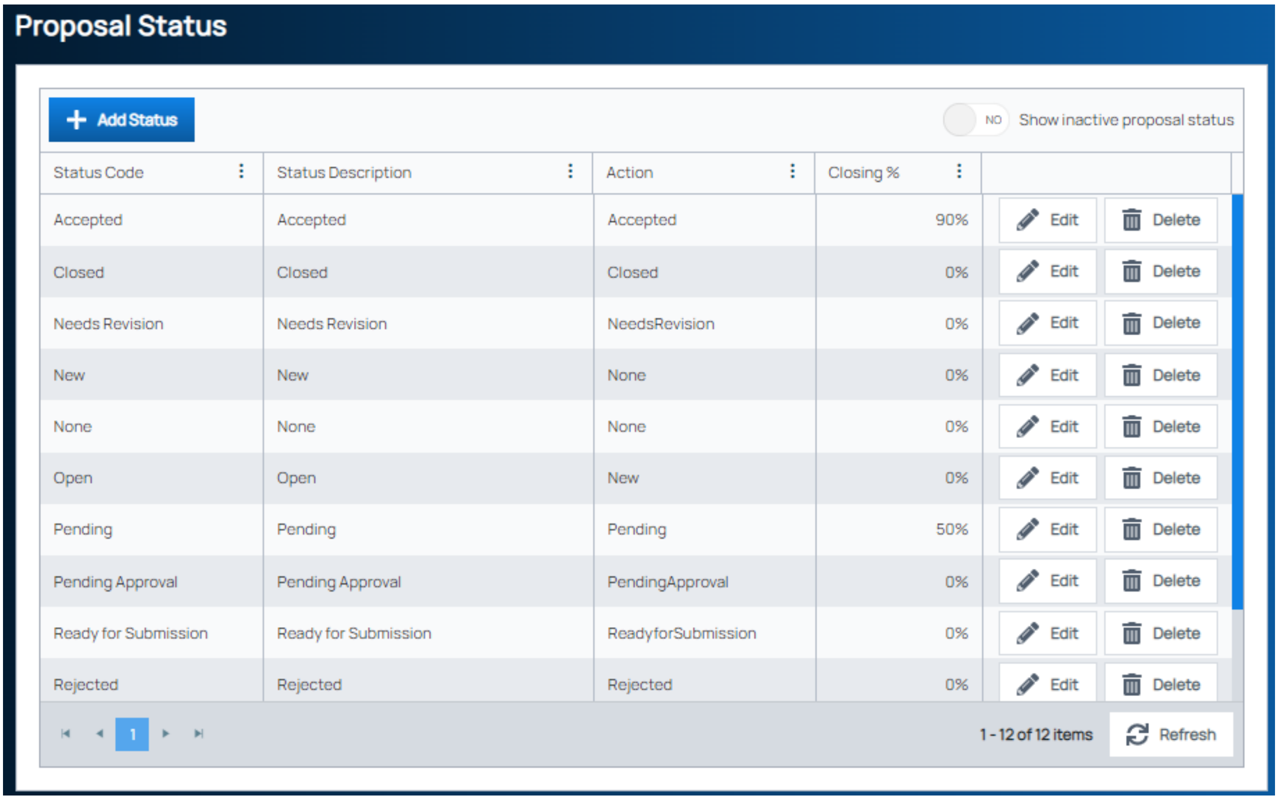
Add a Proposal Status

Last Modified on 11/02/2023 1:51 pm EDT

Proposal Statuses are used to track the progress of a proposal. When a new proposal is created, users must select a status. As the sales cycle progresses, users manually update the proposal status. When viewing the Proposals List, users can sort and filter on the proposal status field.

To add a new Proposal Status, from the main menu, arrive at the Proposal Status setup with this path: Setup > Proposals > Proposal Status.

The Proposal Status list will be displayed. Click the Add Status button at the upper left of the page.

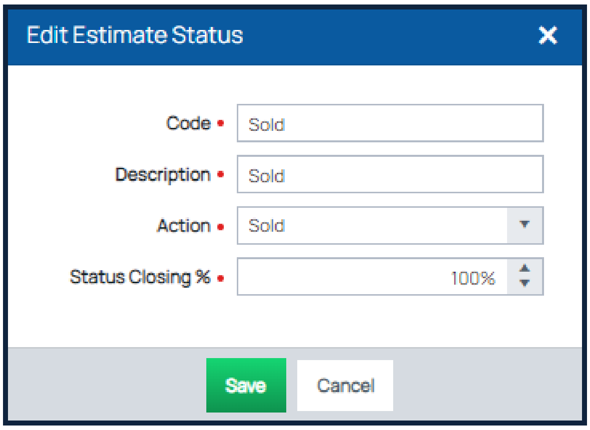


Status Code	Status Description	Action	Closing %	
Accepted	Accepted	Accepted	90%	Edit Delete
Closed	Closed	Closed	0%	Edit Delete
Needs Revision	Needs Revision	NeedsRevision	0%	Edit Delete
New	New	None	0%	Edit Delete
None	None	None	0%	Edit Delete
Open	Open	New	0%	Edit Delete
Pending	Pending	Pending	50%	Edit Delete
Pending Approval	Pending Approval	PendingApproval	0%	Edit Delete
Ready for Submission	Ready for Submission	ReadyforSubmission	0%	Edit Delete
Rejected	Rejected	Rejected	0%	Edit Delete

The Edit Estimate Status form is displayed. Each data entry field is described below — all fields are required.

- **Code** — Type in a code for the status.   Maximum of 25 characters.
- **Description** — Type in a description. Maximum 50 characters.
- **Action** — Make a selection from the drop-down list.
- **Status Closing %** — Type in a value between 0 and 100. You can also use the up and down arrows to the right of the field to select the appropriate value.

When finished, click the **Save** button at the bottom of the form.


Edit Estimate Status
Code
Sold
Description
Sold
Action
Sold
Status Closing %
100%
Save
Cancel