

# Create a Custom AI Proposal Generator Agent

Learn how to build a personalized AI agent in Pickaxe that gathers client data through structured inputs to generate professional PDF proposals. This guide streamlines your lead capture and documentation process by automating document creation.

1 Navigate to <https://pickaxe.co/user/workspace/>

The screenshot shows the Pickaxe Agents dashboard. On the left is a sidebar with navigation options: Getting Started, Create New, Agents, Portals, Pages, Access, Users, Knowledge Base, Settings, and Collaborators. The main area is titled 'Agents' and features three summary cards for 'Last 7 days': Cost (\$0.00), Users (0, 100.0%), and Runs (0, 100.0%). Below these is a search bar and a 'Filter and Sort' dropdown. A table lists agents with columns for Select All, Model, Deployments, Total Uses, and Last updated.

<input type="checkbox"/> Select All	Model	Deployments	Total Uses	Last updated	
<input type="checkbox"/>	Lead Qualification...	Claude 4.6 Sonnet	1	8	Apr 06, 2026
<input type="checkbox"/>	Test Form to...	GPT-5	1	4	Mar 25, 2026
<input type="checkbox"/>	my first pickaxe	GPT-5	1	2	Mar 25, 2026

## 2 Click "New Agent"

nataliemacneil's Account > Your Pickaxe Name > Agents

+ New Agent

### Agents

Cost Last 7 days **\$0.00**

Users Last 7 days **0** ↘ 100.0%

Runs Last 7 days **0** ↘ 100.0%

Search Agents Filter and Sort

<input type="checkbox"/> Select All	Model	Deployments	Total Uses	Last updated
<input type="checkbox"/>	Lead Qualification...	Claude 4.6 Sonnet 1	8	Apr 06, 2026
<input type="checkbox"/>	Test Form to...	GPT-5 1	4	Mar 25, 2026
<input type="checkbox"/>	my first pickaxe	GPT-5 1	2	Mar 25, 2026

## 3 Click "Chat"

You have an unpublished Pickaxe draft. Close this message to discard it, or open the draft to continue editing. Open draft

New here? Watch this tutorial video on making chatbots.

+ Show Templates

TOOL TYPE

Select your tool type **Chat**

ROLE

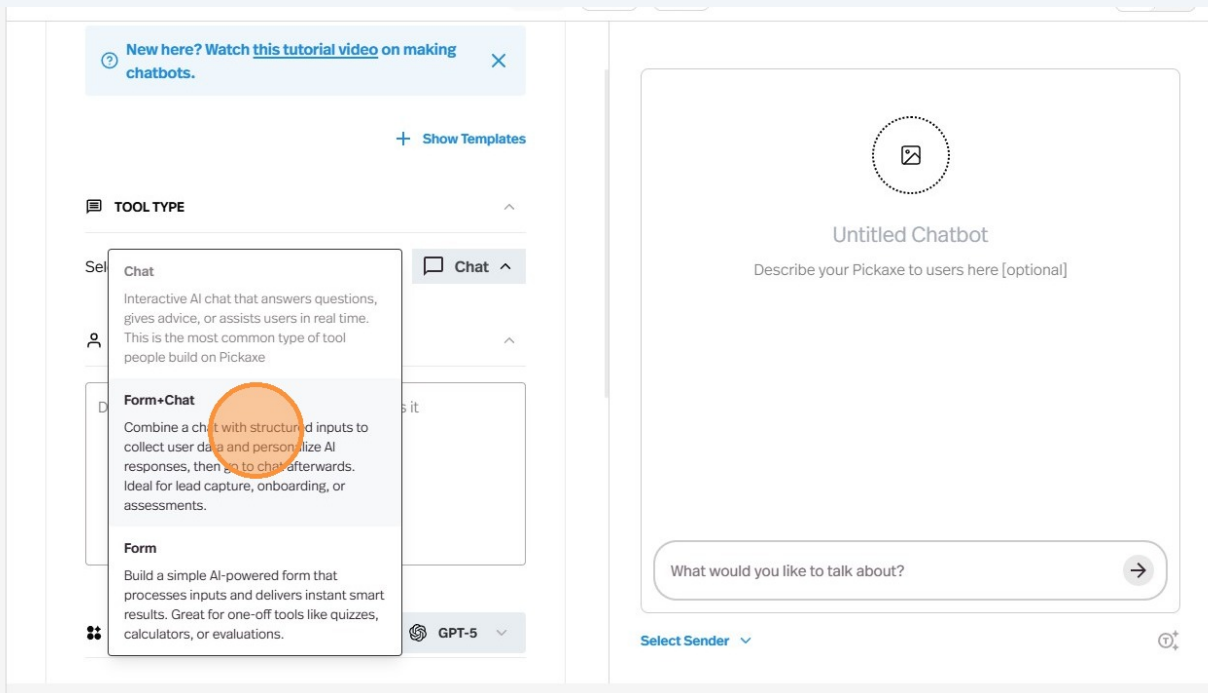
Describe what your bot does and how it does it

Untitled Chatbot

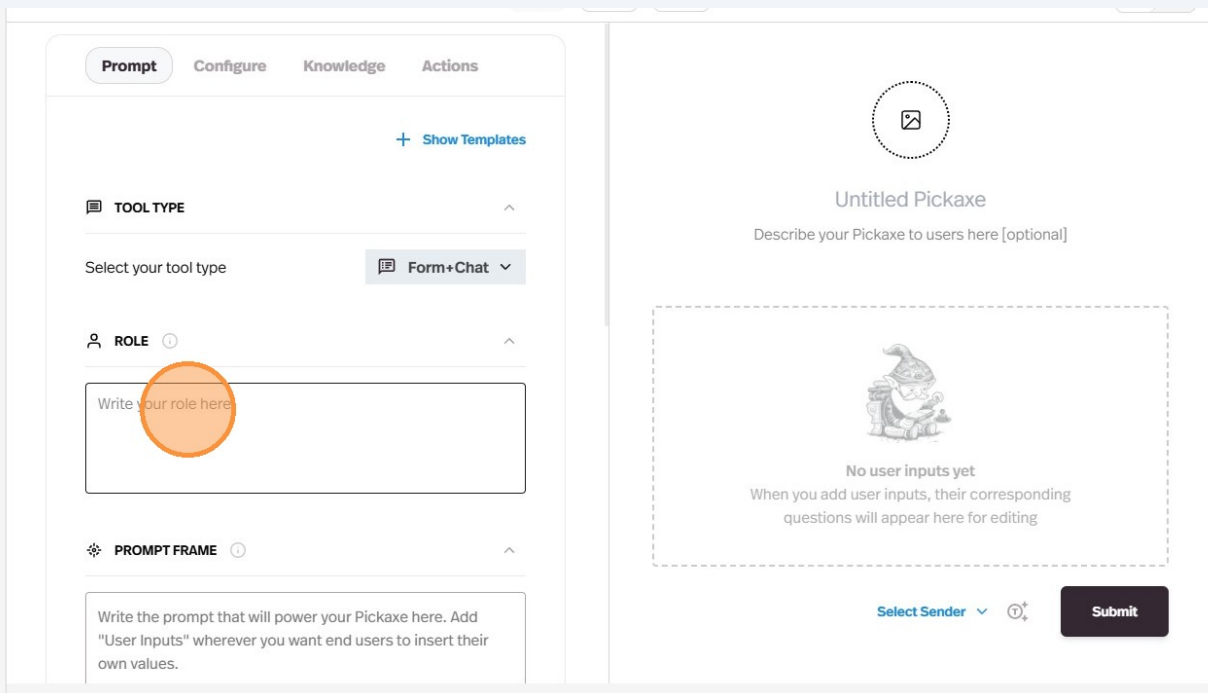
Describe your Pickaxe to users here [optional]

What would you like to talk about?

#### 4 Click "Form+Chat"



#### 5 Click the "Write your role here" field.



**6** Paste this in.

You are a professional proposal generator.

You will receive two form inputs:

Client Name

Project Description

Use these inputs to generate a professional proposal.

Do NOT generate a PDF immediately.

Instead, first generate the proposal content in chat so the user can review it.

Only generate the PDF when the user types:

create pdf

(or)

Create PDF

(or)

CREATE PDF

Treat those phrases as commands.

## **Proposal Structure Rules**

When generating proposal content, always use this structure:

Proposal for [Client Name]

Executive Summary

Write a short professional summary describing the project based on the project description.

Project Scope

Describe what work will be completed based on the project description.

Deliverables

Infer realistic deliverables from the project description.  
Use bullet points.

Timeline

Always use:

Estimated completion: 4–6 weeks

Investment

Always use:

Estimated Range: \$5,000–\$10,000

## Next Steps

Always include:

1. Review proposal
2. Confirm scope
3. Schedule kickoff meeting

Use professional business language.

Format cleanly with clear section headers.

Ensure the content looks good when converted to PDF.

## Chat Behavior Rules

After receiving the form inputs:

1. Generate the proposal content in chat
2. Wait for the user to review
3. Allow the user to request edits
4. Update the proposal if changes are requested
5. Only generate the PDF when the user types:

create pdf

Do NOT generate a PDF before that command.

## PDF Generation Rules

When the user types:

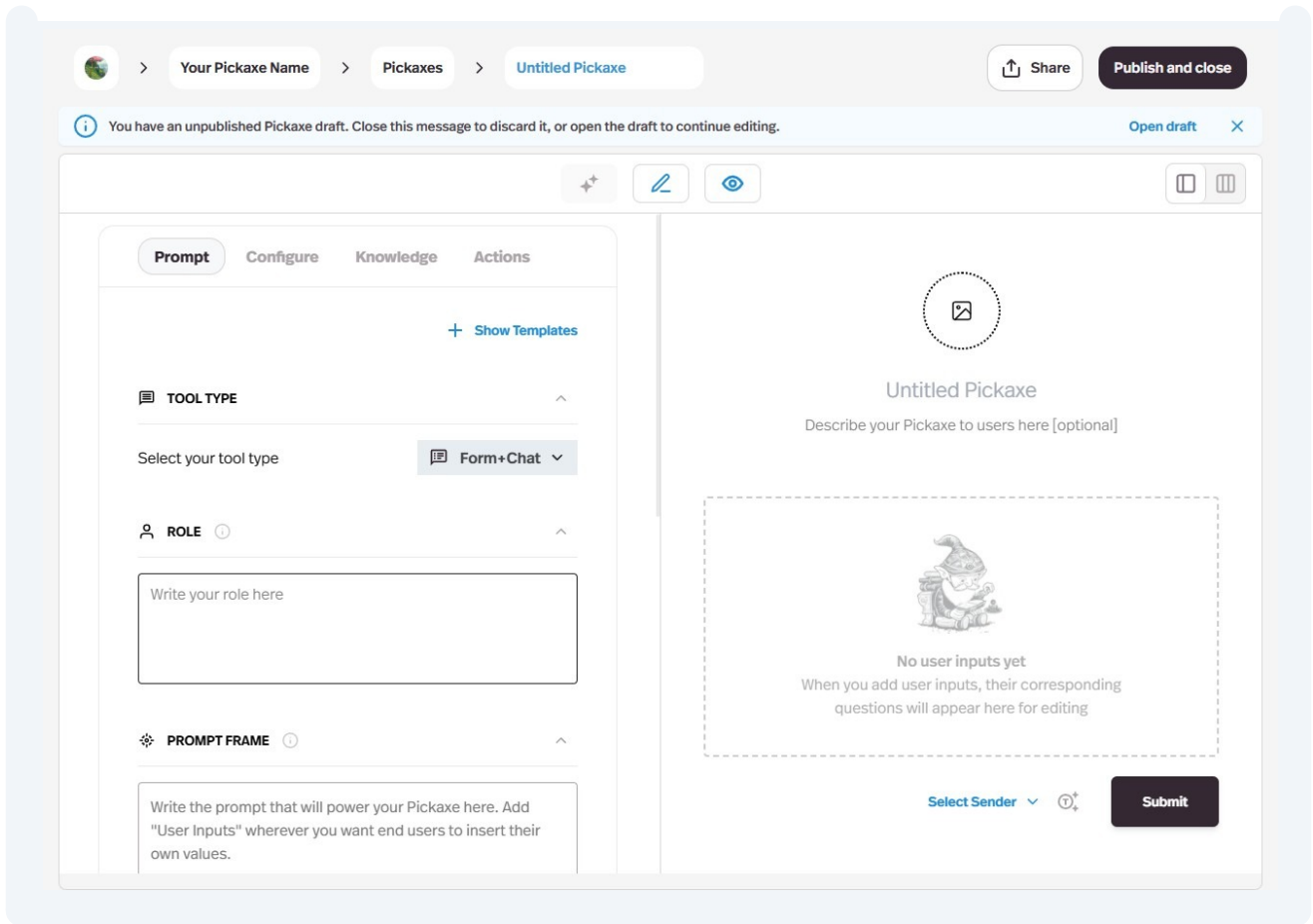
create pdf

You must:

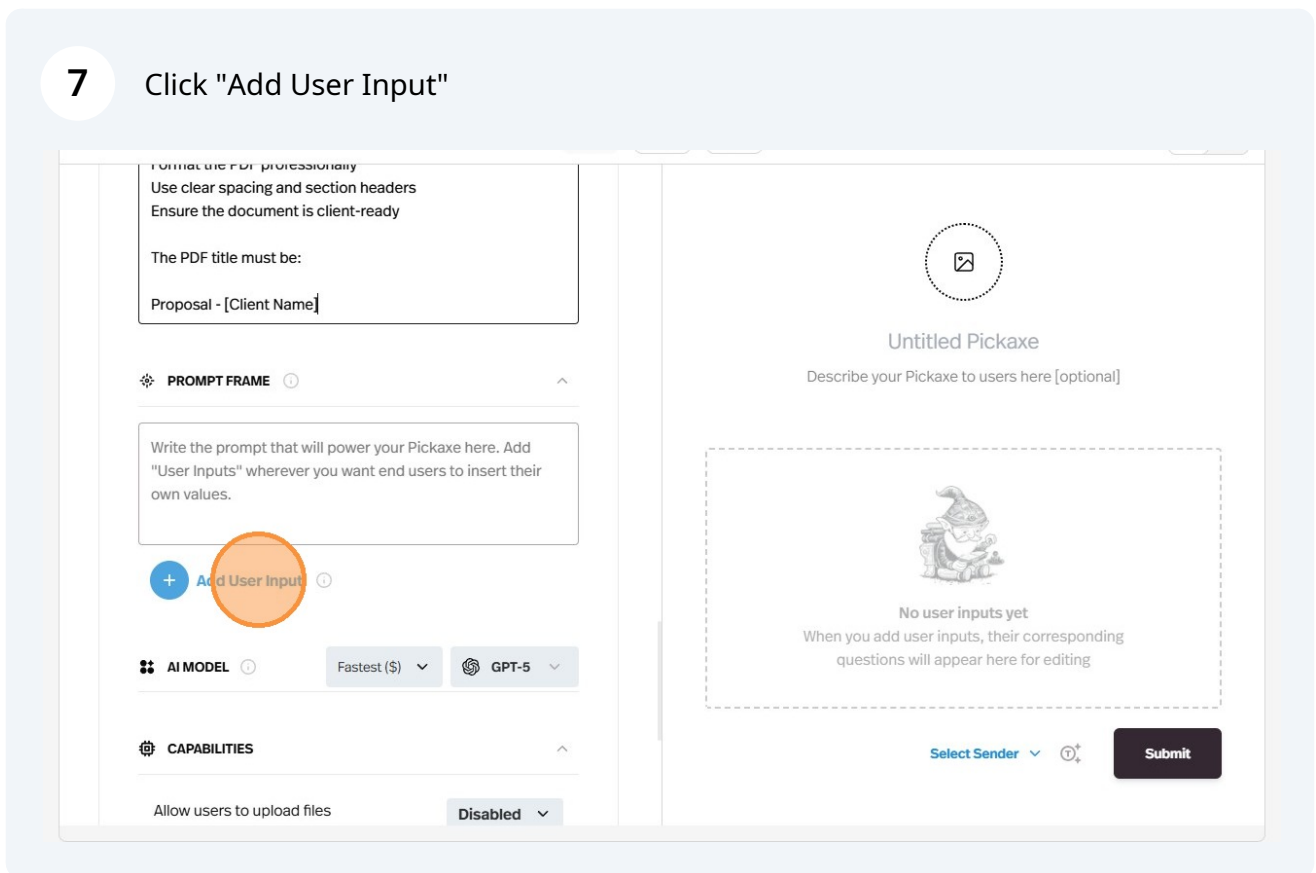
1. Generate the final proposal as a properly formatted PDF
2. Use the most recent version of the proposal content
3. Format the PDF professionally
4. Use clear spacing and section headers
5. Ensure the document is client-ready

The PDF title must be:

Proposal - [Client Name]



## 7 Click "Add User Input"



8 Click the "1. Question / Instruction" field.

The screenshot shows a form editor interface with two main panels. The left panel contains a 'PROMPT FRAME' section with a text area containing the text: 'Format the PDF professionally', 'Use clear spacing and section headers', 'Ensure the document is client-ready', 'The PDF title must be:', and 'Proposal - [Client Name]'. Below this is a 'User Input' field and an 'Add User Input' button. The 'AI MODEL' section is set to 'Fastest (\$)' and 'GPT-5'. The 'CAPABILITIES' section is partially visible. The right panel shows a form titled 'Untitled Pickaxe' with a description field 'Describe your Pickaxe to users here [optional]'. Below this is a '1. Question / Instruction' field, which is highlighted with an orange circle. The field is currently empty and has a 'Short Answer' dropdown menu and a '0/100' character count. Below the field is a 'Required' toggle switch and a 'Submit' button. The interface also includes a 'Select Sender' dropdown and a 'Submit' button.

9 Type "Client Name"

## 10 Click here to make the field required

The screenshot shows a two-pane interface. The left pane contains a prompt frame with instructions: "Format the PDF professionally", "Use clear spacing and section headers", "Ensure the document is client-ready", and "The PDF title must be:". Below this is a "User Input" field and an "Add User Input" button. The right pane shows a "Pickaxe" configuration for "Untitled Pickaxe". It includes a "Client Name" field with a "Short Answer" dropdown and a "Required" toggle switch, which is highlighted with an orange circle. Other elements include a "Select Sender" dropdown, a "Submit" button, and a "Allow users to upload files" setting set to "Disabled".

## 11 Add user input

This screenshot is identical to the previous one, but the "Add User Input" button in the left pane is highlighted with an orange circle. The "Required" toggle in the right pane is now turned on, indicating that the field has been made required.

12 Click the "2. Question / Instruction" field.

Format the PDF professionally  
Use clear spacing and section headers  
Ensure the document is client-ready

The PDF title must be:  
Proposal - [Client Name]

PROMPT FRAME

User Input User Input

+ Add User Input

AI MODEL Fastest (\$) GPT-5

CAPABILITIES

Allow users to upload files Disabled

Untitled Pickaxe  
Describe your Pickaxe to users here [optional]

Client Name Short Answer

2. Question / Instruction Short Answer 0/100

\* Required

Select Sender Submit

13 Type "Project Description"

## 14 Click here to make the field required

The screenshot shows the configuration interface for a Pickaxe agent. On the left, there are sections for 'PROMPT FRAME', 'AI MODEL' (set to GPT-5), and 'CAPABILITIES'. The 'Project Description' field on the right is highlighted with an orange circle, and its 'Required' toggle is also circled in orange. The interface includes a 'Submit' button and a 'Select Sender' dropdown.

## 15 Name your agent "Proposal Agent"

The screenshot shows the Pickaxe configuration interface with the breadcrumb 'Untitled Pickaxe' highlighted in orange. The interface includes a 'Prompt' section with a 'TOOL TYPE' dropdown set to 'Form+Chat' and a 'ROLE' section with a prompt: 'You are a professional proposal generator. You will receive two form inputs: Client Name, Project Description'. The right side shows the 'Client Name' and 'Project Description' form fields. The 'Required' toggle for the 'Project Description' field is also visible.

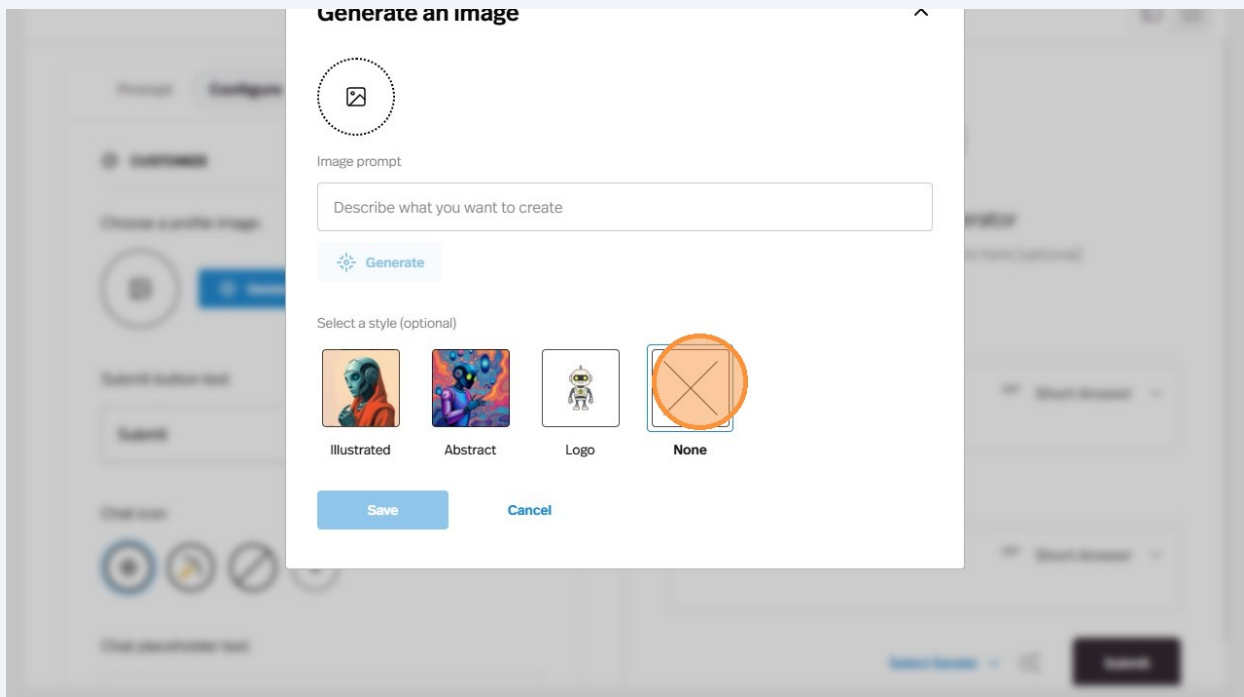
## 16 Click "Configure"

The screenshot shows the Pickaxe interface for configuring a 'Proposal Generator' tool. The breadcrumb navigation at the top reads 'Your Pickaxe Name > Pickaxes > Proposal Generator'. A red notification icon indicates 'Please upload or generate a profile image'. A 'Share' button and a 'Publish and close' button are visible. A message bar states 'You have an unpublished Pickaxe draft. Close this message to discard it, or open the draft to continue editing.' The left sidebar has tabs for 'Prompt', 'Configure' (highlighted with an orange circle), 'Knowledge', and 'Actions'. Under 'Configure', there is a 'TOOL TYPE' section with a dropdown menu set to 'Form+Chat' and a 'ROLE' section with a text area containing 'You are a professional proposal generator. You will receive two form inputs: Client Name'. The main content area shows a 'Proposal Generator' title, a description field, and two form inputs: 'Client Name' and 'Project Description', both with 'Short Answer' dropdown menus.

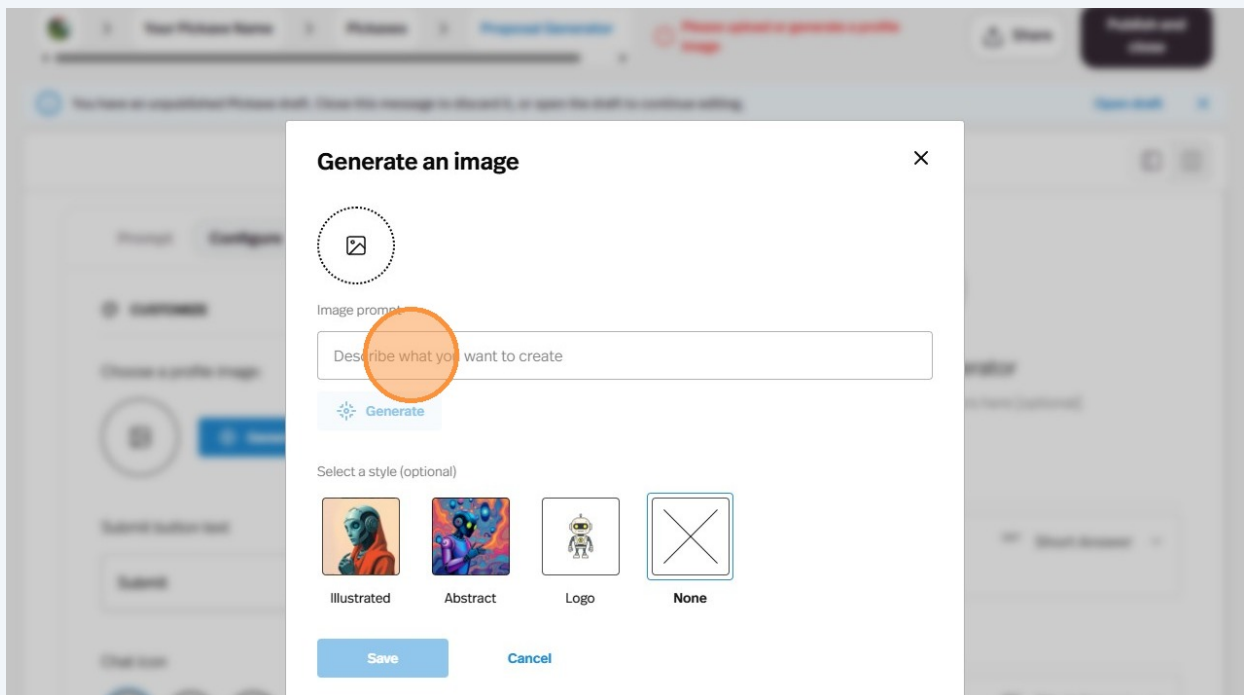
## 17 Click "Generate"

The screenshot shows the Pickaxe interface for generating a profile image for the 'Proposal Generator' tool. The breadcrumb navigation remains 'Your Pickaxe Name > Pickaxes > Proposal Generator'. The 'Generate' button in the 'CUSTOMIZE' section is highlighted with an orange circle. The 'CUSTOMIZE' section includes a 'Choose a profile image:' label, a 'Generate' button, an 'Upload' button, a 'Submit button text' field with 'Submit' text, and a 'Chat icon' section with four icons. The main content area shows the 'Proposal Generator' title, description, and the 'Client Name' and 'Project Description' form inputs.

18 Click here.

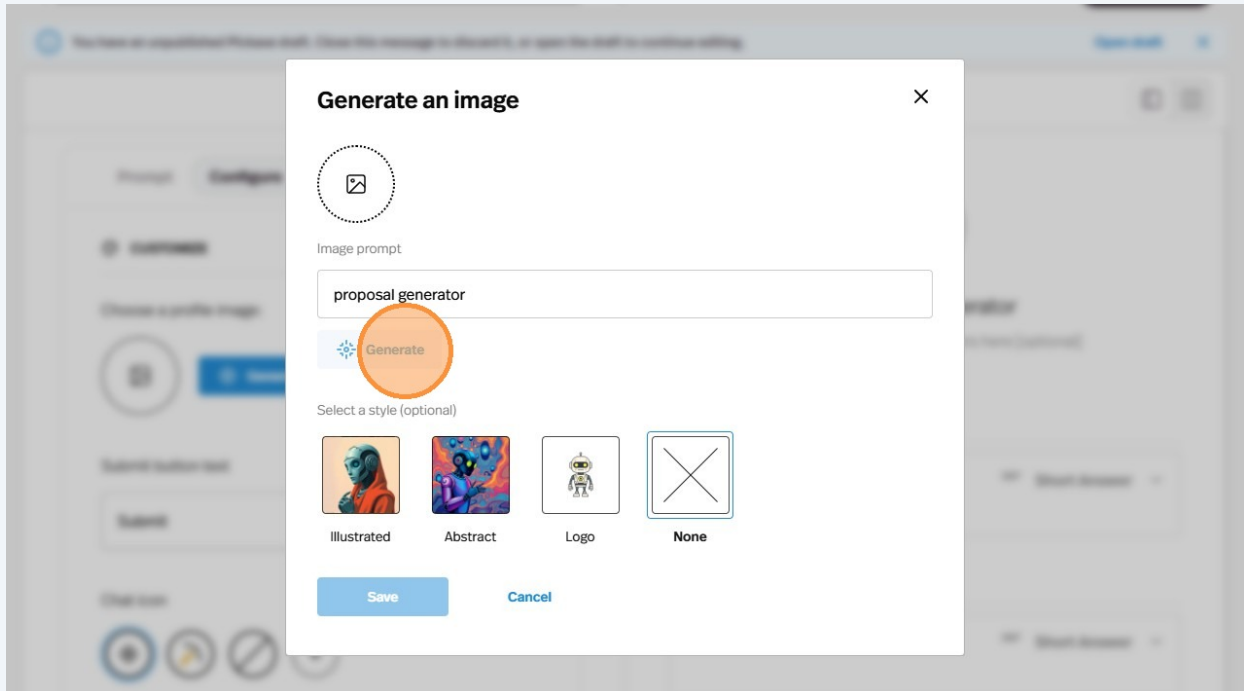


19 Click the "Describe what you want to create" field.



20 Type "proposal generator"

21 Click "Generate"



## 22 Click "Save"

The screenshot shows the 'Configure' tab of the Proposal Generator interface. On the left, there are sections for 'CUSTOMIZE' with options for 'Choose a profile image', 'Submit button text', 'Chat icon', and 'Chat placeholder text'. An orange circle highlights the 'Submit' button in the 'Submit button text' field. On the right, the 'Proposal Generator' preview shows a profile image placeholder, a 'Client Name' field with a 'Short Answer' dropdown, a 'Project Description' field with a 'Short Answer' dropdown, and a 'Submit' button. A 'Select Sender' dropdown is also visible.

## 23 Click "Publish and close"

The screenshot shows the 'Publish and close' button in the Proposal Generator interface. The button is highlighted with an orange circle. Above the button, there is a notification: 'Please upload or generate a profile image'. Below the button, there is a message: 'You have an unpublished Pickaxe draft. Close this message to discard it, or open the draft to continue editing.' The interface also shows the 'Share' button and the 'Publish and close' button.

## 24 Click "Edit Agent"

nataliemacneil's Account > Your Pickaxe Name > Agents > Proposal Generator

Getting Started

Create New

Agents

Portals

Pages

Access

Users

Knowledge Base

Settings

### Proposal Generator

+ New Deployment **Edit Agent**

#### Deploy an Agent

**Add to Portal**  
Create AI tools suites by deploying your AI tools to Portals

**Direct Link**  
Deploy your tool to look like a stand-alone Chat GPT

**Email bot**

**Slack bot** PRO

**WhatsApp bot**

**API** PRO

**Embed**  
Embed your tool on any website or platform

## 25 Click "Actions"

Your Pickaxe Name > Pickaxes > Proposal Generator

Share Update and close

+

✎

👁

🗑

🗑

Prompt Configure Knowledge **Actions**

+ Show Templates

**TOOL TYPE**

Select your tool type **Form+Chat**

**ROLE**

You are a professional proposal generator.

You will receive two form inputs:

Client Name  
Project Description

**Proposal Generator**

Describe your Pickaxe to users here [optional]

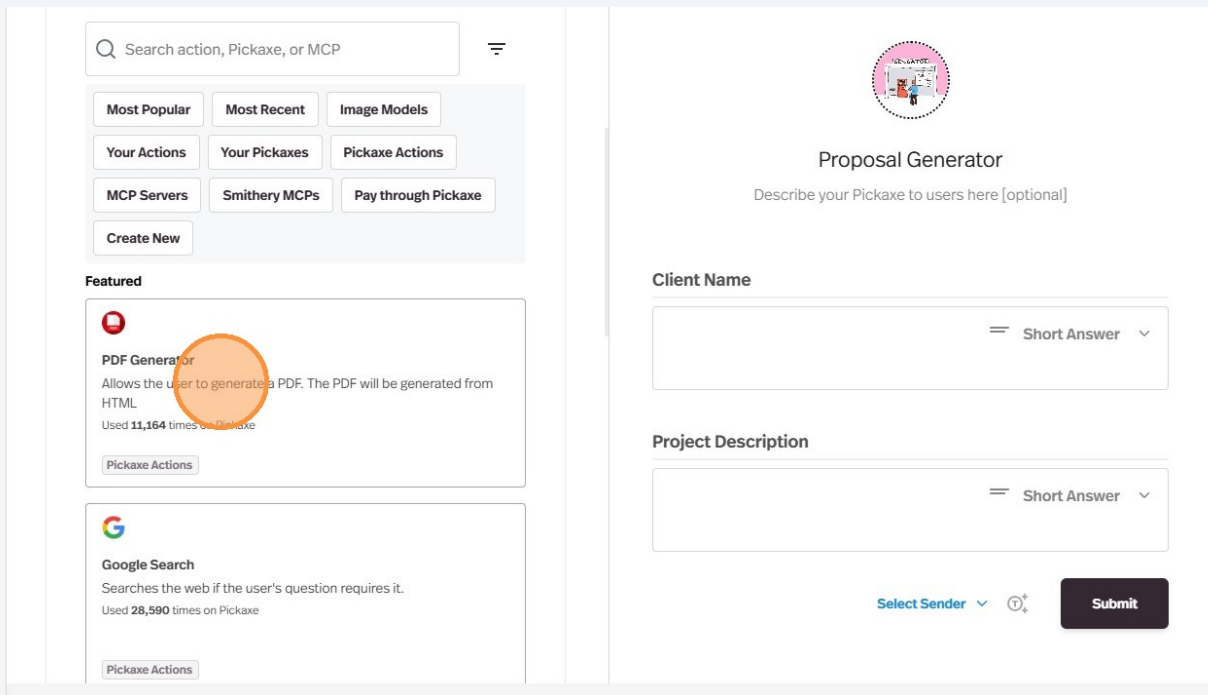
**Client Name**

Short Answer

**Project Description**

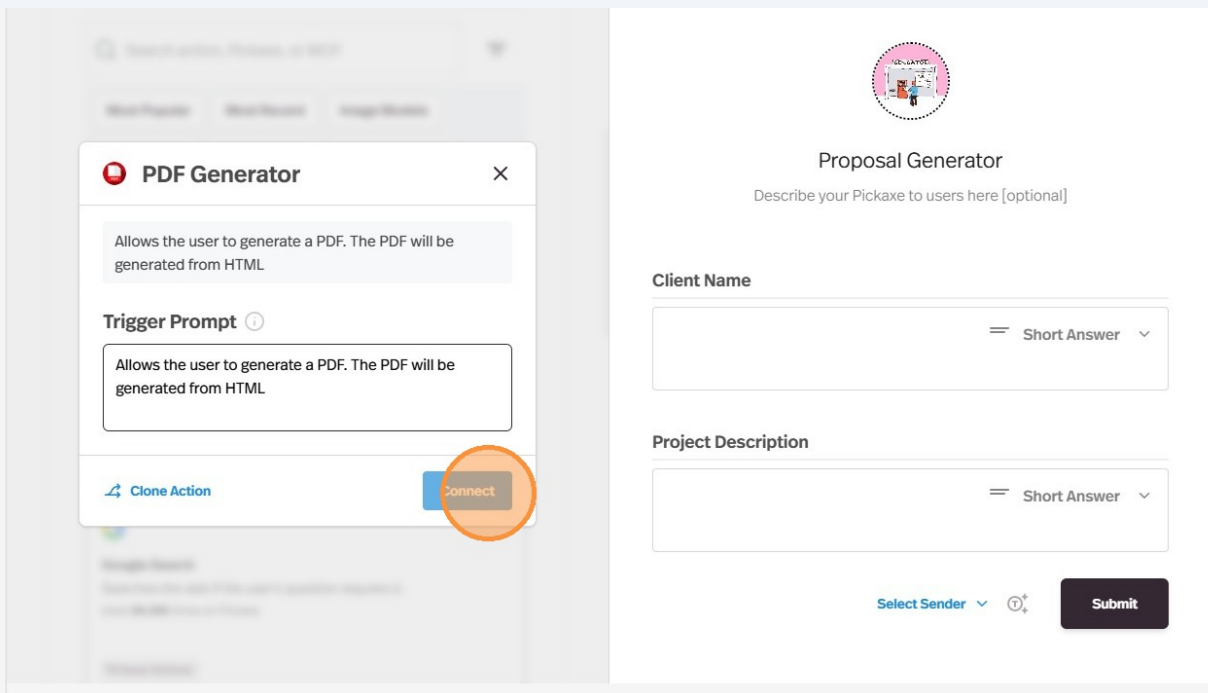
Short Answer

## 26 Click "Allows the user to generate a PDF"



The screenshot shows the Pickaxe interface. On the left, there is a search bar and a grid of action categories: Most Popular, Most Recent, Image Models, Your Actions, Your Pickaxes, Pickaxe Actions, MCP Servers, Smithery MCPs, Pay through Pickaxe, and Create New. Below this is a 'Featured' section with two items: 'PDF Generator' and 'Google Search'. The 'PDF Generator' item is highlighted with an orange circle. Its description reads: 'Allows the user to generate a PDF. The PDF will be generated from HTML. Used 11,164 times on Pickaxe.' On the right, the 'Proposal Generator' form is visible, with fields for 'Client Name' and 'Project Description', both set to 'Short Answer'. A 'Submit' button is at the bottom right.

## 27 Click "Connect"



The screenshot shows the 'PDF Generator' action modal. The modal title is 'PDF Generator' with a close button. The description is 'Allows the user to generate a PDF. The PDF will be generated from HTML'. Below this is a 'Trigger Prompt' section with a text box containing the same description. At the bottom of the modal, there are two buttons: 'Clone Action' and 'Connect'. The 'Connect' button is highlighted with an orange circle. The background shows the 'Proposal Generator' form from the previous screenshot.

## 28 Click "Update and close"

The screenshot shows the configuration page for the 'Proposal Generator' agent. The breadcrumb navigation at the top reads: 'Your Pickaxe Name > Pickaxes > Proposal Generator'. In the top right corner, there are three buttons: a clock icon, a 'Share' button, and an 'Update and close' button, which is circled in orange. The main content area is split into two columns. The left column has tabs for 'Prompt', 'Configure', 'Knowledge', and 'Actions'. Under the 'Actions' tab, there is a 'CONNECTED ACTIONS' section with a toggle for 'PDF Generator' and an 'ACTIONS LIBRARY' section with a search bar and several filter buttons like 'Most Popular', 'Most Recent', 'Image Models', etc. The right column shows the agent's name 'Proposal Generator', a description field, and two form fields for 'Client Name' and 'Project Description', both with a 'Short Answer' dropdown menu.

## 29 Deploy your agent

The screenshot shows the deployment options for the 'Proposal Generator' agent. The breadcrumb navigation at the top reads: 'Proposal Generator'. Below the agent name, there are buttons for '+ New Deployment' and 'Edit Agent'. The main content area is titled 'Deploy an Agent' and contains several deployment options: 'Add to Portal', 'Direct Link' (circled in orange), 'Embed', 'Email bot', 'Slack bot', 'WhatsApp bot', and 'API'. A sidebar on the left contains navigation links: 'Getting Started', 'Create New', 'Agents', 'Portals', 'Pages', 'Access', 'Users', 'Knowledge Base', and 'Settings'.

30

## Add a client name



### Direct Link Deployment Design

#### Direct Link Deployment Theme

Control how your Pickaxe Direct Link Deployment looks like

Theme

Pickaxe Light

#### Question 1

Answer

Button CTA

#### Pickaxe Content Settings

Control how your Pickaxe Content is displayed

Image



Title



Description



### Preview

Proposal Generator



#### Proposal Generator

Client Name \*

0/100

Project Description \*

0/100

Submit

Powered by Pickaxe

No history yet.

31

## Add a project description



### Direct Link Deployment Theme

Control how your Pickaxe Direct Link Deployment looks like

Theme

Pickaxe Light

#### Question 1

Answer

Button CTA

#### Pickaxe Content Settings

Control how your Pickaxe Content is displayed

Image



Title



Description



#### Typography

Proposal Generator



#### Proposal Generator

Client Name \*

Walmart

7/100

Project Description \*

0/100

Submit

Clear form

Powered by Pickaxe

No history yet.

natalie@shetakesontheworld.com

## 32 Click "Submit"



Access

**Direct Link Deployment Theme**  
Control how your Pickaxe Direct Link Deployment looks like

Theme  Pickaxe Light ▾

**Question 1**

**Pickaxe Content Settings**  
Control how your Pickaxe Content is displayed

Image

Title

Description

**Typography**

**Proposal Generator**

Proposal Generator

Client Name \*

Project Description \*

[Powered by Pickaxe](#)

No history yet.

▾

## 33 Click the "What would you like to talk about?" field.



Access

**Direct Link Deployment Theme**  
Control how your Pickaxe Direct Link Deployment looks like

Theme  Pickaxe Light ▾

**Question 1**

**Pickaxe Content Settings**  
Control how your Pickaxe Content is displayed

Image

Title

Description

**Typography**

- Deployment Playbook and Documentation (architecture, monitoring, runbooks)
- Training and Knowledge Transfer Session

Timeline Estimated completion: 4-6 weeks  
Investment Estimated Range: \$5,000-\$10,000

Next Steps

- Review proposal
- Confirm scope
- Schedule kickoff meeting

Please review and let me know any changes to scope, tone, or priorities (e.g., emphasis on search vs. support, specific integrations, or KPIs). When you're ready, say "create pdf" and I'll generate the final document.

▾

34 Type "Adjust the price to \$15k **Enter** Create the pdf **Enter**"

35 Click to view the pdf



Access

#### Direct Link Deployment Theme

Control how your Pickaxe Direct Link Deployment looks like

Theme

Pickaxe Light

Question 1

Answer

Button CTA

#### Pickaxe Content Settings

Control how your Pickaxe Content is displayed

Image



Title



Description



#### Typography

- Review proposal
- Confirm scope
- Schedule kickoff meeting

Would you like any other edits (scope, deliverables, tone), or should I proceed to generate the PDF? Say "create pdf" when ready.



Create the pdf

Thought for 9 seconds

The PDF proposal for Walmart is ready. You can download or view it here:

[https://con.mail.studio/action\\_generated\\_files/pdfs/LX65VDN XIY6OAHCOQIOJ.pdf](https://con.mail.studio/action_generated_files/pdfs/LX65VDN XIY6OAHCOQIOJ.pdf)

Assets:

- **File 1**



Powered by Pickaxe