Proposal Type Overview

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.

Examples of Proposal Types:

- New Customer
- Existing Customer

or

- New Residential Customer
- Existing Residential Customer - Upgrade/Remodel/Relocate
- Existing Residential Customer - New System
- New Commercial Customer
- Existing Commercial Customer - Upgrade/Remodel/Relocate
- Existing Commercial Customer - New System