Proposals Tab

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The Proposals tab displays all open or completed proposals for the customer.

Add New Proposal Button

Clicking on the Add New Proposal button will open the Proposal form to create a new proposal for the customer.

Proposal Hyperlink

In the Number column, clicking on the hyperlink of a Proposal will open the proposal for viewing and/or editing. Users with permissions are able to make changes to the proposal and re-save, only if the proposal has not been completed.