Delete a Proposal Status

Last Modified on 11/02/2023 1:56 pm EDT

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

The Proposal Status list is displayed. Locate the Status you want to delete, and then click the Delete button.

A confirmation message is displayed. If the status has never been used on a proposal, the record is deleted. If the status has been used on a proposal, the record is marked as inactive. Click the Yes button to confirm the deletion or inactivation of the record.