

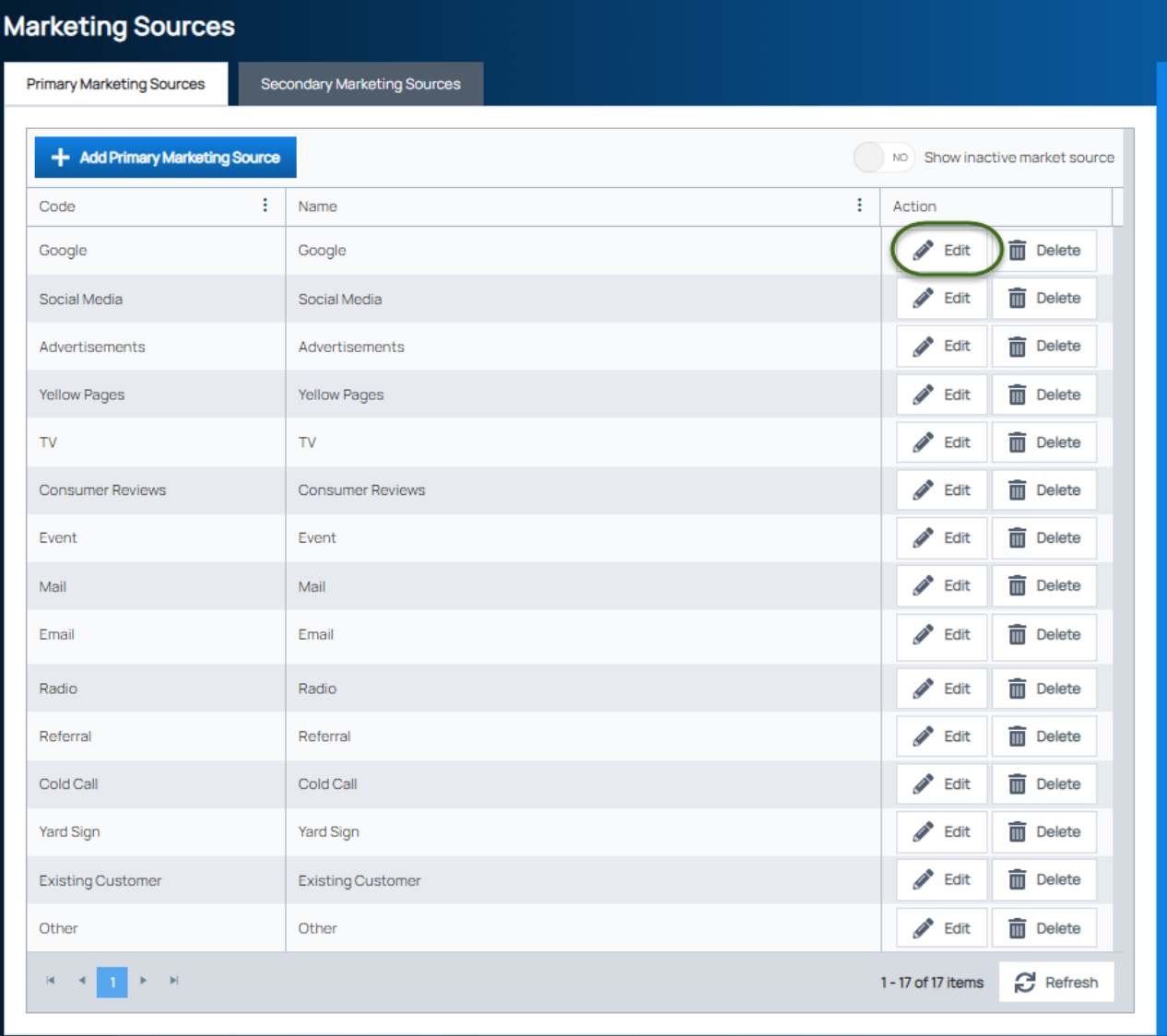
Edit a Marketing Source

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A Marketing Source 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 marketing source was used.

To edit a Marketing Source, from the main menu, arrive at the Marketing Sources setup with this path: Setup > Proposals > Marketing Sources.

The Marketing Sources list will be displayed. Locate the record you want to edit, and then click on the Edit button.



The screenshot shows a web interface titled "Marketing Sources". It features two tabs: "Primary Marketing Sources" (active) and "Secondary Marketing Sources". Below the tabs is a table with columns for "Code", "Name", and "Action". The "Action" column contains "Edit" and "Delete" buttons for each row. The "Edit" button for the "Google" row is circled in green. At the top left of the table area is a button "+ Add Primary Marketing Source". At the top right is a toggle switch labeled "NO Show inactive market source". At the bottom of the table area is a pagination control showing "1" and a "Refresh" button.

Code	Name	Action
Google	Google	 Edit  Delete
Social Media	Social Media	 Edit  Delete
Advertisements	Advertisements	 Edit  Delete
Yellow Pages	Yellow Pages	 Edit  Delete
TV	TV	 Edit  Delete
Consumer Reviews	Consumer Reviews	 Edit  Delete
Event	Event	 Edit  Delete
Mail	Mail	 Edit  Delete
Email	Email	 Edit  Delete
Radio	Radio	 Edit  Delete
Referral	Referral	 Edit  Delete
Cold Call	Cold Call	 Edit  Delete
Yard Sign	Yard Sign	 Edit  Delete
Existing Customer	Existing Customer	 Edit  Delete
Other	Other	 Edit  Delete

The Edit Marketing Sources form will be displayed. Make the necessary changes, and then click on the Save button when finished.

Edit Marketing Sources ✕

Code •

Name •