

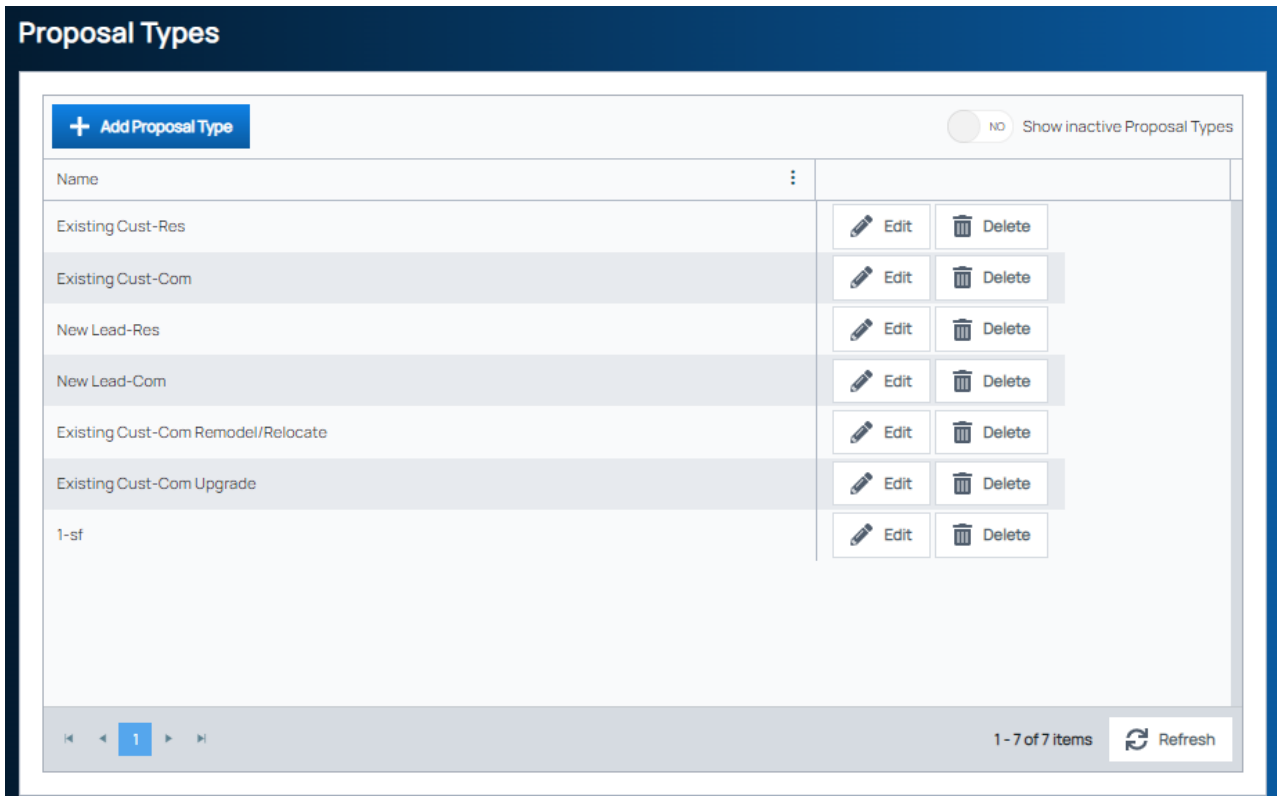
Add a Proposal Type

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Proposal Types are used to identify the proposal. When 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.



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.

