

VBA SOURCE CODE BOOK

PROPOSAL GENERATOR UPDATED

Enter Proposal # []

Date: 10/26/2022
Status: Draft
Proposal Name: Smith Website Design
Customer: Smith Laundry
Total Amount: \$1,050.00

| Milestone | Amount | % |
|-----------------|----------|-----|
| Gather Scope | \$200.00 | 19% |
| Develop Site | \$400.00 | 38% |
| Site Completion | \$300.00 | 29% |
| Site Sign Off | \$100.00 | 10% |
| Warranty | \$50.00 | 5% |

| Type | Variable |
|------------------|-------------|
| Your Comp. Name | [YourComp] |
| Cust. Comp. Name | [CustComp] |
| Customer Name | [CustName] |
| Cust. Address 1 | [CustAdd1] |
| Cust. Address 2 | [CustAdd2] |
| Cust. Phone # | [CustPhone] |
| Cust. Email Add. | [CustEmail] |
| Total Amount | [TotAmount] |
| Proposal Date | [PropDate] |

**EXCLUSIVE FOR
SILVER & GOLD
MEMBERS**

Fredders Web Design
123 Main St.
Anytown, USA 90055
310 555-1212
Fred@FreddersService.com

PROPOSAL Proposal #: 1
Proposal Date: 10/26/2022

Smith Website Design
Presented To: Nancy Smith
3365 Fermentum St.
Boston Massachusetts, 39456
(965) 667-7181 Nancy.Smith@gmail.com

SCOPE OF WORK

1. Complete design specifications based in client requests
2. Submit wireframe designs for client approval
3. Create a prototype on our server for a run through
4. Develop a live site & perform testing
5. Complete SEO additions & updates

Please see the following payment schedule

| Milestone | Amount | % |
|-----------------|----------|-----|
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| Site Completion | \$300.00 | 29% |
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FEATURE, FIX, OR FOCUS



Excel For Freelancers

How To Create An Automated Proposal & Quote Generator In Excel



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**VIEW
TRAINING**

by: Randy Austin

ABOUT THE AUTHOR

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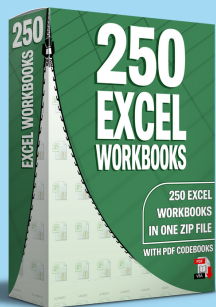
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| | |
|---------------------------------------|----|
| Projects..... | 2 |
| VBAProject..... | 2 |
| Documents..... | 2 |
| Admin..... | 2 |
| (Declarations)..... | 2 |
| Worksheet_SelectionChange [Sub]..... | 2 |
| Customers..... | 3 |
| (Declarations)..... | 3 |
| Items..... | 4 |
| (Declarations)..... | 4 |
| PaySchedDB..... | 5 |
| (Declarations)..... | 5 |
| PropItems..... | 6 |
| (Declarations)..... | 6 |
| Proposal..... | 7 |
| (Declarations)..... | 7 |
| Worksheet_Change [Sub]..... | 7 |
| Worksheet_SelectionChange [Sub]..... | 7 |
| ProposalList..... | 9 |
| (Declarations)..... | 9 |
| ThisWorkbook..... | 10 |
| (Declarations)..... | 10 |
| Forms..... | 11 |
| AddCustForm..... | 11 |
| (Declarations)..... | 11 |
| CancelBtn_Click [Sub]..... | 11 |
| SaveBtn_Click [Sub]..... | 11 |
| Modules..... | 12 |
| Prop_Items..... | 12 |
| (Declarations)..... | 12 |
| Item_AddUpdateItem [Sub]..... | 12 |
| Item_Clear [Sub]..... | 13 |
| Item_New [Sub]..... | 14 |
| Item_SaveUpdate [Sub]..... | 14 |
| Item_Select [Sub]..... | 14 |
| Proposal_Macros..... | 15 |
| (Declarations)..... | 15 |
| Customer_AddNew [Sub]..... | 15 |
| Proposal_Delete [Sub]..... | 15 |
| Proposal_Email [Sub]..... | 16 |
| Proposal_Load [Sub]..... | 16 |
| Proposal_New [Sub]..... | 18 |
| Proposal_Print [Sub]..... | 18 |
| Proposal_SaveAsPDF [Sub]..... | 18 |
| Proposal_SavedMsg [Sub]..... | 18 |
| Proposal_SaveUpdate [Sub]..... | 18 |
| Proposal_SetPrintArea [Sub]..... | 19 |
| Proposal_ShowHideData [Sub]..... | 19 |

```
1 Option Explicit
2
3 Private Sub Worksheet_SelectionChange(ByVal Target As Range)
4     If Target.CountLarge > 1 Then Exit Sub
5
6
7     'On Default Proposal Status selection
8     If Not Intersect(Target, Range("F6:F12" )) Is Nothing And Range("E" & Target.Row).
9         Value <> Empty Then
10         Range("F6:F12" ).ClearContents
11         Target.Value = Chr(252)
12         Range("I5" ).Select
13     End If
End Sub
```

1 Option Explicit

2

1

Option Explicit

1
2

Option Explicit

1
2

Option Explicit

```

1 Option Explicit
2 Dim ItemRow As Long, ItemDesc As String, ItemNumb As Long, VarRow As Long, LastVarRow
   As Long, PropItemRow As Long
3 Dim TopPos As Double, LeftPos As Double
4 Dim ItemShp As Shape
5 Private Sub Worksheet_Change(ByVal Target As Range)
6     If Target.CountLarge > 1 Then Exit Sub
7     'On Change if Proposal Items but not in Proposal Load
8     If Not Intersect(Target, Range("H13:H999" )) Is Nothing And Range("B7" ).Value =
       False And Range("H" & Target.Row).Value <> Empty Then
9         'Check For Saved Proposal
10        If Range("B4" ).Value = Empty Then
11            Target.ClearContents
12            MsgBox "Please save this proposal before adding any items"
13            Exit Sub
14        End If
15
16        'Check For customer
17        If Range("B2" ).Value = Empty Then
18            MsgBox "Please select a customer before entering proposal details"
19            Target.ClearContents
20            Exit Sub
21        End If
22
23        Range("B9" ).Value = Target.Row 'Set Changed Row
24        On Error Resume Next
25        ItemRow = Items.Range("Item_Name" ).Find(Range("H" & Target.Row).Value, ,
       xlValues, xlWhole).Row 'Get Item DB Row
26        On Error GoTo 0
27        If ItemRow = 0 Then Exit Sub 'Item Not Found
28        Range("J3" ).Value = Items.Range("B" & ItemRow).Value 'Set Item Description
29        Item_AddUpdateItem
30    End If
31
32    'On Enter Proposal # Change
33    If Not Intersect(Target, Range("F1" )) Is Nothing And Range("F1" ).Value <> Empty
       Then
34        If Range("B5" ).Value = Empty Then
35            MsgBox "Please enter a correct proposal ID"
36            Range("F1" ).Select
37            Exit Sub
38        End If
39        Range("B3" ).Value = Range("F1" ).Value 'Set Proposal ID
40        Range("F1" ).ClearContents
41        Proposal_Load 'Run Macro to load Proposal
42    End If
43
44
45    'On selected item change, but not on item load
46    'If Not Intersect(Target, Range("J3")) Is Nothing And Range("B10").Value = False
       And Range("J3").Value <> Empty Then
47        ' If Range("B9").Value = Empty Then Exit Sub
48        ' ItemNumb = Range("B9").Value - 12 'Set Item Numb
49        ' On Error Resume Next
50        ' Set ItemShp = Shapes("Item" & ItemNumb)
51        ' On Error GoTo 0
52        ' Item_AddUpdateItem
53    'End If
54
55 End Sub
56

```

```
57 Private Sub Worksheet_SelectionChange(ByVal Target As Range)
58     If Target.CountLarge > 1 Then Exit Sub
59     If Shapes("ClearItmBtn" ).Visible = True Then Shapes("ClearItmBtn" ).Visible =
60         msoFalse
61     'On Item Selection
62     If Not Intersect(Target, Range("H13:H999" )) Is Nothing And Range("H" & Target.Row)
63         .Value <> Empty Then
64             Range("B9" ).Value = Target.Row
65             PropItemRow = Range("B" & Target.Row).Value 'Prop Item DB Row
66             If PropItemRow = 0 Then Exit Sub
67             Range("J3" ).Value = PropItems.Range("C" & PropItemRow).Value 'Set Item Desc.
68             With Shapes("ClearItmBtn" )
69                 .Left = Range("H" & Target.Row).Left - 14
70                 .Top = Range("H" & Target.Row).Top
71                 .Visible = msoCTrue
72             End With
73         End If
74     End Sub
```

1
2

Option Explicit

1 Option Explicit

2

```
1 Option Explicit
2
3
4 Private Sub CancelBtn_Click()
5     AddCustForm.Hide
6 End Sub
7
8 Private Sub SaveBtn_Click()
9     Dim CustomerFld As Control
10    Dim CustRow As Long, CustCol As Long
11    If Me.Field1.Value = Empty Then
12        MsgBox "Please make sure to save a Customer Name before saving"
13        Exit Sub
14    End If
15    With Customers
16        CustRow = .Range("A99999").End(xlUp).Row + 1 'First avail Row
17        On Error Resume Next
18        .Range("A" & CustRow).Value = Application.WorksheetFunction.Max(.Range(
19            "Cust_ID" )) + 1
20        On Error GoTo 0
21        If .Range("A" & CustRow).Value = Empty Then .Range("A" & CustRow).Value = 1
22        'Set First Cust ID to 1
23        For CustCol = 2 To 7
24            Set CustomerFld = Me.Controls("Field" & CustCol - 1)
25            .Cells(CustRow, CustCol).Value = CustomerFld.Value
26        Next CustCol
27        AddCustForm.Hide
28        Proposal.Range("E5").Value = Field1.Value 'Set Customer Name
29    End With
30 End Sub
```

```

1 Option Explicit
2 Dim ItemNumb As Long, VarRow As Long, LastVarRow As Long, SelRow As Long, LastItemNumb,
   PropItemRow As Long
3 Dim SchedRow As Long, LastSchedRow As Long, ItemRow As Long, LastItemRow As Long,
   ShpNumb As Long
4 Dim TopPos As Double, LeftPos As Double
5 Dim ItemDesc As String
6 Dim ItemShp As Shape, PrevShp As Shape
7
8 Sub Item_AddUpdateItem()
9     Dim PaySched As String
10    With Proposal
11        SelRow = .Range("B9").Value 'Selected Row
12        ItemDesc = .Range("J3").Value 'Item Description
13        ItemNumb = SelRow - 12 'Set Item Numb
14        'Add/Update Proposal Item DB
15        If .Range("B" & SelRow).Value = Empty Then 'New Prop Item
16            PropItemRow = PropItems.Range("A99999").End(xlUp).Row + 1 'First Avail. Row
17            PropItems.Range("A" & PropItemRow).Value = .Range("B3").Value 'Prop ID
18            PropItems.Range("D" & PropItemRow).Value = SelRow 'Proposal Row
19            .Range("B" & SelRow).Value = PropItemRow 'Add DB Row
20            PropItems.Range("E" & PropItemRow).Value = "=Row()" 'Add Row Formula
21        Else 'Existing
22            PropItemRow = .Range("B" & SelRow).Value
23        End If
24        PropItems.Range("B" & PropItemRow).Value = .Range("H" & SelRow).Value 'Item
           Name
25        PropItems.Range("C" & PropItemRow).Value = ItemDesc 'Item Description
26        PropItems.Range(PropItemRow & ":" & PropItemRow).WrapText = False
27        If ItemNumb = 1 Then TopPos = .Range("L12").Top Else TopPos = .Shapes("Item" &
           ItemNumb - 1).Top + .Shapes("Item" & ItemNumb - 1).Height + 10 'Set top
           Position
28        LeftPos = .Range("L12").Left + 3 'Set Left Positions
29
30        Set ItemShp = Nothing
31        On Error Resume Next
32        Set ItemShp = .Shapes("Item" & ItemNumb) 'Check for existing shape
33        On Error GoTo 0
34        If ItemShp Is Nothing Then .Shapes("SampleShp").Duplicate.Name = "Item" &
           ItemNumb 'Create Shape if it does not exist
35
36        With .Shapes("Item" & ItemNumb)
37            If InStr(ItemDesc, "[PaySched]") <> 0 Then 'includes PaySched variable
38                .TextFrame2.TextRange.Font.Name = "lucida console"
39                ItemDesc = Replace(ItemDesc, "[PaySched]", "")
40            End If
41            .TextFrame2.TextRange.Text = ItemDesc 'Set Description
42            .Width = Proposal.Range("L:L").Width - 5
43            .TextFrame2.AutoSize = msoAutoSizeShapeToFitText
44            .Height = .Height + 5 ' add 5 pixels to height
45            .Left = LeftPos
46            .Top = TopPos
47        End With
48        'Update Remaining Shapes Position
49        LastItemNumb = .Range("H999").End(xlUp).Row - 12
50        If ItemNumb = LastItemNumb Then GoTo LastShp 'Exit on Last shape
51        For ShpNumb = ItemNumb + 1 To LastItemNumb
52            Set ItemShp = Nothing
53            On Error Resume Next
54            Set ItemShp = .Shapes("Item" & ShpNumb)
55            On Error GoTo 0

```

1 2 3

```

1 2 3
56   If ShpNumb = 1 Then GoTo NextShp
57   If Not ItemShp Is Nothing Then ItemShp.Top = .Shapes("Item" & ShpNumb - 1).
    Top + .Shapes("Item" & ShpNumb - 1).Height + 5
58   NextShp:
59   Next ShpNumb
60   LastShp:
61   Proposal_ShowHideData 'Update Proposal
62   End With
63   End Sub
64
65   Sub Item_Clear()
66   With Proposal
67   If .Range("B9" ).Value = Empty Then Exit Sub 'Exit on no selected row
68   If MsgBox("Are you sure you want to clear the selected item?" , vbYesNo, "Clear
    Item" ) = vbNo Then Exit Sub
69   .Shapes("ClearItmBtn" ).Visible = msoFalse
70   SelRow = .Range("B9" ).Value 'Selected Rob
71   ItemNumb = SelRow - 12 'Item Number
72   LastItemRow = .Range("H999" ).End(xlUp).Row
73   LastItemNumb = LastItemRow - 12 'Last Item Number
74   PropItemRow = .Range("B" & SelRow).Value 'Proposal Item Row
75   If PropItemRow = 0 Then GoTo SkipDBDel
76   If SelRow = LastItemRow Then
77   .Range("B" & SelRow).ClearContents
78   GoTo SkipRowChange
79   End If
80   For ItemRow = SelRow + 1 To LastItemRow
81   If PropItemRow < .Range("B" & ItemRow).Value Then
82   PropItems.Range("D" & .Range("B" & ItemRow).Value).Value = ItemRow - 1
    'Update Item Row in DB
83   .Range("B" & ItemRow).Value = .Range("B" & ItemRow).Value - 1 'Reduce
    DB Row by one (only if greater than deleted row)
84   End If
85   Next ItemRow
86   PropItems.Range(PropItemRow & ":" & PropItemRow).EntireRow.Delete 'Delete Prop
    Item Row
87   SkipRowChange:
88   SkipDBDel:
89
90   On Error Resume Next
91   .Shapes("Item" & ItemNumb).Delete 'Clear Item Shape
92   On Error GoTo 0
93   .Range("H" & SelRow).ClearContents 'Clear Selected Item
94   .Range("B9" ).ClearContents 'Clear Selected Row
95   .Range("J3" ).Select
96   If ItemNumb = LastItemNumb Then Exit Sub 'Exit on Last shape
97   'Move items & Shapes Up 1
98   .Range("B10" ).Value = True
99   .Range("H" & SelRow & ":" & "H" & LastItemRow - 1).Value = .Range("H" & SelRow + 1
    & ":" & "H" & LastItemRow).Value 'Move all Items Up
100  .Range("H" & LastItemRow).ClearContents 'Clear Last Item
101  .Range("B" & LastItemRow).ClearContents 'Clear Last Item DB Row (if any)
102  .Range("B10" ).Value = False
103  'Rename & Reposition Shapes
104  For ShpNumb = ItemNumb + 1 To LastItemNumb
105  If ShpNumb <= 2 Then TopPos = .Range("L12" ).Top Else TopPos = .Shapes("Item"
    & ShpNumb - 2).Top + .Shapes("Item" & ShpNumb - 2).Height + 10 'Set top
    Position
106  .Shapes("Item" & ShpNumb).Name = "Item" & ShpNumb - 1
107  .Shapes("Item" & ShpNumb - 1).Top = TopPos 'Reset TopPos
108  Next ShpNumb

```



```

1 2
109
110     End With
111 End Sub
112 Sub Item_New()
113     Dim ItemName As String
114     With Proposal
115         .Range("B9,J3:J44").ClearContents 'Clear Existing Item
116         ItemName = InputBox("Enter the item name" , "Item Name" , , 2700, 1500)
117         If ItemName = "" Then Exit Sub
118         .Range("B1").Value = ItemName
119         .Range("J3").Select
120     End With
121 End Sub
122
123 Sub Item_SaveUpdate()
124     Dim ItemName As String
125     With Proposal
126         If .Range("J3").Value = Empty Then
127             MsgBox "Please enter an Item Description"
128             Exit Sub
129         End If
130         ItemName = .Range("B1").Value 'Set Item Name
131         If .Range("B8").Value = Empty And ItemName = "" Then 'On New item & missing
132             Name
133             ItemName = InputBox("Enter the item name" , "Item Name" , , 2700, 1500)
134             If ItemName = "" Then Exit Sub
135             .Range("B1").Value = ItemName
136         End If
137         If .Range("B8").Value = Empty Then 'New Item
138             ItemRow = Items.Range("A9999").End(xlUp).Row + 1 'First Avail Row
139             Items.Range("A" & ItemRow).Value = ItemName 'Set Item Name
140             Items.Range("B" & ItemRow).Value = .Range("J3").Value 'Set Item Description
141             SelRow = .Range("H999").End(xlUp).Row + 1 'First Avail Row
142             .Range("H" & SelRow).Value = ItemName 'Add New Item Name
143             .Range("B9").Value = SelRow 'Set Selected Row
144         Else 'Existing Item
145             ItemRow = .Range("B8").Value 'Item DB Row
146             Items.Range("B" & ItemRow).Value = .Range("J3").Value 'Set Item Description
147         End If
148         MsgBox "Item Saved"
149     End With
150 End Sub
151 Sub Item_Select()
152     With Proposal
153         ItemNumb = Replace(Application.Caller, "Item" , "" )
154         ItemRow = ItemNumb + 12 'Item Row Numb.
155         PropItemRow = .Range("B" & ItemRow).Value 'Proposal Item DB Row
156         .Range("J3").Value = PropItems.Range("C" & PropItemRow).Value 'Set Desc. from
157         DB
158         .Range("B9").Value = ItemRow 'Set Item Row
159     End With
160 End Sub

```

```

1 Option Explicit
2 Dim PropRow As Long, PropCol As Long, PropItemRow As Long, LastRow As Long, LastItemRow
  As Long, StatusRow As Long, ItemNum As Long
3 Dim ResultRow As Long, LastResultRow As Long, ItemRow As Long, ShpNum As Long,
  PaySchedRow As Long, LastPaySchedRow As Long, PaySchedDBRow As Long
4 Dim VarRow As Long, LastVarRow As Long, SchedRow As Long, LastSchedRow As Long
5 Dim LeftPos As Double, TopPos As Double
6 Dim ItemDesc As String
7 Dim ItemShp As Shape
8
9 Sub Customer_AddNew()
10     Unload AddCustForm
11     AddCustForm.Show
12 End Sub
13
14
15
16 Sub Proposal_Delete()
17     If MsgBox("Are you sure you want to delete this Proposal?" , vbYesNo, "Delete
  Proposal" ) = vbNo Then Exit Sub
18     With Proposal
19         If .Range("B4" ).Value = Empty Then GoTo NotSaved
20         PropRow = .Range("B4" ).Value 'Order Row
21         ProposalList.Range(PropRow & ":" & PropRow).EntireRow.Delete 'Delete Proposal
  row
22
23         'Remove Proposal Items
24         With PropItems
25             LastRow = .Range("A99999" ).End(xlUp).Row
26             If LastRow < 3 Then GoTo NotSaved
27             .Range("A3:E" & LastRow).AdvancedFilter xlFilterCopy, CriteriaRange:=.Range(
  "G2:G3" ), CopyToRange:=.Range("K2:N2" ), Unique:=True
28             LastResultRow = .Range("K99999" ).End(xlUp).Row
29             If LastResultRow < 3 Then GoTo NoItems
30             If LastResultRow < 4 Then GoTo SingleItemRow
31             'Sort based on descending rows
32             With .Sort
33                 .SortFields.Clear
34                 .SortFields.Add Key:=PropItems.Range("K3" ), SortOn:=xlSortOnValues, Order:
  =xlDescending, DataOption:=xlSortNormal
35                 .SetRange PropItems.Range("K3:N" & LastResultRow)
36                 .Apply
37             End With
38             SingleItemRow:
39             For ResultRow = 3 To LastResultRow
40                 PropItemRow = .Range("K" & ResultRow).Value 'Proposal Item DB Row
41                 .Range(PropItemRow & ":" & PropItemRow).EntireRow.Delete 'Delete Proposal
  Item Row
42             Next ResultRow
43         End With
44         NoItems:
45         'Remove Payment Sched Items
46         With PaySchedDB
47             LastRow = .Range("A99999" ).End(xlUp).Row
48             If LastRow < 3 Then GoTo NotSaved
49             .Range("A3:E" & LastRow).AdvancedFilter xlFilterCopy, CriteriaRange:=.Range(
  "J2:J3" ), CopyToRange:=.Range("L2:N2" ), Unique:=True
50             LastResultRow = .Range("L99999" ).End(xlUp).Row
51             If LastResultRow < 3 Then GoTo NoPayItems
52             If LastResultRow < 4 Then GoTo SinglePayRow
53             'Sort based on descending rows

```

1 2 3

```

54 1 2 3 With .Sort
55     .SortFields.Clear
56     .SortFields.Add Key:=PaySchedDB.Range("L3" ), SortOn:=xlSortOnValues, Order
        :=xlDescending, DataOption:=xlSortNormal
57     .SetRange PaySchedDB.Range("L3:N" & LastResultRow)
58     .Apply
59 End With
60 SinglePayRow:
61 For ResultRow = 3 To LastResultRow
62     PaySchedDBRow = .Range("L" & ResultRow).Value 'Proposal Item DB Row
63     .Range(PaySchedDBRow & ":" & PaySchedDBRow).EntireRow.Delete 'Delete
        Payment Schedule Item row
64 Next ResultRow
65 End With
66
67 NoPayItems:
68 NotSaved:
69 Proposal_New 'Clear Out All Proposal Fields
70 End With
71 End Sub
72
73 Sub Proposal_Email()
74     Dim OutMail As Object, OutApp As Object
75     Dim EmailTo As String, Subj As String, Mesg As String, FilePath As String
76     Dim CustRow As Long, VarRow As Long
77     With Proposal 'Check For Proposal Save
78         If .Range("B4" ).Value = Empty Then
79             MsgBox "Please make sure to save the Proposal before emailing"
80             Exit Sub
81         End If
82         Proposal_SetPrintArea
83
84         'Set Variables
85         CustRow = .Range("B2" ).Value 'Customer Row
86         EmailTo = Customers.Range("G" & CustRow).Value 'Email Address
87         Subj = .Range("Q6" ).Value 'Subject
88         Mesg = .Range("Q7" ).Value 'Email Message
89         For VarRow = 19 To 29
90             Subj = Replace(Subj, .Range("E" & VarRow).Value, Format(.Range("F" & VarRow)
                .Value, .Range("F" & VarRow).NumberFormat))
91             Mesg = Replace(Mesg, .Range("E" & VarRow).Value, Format(.Range("F" & VarRow)
                .Value, .Range("F" & VarRow).NumberFormat))
92         Next VarRow
93         FilePath = ThisWorkbook.Path & "\" & Proposal.Range("E4" ).Value & "_" &
            Proposal.Range("B3" ).Value & ".pdf" 'File Path
94         If Dir(FilePath, vbDirectory) <> "" Then Kill (FilePath) 'Delete file if exists
95
96         Proposal.ExportAsFixedFormat xlTypePDF, FilePath, , , False, , , False
97         Set OutApp = CreateObject("Outlook.Application" ) 'Set Outlook Application
98         Set OutMail = OutApp.CreateItem(0) 'Create Email
99         With OutMail
100             .To = EmailTo 'Email address
101             .Subject = Subj
102             .body = Mesg
103             .attachments.Add FilePath
104             .display 'use .Send to send email directly
105         End With
106     End With
107 End Sub
108 Sub Proposal_Load()
1

```

```

1
109 With Proposal
110 'Remove any/all Item shapes
111 For Each ItemShp In .Shapes
112     If InStr(ItemShp.Name, "Item" ) > 0 Then ItemShp.Delete
113 Next ItemShp
114 If .Range("B4" ).Value = Empty Then
115     MsgBox "Please enter a correct Proposal #"
116     Exit Sub
117 End If
118 PropRow = .Range("B4" ).Value 'Proposal Row
119 .Range("B7" ).Value = True 'Set Prop. Load to true
120 .Range("B9,F1,E2:F6,C10:E15,B13:B999,H13:H999,J3:J45" ).ClearContents
121 For PropCol = 2 To 6
122     .Range("E" & PropCol).Value = ProposalList.Cells(PropRow, PropCol).Value '
        Load Date, Status, Name, Cust, Total
123 Next PropCol
124
125 'Load Payment Schedule Items
126 With PaySchedDB
127     LastRow = .Range("A99999" ).End(xlUp).Row
128     If LastRow < 4 Then Exit Sub
129     .Range("A3:E" & LastRow).AdvancedFilter xlFilterCopy, CriteriaRange:=.Range(
        "J2:J3" ), CopyToRange:=.Range("L2:O2" ), Unique:=True
130     LastResultRow = .Range("L99999" ).End(xlUp).Row
131     If LastResultRow < 3 Then GoTo NoPayItems
132     For ResultRow = 3 To LastResultRow
133         PaySchedRow = .Range("O" & ResultRow).Value 'Pay Schedule Result Row
134         Proposal.Range("C" & PaySchedRow & ":E" & PaySchedRow).Value = .Range(
        "L" & ResultRow & ":N" & ResultRow).Value 'Row, Milestone & Amount
135     Next ResultRow
136     Proposal.Range("C10:E" & LastResultRow + 7).Value = .Range("L3:N" &
        LastResultRow).Value 'Bring Over Payment Schedule
137 End With
138 NoPayItems:
139
140 'Add Proposal Items
141 With PropItems
142     LastRow = .Range("A99999" ).End(xlUp).Row
143     If LastRow < 4 Then GoTo NoItems
144     .Range("A3:E" & LastRow).AdvancedFilter xlFilterCopy, CriteriaRange:=.Range(
        "G2:G3" ), CopyToRange:=.Range("K2:N2" ), Unique:=True
145     LastResultRow = .Range("K99999" ).End(xlUp).Row
146     If LastResultRow < 3 Then GoTo NoItems
147     With .Sort
148         .SortFields.Clear
149         .SortFields.Add Key:=PropItems.Range("N3" ), SortOn:=xlSortOnValues, Order:=
        xlAscending, DataOption:=xlSortNormal 'Sort
150         .SetRange PropItems.Range("K3:N" & LastResultRow) 'Set Range
151         .Apply 'Apply Sort
152     End With
153
154     For ResultRow = 3 To LastResultRow
155         PropItemRow = .Range("N" & ResultRow).Value 'Get Proposal Row
156         Proposal.Range("B" & PropItemRow).Value = .Range("K" & ResultRow).Value
        'DB Riws
157         Proposal.Range("H" & PropItemRow).Value = .Range("L" & ResultRow).Value
        'Item Name
158     Next ResultRow
159 End With
160 Proposal_ShowHideData
161 NoItems:

```

1 2

```

1 2
162     .Range("B7" ).Value = False 'Set Prop. Load to false
163     End With
164     End Sub
165
166     Sub Proposal_New()
167         With Proposal
168             'Remove any/all Item shapes
169             For Each ItemShp In .Shapes
170                 If InStr(ItemShp.Name, "Item" ) > 0 Then ItemShp.Delete
171             Next ItemShp
172             .Range("B7" ).Value = True 'Set Prop. Load to true
173             .Range("B3,B9,F1,E2:F6,C10:E15,B13:B999,H13:H999,J3:J45" ).ClearContents
174             .Range("B3" ).Value = .Range("B6" ).Value 'Set Next Proposal #
175             .Range("E2" ).Value = Date 'Set current Date
176             .Range("B7" ).Value = False 'Set Prop. Load to false
177             On Error Resume Next
178             StatusRow = Admin.Range("F6:F12" ).Find(Chr(252), , xlValues, xlWhole).Row
179             On Error GoTo 0
180             If StatusRow <> 0 Then .Range("E3" ).Value = Admin.Range("E" & StatusRow).Value
181             'Set Default Status
182         End With
183     End Sub
184
185
186     Sub Proposal_Print()
187         Proposal_SetPrintArea
188         Proposal.PrintOut , , , False, True, , , , False
189     End Sub
190
191     Sub Proposal_SaveAsPDF()
192         Dim FilePath As String
193         Proposal_SetPrintArea
194         FilePath = ThisWorkbook.Path & "\" & Proposal.Range("E4" ).Value & "_" & Proposal.
195         Range("B3" ).Value 'File Path
196         If Dir(FilePath, vbDirectory) <> "" Then Kill (FilePath)
197         Proposal.ExportAsFixedFormat xlTypePDF, FilePath, , , False, , , True
198     End Sub
199
200
201     Sub Proposal_SavedMsg()
202         With Proposal.Shapes("PropSavedMsg" )
203             Dim I As Long, Delay As Double, StartTime As Double
204             .Visible = msoCTrue
205             For I = 1 To 80
206                 .Fill.Transparency = I / 80
207                 Delay = 0.008
208                 StartTime = Timer
209                 Do
210                     DoEvents
211                 Loop While Timer - StartTime < Delay
212             Next I
213             .Visible = msoFalse
214         End With
215     End Sub
216
217     Sub Proposal_SaveUpdate()
218         With Proposal
219             If .Range("B2" ).Value = Empty Then
220                 MsgBox "Please make sure to add a customer before saving Proposal"
221             End If
222         End With

```

```

1 2 3
221 End If
222 LastItemRow = .Range("H9999" ).End(xlUp).Row 'Last Item Row
223
224 'Deterermine New Proposal/Existing Proposal
225 If .Range("B4" ).Value = Empty Then 'new Proposal
226 PropRow = ProposalList.Range("A99999" ).End(xlUp).Row + 1 'First Avail Row
227 .Range("B3" ).Value = .Range("B6" ).Value 'Next Prop. #
228 ProposalList.Range("A" & PropRow).Value = .Range("B6" ).Value 'Next Prop. #
229
230 Else 'Existing Proposal
231 PropRow = .Range("B4" ).Value 'Proposal Row
232 End If
233 For PropCol = 2 To 6
234 ProposalList.Cells(PropRow, PropCol).Value = .Range("E" & PropCol).Value '
Add Date, Status, Name, Cust, Total
235 Next PropCol
236 'Add/Update Pay Sched Items
237 LastPaySchedRow = .Range("D16" ).End(xlUp).Row
238 If LastPaySchedRow < 10 Then GoTo NoPaySched
239 For PaySchedRow = 10 To LastPaySchedRow
240 If .Range("C" & PaySchedRow).Value = Empty Then
241 PaySchedDBRow = PaySchedDB.Range("A99999" ).End(xlUp).Row + 1 'First
Avail Row
242 PaySchedDB.Range("A" & PaySchedDBRow).Value = .Range("B3" ).Value 'Set
Prop. ID
243 PaySchedDB.Range("D" & PaySchedDBRow).Value = PaySchedRow 'Set Prop. Row
244 PaySchedDB.Range("E" & PaySchedDBRow).Value = "=Row()" 'Set DB Row
245 .Range("C" & PaySchedRow).Value = PaySchedDBRow 'Set DB Row
246 Else
247 PaySchedDBRow = .Range("C" & PaySchedRow).Value
248 End If
249 PaySchedDB.Range("B" & PaySchedDBRow).Value = .Range("D" & PaySchedRow).
Value 'Milestone
250 PaySchedDB.Range("C" & PaySchedDBRow).Value = .Range("E" & PaySchedRow).
Value 'Amount
251 Next PaySchedRow
252 NoPaySched:
253 End With
254 Proposal_SavedMsg 'Run Proposal Fade Out Message
255 End Sub
256
257 Sub Proposal_SetPrintArea()
258 With Proposal
259 LastItemRow = .Range("H999" ).End(xlUp).Row
260 If LastItemRow < 13 Then
261 MsgBox "Please add at least 1 item before printing this Proposal"
262 Exit Sub
263 End If
264 ItemNumb = LastItemRow - 12 'Set Item For Last Item #
265 On Error Resume Next
266 Set ItemShp = .Shapes("Item" & ItemNumb)
267 On Error GoTo 0
268 If ItemShp Is Nothing Then Exit Sub
269 PropRow = ItemShp.BottomRightCell.Row 'Last Row of last shape
270 .PageSetup.PrintArea = "$L$1:$L$" & PropRow
271 End With
272 End Sub
273
274 Sub Proposal_ShowHideData()
275 With Proposal
1 2

```

```

276 1 2 'Remove any/all Item shapes
277     For Each ItemShp In .Shapes
278         If InStr(ItemShp.Name, "Item" ) > 0 Then ItemShp.Delete
279     Next ItemShp
280     LastItemRow = .Range("H9999" ).End(xlUp).Row 'Last Item Row
281
282
283     For ItemRow = 13 To LastItemRow
284         PropItemRow = .Range("B" & ItemRow).Value 'Get Item DB Row
285         If PropItemRow = 0 Then GoTo NextItem
286         ItemDesc = PropItems.Range("C" & PropItemRow).Value 'Item Description
287         'Add Variable Data & Payment Schedule If Applicable
288         If .Range("B11" ).Value = True Then 'Show Proposal Data
289             'Add variables
290             LastVarRow = .Range("D31" ).End(xlUp).Row 'Last Variable Row
291             For VarRow = 19 To LastVarRow
292                 ItemDesc = Replace(ItemDesc, .Range("E" & VarRow).Value, Format(.Range(
293                     "F" & VarRow).Value, .Range("F" & VarRow).NumberFormat))
294             Next VarRow
295
296             'Add in Payment Table (if any)
297             If InStr(ItemDesc, "[PaySched]" ) <> 0 Then 'Variable Exists
298                 LastSchedRow = .Range("D16" ).End(xlUp).Row
299                 If LastSchedRow < 10 Then GoTo NoPaySched
300                 ItemDesc = ItemDesc & vbCrLf 'Add new line
301                 For SchedRow = 9 To LastSchedRow
302                     ItemDesc = ItemDesc & .Range("D" & SchedRow).Value & _
303                         Space(25 - Len(.Range("D" & SchedRow).Value)) & _
304                         Format(.Range("E" & SchedRow).Value, .Range("E" & SchedRow).
305                             NumberFormat) & Space(20) & _
306                         Format(.Range("F" & SchedRow).Value, .Range("F" & SchedRow).
307                             NumberFormat) & vbCrLf
308                 Next SchedRow
309             End If
310         End If
311     NoPaySched:
312     ItemNum = ItemRow - 12 'Set Item Number
313     If ItemNum = 1 Then TopPos = .Range("L12" ).Top Else TopPos = .Shapes("Item"
314         & ItemNum - 1).Top + .Shapes("Item" & ItemNum - 1).Height + 10 'Set top
315     Position
316     LeftPos = Proposal.Range("L12" ).Left + 3
317     Proposal.Shapes("SampleShp" ).Duplicate.Name = "Item" & ItemNum 'Create
318     Shape if it does not exist
319
320     With Proposal.Shapes("Item" & ItemNum)
321         If InStr(ItemDesc, "[PaySched]" ) <> 0 And Proposal.Range("B11" ).Value =
322             True Then
323             .TextFrame2.TextRange.Font.Name = "lucida console"
324             ItemDesc = Replace(ItemDesc, "[PaySched]" , "" )
325         End If
326         .TextFrame2.TextRange.Text = ItemDesc 'Set Description
327         .Width = Proposal.Range("L:L" ).Width - 3
328         .TextFrame2.AutoSize = msoAutoSizeShapeToFitText
329         .Height = .Height + 5
330         .Left = LeftPos
331         .Top = TopPos
332     End With
333     NextItem:
334     Next ItemRow
335 End With
336 End Sub

```

- _, 20
- A**
Add, 15-17
AddCustForm, 11, 15
Admin, 18
AdvancedFilter, 15, 17
Application, 11, 14
Apply, 15-17
attachments, 16
AutoSize, 12, 20
- B**
body, 16
BottomRightCell, 19
- C**
Caller, 14
CancelBtn_Click, 11
Cells, 11, 17, 19
Chr, 2, 18
Clear, 15-17
ClearContents, 2, 7, 13, 14, 17, 18
Control, 11
Controls, 11
CopyToRange, 15, 17
CountLarge, 2, 7, 8
CreateItem, 16
CreateObject, 16
CriteriaRange, 15, 17
CustCol, 11
Customer_AddNew, 15
CustomerFld, 11
Customers, 11, 16
CustRow, 11, 16
- D**
DataOption, 15-17
Delay, 18
Delete, 13, 15-18, 20
Dir, 16, 18
display, 16
DoEvents, 18
Duplicate, 12, 20
- E**
EmailTo, 16
Empty, 2, 7, 8, 11-19
EntireRow, 13, 15, 16
Explicit, 2-7, 9-12, 15
ExportAsFixedFormat, 16, 18
- F**
Field1, 11
FilePath, 16, 18
Fill, 18
Find, 7, 18
Font, 12, 20
Format, 16, 20
- H**
Height, 12, 13, 20
Hide, 11
- I**
I, 18
InputBox, 14
InStr, 12, 17, 18, 20
- Intersect, 2, 7, 8
Item_AddUpdateItem, 7, 12
Item_Clear, 13
Item_New, 14
Item_SaveUpdate, 14
Item_Select, 14
ItemDesc, 7, 12, 15, 20
ItemName, 14
ItemNumb, 7, 12-15, 19, 20
ItemRow, 7, 12-15, 20
Items, 7, 14
ItemShp, 7, 12, 13, 15, 17-20
- K**
Key, 15-17
Kill, 16, 18
- L**
LastItemNumb, 12, 13
LastItemRow, 12, 13, 15, 19, 20
LastPaySchedRow, 15, 19
LastResultRow, 15-17
LastRow, 15, 17
LastSchedRow, 12, 15, 20
LastShp, 12, 13
LastVarRow, 7, 12, 15, 20
Left, 8, 12, 20
LeftPos, 7, 12, 15, 20
Len, 20
- M**
Max, 11
Msg, 16
MsgBox, 7, 11, 13-19
msoAutoSizeShapeToFitText, 12, 20
msoCTrue, 8, 18
msoFalse, 8, 13, 18
- N**
Name, 12, 13, 17, 18, 20
NextItem, 20
NextShp, 13
NoItems, 15, 17
NoPayItems, 15-17
NoPaySched, 19, 20
NotSaved, 15, 16
NumberFormat, 16, 20
- O**
Order, 15-17
OutApp, 16
OutMail, 16
- P**
PageSetup, 19
Path, 16, 18
PaySched, 12
PaySchedDB, 15-17, 19
PaySchedDBRow, 15, 16, 19
PaySchedRow, 15, 17, 19
PrevShp, 12
PrintArea, 19
PrintOut, 18
PropCol, 15, 17, 19
PropItemRow, 7, 8, 12-15, 17, 20
PropItems, 8, 12-15, 17, 20
Proposal, 11-20
Proposal_Delete, 15
Proposal_Email, 16
Proposal_Load, 7, 16
Proposal_New, 16, 18
Proposal_Print, 18
Proposal_SaveAsPDF, 18
Proposal_SavedMsg, 18, 19
Proposal_SaveUpdate, 18
Proposal_SetPrintArea, 16, 18, 19
Proposal_ShowHideData, 13, 17, 19
ProposalList, 15, 17, 19
PropRow, 15, 17, 19
- R**
Range, 2, 7, 8, 11-20
Replace, 12, 14, 16, 20
ResultRow, 15-17
Row, 2, 7, 8, 11-15, 17-20
- S**
SaveBtn_Click, 11
SchedRow, 12, 15, 20
SelRow, 12-14
SetRange, 15-17
Shape, 7, 12, 15
Shapes, 8, 12, 13, 17-20
Show, 15
ShpNumb, 12, 13, 15
SingleItemRow, 15
SinglePayRow, 15, 16
SkipDBDel, 13
SkipRowChange, 13
Sort, 15-17
SortFields, 15-17
SortOn, 15-17
Space, 20
StartTime, 18
StatusRow, 15, 18
Subj, 16
Subject, 16
- T**
Target, 2, 7, 8
Text, 12, 20
TextFrame2, 12, 20
TextRange, 12, 20
ThisWorkbook, 16, 18
Timer, 18
Top, 8, 12, 13, 20
TopPos, 7, 12, 13, 15, 20
Transparency, 18
- U**
Unique, 15, 17
Unload, 15
- V**
Value, 2, 7, 8, 11-20
VarRow, 7, 12, 15, 16, 20
vbCrLf, 20
vbDirectory, 16, 18
vbNo, 13, 15
vbYesNo, 13, 15
Visible, 8, 13, 18
- W**
Width, 12, 20
Worksheet_Change, 7
Worksheet_SelectionChange, 2, 8
WorksheetFunction, 11
WrapText, 12

X

- xlAscending, 17
- xlDescending, 15, 16
- xlFilterCopy, 15, 17
- xlSortNormal, 15-17
- xlSortOnValues, 15-17
- xlTypePDF, 16, 18
- xlUp, 11-15, 17, 19, 20
- xlValues, 7, 18
- xlWhole, 7, 18

Thank You!

This source code was created and made available to help you gain a better understanding of how VBA is used to create amazing Excel-based applications.

Thank you so much for your continued shares, likes and support. It really helps.



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