCOMPANY, CREATEDATE, SAVEDATE, PAGENUMBER, PAGECOUNT, CURRENTDATE, CURRENTTIME, and CURRENTDATETIME (see PAGENUMBER and PAGECOUNT in the previous example picture).

At the bottom of the screen you can specify whether you would like to include the cover page and/or footer in your proposal.

Note: If you change the title of a proposal, you will be prompted whether to retitle the proposal, or create a brand new copy with the new title. This is useful when you need to make a new proposal very similar to a past proposal. You may wish to create a few proposals named something like "Template #1", #2, etc., and then just copy them into new proposals for similar "cookie cutter" projects.

Use the "Output Font..." button to select a new font family and size to be used when printing or exporting your proposal. Tap the button beside "Font Family:" to select a different font. Edit the size (generally, a size in the range of 10 to 15 points is reasonable). You can also save the default font family and size used for new proposals. The "Custom" button is used to define custom font families, as described below.

You can define a new font family based on iOS internal font faces and/or imported TrueType (.ttf) font face files. You will need to specify a family name and a normal and bold font face for each new font family you define. Italic and bold-italic are not currently used by the proposal.

"List Options" provides a menu to add a family, copy one, remove one, or reorder the list.

INT/TTF determines whether the font face will be an internal iOS font or come from a user-provided .ttf (TrueType) font file.

"..." displays a list of available font faces or ttf files.

Add TrueType Font opens a file selection screen to select a TrueType (.ttf) file and import it into the App. The file is stored in The Proposal's Documents/fonts/ directory. You must press Save All to save any font families you have added or changed.

Note, the user is responsible for properly licensing any commercial font files imported and used in The Proposal. Free fonts do exist. Some fonts may not be compatible with The Proposal. Specifically we have encountered a file which renders with insufficient space between lines. Using font modification tools to increase the font's "ascender" property made it work OK.
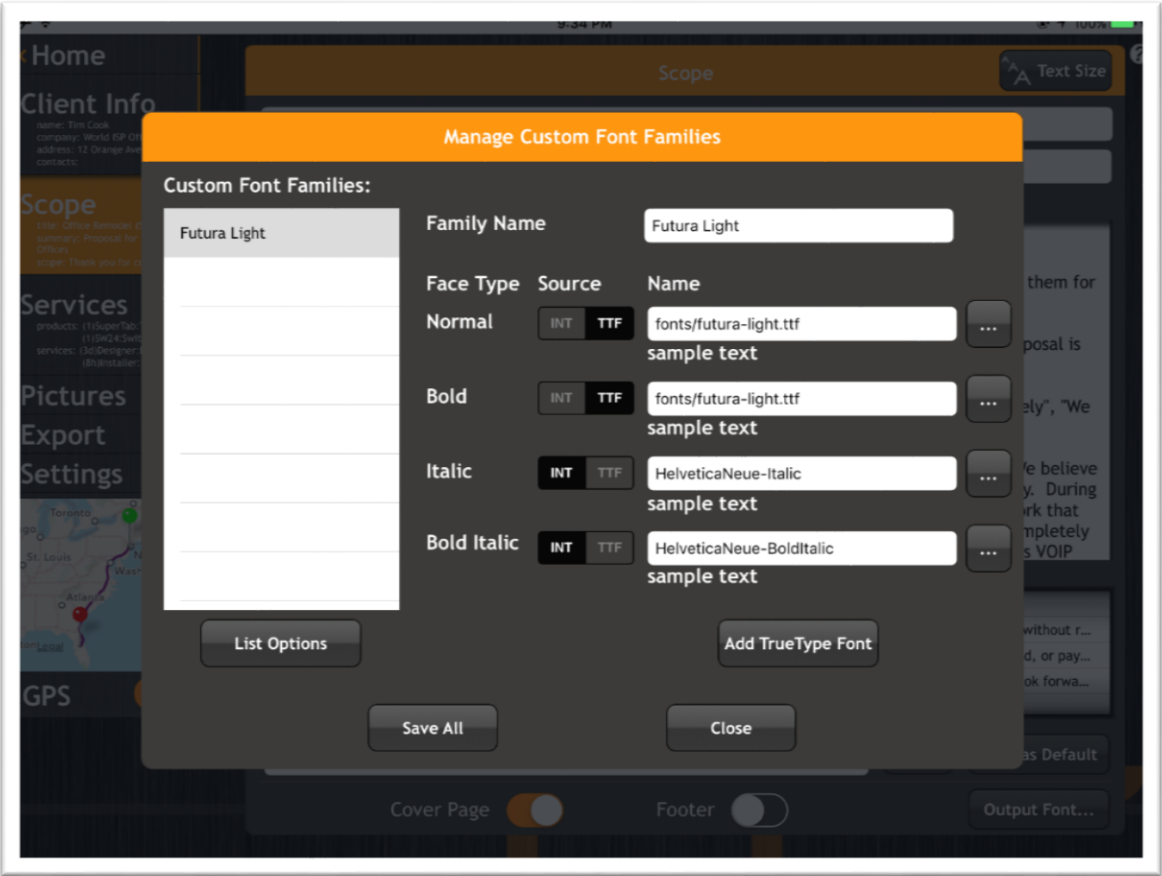
The Services Screen

This screen lets you select the items and services which make up your proposal.

In the Pricing Lists section, you can see lists of product and service price sheets. Tap a price sheet, such as AV/Mart in the example picture, to see items in this list and add them to your proposal. Tap the chevron (">") above a section to enlarge it and see more items. Tap the Add button to add a new item, not in your current price lists, to your proposal and/or to one of your price lists.

In the Proposal section, tap any item to view its details or adjust pricing, taxes, quantities, and descriptions to tailor the list for your proposal. You can also tap the Edit button to put the list of items into edit mode, which allows you to drag items up and down using the grip strip on the right side of the item box, or delete them using the red minus button (and then confirming by pressing the "Delete" button).
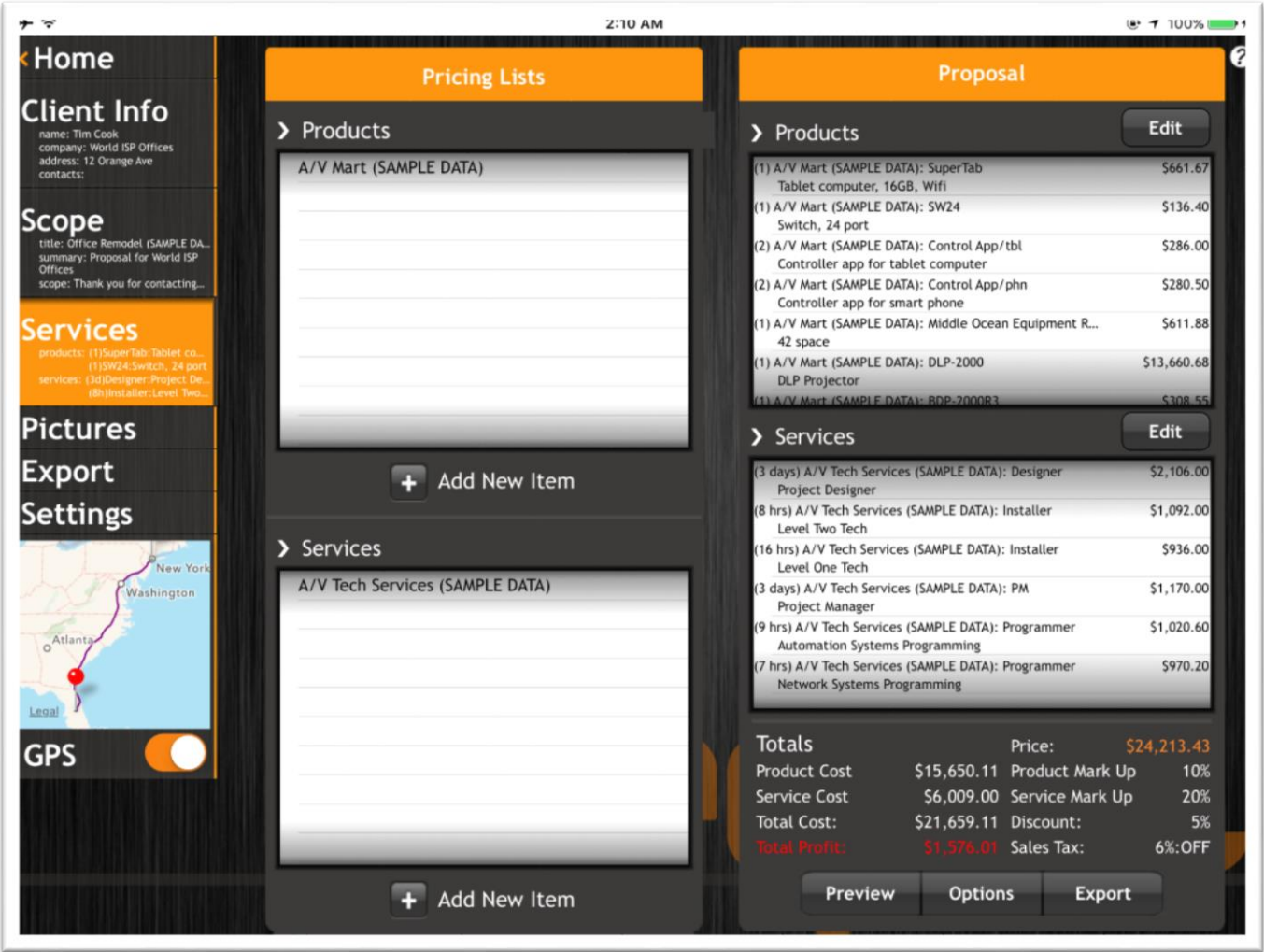
Accessing Pricing Lists

The Products and Services lists are where you will choose all of the hardware, items, products, and services which make up your proposal. The wheel lists all of your pricing lists and custom items (user added). You might name price lists by type of item, vendor, or any other name or category system you prefer. To add items to your proposal, simply select the price list to view the items within it. See examples A1 & A2. Please see the Price Lists section, below, to learn how to add price lists. Tap the Add New Item button to create new items to add directly to your proposal, and/or to a price list for future use.

Pricing Lists

> Products

A/V Mart (SAMPLE DATA)

+ Add New Item

	Add Items to Proposal from A/V Mart (SAMPLE DATA)

Back

Search: [_____] 11 items.

Product	Price ✓
AAAudio, FTH T-14-135DEG: HOSE Audio GHFender	$548.90
AAAudio, FTH T-8-7: AUDIO INCTV Digital Audio Translator	$86.90 ✓
AAAutomation, Control App/phn: Controller app for smart phone	$140.25 ✓
AAAutomation, Control App/tbl: Controller app for tablet computer	$143.00
AAAutomation, Middle Ocean Equipment Rack: 42 space	$611.88
AAComputers, SuperTab: Tablet computer, 16GB, Wifi	$770.00
AANetworking, SW24: Switch, 24 port	$136.40
AAVideo, BDP-2000R3: Blu-Ray Player	$308.55
AAVideo, DLP-2000: DLP Projector	$13,660.68 ✓
AAVideo, GBR 6000H09210: AUDIO INCTV Scaler Pro	$472.85 ✓
AAVideo, GBR 7661X03400: HDMI Wall Plate - Right Angle	$108.90 ✓

Add

Select Quantities

Quantity	Product	Cost
1	AAAudio, FTH T-8-7: AUDIO INCTV Digital Audio Translator	$79.00
1	AAAutomation, Control App/phn: Controller app for sma...	$127.50
2	AAVideo, DLP-2000: DLP Projector	$12,418.80
	AAVideo, GBR 6000H09210: AUDIO INCTV Scaler Pro	$429.86
	AAVideo, GBR 7661X03400: HDMI Wall Plate - Right Angle	$99.00

Cancel   Add

A1. Select a price list in the products wheel to view the items within it. Select all of the items that you would like to add to your proposal. When done, press "Add".
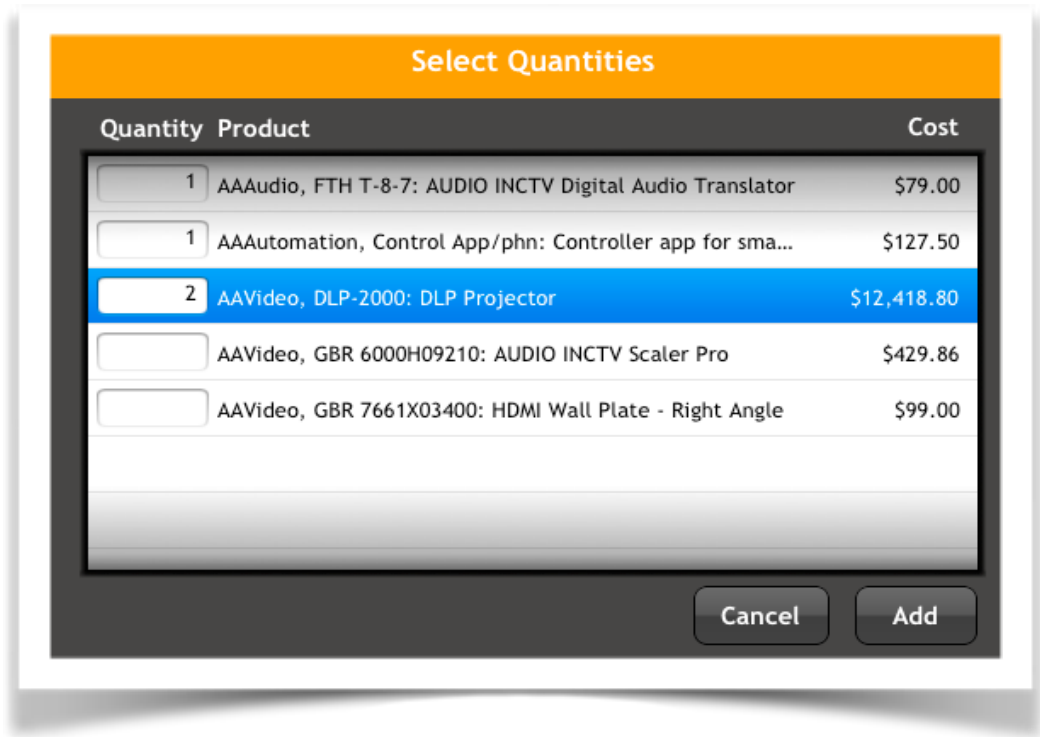
A2. After you have selected "Add" the quantities window will appear. Enter the quantities for each item and then press "Add" to add them to the proposal.

Add New Item

Use "Add New Item" to create a new item entry and add it to your proposal and/or a price list. In the example here, we add a service to the proposal and to a new pricing list named "Special Site Services". Use "Add & Continue" to add multiple items with similar properties - a time saver when adding multiple items which are similar except in size, color, material, etc.

Most entry fields should be self-explanatory.

Manufacturer/Vendor may be blank. Model / Part Number / Name should be unique within a pricing list. Description is optional, if your model number/part number/name is self-explanatory. Mark Up and Sales Tax should be left empty unless you need to override your proposal's default settings. Quantity is required, if adding the new item to the proposal now. Price List name is required, if adding the item to a price list. The price list need not exist, one will be created if it is not present. Tap the ellipses ("...") button to pop up a selection list of price lists, for the currently specified item type.

Proposal	
❯ Products	**Edit**
(1) A/V Mart (SAMPLE DATA): SuperTab Tablet computer, 16GB, Wifi	$661.67
(1) A/V Mart (SAMPLE DATA): SW24 Switch, 24 port	$136.40
(2) A/V Mart (SAMPLE DATA): Control App/tbl Controller app for tablet computer	$286.00
(2) A/V Mart (SAMPLE DATA): Control App/phn Controller app for smart phone	$280.50
(1) A/V Mart (SAMPLE DATA): Middle Ocean Equipment R... 42 space	$611.88
(1) A/V Mart (SAMPLE DATA): DLP-2000 DLP Projector	$13,660.68
(1) A/V Mart (SAMPLE DATA): BDP-2000R3	$308.55
❯ Services	**Edit**
(3 days) A/V Tech Services (SAMPLE DATA): Designer Project Designer	$2,106.00
(8 hrs) A/V Tech Services (SAMPLE DATA): Installer Level Two Tech	$1,092.00
(16 hrs) A/V Tech Services (SAMPLE DATA): Installer Level One Tech	$936.00
(3 days) A/V Tech Services (SAMPLE DATA): PM Project Manager	$1,170.00
(9 hrs) A/V Tech Services (SAMPLE DATA): Programmer Automation Systems Programming	$1,020.60
(7 hrs) A/V Tech Services (SAMPLE DATA): Programmer Network Systems Programming	$970.20

Totals		Price:	$24,213.43
Product Cost	$15,650.11	Product Mark Up	10%
Service Cost	$6,009.00	Service Mark Up	20%
Total Cost:	$21,659.11	Discount:	5%
Total Profit:	$1,576.01	Sales Tax:	6%:OFF

Preview	Options	Export

Proposal Window

The Proposal window is where you see all the products and services added to your proposal so far. You can adjust any item by tapping it. See example C1 below. Tap a chevron ("❯") to expand the area beneath it to reveal more items. Tap Edit to reorder or delete items.

The bottom portion of the window displays all the totals for the proposal. You can view a more detailed price summary by tapping in the totals area.

Back	Proposal Price Summary		
Type of Item:	**Products**	**Services**	**Total**
Cost	$15,650.11	$6,009.00	$21,659.11
Mark Up Default Rate	$1,513.12 10%	$1,285.80 20%	$2,798.92
Price	$17,163.23	$7,294.80	$24,458.03
Discount Discount Rate	$858.16 5%	$364.74 5%	$1,222.90
Sales Tax	$978.30 6%	$0.00 0%	$978.30
Profit	$654.96	$921.06	$1,576.02
Net Price	$17,283.37	$6,930.06	$24,213.43

Edit Proposal Product Item

Back

Price Sheet	A/V Mart (SAMPLE DATA)
Model Number	AAVideo DLP-2000
Description	DLP Projector
Sales Tax Rate	Sales Tax % (0% for tax exempt; blank for proposal default)

Quantity	Each	x	1
Cost	12,418.80 $		$12,418.80
Markup (350 $)	$350.00		$350.00
Global Markup (10%)	$0.00		$0.00
Price (before discounts & taxes)	$12,768.80		$12,768.80

Remove   Save

Edit Proposal Service Item

Back

Price Sheet	A/V Tech Services (SAMPLE DATA)
Labor Type	Programmer
Description	Automation Systems Programming
Sales Tax Rate	Sales Tax % (if blank or 0%, item is tax exempt)

Quantity	Each	Hour Day Fixed	x	9
Rate	94.50 $			$850.50
Markup (20 %)	$18.90			$170.10
Global Markup (20%)	$0.00			$0.00
Price	$113.40			$1,020.60

Remove   Save

C1. You can modify these items by tapping them to adjust the quantity, description, sales tax, cost, mark up, and unit (services only).

Changing Price List Output Format Options

Tap the Options button to access a set of options to tailor the appearance of your proposal's pricing section. You can turn off the line items, pricing, quantities, and subtotals for the product and service categories, as well as the discount and tax entries. You can also provide a new label for the tax line, if the term "Sales Tax:" is locally inappropriate. Note that this feature is meant as an appearance option only, it does not change your proposal math. If you hide the tax or discount, your total will not re adjusted to match what is still visible. To remove tax or discount from the total calculations, you must disable them in the Settings Tab.
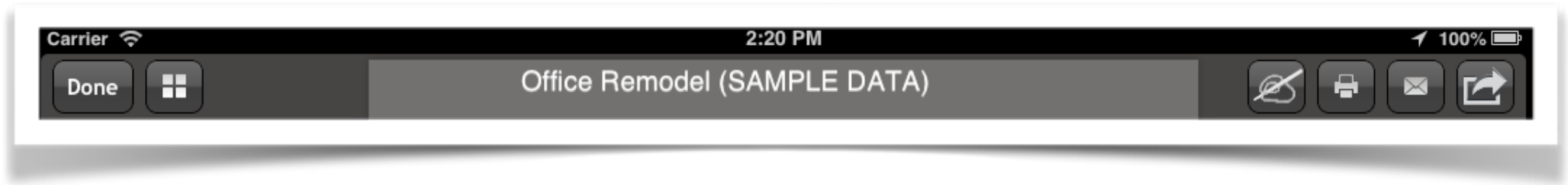
The Preview Screen

This menu choice will display a full preview of your proposal, with options to sign, mail, or print the proposal. See examples D1 and D2.
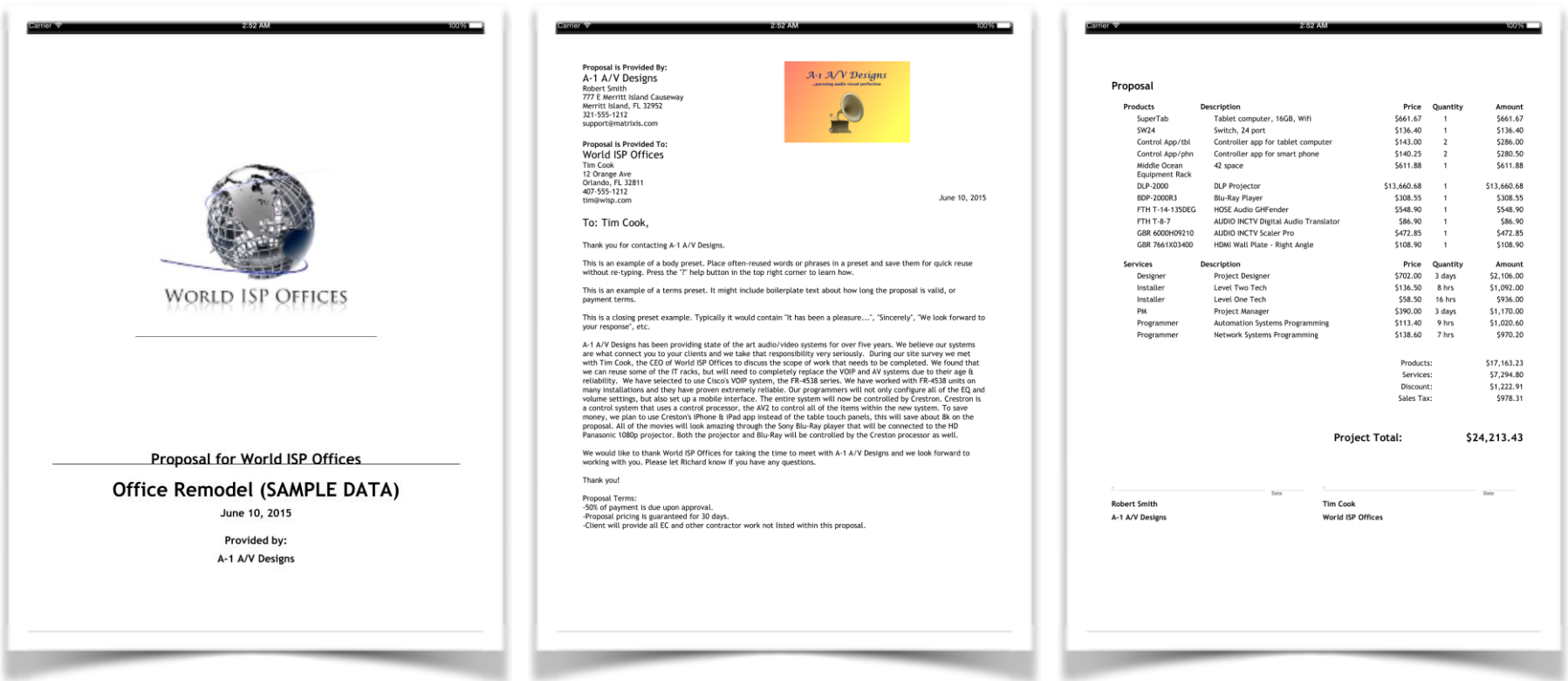
D1. Once at the preview screen you can switch between each page by tapping the side of the page or swiping your finger across the screen. You can also tap a thumbnail at the bottom of the screen (tap bottom center to reveal thumbnails, if hidden). You can also pinch the screen to zoom in or out, or double-tap to zoom in.

The toolbar at top (tap top center if hidden) offers some additional options:

D2. Preview Toolbar Options

Done - close the preview screen, returning to where you were previously.

Tiles - show a reduced version of each page, to allow selecting a new page.

Hand w/ Pen - open signature options screen.

Printer - open a print options box, from which you can print the proposal.

Envelope - compose an email with the proposal attached.

Share - open the PDF document in another app on your iPad (any app which is known to work with PDF files).
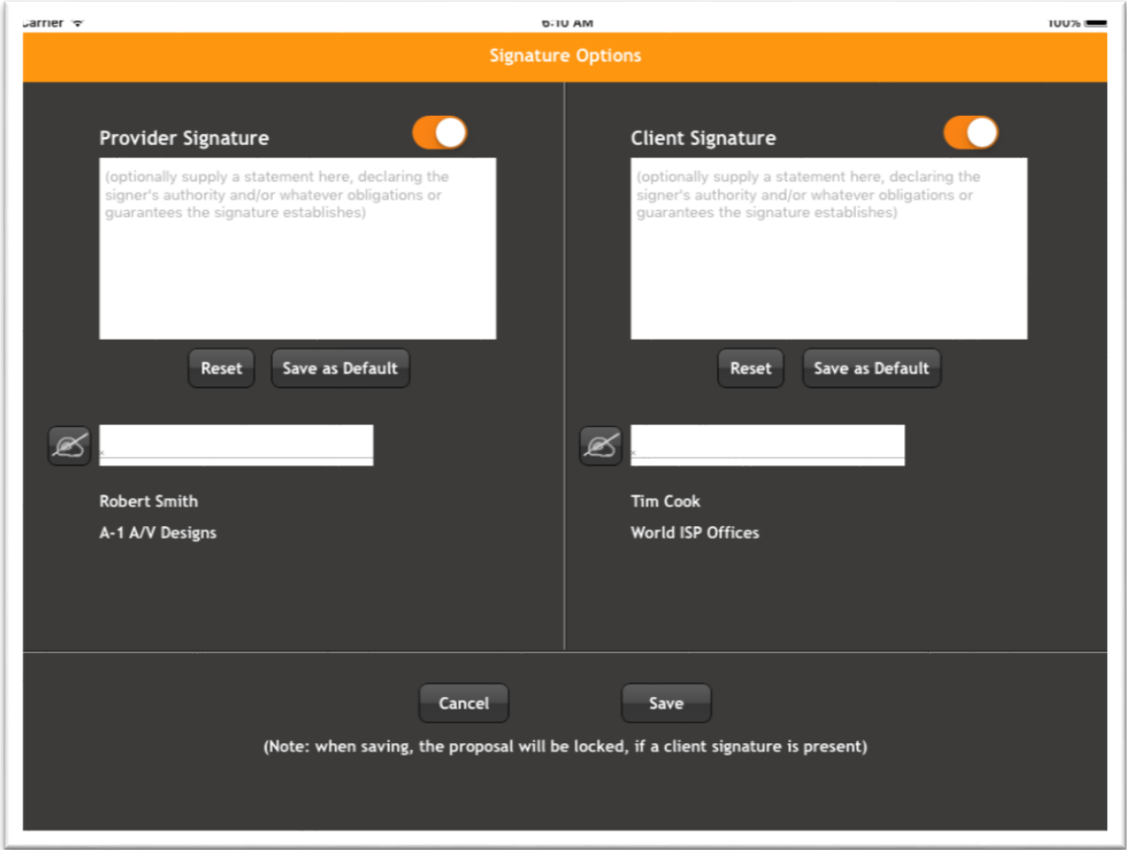
Signature Options Screen

The signature options screen allows you to turn off a provider signature block, and a client signature block, on a per-proposal basis. These blocks, if turned on, are displayed below the pricing list of the proposal. Each signature is preceded by optional terms (typically declaring that the signer is authorized to sign for his/her organization, and agreeing to comply with the terms of the proposal). A date follows the signature, then the name of the provider/client and his/her organization.

From the signature options screen, tap the left or right "hand with pen" button to sign the proposal as provider or client, respectively. This pops up a signature capture screen (see next page), where the user can sign the screen with a fingertip or stylus.

Note that a client-signed proposal cannot be modified without re-signing. The proposal is locked when the signature is saved, and unlocking it removes the signature.

Press Save to keep all changes made to the terms, signatures, and signing dates. Cancel will exit without changing your proposal.

Use the "Save as Default" buttons to save the respective signature on/off status and terms as defaults for future proposals. Use Reset to change the current terms and on/off status to restore default settings in the current proposal.

Signature Capture Screen

This screen allows you to capture a signature, by writing on the screen with your fingertip or a stylus. Adjust the color and stroke width with the top right options. You can rest your palm on the lower half of the screen while writing, but you will first need to go to iPad Settings and turn off multi-tasking gestures. Otherwise the palm pressing on the screen will trigger the iPad's app list. Sign in the white box and press Done, or Clear Signature to start over, or Cancel to return to Signature Options without acquiring a signature.
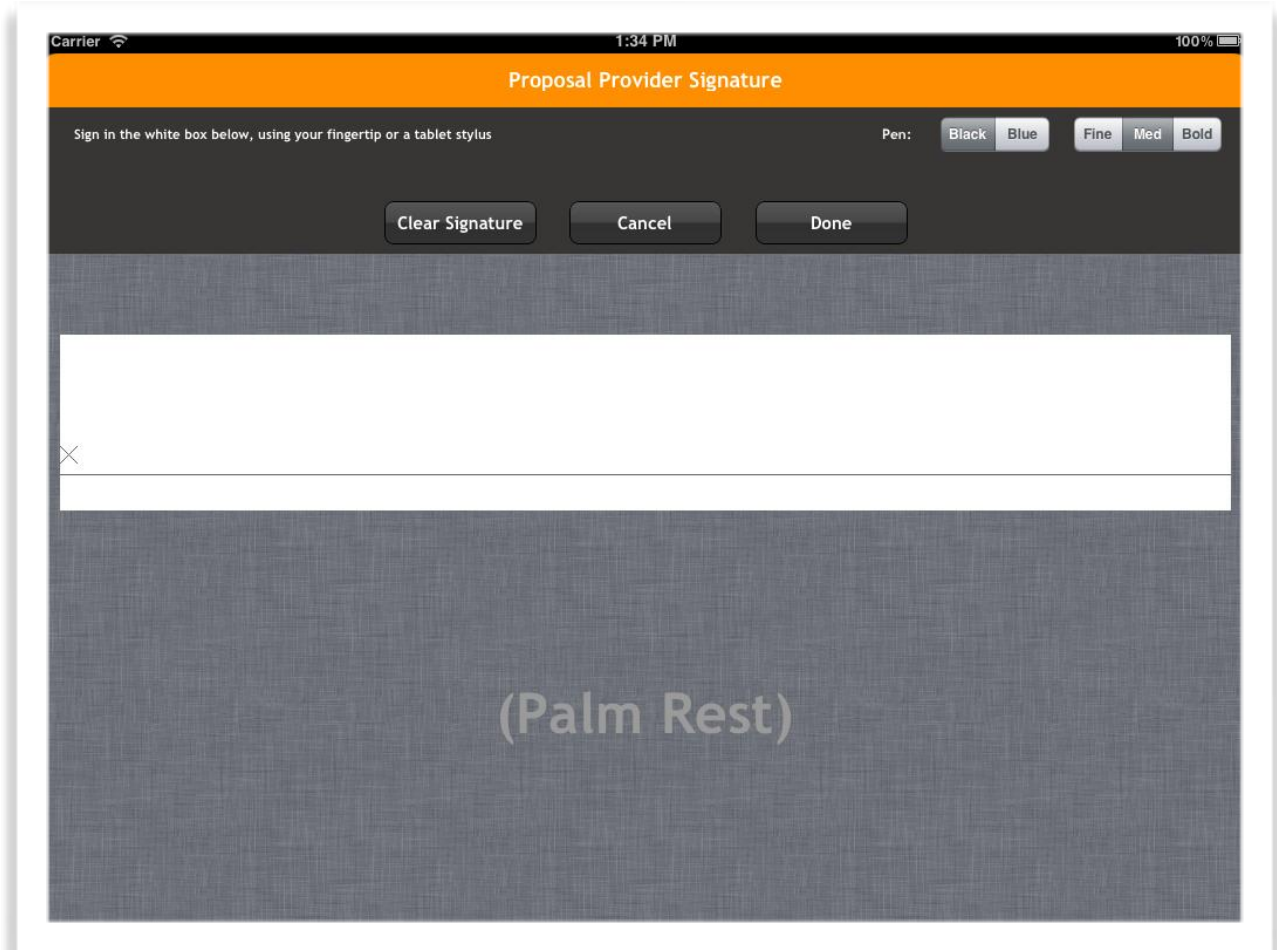
The Pictures Screen

The Pictures screen allows you to add pictures to the end of your proposal, with captions. Pictures will all be displayed in the same selected format: one, two, or four pictures per page. The single picture per page format is rotated landscape. A preview picture of the current page is visible on the Pictures screen, to show how the current pictures and layout selection will be presented. Tap the preview to expand it to a larger view, and tap again to return it to normal size.
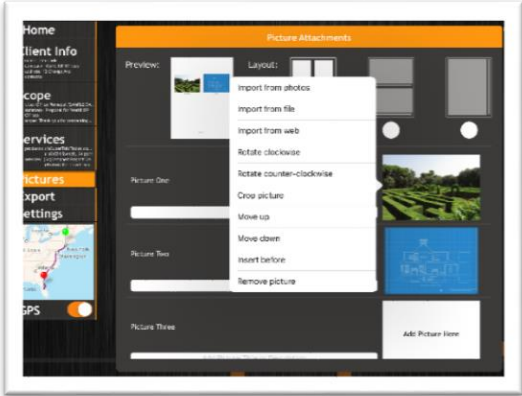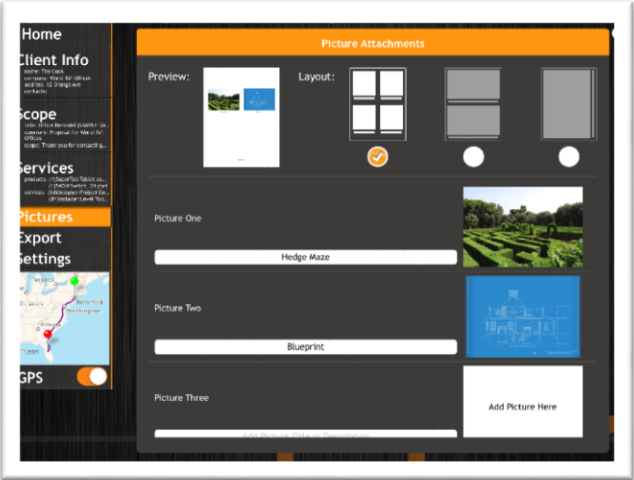
Tap on a picture in the right column for a list of options to add, change, remove, or reorder pictures.
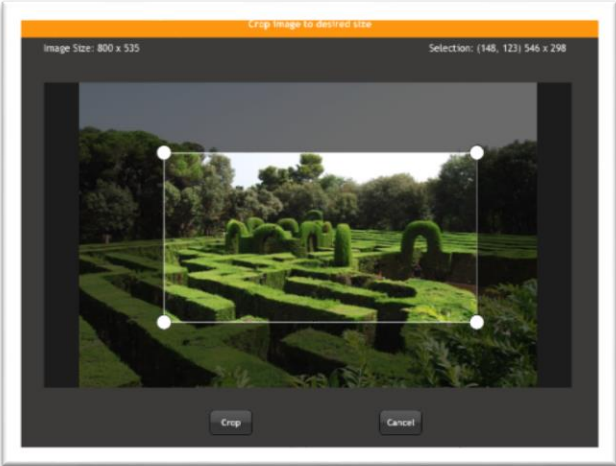
Use "Crop Picture" to trim away unneeded borders from your pictures.

The Export Screen

The Export Screen is the place to export, print, email, or lock/unlock your proposal.

Additionally, Backup Database and Restore Database allow you to save or reload a copy of the app's proposals into a file on your iPad or in Dropbox.

Export as PDF Button

Once you select Export as PDF, the app will ask for a filename, and whether to save to your iPad or Dropbox. From the iPad, you can retrieve your saved PDFs using iTunes. Connect your iPad to your Mac/PC, launch iTunes, select your iPad at the top of the screen, select Apps on the left, locate the File Sharing: Apps list at the bottom of the page, select the app "The Proposal," and your PDFs will be in the window on the right labeled "The Proposal Documents" (Dropbox is more straightforward and self-explanatory).

Export as RTF Button

Export as RTF saves the current proposal to a Rich Text Format document, suitable for further editing using a word processor. This process works the same as exporting a PDF. Once you export the RTF document, you can edit it, typically using a desktop PC application or an online word processing application. Note that some applications, such as TextEdit and Pages, offer little or no support for viewing or editing RTF documents with embedded images. Microsoft® Word offers good support for RTF documents with images. Free or donation-supported suites such as Apache OpenOffice or its derivatives might be economical & effective alternatives if your preferred word processor lacks full .rtf support.
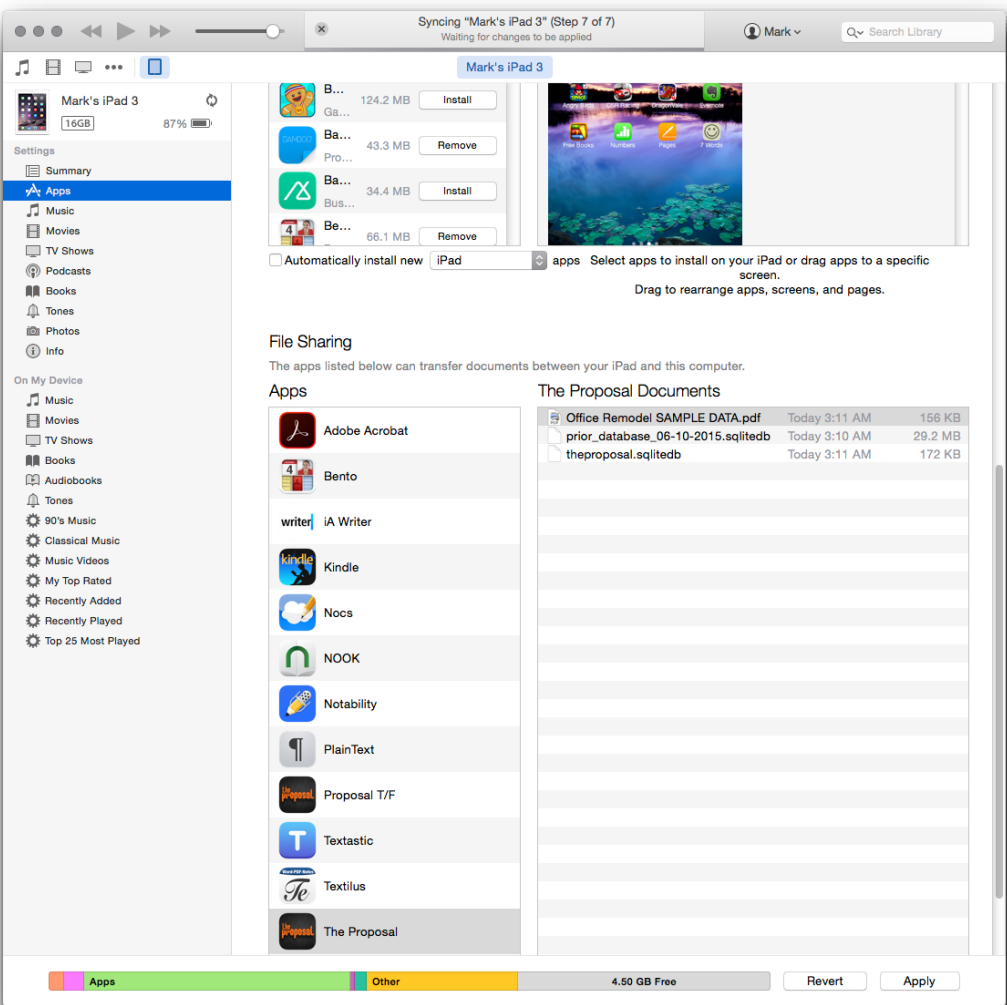
Export Proposal BOM Button

Saves a Bill of Materials (BOM) for the current proposal. This is a list of items in the proposal, with cost, mark up, discount, sales tax, and price extended. As with the PDF and RTF export options, you can save to the iPad or to Dropbox. The BOM, which is created in a .xml file, can be opened with Excel 2003 or newer, or Apache OpenOffice Calc.

|	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Proposal:	Office Remodel (SAMPLE DATA)											
2	Provided by:	Josh Almeida											
3	Phone:	407-555-5746											
4	E-mail:	info@ascendstudios.com											
5	Apply Product Discount?	NO											
6	Apply Service Discount?	NO											
7	Default Product Markup:	10.00%											
8	Default Service Markup:	20.00%											
9	Default Product Sales Tax:	6.00%											
10	Default Service Sales Tax:	0.00%											
11													
12	Client:	Tim Cook											
13	Company:	World ISP Offices											
14	Address:	12 Orange Ave Orlando, FL 32811											
15	Phone:	407-555-2378											
16	E-mail:	tim@wisp.com											
17													
18													
19	Bill of Materials												
20	Type	Manufacturer/Vendor	Part/Model	Description	Quantity	Unit	Cost Each	Cost	Mark Up	Discount	Pre-tax Price	Tax	Net Price
21	Product	AAComputers	SuperTab	Tablet computer, 16GB, Wifi	1		648.70	648.70	12.97	33.08	628.59	37.72	666.31
22	Product	AANetworking	SW24	Switch, 24 port	1		124.00	124.00	12.40	6.82	129.58	7.77	137.35
23	Product	AAAutomation	Control App/tbl	Controller app for tablet computer	2		130.00	260.00	26.00	14.30	271.70	16.30	288.00
24	Product	AAAutomation	Control App/phn	Controller app for smart phone	2		127.50	255.00	25.50	14.03	266.47	15.99	282.46
25	Product	AAAutomation	Middle Ocean Equipment Rack	42 space	1		556.25	556.25	55.63	30.59	581.29	34.88	616.17
26	Product	AAVideo	DLP-2000	DLP Projector	1		12418.80	12418.80	1241.88	683.03	12977.65	778.66	13756.31
27	Product	AAVideo	BDP-2000R3	Blu-Ray Player	1		280.50	280.50	28.05	15.43	293.12	17.59	310.71
28	Product	AAAudio	FTH T-14-135DEG	HOSE Audio GHFender	1		499.00	499.00	49.90	27.45	521.45	31.29	552.74
29	Product	AAAudio	FTH T-8-7	AUDIO INCTV Digital Audio Translator	1		79.00	79.00	7.90	4.35	82.55	4.95	87.50
30	Product	AAVideo	GBR 6000H09210	AUDIO INCTV Scaler Pro	1		429.86	429.86	42.99	23.64	449.21	26.95	476.16
31	Product	AAVideo	GBR 7661X03400	HDMI Wall Plate - Right Angle	1		99.00	99.00	9.90	5.45	103.45	6.21	109.66
32													
33	Service	A/V Tech Services	Designer	Project Designer	3	DAY	585.00	1755.00	351.00	105.30	2000.70	0.00	2000.70
34	Service	A/V Tech Services	Installer	Level Two Tech	8	HOUR	105.00	840.00	252.00	54.60	1037.40	0.00	1037.40
35	Service	A/V Tech Services	Installer	Level One Tech	16	HOUR	48.75	780.00	156.00	46.80	889.20	0.00	889.20
36	Service	A/V Tech Services	PM	Project Manager	3	DAY	325.00	975.00	195.00	58.50	1111.50	0.00	1111.50
37	Service	A/V Tech Services	Programmer	Automation Systems Programming	9	HOUR	94.50	850.50	170.10	51.03	969.57	0.00	969.57
38	Service	A/V Tech Services	Programmer	Network Systems Programming	7	HOUR	115.50	808.50	161.70	48.51	921.69	0.00	921.69
39													
40					Product Subtotal:			15650.11	1513.12	858.17	16305.06	978.31	17283.37
41					Service Subtotal:			6009.00	1285.80	364.74	6930.06	0.00	6930.06
42													
43					Grand Total:			21659.11	2798.92	1222.91	23235.12	978.31	24213.43

Print Proposal Button

Select the "Air Print" printer, the pages you would like to print and how many copies. Then select "Print" and your proposal should print. For a list of Apple approved printers, visit https://support.apple.com/HT201311.

Email Proposal Button

Pressing the Email Proposal Button will bring up an email template manager. Here, you can create or modify email templates, for reuse in future proposals, or just select an existing template and press Compose to finish creating your email in the Apple mail app. The title of the email and the filename of the PDF are both generated from the proposal title which was added on the scope screen.
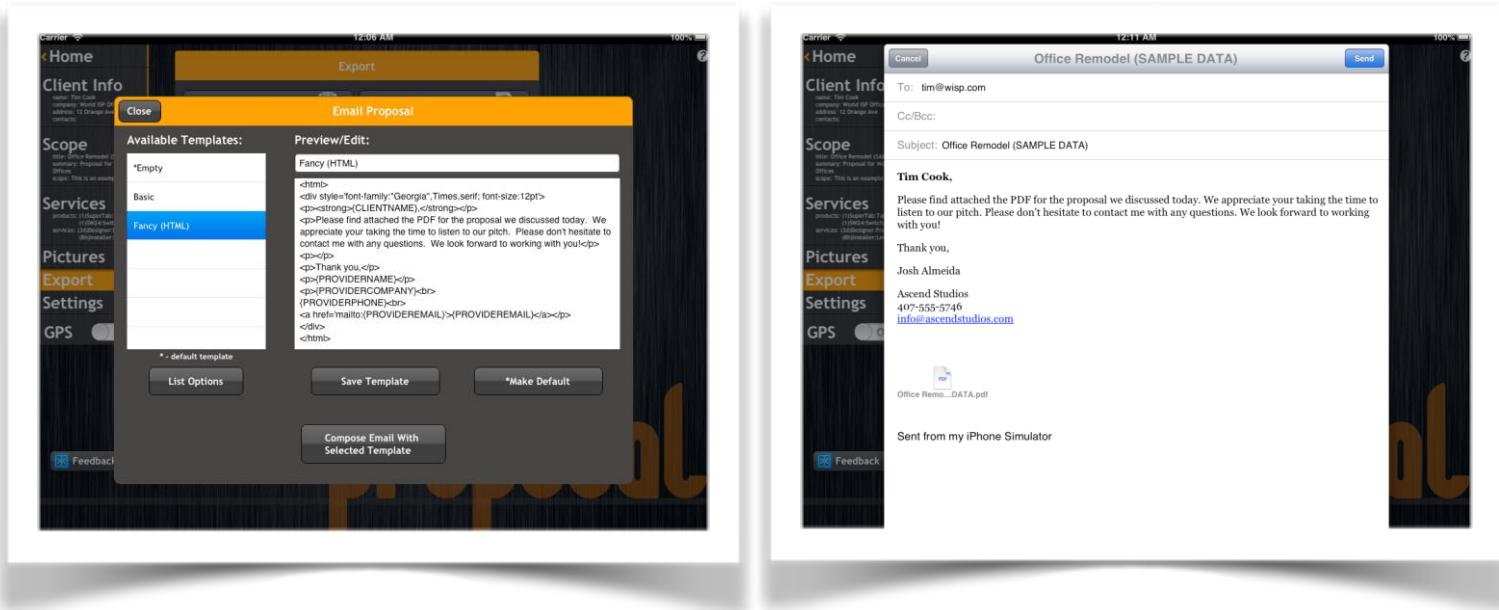
The example here shows you can use HTML formatting to make your email a bit more stylish. Just begin the template with the characters <html>, and you can use HTML tags like <strong>, <u>, <em>, <ulist>
...</ulist>, and the <a>, <p>, and <br> tags shown above.

Notice the field codes, too, like {CLIENTNAME}. These are replaced by actual proposal content when you compose your email. When editing a template, tap the cursor and select "Insert Field" to select from a list of all available fields.

Lock Proposal

This feature allows you to lock the proposal to avoid updating a completed proposal by mistake. A locked proposal will display this icon in the lower left-hand corner of the screen. While the proposal is locked, all text fields and buttons that affect the pricing of the proposal are blocked. To unlock the proposal, just tap the lock icon or go into the Export Tab and select "Unlock Proposal". Note that a proposal is automatically locked when a client signature is added. Unlocking a proposal will remove any client signature.

Backup Database

This button accesses features to set up backup options and back up the database. The Proposal uses a SQLite database file to store all proposal data. This file is stored in the app's documents folder: Documents/theproposal.sqlitedb . If the file is damaged or deleted, you may loose all of your proposals. Keeping a backup is a good precaution against excessive loss, especially if you rely on The Proposal as a historical archive of past proposals.

Proposals may be saved on the iPad's internal storage, or to Dropbox. Dropbox is generally the preferred backup destination, since there your data is safe from events like iPad loss, physical damage, or whole-device data corruption from malware, hardware failure, etc.

To save a backup, select a destination, edit the filename if desired, and press save.
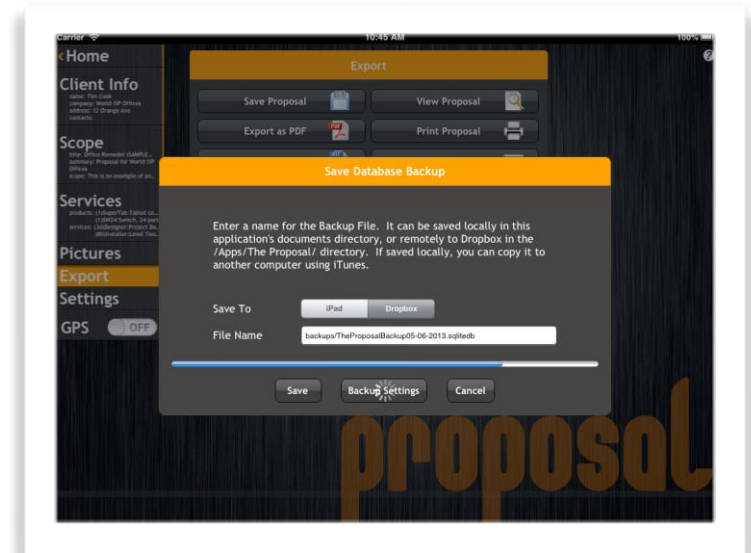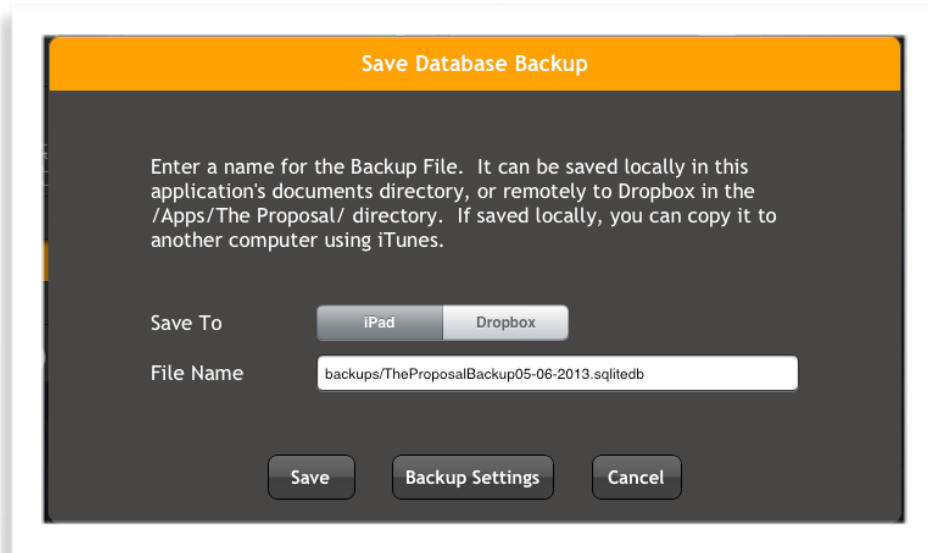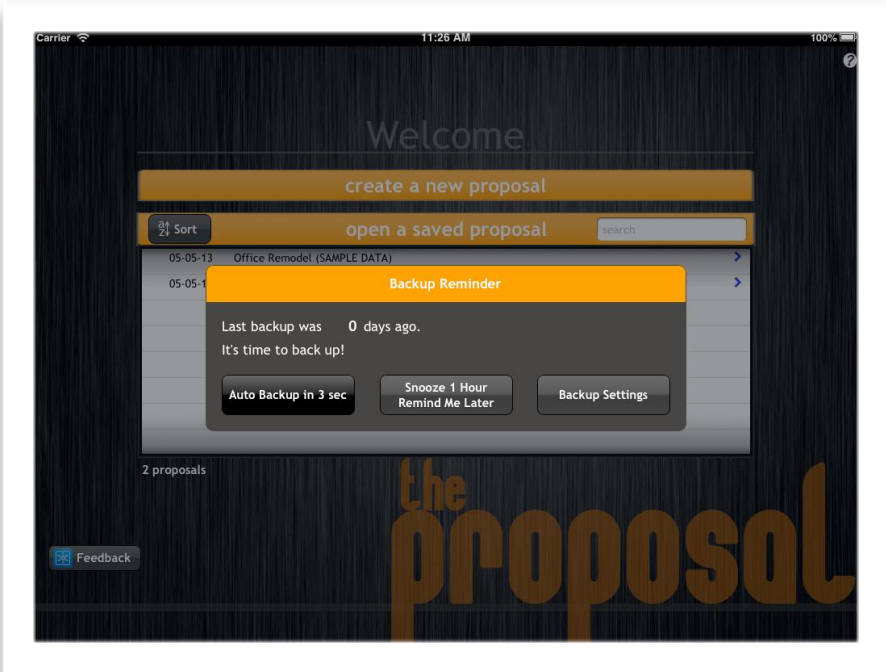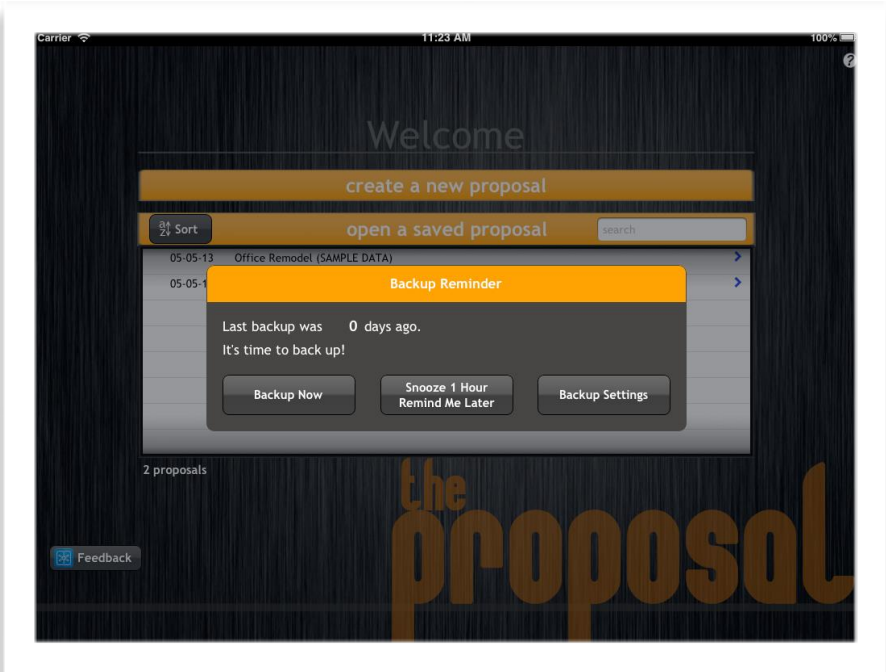
Backup Settings allows you to tailor the backup process:

The first setting establishes how often The Proposal will either perform a backup automatically or remind you to back up. You can enter a decimal value, such as 0.5 days. Reminders and automatic backups occur when you start the app or go to the home tab, within 30 minutes of the next scheduled backup date and time. (this way if backing up is part of your daily 8am routine, you will still be reminded if you're a little early). After any backup, The Proposal will remove extra backup files from the backup target. This is done by removing all but the most recent (specified number) of database files (files with a suffix of .db, .sqlite, or .sqlitedb) from the backups/ directory on the target device or location (iPad or Dropbox).

Backup automatically causes all backup activities to occur onscreen without your intervention. You cannot use the application while it is backing up, but it typically takes a second or two to backup to iPad and a few minutes or less to backup to Dropbox, depending of course on your database size and Internet connection speed.

Here are some pictures of the backup process with reminders and then with automatic backups:

Restore Database

Select "Restore Database" to restore a database using a backup made on some earlier date. This is usually for disaster recovery, if your database somehow gets scrambled and unusable. Other reasons might include going "back in time" to edit a proposal you recently deleted, or copying a database, with price lists and email templates and global settings all preconfigured, from one iPad to another.

Carrier 🗣   10:05 AM   100% 🔋

Opening file in [iPad] [Dropbox]

Select a database file to restore. Typically, you will restore a backup named TheProposalBackup(Date)sqlitedb. Your current database, theproposal.sqlitedb, will be saved on your device as prior_database_(date MM-DD-YYYY)-(optional sequence number).sqlitedb. The new database will be copied over the current database. No files will be deleted, but any work done between the time the selected restore file was made and now will become unavailable.

Directories

..
<parent>

Files

TheProposalBackup05-05-2013.sqlitedb
05/05/2013 07:22:27 AM   6.4 MB
TheProposalBackup05-06-2013.sqlitedb
05/06/2013 03:07:28 PM   588 KB

/backups/

Filename: [Open] [Cancel]

The Settings Screen

This screen is where you specify your company information, and set default global mark ups, discounts and sales tax rates. You can also import and manage all of your price sheets from this screen as well.

Company Information

You can import your company information from your iPad contacts by selecting the blue arrow within the "Sales Rep Name" text box or you can manually enter the information. You can import your company logo from the web or your iPad photos. The logo will be shown on the scope page within your proposal. Use the Save as Default button to save the company information and logo for use in new proposals. Use Reset to insert the default company information and logo into your current proposal.
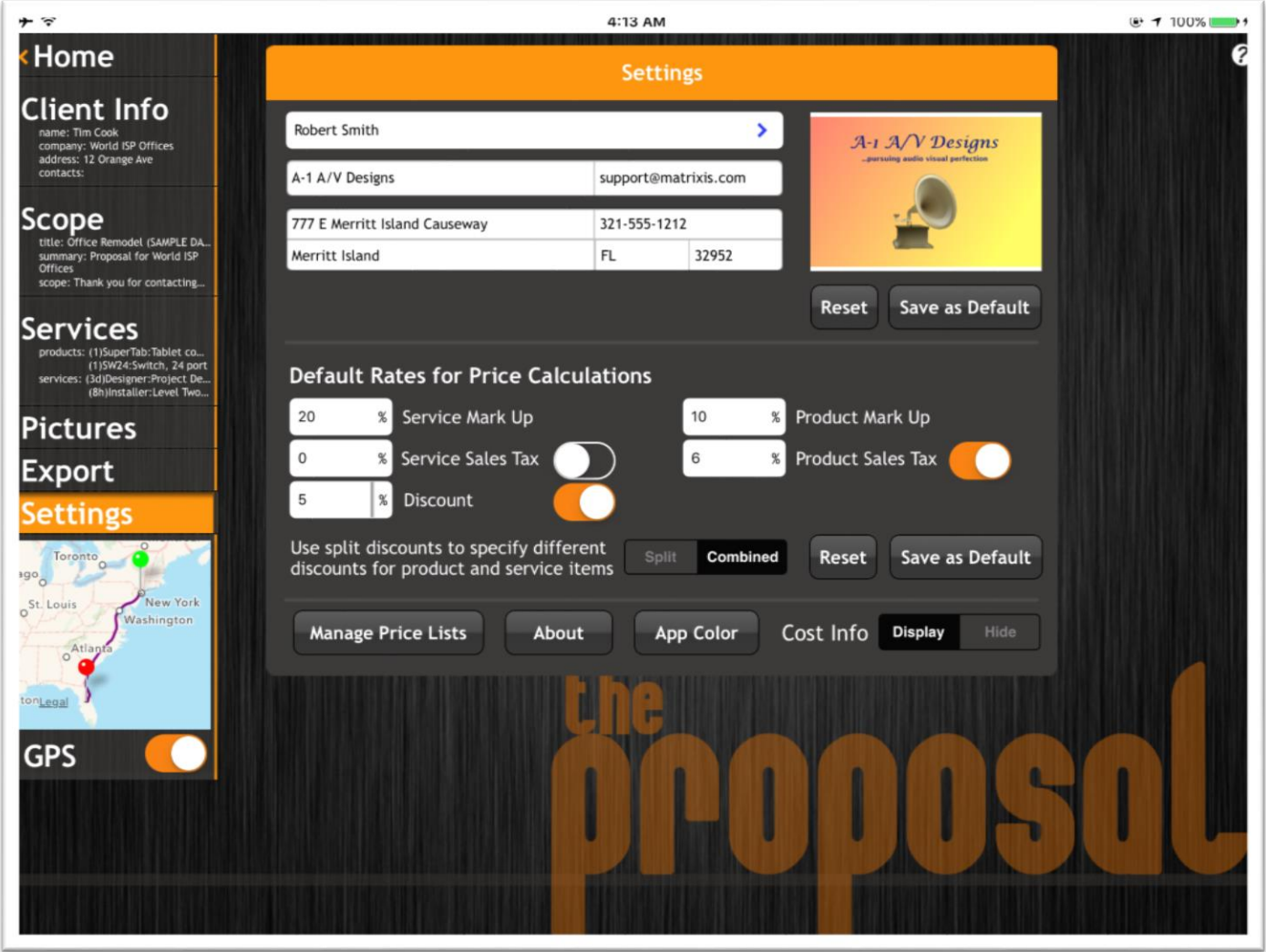
Rate Information

This section allows you to set default mark up, discount, and sales tax rates. There are two types of default mark ups - Service and Product. They both work the same for their sections. These default mark ups will be applied to all of the added items within a proposal. If you have adjusted the mark up of an item manually from the Services page then the default mark up is removed and the one you set on the Services page is applied. Discount will add a global discount to your proposal. You can discount by a percentage or by a fixed dollar amount. To switch between a percentage or dollar amount press the "%" or "$" symbols. This will affect the total price of your proposal, prior to sales tax. If you select the "Split" discount option, you can specify different amounts or percentages for product items and for service items, and turn these discounts on and off individually. If a discount is applied within your proposal it will be shown in the totals section on the Services Screen. Sales tax will be included with your proposal's total. You can also see your sales tax in the totals section of the Services Screen.

As with company information, use Save as Default to save these rates for use in future proposals, and Reset to insert the default values into this proposal.

Manage Price Lists

This screen allows you to create, edit, or delete your dealer pricing, labor rates and custom products. In the side menu, select "Price Lists" to get started. You can also import price lists from spreadsheet files in your app document directory or in `Dropbox.
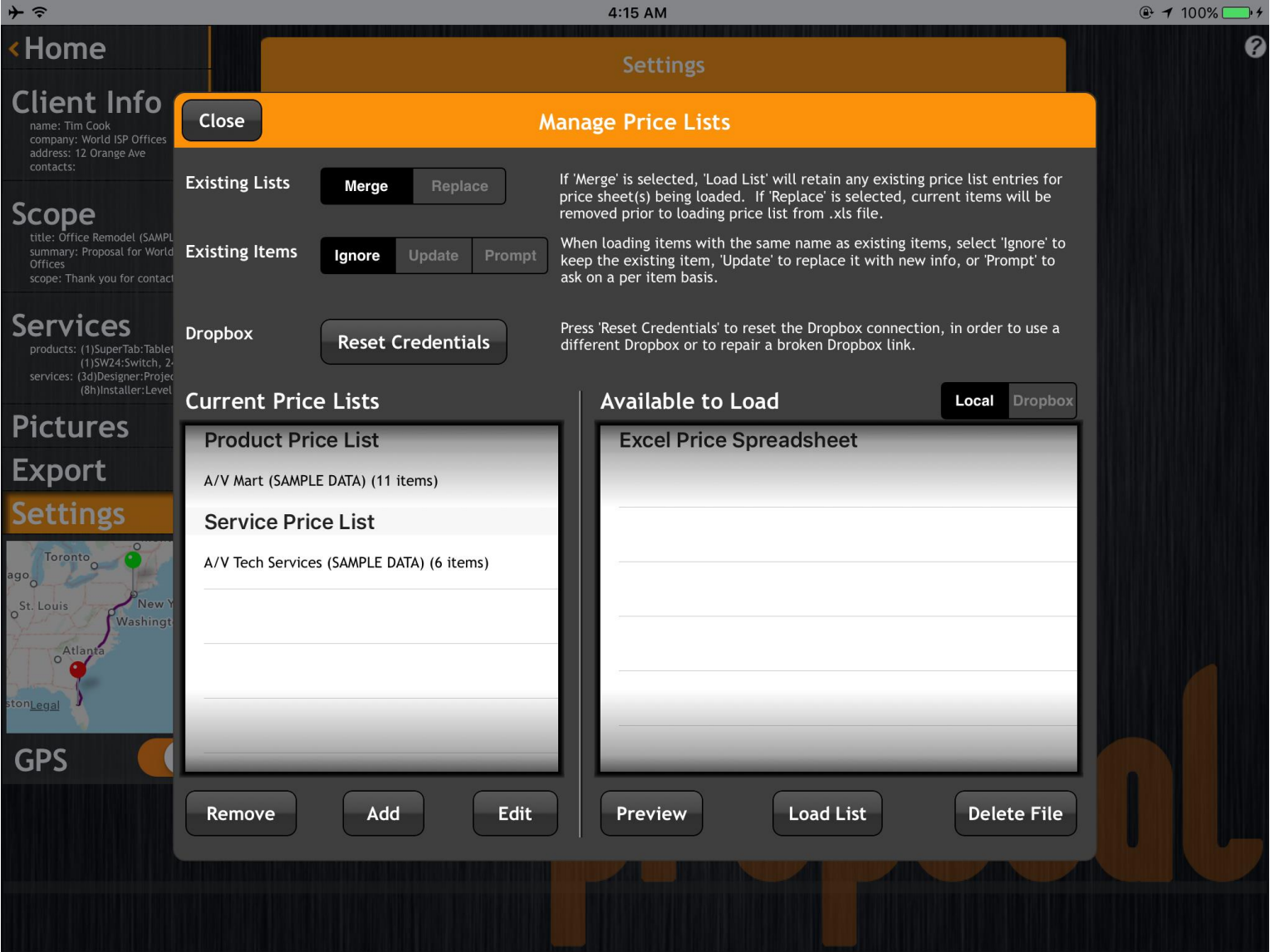
How To Add Price Lists

There are several ways to add your price lists to The Proposal. You can enter them one item at a time from the Services screen, Edit lists from the Price Lists screen (left panel), or import them from Excel .xls spreadsheet files saved in Dropbox or in your app's document directory.

iTunes

You can import your price list files using iTunes.

• Connect your iPad to iTunes.

• In iTunes, select your iPad in the device list on the top of the screen.

• Select the "Apps" category on the left of the page in iTunes.

• Scroll to the bottom of the screen to the File Sharing section.

• Select "The Proposal" in the Apps window. All of your saved proposals will be listed along with past saved price lists that were loaded though iTunes.

• Drag & drop your .xls price lists into "The Proposal Documents" window. Once they have finished loading into iTunes, select "Sync" to sync your iPad. All of your loaded price lists will be shown in the Manage Price Lists window. Make sure you select "Local" to view all price lists that are loaded from iTunes in the Available to Load section.
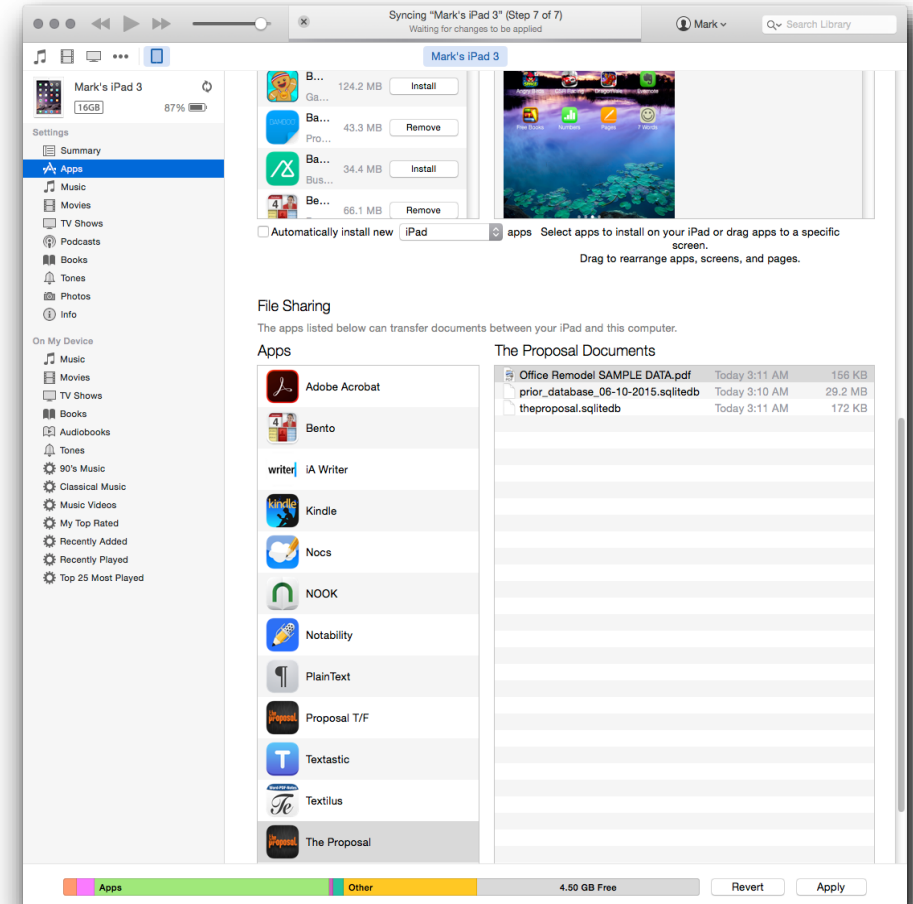
Dropbox App

First, download Dropbox's app from iTunes. It's normally a free download. All of your price lists should be added to Dropbox in folder /Apps/The Proposal/. Once they have been added, you are ready to import them into The Proposal. See examples F1-2.
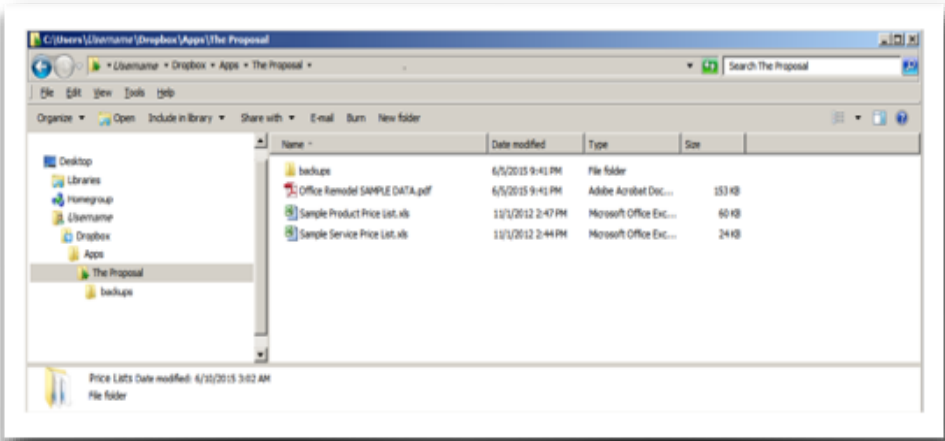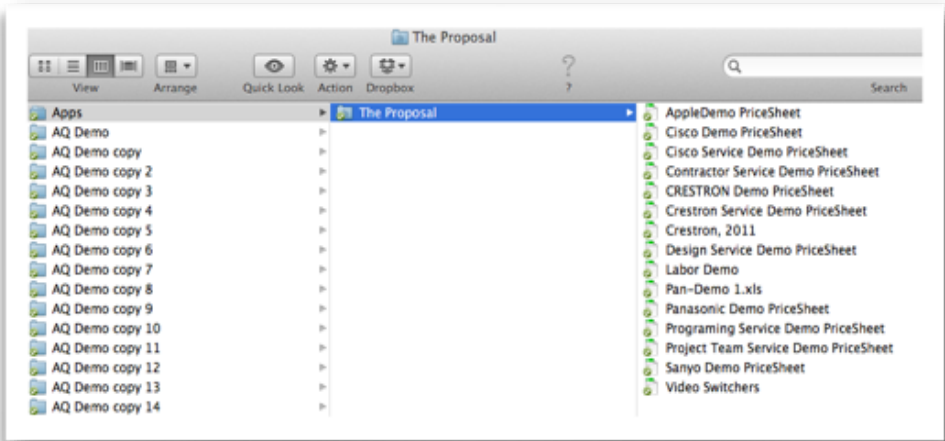
F1. All price lists should be saved in Dropbox: /Apps/The Proposal/

F2. Select "Allow" to access your price lists within dropbox.

F3. Select "Save" after you have loaded a new price list.

- In The Proposal, open a new or active proposal.

- Select the "Settings" button & then select "Manage Price Lists".

- Select the "Dropbox" button on the right side of the window.

- The Dropbox app will open and ask for you to allow The Proposal to access your Dropbox files. Select "Allow" if you approve this action (if you do not approve it your Dropbox files will not work). See example F2.

- You will be returned to Manage Price Lists window within The Proposal after you select "Allow" in Dropbox. You should now see all of your new price lists in the list wheel on the right.

- To add a price list to Products or Services, select the price list you would like to add then select "Load List". After the list has been added to the database select "Save Results". See example F3.

- You should now see all of your new price lists within the list wheel on the left hand side under the section you choose (Products or Services).

G1. Use this window to add and edit your price lists.

Create Your Own Price List

To create your own custom price list, first select the "Add" button on the Manage Price Lists window. The Editing Price List window will appear and you're now ready to start creating your new price list. See example G1.

• Select "Add" on the Manage Price List window.

• Title the new price list in the "Price Sheet Name" text box.

• Select "Product or Service" for the type of price list you are creating.

• Select the "Add Item" to start adding items to your price list.

• Once you have filled out the item's information on the right hand side of the screen, select "Add Item" to add another item to the list. Continue this process to populate your price list.

• When the list has been completed, select "Save" to add it to your price list wheel you chose before (Product or Service).

Tip: If you are adding multiple items that only differ a little from each other (different colors or sizes, for example) then you can select "Duplicate Item" to copy all of the selected item's information and save time by just changing what you need to.

Use Edit Types to change the labels "Products" and "Services" if desired - for example, use "Material" and "Labor". This may be appropriate for certain lines of business.

How To Edit Price Lists

- Select the "Settings" tab.

- Select "Manage Price Lists"

- Highlight the price list that you would like to edit and press "Edit" at the bottom of the Manage Price Lists window. From here, this works exactly like adding a new list.

- Find the item that you would like to edit. You can ether scroll down the list of items or use the search bar at the top of the page. Select the item.

- Update the item and select "Save" if you are done editing the price list. If there is more then one item that you would like to edit, then select the next item from your list and the changes you made in the last item will be saved.

- To exit the Editing Price List page, select "Save" or "Cancel".

How to Create a Price List in Excel

This is one of the best features of The Proposal app - importing your dealer or company price lists. We have included a sample price list within the app for you to practice with. You can also visit our website, www.matrixis.com to download the sample price list and view in Excel. Let's get started...

Open your price list in Microsoft Excel. All imported prices list must be .XLS files. You can have multiple worksheets within a price list. Each worksheet may have multiple price lists stacked vertically.

The price list should be set up in rows of columns, like a normal Excel table configuration. Keep in mind that there can be no empty columns separating filled in columns.

Sample Product Price List

Product/Service	Manufacturer/Vendor	List Name	Model	Description	PRICE	COST	Mark Up	Mark Up Type
PRODUCT	Itty Bitty Semiconductor Devices	Sample Price List	TRUS QC-1524-BT	High Definition Time Delay	$1,299.00	$860.78	$438.22	DOLLAR
PRODUCT	NewSoundSystems	Sample Price List	TRUS QC-1524-SW	Analog Audio expansion module	$199.00	$131.87	$67.13	DOLLAR
PRODUCT	NewSoundSystems	Sample Price List	TRUS QC-2336-BT	Digital Audio expansion module	$299.00	$198.13	$100.87	DOLLAR
PRODUCT	NewSoundSystems	Sample Price List	TRUS QC-2336-SW	Analog Audio expansion module	$199.00	$131.87	$67.13	DOLLAR
PRODUCT		Sample Price List	TRUS PH-0006	Broadcast Server Package	$249.00	$165.00	$84.00	DOLLAR
PRODUCT		Sample Price List	TRUS PH-S16	Broadcast Server Package	$399.00	$264.40	$134.60	DOLLAR
PRODUCT	Ascend Studios	Sample Price List	TRUS PH3-7J	Three Channel server	$199.00	$131.87	$67.13	DOLLAR
PRODUCT	Ascend Studios	Sample Price List	TRUS PH3-8	Four Channel server	$599.00	$396.93	$202.07	DOLLAR
PRODUCT	Ascend Studios	Sample Price List	TRUS PH5-10	for 3 channel MAXX servers only	$649.00	$430.06	$218.94	DOLLAR
PRODUCT	Ascend Studios	Sample Price List	TRUS PH7-12	for MAXX-2400-SD server only	$1,199.00	$794.52	$404.48	DOLLAR
PRODUCT	Ascend Studios	Sample Price List	TRUS PH8-12	for MAXX-2400-SD server only	$999.00	$661.99	$337.01	DOLLAR
PRODUCT	(best price)	Sample Price List	TRUS CC-096	Standard Definition Time Delay	$399.00	$264.40	$134.60	DOLLAR

H1. All product price lists need to have a layout similar to this.

Column Settings for a Product Price List

The columns are recommended to be in the following order for a PRODUCT price list. See Example H1.

- Product/Service, must use PRODUCT (or HW/Labor, or Hardware/Labor)
    - Example: PRODUCT
- Manufacturer/Vendor (or Manufacturer, or Vendor, or Source) (this is optional)
    - Example: ACME Products
- List Name (or Price List Name)
    - Example: Sample Product Price List
- Model (or Model Num, or Model Number, or Name, or Item Name)
    - Example: TRUS QC-1524-BT
- Description (or Title)
    - Example: High Definition Time Delay
- Price (or Net, or Net Price) (this is optional; the program will calculate it if cost and mark up are known)
    - Example: $1,299.99
- Cost (or Cost Each)
    - Example: $860.78
- Mark Up (or Mark-Up, or Markup)
    - Example: $438.22, fixed mark up using the DOLLAR setting
- Markup Type, PERCENT or DOLLAR
    - Example: Fixed dollar amount
- Unit (or Lot, or Lot Size)
    - Example: EACH
- Sales Tax (or Tax)
    - Example: (blank):   Use default sales tax for a proposal, from SETTINGS
    - Example: 0.00:   Item is tax exempt
    - Example: 0.06:   Item receives six percent sales tax, UNLESS CLIENT IS TAX EXEMPT

Column Settings for a Service Price List

Sample Service Price List

Product/Service	Manufacturer/Vendor	List Name	Model	Description	PRICE	COST	Mark Up	Mark Up Type	Unit	Sales Tax
SERVICE	Matrix Information Systems	Sample Service List	C++ PROGRAMMER	Programmer to Write & Design C++ code	$195.00	$95.00	$ 100.00	DOLLAR	HOUR	
SERVICE	Matrix Information Systems	Sample Service List	FLASH PROGRAMMER	Programmer to Write & Design Flash	$152.13	$85.00	$ 67.13	DOLLAR	HOUR	
SERVICE	Ascend Studios	Sample Service List	TECHNICIAN, LEVEL 1	Install Speakers and Wall Displays	$42.00	$35.00	20.00%	PERCENT	HOUR	
SERVICE	Ascend Studios	Sample Service List	TECHNICIAN, LEVEL 2	Install and Wire Audio Video Racks	$122.13	$55.00	$ 67.13	DOLLAR	HOUR	
SERVICE	Ascend Studios	Sample Service List	TECHNICIAN, LEVEL 3	Install Systems and Program DSP Files	$82.50	$75.00	0.1	PERCENT	HOUR	
SERVICE	A-1 Electrical Contractors	Sample Service List	EC, HOURLY	Electrician Contractor	$205.00	$110.00	$ 95.00	DOLLAR	HOUR	
SERVICE	A-1 Electrical Contractors	Sample Service List	EC, DAILY	Electrician Contractor	$600.00	$450.00	$ 150.00	DOLLAR	DAY	
SERVICE	Matrix Information Systems	Sample Service List	WEBSITE DESIGN	Design & Load New Websites	$90.00	$45.00	$ 45.00	DOLLAR	HOUR	
SERVICE	Ascend Studios	Sample Service List	HELP DESK SUPPORT	Remote Support on Active Systems	$100.00	$25.00	$ 75.00	DOLLAR	FIXED	

H2. All service price lists need to have a layout similar to this.

The columns are recommend to be in the following order for a SERVICE price list. See Example H2.

- -Product/Service, must use SERVICE (or Labor)
  - Example: SERVICE
- -Manufacturer/Vendor (or Manufacturer, or Vendor, or Source) (this is optional)
  - Example: ACME Products
- -List Name (or Price List Name)
  - Example: Sample Service Price List
- -NAME (or Item Name, Model)
  - Example: C++ PROGRAMMER
- -Description (or Title)
  - Example: Programmer to Write & Design C++ Code
- -Price (or Net, or Net Price)
  - Example: $195.00
- -Cost (or Cost Each)
  - Example: $95.00
- -Mark Up (or Mark-Up, or Markup)
  - Example: $100.00, fixed mark up using the DOLLAR setting
- -Markup Type, PERCENT or DOLLAR
  - Example: Fixed dollar amount
- -Unit (or Lot, or Lot Size)
  - Example: EACH, HOUR, DAY or FIXED
- -Sales Tax (or Tax)
  - Example: (blank):   Use default sales tax for a proposal, from SETTINGS
  - Example: 0.00:   Item is tax exempt
  - Example: 0.06:   Item receives six percent sales tax, UNLESS CLIENT IS TAX EXEMPT

About The Proposal

Want to know more about The Proposal or how to contact us? It's all here! We have also listed the terms & legal items for the app here as well. Please let us know what you think!

App Color Button

This option allows you to select a new highlight color for The Proposal's title bars and selected user interface elements. Use this for a little variety or perhaps to match your corporate theme.

Drag the component sliders left and right to adjust the color, or use the stepper buttons for small changes. Press OK to use the new color, Cancel to retain the previous color, or Default to restore the original app colors.

Note: this has NO affect on your proposals - it is just an app aesthetic option.
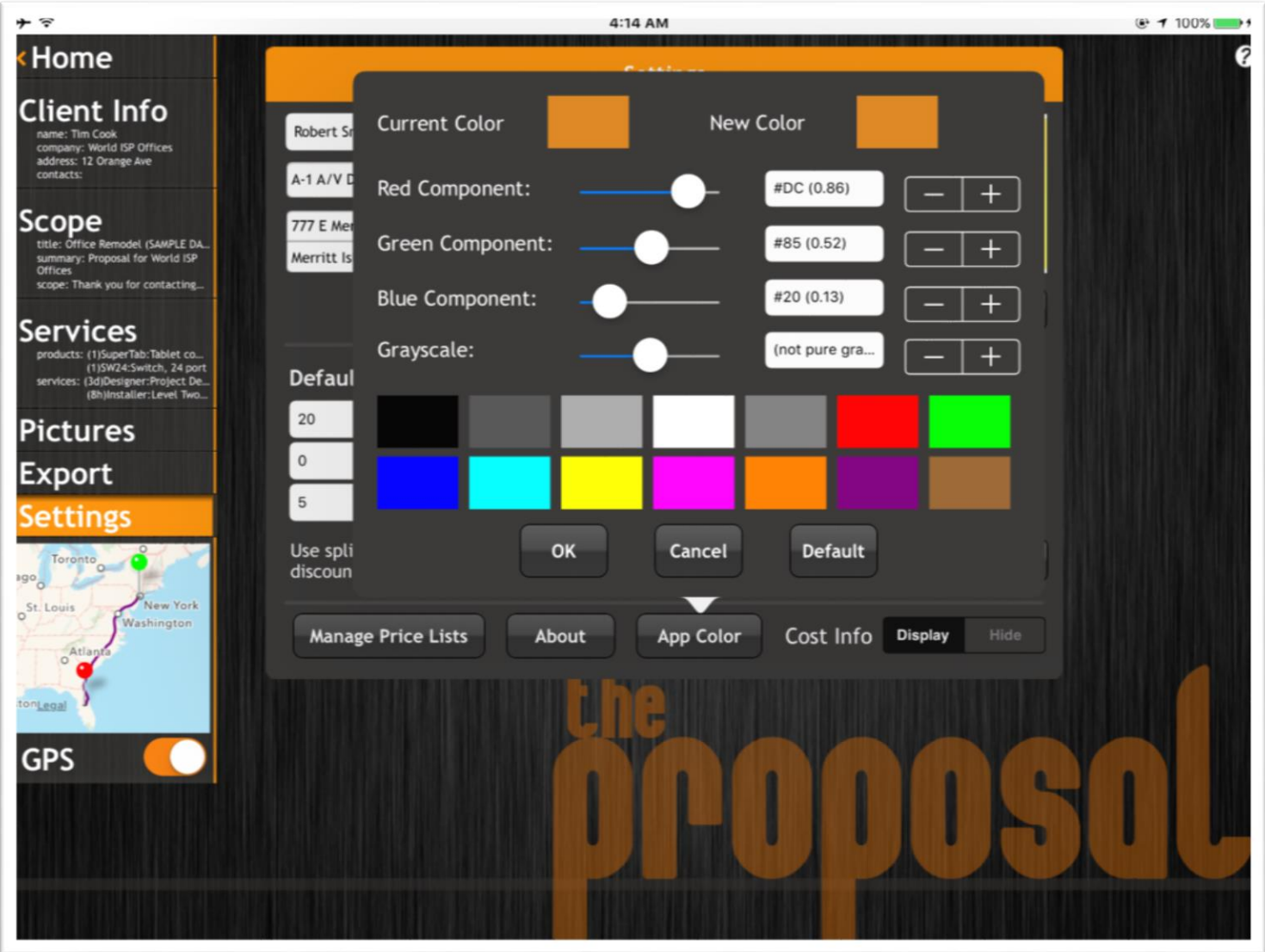
Cost Info Button

This option allows you to hide all internal information like mark ups, profits and costs from the app. This is a great feature if you are creating your proposal in front of your client. If you would like to hide all of your internal information, select "Hide". To show all of your internal information again, select "Display".

Frequently Asked Questions (FAQ):

How do I:

Delete a proposal? In the welcome screen/selection list, swipe the proposal to be deleted left or right. A red delete button will appear.

Copy a proposal? In the Scope screen, edit the title. When you exit the field, the app will ask you whether to copy the proposal or just change the title.

Edit a proposal with a word processor? Export it to an RTF file. Saving to Dropbox is easiest, if you intend to edit it with a desktop PC/Mac. Open the RTF file using a RTF-compatible word processor such as Microsoft® Word or OpenOffice.Org writer. Save and print using the word processor (there is no automatic way to upload a word processor document into The Proposal, other than copying and pasting piece by piece.

Sign a proposal electronically? While previewing the proposal, press the "hand holding pen" button on the toolbar at top of screen. The signature options screen will display, allowing you to turn on/off the provider and client signatures, specify text to appear above the signature, and pop up a signing screen where you can use your fingertip or a stylus to sign directly on the iPad screen.

Edit a scope preset? You cannot edit a preset after saving it, but you can swipe across it to delete it, and then add a new preset with the desired text.

How are prices calculated?

PRICE = ((SUM (COST + MARKUP) * QUANTITY) - DISCOUNT)   *   (1 + SALES TAX RATE)

Each item or task in the proposal becomes a line item in the proposal's pricing area. The value shown is equal to (cost plus mark up) times quantity. The line items are added to create a subtotal. The discount is subtracted from the subtotal, then sales tax is added to (subtotal minus discount). The result is the grand total.

Mark ups will normally be provided in the proposal's settings, as a percentage. This mark up may be set for a specific item in its price list, overriding the proposal's global mark up settings. Individual item mark ups may be a fixed dollar amount instead of a percentage, if desired. Further, mark up may be specified in a proposal's items, overriding both the proposal setting's mark up and the price list mark up.

Sales taxes are handled very much the same as mark ups. Each proposal has a default product sales tax rate, and a default service tax rate. As with markups, you can override any item's tax rate by saving a different tax rate in the item's price list before adding the item to your proposal, or in the proposal by tapping the proposal item from the Services Tab, and specifying a tax rate for the item. Taxes can be turned off in two ways: turning them off in the Settings Tab, or designating the client tax exempt in the Client Info Tab. Note taxes can be turned off for products, services, or both.

Discount is more complicated, to accommodate a variety of discount methods. Discounts are set in the Settings Tab, and cannot be adjusted elsewhere. Discount may be specified independently for products and for services (the "split" option), or a single "combined" discount may be specified for all items. Discounts may be specified as a percentage of each item's price, or as a fixed amount which will be divided proportionally among all items. When a fixed discount is divided proportionally, the discount is first allocated against mark ups, so no item will be sold for a loss until all markups are exhausted. If the discount exceeds the total of markups, the remaining discount is allocated proportionally to item price. Finally some items may be adjusted minimally to compensate for round off errors.

IMPORTANT NOTE: The Proposal is not smart enough to know your local laws and customary practices. You should work with the various price settings and calculation options on the Settings Tab, and the pricing values in your price sheets, to make sure your proposals are creating the proposal prices you need. The Proposal is a flexible tool, but not an accountant - it is up to the user to adjust settings for correct prices, mark ups, discounts, and taxes.

I am encountering a crash in the application. When will it be fixed?

We receive some anonymous data about user crashes, but it is often insufficient to determine what caused the crash. We welcome any and all feedback about crashes, so we can prevent them as promptly and completely as possible. Send an email to support@matrixis.com describing what screen you were on and what you did just prior to the crash, and it will help us fix it ASAP. We also appreciate and listen to new feature suggestions!

I have a long price list I would like to load, is there a quick way?

You will need to save the price list into a spreadsheet file, in Microsoft Excel 97 (.xls) format. The spreadsheet columns must be titled and formatted as described previously (see illustrations H1 and H2, and neighboring text). Copy the file to your iPad using iTunes, or put it into a Dropbox account in a directory named /Apps/The Proposal/, and use the Price List Manager Screen (under the Settings tab) to load the list. If it does not load, inspect your spreadsheet carefully, all columns must be present, with no empty columns between them, and with the headers exactly as shown in H1 and H2.

Can I export my price list to Excel for updates/additions?

This is not supported at this time. A technically savvy user could extract the data from the items table in the app's SQLite database (theproposal.sqlitedb, in The Proposal's documents folder which is accessible via iTunes file sharing), using ODBC or off the shelf SQLite client apps, and insert it into a spreadsheet.

Does The Proposal support international users?

Only in a limited fashion. The app's user interface is all in English, and the proposals produced by the app include boilerplate English. The app does check the current regional settings and adapts the date and number formats, and currency symbols to the current language and nationality. This should provide reasonable output for UK, Australian, and other English-

language nationalities, but the effect in Spanish, Dutch, etc. would be rather poor without a full translation, and we would expect a dismal failure in a non left-to-right written language.

How can I use a Bill of Materials?

The Bill of Materials is an XML file made specially for Excel 2003 and later. Excel or OpenOffice.org Calc can open this file just like a regular .XLS file. Once you open it in a spreadsheet, you can edit it, copy and paste into another app, or save it into a normal .XLS, .XLSX, .CSV, etc. format to use by other applications.

Can I display the manufacturer/vendor in my proposals?

Manufacturer/Vendor can be displayed by going to iPad Settings, finding "The Proposal", and turning on the setting "Prefix model in line items with manufacturer?"

I attached pictures and they are grainy or pixelated - did I do something wrong?

Probably not. The Proposal makes a size versus quality decision when importing pictures, and for any picture exceeding 70,000 bytes (JPG size), it resizes the picture to fit within an 800x600 (or 600x800) box. This does a great job of shrinking the storage requirement but may reduce output quality. Furthermore, if the picture is shrunk to fit 800x600, then cropped by the user to a smaller size, the two steps compound the quality loss. You may achieve better results by resizing and cropping pictures before importing them into the proposal.

The proposal crashes or displays an error when trying to access my Dropbox. What can I do?

Occasionally The Proposal loses its ability to connect to Dropbox for undetermined reasons (hopefully improved greatly in version 3.0.0). This is normally fixed by either shutting down and restarting your iPad (hold the power button down until the "Slide to power off" tool appears), or by resetting the dropbox credentials. The latter is performed by opening the Settings tab, tapping "Manage Price Lists", and tapping the "Reset Credentials" button.

Version History:

1.0	Jan. 24, 2012	Initial Release.
1.0.1	Jan. 30, 2012	Bug fixes (contact import).
1.0.2	Feb. 25, 2012	Limited international number, date, and currency symbol support based on device locale settings.
		Empty vs. zero mark up difference implemented, so a user could specify a zero mark up for a specific item.
		Suppress empty sections of price summary.
		Suppress page footer on cover page of proposal.
		Allow 255 characters in item descriptions.
1.0.3	Feb. 25, 2012	Limited international support: use currency, decimal, and date formats from device locale.
		Revise use of markup values: zero means zero, blank means use global default from Settings screen.
		Suppress empty sections in price summary.
		Suppress page footer on cover page of proposal.
		Extend item description limit to 255 characters.
1.0.4	Feb. 29, 2012	Fix crash when generating PDF from proposal with NULL (empty) item description.
1.0.5	Mar. 21, 2012	Bug fixes in price list import; add Crittercism crash reporting library to monitor app stability.
1.5	May 25, 2012	Export proposal to RTF file (on device or to Dropbox).

Searchable, sortable proposal selection list.

Adjustable edit size for scope text.

Capture signatures in preview screen.

Various "save as default" options to eliminate redundant boilerplate field entry.

Undo button in scope editor.

1.5.1	Jun. 4, 2012	Minor bug fixes - keyboard shifting and percent value save error.
1.5.2	Sep. 26, 2012	Round-off fix for fixed-price discounts.
		iOS 6 compatibility fixes.
		Retina display update (help screens are slow).
		Automatically save a proposal backup when the user locks the proposal.
1.5.3	Nov. 13, 2012	Split sales tax setting into product and service settings, with on/off switch for each.
		Split discount settings into separate product and service settings.
		Add switches to turn output of line item details off for products and for services.
		Revise app code to use ARC memory management.
		End of iOS 4.x compatibility.
		Revise service screen to allow maximizing product or service items (accordion up/down effect).
		New add item interface to allow inserting a new item directly into a proposal (bypassing price sheets).

Add ability to add new items to price sheets from service screen.

Add export function to write a Bill of Materials to a file, on iPad or in Dropbox, which can be opened with Excel or OpenOffice.org Calc. This summarizes the proposal details and lists items row by row with cost, mark up, discount, quantity, etc. - suitable for development of invoices, shipping lists, etc.

Add preview button to open PDF document in another app on the iPad.

1.5.4	Nov. 20, 2012	Help updates and signature button bug fix.
1.5.5	Nov. 27, 2012	Fix for proposal preview crashing under iOS 5.1.1.
1.5.6	Dec. 9, 2012	Fix for price list editor crashing under iOS 5.x only.

Fix number entry error in proposal item editors: if you clear the current entry and enter ".25", "025" is entered instead.

1.6.0	April 7, 2013	Expand sales tax fields to four decimal digits, allowing taxes like 8.1875%.

License key fix for Google Maps.

Minor bug fixes and stability improvements.

2.0.0	May 13, 2013	Picture Attachments - add picture pages to the end of your proposal, using one of three picture layouts. Import from photo library, file (local or dropbox), or web. Rotate and crop pictures.

Email Templates - create email body templates to shorten process of sending a proposal. Embed proposal fields for contact info, title, summary, etc. Use plain text or HTML for email format.

Bug Fix: some default setting values are not implemented in new proposals: taxes on/off and proposal discount split or combined.

Bug Fixes: "quick add" would not add to proposal, and created tax-exempt service items which could not be made non-tax exempt without using price list editor.

Customize app color - this changes the orange highlighting throughout the app to a user-selected color.

Custom font family - allows you to import TrueType font faces and define font families using internal and/or imported font faces.

Backups - manually or automatically back up the application's database to local iPad storage or Dropbox. Restore a backup. Set up old backup retention policy.

2.1.0 May 23, 2013   Fix app to copy default signature terms and inclusion status into new proposals.

2.2.0 June 7, 2014   Rebrand to reflect Matrix full ownership of app. Add several options to the Services Tab, to govern output of item lists, item prices, subtotals, discount, sales tax, and total. Internal updates for compatibility with iOS 7 and Xcode 5. Revised to use TestFlight service to capture anonymous crash and usage data for app error detection and improvement.

2.3.0 June 26, 2014   * * * IMPORTANT NOTICE * * *

This release of The Proposal (2.3) is planned to be the FINAL release compatible with iOS 5.x and future updates will require iOS 6 or higher.

If you use an iPad 1 or choose not to upgrade iOS on newer iPads, you will be unable to update The Proposal after this release.

We apologize for any inconvenience while The Proposal keeps up with the times!:-)

Fixed a significant bug in output generation which was causing incorrect calculations due to use of simplified settings fields from earlier versions of The Proposal. This was resulting in incorrect calculations of taxes and discounts under version 2.2.

Revised Output Options feature on the Services Tab, to make no changes to proposal pricing. These options only affect what is displayed or not displayed. Turning off visibility of taxes will not lower your proposal total, nor will hiding discounts increase the total. Updated the totals area to hide taxes or discount when these are turned off in output options.

Fixed a broken dollar/percent button for markup type in the Services Tab, add item screen.

Fix cropped email template selection when sending from portrait-oriented preview screen.

Fix a crash occurring when importing .xls format price lists saved by Apple Numbers.

Implemented list editing for proposal items on the services screen, allowing drag and drop item reordering and simpler item removal.

Removed scale and crop step from the operation to import a photo into your proposal's picture attachments. This was always cropping some pictures which did not have typical photo aspect ratios. Pictures may be cropped after import, using the picture edit menu.

Added capability to turn quantities (and units) on and off in a generated proposal PDF (similar to the price functionality of the prior release).

Changed the long date format on the cover sheet, from "January 1st, 2000" to "January 1, 2000."

Added a capability to set a branding logo on the main screen. This is displayed when no tabs are open (Scope, Services, etc).

2.3.1	June 28, 2014	Bug fix for editing items in proposal - changes made by tapping an item on the right column of the services tab were not being saved (silently failing). Still iOS 5.x compatible.
2.3.2	August 19, 2014	Bug fix for editing items in price lists - changes made by editing list with price list manager or loading a list with merge option were not being saved (silently failing). Fix a bug where selecting an picture from the iPad photos always changed the app background picture to match it, even when setting a client or provider logo or picture attachment. Still iOS 5.x compatible.
2.3.3	Dec. 16, 2014	Bug fixes: Opening help under iOS 8 was crashing app. Quick adding an item from the services tab to your proposal and/or to a price list was setting the new item's markup to blank, resulting in proposal default markup being used. Quick add item type switch (product or service) and service unit type did not display properly under iOS 8. The Proposal 2.3.3 is still iOS 5.x compatible.
2.4.0	July 7, 2015	Maintenance release: Minor bug fixes and performance enhancements. Revised for iOS 8. Runs in 64-bit mode on newer devices. No longer compatible with iOS 5-7. Proposal search function is faster and allows typing while searching. Dropbox and PDF libraries have been updated. Backing up displays progress while saving to Dropbox. Various screen rotation and keyboard sizing bugs have been addressed. In particular, now keyboard predictions should not overlay input fields.
2.4.1	July 30, 2015	Bug fix release: SQLite database library was failing intermittently in version 2.4.0, so regressing to the stock SDK 8 version of SQLite.
2.4.2	August 3, 2015	Bug fix release: fix lingering bugs in background searching/loading of proposals list, which were resulting in crashes and/or an empty proposal list. Also fix signature box background turning black on some devices upon first touch.

2.4.3	Sept. 10, 2015	Bug fix release: Fix a bug causing a crash when exporting a proposal to an RTF document, when the proposal uses a multi-section footer. Fix a bug which disabled the email button on the proposal preview screen.
2.4.4	Sept. 29, 2016	Bug fix for iOS 10. Importing a contact crashes app, due to new rules for accessing address book contacts. Updated map functions to use Apple MapKit instead of Google Maps, to fix occasional failures as Google updates their map service. Some cosmetic updates to fix glitches under iOS 9 and 10.
2.4.5	June 26, 2017	Update to support new Dropbox requirements (Dropbox v2 API). Dropbox changed how apps need to talk to them and now they are are turning off support for the old way – an internal coding issue. Price list import now works from a subdirectory of /Apps/The Proposal/ in your Dropbox.
2.4.6	Dec. 8, 2018	Bug fix for iOS 12: proposals were truncating bottom lines of text in price table cells (in PDFs for preview, save, or email) when using certain low-descender fonts.

The proposal search function is enhanced with match highlighting. Also fixed a bug causing crash when typing fast in the search box.

Relaxed import requirements for price sheets a bit, to allow "each" as a unit, and different capitalizations and plural forms of material, labor, service, product, and markup in the price sheet column headers – just to make simple errors less likely.

Fixed a file selection bug: browsing subdirectories failed when opening a file. i.e. user could open a file in backups/ but not in backups/2016/ - navigating into 2016 created an error, with no way out but to cancel. |

Updated documentation for deleting a proposal – you must now slide the title left to display the delete button, not in either direction.

Fixed an upside-down launch screen issue, which was appearing when starting the app with the iPad locked in portrait orientation.

Altered database restoration behavior to begin a new backup cycle upon loading a new database. It was typically prompting to backup immediately (depending on the settings and last backup date recorded in the new database).

Fixed an occasional instance of corruption of settings. We also added code to detect settings table corruption and repair it if found.

Future:

We are working on a purchasable enhancement to allow users to send proposals, price lists, settings, bundles, email templates, and presets from one user to another via email or Dropbox. Bundles will be a new feature, available for free, to group a set of products and/or services under a name for simple bulk addition into new proposals.

Terms: