



Quick Start Guide

From sign-up to your first AI-generated proposal in 15 minutes

v1.2 | May 2026 | sourcegent.com

Welcome to SourceGent

This guide walks you through six steps to generate your first proposal.

Step	What You Do	Time
1	Create your account and verify your email	2 min
2	Set up your company profile	3 min
3	Upload documents to the Knowledge Vault	2 min
4	Set up your rate library (optional)	3 min
5	Import or upload an opportunity	2 min
6	Generate, review, price, and export your proposal	5 min

Step 1: Create Your Account

Go to sourcegent.com and sign up. Verify your email via the confirmation link. All accounts include a 48-hour free trial of the Starter plan. No credit card required.

Step 2: Set Up Your Company Profile

Navigate to Company Profile. Fill in company name, overview, core services, differentiators, past performance summary, and NAICS codes.

Shortcut: Upload documents to the Knowledge Vault first, extract knowledge, then use Build Profile to auto-populate most fields.

Step 3: Upload Documents to the Knowledge Vault

Go to Knowledge Vault. Drag and drop company documents. Click Extract Knowledge, review the extracted items, approve accurate ones, then use Build Profile to populate your profile. Bulk extraction shows a sequential progress banner so you can see exactly which document is currently processing.

Step 4: Set Up Your Rate Library (Optional)

If you plan to build proposal pricing, navigate to Pricing in the sidebar. This step is optional but recommended for government bids and any proposal requiring cost volumes.

- **Labor Rates:** Add your billing rates one by one, or bulk import from a spreadsheet (.xlsx or .csv). Each rate needs a category name, hourly rate, and type (Direct, Loaded, or GSA Schedule).
- **Indirects:** Set your fringe, overhead, G&A, and fee percentages. Mark defaults for each type.
- **ODCs:** Review the auto-seeded Other Direct Cost categories (travel, materials, equipment). Edit or add as needed.

Tip: Default indirect rates auto-fill on new pricing models, so setting them up once saves time on every future proposal.

Plan note: Starter plans support draft pricing and the rate library. To approve, lock, or amend a pricing model (and to use advanced mode with multi-period fringe/overhead/G&A buildups), you need Pro or higher.

Step 5: Import or Upload an Opportunity

Government bids: Import from SAM.gov by URL/GUID or use the Discover tab.

Grants: Search and import from Grants.gov.

Business proposals / Vendor questionnaires: Upload the document directly.

Step 6: Generate, Review, Price, and Export

From the Command Center, click Generate Proposal.

During generation:

- Sections stream in real-time. A global banner tracks progress.
- The proposal is automatically scored on completion.

After generation:

- Review sections in the Proposal Editor. Fill in [PLACEHOLDER] markers using the Prev/Next navigation.
- Check the Score Page for your grade and prioritized improvement list. Mark any category as N/A if it does not apply to your submission.
- Click the Pricing button to build your cost model: add labor and ODC line items, set fee percentage, and the calculator computes totals automatically. On Pro or higher, lock the model when ready to capture an immutable snapshot.
- Use the Requirement Matrix to verify coverage and the Attachment Checklist to track required documents. The checklist supports a bulk 'Mark all as' action.
- Click Export to download as DOCX or PDF.

What's Next

- **Proposal Review:** Upload a completed proposal for AI procurement persona scoring with native PDF reading.
- **Requirement Matrix:** Track every requirement with risk levels and deep-link fixes.
- **Attachment Checklist:** AI-generated list of required submission documents.
- **Past Performance:** Import federal past awards from USASpending.gov.
- **Content Library:** Build reusable content blocks for faster proposals.
- **Analytics:** Win/loss patterns and AI-driven improvement recommendations.
- **Pipeline:** Kanban board from Draft through Won/Lost.
- **Deadline Calendar:** Urgency-coded calendar with daily focus panels.
- **Rate Library:** Build your pricing foundation with labor rates, indirects, and ODCs.
- **Pricing snapshots:** Lock and amend pricing models to keep an auditable version history.

Need help? The AI onboarding assistant (floating chat widget) is available on every page. Visit the FAQ page from the sidebar for common questions.

Glossary of Terms

This glossary defines key terms used throughout SourceGent, organized by feature area.

Platform and Account

SourceGent

AI-powered proposal writing platform for government bids, grant applications, business proposals, and vendor questionnaires.

Dashboard

The main landing page after login. Shows prioritized proposals, next actions, score trajectories, and pipeline summary.

Sidebar

The left navigation panel providing access to all sections: Dashboard, Opportunities, Proposals, Pipeline, Deadlines, Knowledge Vault, Content Library, Past Performance, Pricing (Labor Rates, Indirects, ODCs), Proposal Review, Analytics, FAQ, Billing, and Company Profile.

Dark Mode

An alternate visual theme with dark backgrounds. Toggled via the sun/moon button in the sidebar. Preference is saved locally and OS preference is auto-detected.

Onboarding Assistant

A floating AI chat widget on all authenticated pages powered by our custom AI system. Adapts to your current page, plan tier, vault status, and submission progress. Rate-limited to 20 messages per hour.

Onboarding Milestones

Tracked events: vault_uploaded, vault_processed, first_submission_created, first_section_generated, first_section_edited, sam_viewed, and onboarding_completed. Power funnel analytics and personalize the assistant.

Company Profile

Your organization's details (EIN, CAGE, UEI, overview, services, differentiators, past performance, NAICS codes). Feeds directly into AI proposal generation.

Multi-Company Support

The ability to create and switch between multiple isolated company profiles. Data is fully separated between companies.

48-Hour Free Trial

A trial period on the Starter plan included with every new account. No credit card required.

Opportunities and Analysis

Opportunity

A solicitation, RFP, grant NOFA, client brief, or questionnaire you are considering responding to.

RFP

Request for Proposal. A formal document from a buyer describing requirements. Used broadly in SourceGent for any opportunity document.

SAM.gov

The U.S. government's System for Award Management. SourceGent imports government bid solicitations directly by URL or GUID.

SAM.gov Discover

A search tab that queries SAM.gov for active solicitations matching your NAICS codes and keywords. Results are cached, with a last-searched timestamp shown.

Grants.gov

The U.S. federal grants portal. SourceGent can search and import grant NOFAs with eligibility matching.

Submission Type

One of four categories: Government Bid, Grant Application, Business Proposal, or Vendor Questionnaire. Each has its own template, scoring weights, and enrichment.

Command Center

The detailed view of a single opportunity, showing the Decision Strip, Action Center, Strategic Intelligence tabs, Requirements preview, and sidebar.

Submission Decision Strip

A card at the top of the Command Center showing READY, RISKY, or NOT READY verdict with readiness bar, confidence percentage, and blocker count.

Action Center

A ranked list of actions on the opportunity page, sorted by severity and impact.

Next Best Action (NBA)

The single highest-priority recommended action with projected point gain.

Strategic Intelligence

Tabbed panel showing Scope, Strategy, Evaluation, Competition, and Risks from AI analysis.

Competitor Intelligence

Data about likely competitors pulled from USASpending.gov for government bids.

Past Awards

Your company's federal contract history from USASpending.gov. Can be bulk-saved to Past Performance.

Decision Field

A per-opportunity selector: Pursue, Watch, or Pass.

NAICS Code

North American Industry Classification System 6-digit code. SourceGent provides a searchable picker with keyboard navigation.

AI Analysis

Automated extraction of requirements, evaluation criteria, win themes, buyer priorities, scope, and risks from an opportunity document.

Proposals and Generation

Proposal

A generated response to an opportunity, organized into sections defined by the submission type template.

Proposal Section

An individual part of a proposal (e.g., Executive Summary, Technical Approach, Pricing). Sections can be reordered or deleted.

AI Generation

Our AI system writes all proposal sections using your company profile, Knowledge Vault, and similar past proposals as context.

Background Generation

Proposals are generated in background batches of 3 sections. Sections stream in via Supabase Realtime.

Streaming Regeneration

Rewriting a single section with word-by-word SSE streaming. Textarea shows a blue border during streaming.

Placeholder

A marker like [PLACEHOLDER: contract number] inserted by the AI where it needs specific details from you.

Optimistic Locking

Concurrency control: the server checks updated_at before saving. If another user modified the section, the save is rejected.

RFP Context Sidebar

Right-side panel in the editor showing Win Themes, Buyer Priorities, Evaluation Criteria, Key Requirements, and Scope Summary.

Evidence Panel

Panel pulling relevant entries from Knowledge Vault, Past Performance, and Content Library for reference while editing.

Smart Content Reuse

The AI finds similar past proposals by keyword overlap and uses them as reference during generation.

Deep-Link

A URL navigating directly to a specific proposal section with amber highlight, used by 'Fix this' buttons.

Generation Banner

A global notification bar tracking generation progress, errors, and retry options.

Proposal Template

A saved section structure reusable for future proposals. Scoped to the active company.

Pricing Module

Pricing (Sidebar Group)

A sidebar navigation group with three children: Labor Rates, Indirects, and ODCs. Available on Starter plans and above; approve/lock and amend capabilities require Pro or higher.

Labor Rate

An hourly rate for a specific labor category (e.g., Senior Software Engineer, \$185/hr). Types: Direct, Loaded, or GSA Schedule.

Labor Rate Status

The state of a labor rate: Approved (active, available for pricing), Pending Review (imported but not yet approved), or Archived (soft-deleted, not available until restored).

Rate Library

The collective set of labor rates, indirect rates, and ODC categories maintained per company. Plan-gated: Free blocked, Starter 50, Pro 250, Agency unlimited labor rates.

Bulk Import

Upload labor rates from an .xlsx or .csv file. A two-step flow: upload and parse, then review each row before approval. Imported rows default to Pending Review status.

Import Review

Step 2 of bulk import. Each row shows status (Ready, Has Warnings, Errors, Duplicate). Rows with errors cannot be selected. Approved rows become active labor rates.

Indirect Rate

A percentage applied on top of direct labor: fringe (benefits), overhead, G&A, fee, material handling, or subcontract handling. Grouped by rate type with a default per type.

Fringe Rate

An indirect rate covering employee benefits (health, retirement, etc.) applied as a percentage of direct labor cost.

Overhead Rate

An indirect rate covering facility and operational costs applied as a percentage of direct labor plus fringe.

G&A Rate

General and Administrative rate, an indirect percentage covering company-wide management and administrative expenses.

Fee

The profit margin applied to pricing. Can be a percentage of the subtotal or a fixed dollar amount, but not both.

Material Handling

An indirect percentage applied to material ODCs to cover procurement and warehousing costs.

Subcontract Handling

An indirect percentage applied to subcontractor costs to cover management and oversight.

ODC

Other Direct Cost. Non-labor costs such as travel, materials, equipment, and subcontractor expenses. Templates with default costs, unit types, and markup percentages.

ODC Category

A reusable template for a type of Other Direct Cost (e.g., Travel, Materials, Equipment). Each has a default cost, unit type, and optional markup percentage.

Pricing Model

A pricing structure linked one-to-one with a proposal. Contains fee configuration, calculator version, and computed totals. Single active model per proposal; history preserved as locked snapshots.

Pricing Snapshot

An immutable copy of a pricing model captured at lock time. Snapshots are retained permanently and always route to their original calculator version via the calculator version registry, ensuring reproducibility.

Pricing Lock

The action of locking a pricing model. Locked pricing is independent of proposal edit state and cannot be modified except through a new amendment. Requires Pro or higher.

Amendment Chain

When a locked pricing model is amended, a new version is created linked to the previous one. The chain is linear (not branching) so the history reads as a clean sequence of versions.

Draft Pricing Model

A pricing model that has not yet been locked. Editable freely. Drafts auto-clean after 90 days of inactivity; locked snapshots are retained forever.

Line Item

A single row in a pricing model: a labor entry (with hours and hourly rate) or an ODC entry (with quantity and unit cost). Can be linked to a rate library entry or entered ad-hoc.

Ad-Hoc Line Item

A line item not tied to a rate library entry. Flagged with an 'ad-hoc' provenance warning. Allowed for both labor and ODCs.

Provenance

The source of a line item's rate: `rate_library` (linked to an approved rate), `ad_hoc` (manually entered without library reference), or `manual` (user-set override).

Pricing Calculator

A deterministic math engine (no AI) that computes extended amounts, subtotals, fee, and total price from line items and indirect rates. Uses banker's rounding at 2 decimal places.

Banker's Rounding

Round-half-to-even rounding policy used in the pricing calculator. Eliminates upward bias across many operations.

Extended Amount

The computed cost of a single line item: hours multiplied by hourly rate (labor) or quantity multiplied by unit cost (ODC).

Pricing Button

A button on the proposal page that navigates to the pricing model for that proposal. Creates the model if one does not exist.

Validation Summary

A set of automated checks run after pricing calculation: non-negative total, fee exclusivity, rate library reference integrity, excluded line handling.

Scoring and Review

Proposal Strength Score

A composite score (0 to 100) across multiple weighted categories, mapped to a letter grade (A through D).

Category Score

An individual score within the strength score. Categories vary by submission type.

Score Confidence

High, Medium, or Low label indicating data completeness for scoring.

Score Delta

Projected improvement if issues are fixed. Shown as 'current to projected (+N pts)'.

Time-to-Fix Estimate

Approximate hours shown on the score page, calculated from issue severity counts.

Open Issues

Identified problems grouped by severity: Blockers, High Impact, Medium, Low. Each shows point value and deep-link.

Category Exclusion (N/A)

Marking a scoring category as Not Applicable. Overall score recalculates with redistributed weights. Available on both the main score page and within Proposal Review results.

Proposal Review

Upload a completed proposal (PDF/DOCX, up to 3 volumes plus an optional RFP file) and have it scored by an AI procurement persona. PDFs are processed natively by our AI system for accurate table and figure reading.

Procurement Persona

One of six AI reviewer profiles: Federal CO, Grant Panelist, Corporate PM, Tech Evaluator, State/Local Officer, SBIR Reviewer.

Review History

Log of past AI proposal reviews with date, persona, grade, and score.

Win Position Card

Auto-generated Strengths vs. Gaps summary from category scores.

Readiness Score

A percentage combining section completion (40%), requirement coverage, proposal score, and deadline proximity. Reaches 100% when fully complete.

Knowledge, Content, and Past Performance

Knowledge Vault

Repository of company documents from which our AI system extracts structured knowledge items. Shown with a sky accent explanation panel.

Knowledge Extraction

AI parsing of uploaded documents into structured knowledge items. Items enter Needs Review status until approved. Bulk extraction shows a sequential per-document progress banner.

Knowledge Strength

Per-document badge: High Value (5+ items), Medium (2 to 4), or Low (1).

Content Library

Pre-written reusable text blocks (boilerplate, standard responses). Shown with a violet accent explanation panel.

Block Strength

Per-block badge (High or Medium use) based on usage count.

Past Performance

Structured project records with measurable outcomes and contract values. Shown with an emerald accent explanation panel.

Proof Strength

Heuristic badge (High, Medium, Low) based on outcomes, scope details, and tags.

Source Lineage

Badge showing origin: Vault, USASpending, or Proposal.

Explanation Panel

A callout banner at the top of Knowledge Vault, Content Library, and Past Performance pages explaining each tool and how it differs from the other two.

Build Profile

Bulk action to auto-populate company profile from approved Knowledge Vault items.

Conflict Detection

When re-uploading documents, the system shows side-by-side comparison for fields that differ from existing profile data.

Requirements and Compliance

Requirement Matrix

Table mapping every extracted requirement with risk level, type, response status, and deep-link fixes.

Risk Level

Classification per requirement: High Risk, Medium Risk, or Low Risk.

Source Type

Requirement classification: Risk/Rule, Requirement, Deliverable, Evaluation Criterion, or N/A.

Response Status

Requirement state: Not Started, In Progress, Needs Proof, Addressed, or N/A.

Needs Proof

Status indicating a response exists but lacks supporting evidence.

Impact Badge

Priority indicator: High Impact (+5 pts), Medium (+3 pts), or Low (+1 pts).

Best Fix

Star badge on the highest-impact requirement row in each group.

Attachment Checklist

AI-generated list of required submission documents with status: Missing, Uploaded, Outdated, N/A, or Complete. Supports a bulk 'Mark all as' header action and disables Regenerate once all items have been handled, protecting manual work.

Compliance Check

AI analysis verifying proposal content against requirements. Type-aware per submission type.

Pipeline, Calendar, and Analytics

Pipeline

Kanban board with five columns: Draft, In Review, Submitted, Won, Lost.

Pipeline Card

A proposal card showing risk indicator, readiness bar, priority chips, score delta, and action button.

Readiness Bar

Visual progress indicator showing readiness percentage with contextual text.

Priority Chips

Badges: High Priority (risk), Due in N days (deadline), +N pts potential (score opportunity).

Recommended Badge

Star on the highest-priority Draft in the pipeline or dashboard.

Insight Banner

Summary bar above the pipeline showing proposals near submission, deadlines, and overdue counts.

Deadline Calendar

Monthly view of submission deadlines with five-tier urgency color coding.

Daily Focus Panel

Sidebar opened by clicking a calendar date, showing all RFPs due with detail cards.

Critical Banner

Full-width alert when any proposal is due within 7 days and at risk.

Quick Win

Tag on proposals with 15+ points of recoverable score.

Performance Intelligence

The analytics page. Shows win/loss analysis, pipeline breakdown, intelligence coverage, and recommendations. Unlocks at 3+ decided outcomes.

Competitiveness Signal

Label: Highly Competitive, Competitive, Borderline, or Not Competitive.

Intelligence Coverage

Health check showing Knowledge Vault, Past Performance, and Content Library counts with usage rates.

AI Activity

Usage card on analytics showing Proposal Reviews and Analyze Fit runs for current month and all time.

FAQ Page

Dedicated page at /faq with searchable questions covering quick-start orientation, sidebar breakdown, and plan/usage topics. Accessible from the sidebar between Analytics and Billing.

Plans, Billing, and Security

Starter Plan

\$99/mo. 5 proposals, 15 analyses, 2 regenerations per section. DOCX/PDF export. 50 labor rates. Draft pricing supported.

Pro Plan

\$199/mo. 20 proposals, 50 analyses, 10 regenerations. Knowledge Vault, scoring, compliance, 15 reviews/mo. 250 labor rates. Approve/lock pricing, amend snapshots, advanced mode.

Agency Plan

\$399/mo. Unlimited proposals, analyses, regenerations, reviews. Multi-client profiles. Unlimited labor rates.

Daily AI Cost Cap

Per-plan spending limit: Free \$1, Starter \$5, Pro \$15, Agency \$50. Based on estimated token cost per operation.

Usage Meter

Visual indicator of consumption against plan limits. Unlimited plans show a decorative bar with activity count.

Row Level Security (RLS)

Supabase database policy ensuring users can only access data belonging to their company and team.

Optimistic Locking

Concurrency control checking updated_at before writes to prevent overwriting.

Fail Closed

Security posture where feature gates deny access on database errors rather than granting it.

Audit Log

Record of every data mutation (creates, updates, deletes) for compliance visibility. Failed inserts reported to Sentry.

Share Token

A 48-character hex token for read-only proposal review links. Expires after 90 days by default.