



User Manual

AI-Powered Proposal Writing Platform | Complete Reference Guide

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1. Getting Started

SourceGent is an AI-powered platform that helps you write, score, price, and manage proposals for government bids, grant applications, business proposals, and vendor questionnaires. This manual covers every feature in the current release.

1.1 Creating Your Account

Visit sourcegent.com and click the sign-up button. Enter your email and create a password. You will receive a verification email. Click the link to activate your account. All new accounts start with a 48-hour free trial of the Starter plan. No credit card is required.

Important: Email verification is required before you can use AI features (analysis, generation, scoring, extraction). Verify your email promptly.

1.2 Setting Up Your Company Profile

Navigate to Company Profile in the sidebar. Your profile provides the AI with context about your organization. The profile is divided into two sections:

- **Business and Compliance Data:** EIN, CAGE code, UEI, DUNS, company overview. Fields show Missing or Too brief badges.
- **Proposal Content:** Core services, differentiators, past performance summary, team summary, and AI writing defaults (tone, style). These feed directly into generation.

1.3 Populating Your Profile from Documents

Upload company documents to the Knowledge Vault. Our AI system extracts relevant information and suggests profile field values. When you upload additional documents after your profile is populated, the system detects conflicts and shows a side-by-side comparison so you can choose whether to keep existing data or replace it.

1.4 Submission Types

Type	Source	Enrichment	Unique Tabs
Government Bid	SAM.gov import	Competitor intel, past awards (USASpending.gov)	Competition, Past Awards
Grant Application	Grants.gov	NOFA fields, eligibility matching	Funding Details, Eligibility
Business Proposal	Manual upload	Client intelligence (industry, pain points)	Client Intel
Vendor Questionnaire	Manual upload	None	Base tabs only

2. Dashboard

The dashboard is your command center, providing a prioritized view of all active opportunities and proposals.

2.1 Priority Strip

Shows your highest-impact opportunities sorted by urgency. Each row includes a readiness bar, score trajectory (current and projected score), deadline countdown, and a contextual action button.

- **Recommended badge:** Star marking the single highest-priority opportunity.
- **Score potential:** Trajectory like '65 to 82 possible' with the weakest section named.
- **Contextual action:** Labels like 'Fix 3 gaps, +12 pts' linking to the relevant editor section.
- **Deadline pill:** Actual date plus days remaining. Past deadlines show strikethrough with 'Passed'.
- **Confidence cues:** Scores 88+ show 'Competitive'; 80+ show 'Strong'.

2.2 AI Activity and Proposal Flow

A usage card shows total and this-month counts of completed Proposal Reviews and Analyze Fit runs. The sidebar Proposal Flow widget shows pipeline breakdown by status with real-time counts that update on window focus.

3. Opportunities (RFPs)

3.1 Importing Opportunities

- **SAM.gov import:** Paste a SAM.gov URL or solicitation GUID for government bids.
- **Grants.gov import:** Search and import grant NOFAs directly.
- **Manual upload:** Upload an RFP, client brief, or questionnaire (PDF/DOCX).

3.2 SAM.gov Discover

The Discover tab searches SAM.gov for active solicitations matching your NAICS codes and keywords. Results are cached. A 'Last searched' timestamp shows when results were refreshed.

3.3 Opportunity Command Center

- **Sticky header:** Editable title, analyzed badge, deadline countdown, requirements counter, Generate/Open Draft button.
- **Submission Decision Strip:** READY, RISKY, or NOT READY verdict with readiness bar and blocker count.
- **Action Center:** Ranked items by severity and impact with 'why' explanations and CTA buttons.
- **Next Best Action panel:** Single card with highest-priority action and readiness impact.
- **Strategic Intelligence tabs:** Scope, Strategy, Evaluation, Competition, Risks. Competition tab includes competitors and Past Awards from USASpending.gov.
- **Requirements and Gaps preview:** Filterable list with risk level badges.
- **Sidebar:** Deadline card (urgency-colored), readiness breakdown, and inputs needed.

3.4 Decision Tracking and Risk Columns

Each opportunity has a Decision field (Pursue, Watch, Pass). The list view shows computed Risk, Readiness percentage, and Missing Requirements count.

4. Proposal Editor

4.1 Section-Based Editing

Proposals are organized into sections defined by the submission type template. You can drag and drop sections to reorder them or delete unneeded sections.

4.2 AI Generation

Click Generate to have our AI system write all sections using your company profile, Knowledge Vault, and similar past proposals. Sections stream in real-time via Supabase Realtime. A global banner tracks progress.

Tip: If generation stalls for more than 5 minutes, a red warning banner with a Retry button appears. Retry does not consume additional usage.

4.3 Streaming Regeneration

Click Regenerate on any section for word-by-word streaming rewrite. The button label adapts: 'Regenerate (Fix Issues)' when issues exist, 'Regenerate (Enhance)' when clean.

4.4 Real-Time Guidance

- **Progress bar:** Thin bar under section title showing completion percentage.
- **Inline issue chips:** Color-coded chips above textarea with estimated point gain per fix.
- **Placeholder navigation:** Prev/Next buttons cycle through [PLACEHOLDER] markers.
- **Deep-link arrival:** Arriving via 'Fix this' highlights the section with amber ring.

4.5 RFP Context Sidebar and Evidence Panel

A right-side panel shows extracted RFP intelligence in collapsible groups that auto-expand per section. Items show 'Addressed' or 'Not found' badges. Below, the Evidence Panel pulls relevant entries from Knowledge Vault, Past Performance, and Content Library.

4.6 Pricing Button

A Pricing button on the proposal page navigates to the pricing model for that proposal. If no pricing model exists yet, one is created automatically. See Chapter 6 for full pricing module details.

4.7 Optimistic Locking

Section saves check the updated_at timestamp before writing. If another tab or team member modified the section, the save is rejected with a notification to refresh.

5. Proposal Scoring and Review

5.1 Automatic Scoring

After generation, SourceGent scores your proposal across multiple weighted categories with an overall grade (A through D) and detailed issue list.

5.2 Score Page Features

- **Next Best Action panel:** Ranks issues by composite impact and highlights the top fix.
- **Time-to-fix estimate:** Approximate hours based on issue severity.
- **Score Confidence:** High, Medium, or Low based on data completeness.
- **Category cards:** Click any badge to filter Open Issues. 'Why it matters' description per category.
- **Open Issues:** Grouped by severity with '+X pts' tags and deep-links.
- **Win Position card:** Auto-generated Strengths vs. Gaps summary.

5.3 Category Exclusion

Mark any category as N/A via checkbox. Score and grade recalculate with redistributed weights. Available on both the main score page and within Proposal Review results, so you can exclude criteria that do not apply (e.g., Pricing Readiness when the RFP does not require pricing).

5.4 AI Proposal Review

Upload a completed proposal (PDF or DOCX, up to 3 volumes) plus an optional RFP file. PDFs are processed natively by our AI system for accurate table and figure reading. Choose from six procurement personas:

- Federal Contracting Officer (FAR 15.305 best-value)
- Federal Grant Panelist (NIH Simplified Peer Review 2025)
- Corporate Procurement Manager (enterprise weighted scoring)
- Technical Evaluation Committee Member (deep technical feasibility)
- State and Local Procurement Officer (NASPO best-value)
- SBIR/STTR Reviewer (SBA innovation criteria)

Reviews are saved to history (Starter: 3/mo, Pro: 15/mo, Agency: unlimited). When multiple volumes are uploaded, the AI evaluates them holistically rather than scoring each in isolation, so cross-volume consistency (e.g., scope coverage in technical matching cost basis in pricing) is reflected in the score.

6. Pricing Module

The Pricing module is a comprehensive system for building and managing proposal pricing. It appears as a sidebar group with three children: Labor Rates, Indirects, and ODCs. Available on Starter plans and above (Free tier sees an upgrade prompt).

6.1 Labor Rates

Navigate to Pricing → Labor Rates to manage your hourly rate library. Labor rates represent the billing rates for each labor category your team can provide.

- **Rate types:** Direct, Loaded, or GSA Schedule.
- **Status workflow:** Approved (active), Pending Review (imported, awaiting approval), Archived (soft-deleted, restorable).
- **Table columns:** Category (with optional code), Type badge, Rate (\$/hr), Status, Effective date, Expiration date, Source badge, and Actions (Edit, Archive/Restore).
- **Plan limits:** Free: 0 labor rates, Starter: 50, Pro: 250, Agency: unlimited. A warning strip appears at 80% capacity.
- **Validation:** Rates above \$500/hr show a non-blocking hint. Rates above \$10,000/hr are blocked.
- **Filters:** All, Approved, Pending Review, Archived.

6.2 Bulk Import

Import labor rates from .xlsx or .csv files using a two-step flow:

- **Step 1 (Upload):** Drag and drop or select a file (5MB max). Download a template with canonical headers.
- **Step 2 (Review):** Each row shows Ready, Has Warnings, Errors, or Duplicate status. Rows with errors cannot be selected. Warnings (rate under \$20/hr or over \$500/hr) require confirmation. Selected rows import as Pending Review status.

After approval, a toast confirms the count imported and skipped. The import never auto-approves.

6.3 Indirect Rates

Navigate to Pricing → Indirects to manage the percentages applied on top of direct labor. Rates are grouped by type:

- **Fringe:** Employee benefits (health, retirement, etc.).
- **Overhead:** Facility and operational costs.
- **G&A:** General and Administrative expenses.
- **Fee:** Profit margin (percentage or fixed amount, not both).
- **Material Handling:** Procurement and warehousing markup on material ODCs.
- **Subcontract Handling:** Management and oversight markup on subcontractor costs.

Each type section shows its count and default rate. Click the star icon next to any rate to make it the default for that type. Defaults auto-fill on new pricing models.

6.4 ODC Categories

Navigate to Pricing → ODCs to manage Other Direct Cost templates. These are reusable category definitions (travel, materials, equipment, subcontractor costs) with default costs, unit types, and optional markup percentages. Default ODC categories are seeded automatically when a company profile is created.

6.5 Pricing Calculator

The pricing calculator is a deterministic math engine (no AI) that computes your proposal's total price from line items and indirect rates.

- **Pricing model:** One active model per proposal. History is preserved as locked snapshots.
- **Line items:** Labor entries (hours x hourly rate) and ODC entries (quantity x unit cost). Items can reference your rate library or be entered ad-hoc (flagged with provenance warnings).
- **Fee calculation:** Percentage of subtotal or fixed dollar amount (not both).
- **Precision:** Money at 2 decimals, hours at 2 decimals, percentages at 4 decimals. Banker's rounding (round-half-to-even) applied at each subtotal.
- **Validation summary:** Automated checks for non-negative totals, fee exclusivity, rate library references, and excluded line handling.

6.6 Snapshots, Locking, and Amendments

When a pricing model is approved and locked, the system captures an immutable snapshot of the entire model: line items, indirect rates, fee, calculator version, and computed totals. Snapshots cannot be edited.

- **Reproducibility:** Snapshot immutability is enforced both by a Postgres trigger and a reproducibility check at build time. The calculator version registry routes locked snapshots to their original calculator version forever, so reopening a snapshot months later produces the exact same totals.
- **Independence:** Pricing locks are independent of proposal edit state. Editing other parts of the proposal does not alter locked pricing.
- **Retention:** Locked snapshots are retained permanently. Draft models that sit idle auto-clean after 90 days.
- **Amendments:** To change locked pricing, amend it. Amending creates a new linked version. The amendment chain is linear (not branching), so version history reads as a clean sequence.
- **Default snapshot view:** When you open the pricing page on a proposal with a history, the newest snapshot is shown by default.

6.7 Pricing Button on Proposals

Every proposal has a Pricing button that navigates to its pricing model. If no model exists, one is created automatically with your default indirect rates pre-filled. From there, add labor and ODC line items, and the calculator computes totals in real time.

6.8 Plan Gating

Plan	Pricing Capability
Free	Blocked. Upgrade prompt shown.
Starter	Draft pricing + rate library (50 labor rates).

Plan	Pricing Capability
Pro	Draft + approve/lock + amend + advanced mode (250 labor rates).
Agency	Pro features + unlimited labor rates.

6.9 Audit Trail

Every rate mutation (create, update, archive, restore, import approve/reject) is written to the audit log with dedicated action types for full traceability. Snapshot creation and amendment events are also captured.

7. Knowledge Vault

The Knowledge Vault stores your company's institutional knowledge. A sky-colored explanation panel at the top explains what the Vault is for and how it differs from the Content Library and Past Performance.

- **Upload:** Drag-and-drop company documents. Multiple documents supported with a sequential extraction progress banner that shows 'Extracting 2 of 5 documents...' and per-document status.
- **Extract Knowledge:** Our AI system parses documents into structured items. Items enter Needs Review status.
- **Impact column:** Shows item count and active proposal usage.
- **Knowledge Strength:** High Value (5+), Medium (2 to 4), Low (1) badge per document.
- **Top Knowledge section:** Highlights your top 3 documents by item count.
- **Build Profile:** Auto-populate company profile from approved items with conflict detection.

8. Content Library

Pre-written reusable text blocks. A violet-colored explanation panel at the top explains how it differs from Knowledge Vault and Past Performance. Table shows Block, Category, Status, Source, Block Strength badge, and usage count. Top Content Blocks panel highlights your most-used blocks.

9. Past Performance

Structured project records. An emerald-colored explanation panel explains its role. Table shows Project, Type, Contract Value, Proof Strength badge, Outcomes, Source Lineage, and Actions. Strongest Proof panel highlights top records. Federal past awards can be imported from USASpending.gov via the Past Awards tab.

10. Proposal Pipeline

Kanban board with five columns: Draft, In Review, Submitted, Won, Lost. Drag cards between columns to update status.

- **Card intelligence:** Risk indicator (colored border), readiness bar, priority chips, score delta, contextual action button.
- **Recommended badge:** Star on highest-priority Draft.
- **Insight banner:** Proposals near submission, due within 7 days, and overdue counts.
- **Hover quick-actions:** Open editor, Fix gaps, View requirements.

11. Deadline Calendar

Days Until Deadline	Color	Behavior
3 or fewer	Red	Pulsing dot when at risk
4 to 7	Orange	Signal sub-row
8 to 14	Amber	Signal sub-row
15+	Green	Standard chip
Past due	Gray	Reopen/Archive buttons

- **Critical banner:** Full-width alert for at-risk proposals due within 7 days.
- **Daily Focus Panel:** Click date for per-RFP detail cards with action buttons.
- **Hover preview:** Score delta, gap count, and quick-action buttons.
- **Quick Win tag:** 15+ recoverable points shows green chip.

12. Analytics and Performance Intelligence

- **Win/Loss panels:** Category deltas across won vs. lost (unlocks at 3+ outcomes). Confidence Level indicator.
- **Pipeline breakdown:** Average score per stage with risk flags.
- **Intelligence Coverage:** KV, Past Performance, Content Library health. Missing vs. Underperforming classification.
- **Recommended Actions:** Up to 5 suggestions with Time to Fix badges (Quick Win, Medium, Heavy).
- **Biggest Lever:** Single highest-impact action highlighted above the list.
- **AI Activity section:** Completed Proposal Reviews and Analyze Fit run counts.

13. Company Profile

- **Multi-company:** Switch via sidebar selector. Data fully isolated.
- **NAICS picker:** Searchable by code and industry name with keyboard navigation.
- **Logo upload:** Stored in Supabase Storage, embedded in DOCX/PDF exports.
- **Field status badges:** Missing (amber) and Too brief (slate) on key fields.

14. Team Management

Invite teammates with role-based access. Shared Knowledge Vault, Past Performance, Content Library, pricing data, and proposals. Stale invitations auto-expire.

15. Billing and Plans

All plans start with a 48-hour free trial. The Free tier is no longer shown on billing and pricing pages.

Plan	Price	Prop s	Anly s	Rege ns	Labor Rates	Key Features
Starter	\$99/mo	5	15	2/sec	50	Draft pricing, DOCX/PDF export
Pro	\$199/mo	20	50	10/sec	250	KV, scoring, compliance, 15 reviews, approve/lock + amend pricing, advanced mode
Agency	\$399/mo	Unlim	Unlim	Unlim.	Unlim.	Multi-client, custom onboarding

16. Export (DOCX and PDF)

Export proposals as professionally formatted DOCX or PDF files with company logo, structured sections, and formatted content. Available on Starter plans and above.

17. FAQ Page

A dedicated FAQ page lives at /faq in the sidebar between Analytics and Billing. It includes a search filter and covers quick-start orientation, a one-line breakdown of every sidebar menu item, and common plan and usage questions. The Billing page shows a pointer card linking to the FAQ.

18. Onboarding Assistant

A floating AI chat widget on all authenticated pages, powered by our custom AI system. Adapts its system prompt to your current page, plan tier, vault status, and progress. Quick action pills rotate based on onboarding state. Rate-limited to 20 messages/hour. Will not improvise on billing, account, or error topics.

Milestones tracked: vault_uploaded, vault_processed, first_submission_created, first_section_generated, first_section_edited, sam_viewed, onboarding_completed.

19. Settings and Account

- **Dark mode:** Toggle via sidebar sun/moon button. Preference saved locally.
- **Account deletion:** Cascading delete of all data and auth record.

20. Tips and Shortcuts

- Use Prev/Next navigation to cycle through [PLACEHOLDER] markers quickly.
- Score page category badges are clickable — filter issues by category.
- Deep-link URLs from 'Fix this' buttons can be bookmarked.
- Dashboard refreshes proposal status on window focus automatically.
- Company switching preserves scroll position and context.
- Use the Evidence Panel while editing to reference Knowledge Vault and Past Performance.
- On the Pricing page, download the import template before bulk-uploading rates.
- Archive labor rates instead of deleting — they can be restored later.
- Set indirect rate defaults once; they auto-fill on new pricing models.
- Lock pricing models when ready to capture an immutable snapshot. If something changes, amend the snapshot rather than editing it.
- Use the bulk 'Mark all as' action on the attachment checklist to move many items at once.

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.