Add a Proposal Type

Last Modified on 08/15/2022 11:46 am EDT

Proposal Types are used to identify the proposal. When a creating a new proposal, the Proposal Type is a required field. When viewing the list of open or completed proposals, the user may sort and/or filter on the Proposal Type.

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

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

Proposal Types				
+ Add Proposal Type	NO Show inactive Proposal Types			
Name	:			
Existing Cust-Res	🖋 Edit 🗰 Delete			
Existing Cust-Com	🖋 Edit 🛅 Delete			
New Lead-Res	🖋 Edit 🛅 Delete			
New Lead-Com	🖋 Edit 🛅 Delete			
Existing Cust-Com Remodel/Relocate	🖋 Edit 🛅 Delete			
Existing Cust-Com Upgrade	🖋 Edit 🛅 Delete			
1-sf	🖋 Edit 🛅 Delete			
и < <mark>1</mark> » н	1-7 of 7 items 🔗 Refresh			

The Add Proposal Type form will be displayed. There is only one data entry field on this form - Name. A maximum of 50 characters is allowed.

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

Add Proposal Type		×		
Name • Existing Cust-Res				
	Save	Cancel		