Edit a Proposal Type

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A Proposal Type may be edited at any time. However, keep in mind, if a change is made, this will affect all open and closed proposals where the original proposal type was used.

To edit a 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. Locate the record you want to edit, and then click on the Edit button.

Proposal Types	
+ Add Proposal Type	NO Show inactive Proposal Types
Name	:
Existing Cust-Res	🖋 Edit 🛅 Delete
Existing Cust-Com	delt 🗰 Delete
New Lead-Res	Bdit 🛅 Delete
New Lead-Com	🖋 Edit 🛅 Delete
Existing Cust-Com Remodel/Relocate	🖋 Edit 🛅 Delete
Existing Cust-Com Upgrade	🖋 Edit 🛅 Delete
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The Edit Proposal Type form will be displayed. Make the necessary changes, and then click on the Save button when finished.

Edit Proposal Type		×	
Name •	Existing Cust-Res		
	Save C	Cancel	