

Setup (Document Format) - Proposal Form Type Setup Active Column (14623) [Enhancement]

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A new Active column has been added to the Proposal Form Type Setup screen to indicate if a form is active or inactive. By default, this field is set to 'Active'. To change, double click within the row to open the 'Update Proposal Form Type' editor and select from the 'Yes/No' options in the Active drop down field.

ID	NAME	FORM TYPE	REASON CODE	IS REVERSAL TYPE	IS TEMP	PRE AUTHORIZATION	APPROVAL	CHECK LIST TYPE	ACTIVE
10	New Service	Proposal	Add Svc. New Service	No	No	Not Required	Required		Active
11	New Service	Service Contract	Add Svc. New Service	No	No	Not Required	Required	Review required prior to Approval	Active
17	New Service	Service Charge Form	Add Svc. New Service	No	No	Not Required	Required	Review required prior to Approval	Active
24	Chg Svc Price Decrease	Proposal	Chg. Price Decrease	Yes	No	Not Required	Required		Active
48	Chg Svc Price Decrease	Service Contract	Chg. Price Decrease	Yes	No	Not Required	Required		Active
49	Chg Svc Price Decrease	Service Charge Form	Chg. Price Decrease	Yes	No	Not Required	Required		Active
78	Chg Svc Price Increase	Proposal	Chg. Price Increase	Yes	No	Not Required	Required		Active
79	Chg Svc Price Increase	Service Contract	Chg. Price Increase	Yes	No	Not Required	Required		Active
80	Chg Svc Price Increase	Service Charge Form	Chg. Price Increase	Yes	No	Not Required	Required		Active
81	Chg Svc Service Decrease	Proposal	Chg. Service Decrease	Yes	No	Not Required	Required		Active
82	Chg Svc Service Increase	Proposal	Chg. Service Increase	Yes	No	Not Required	Required		Active
83	Chg Svc Service Increase	Service Contract	Chg. Service Increase	Yes	No	Not Required	Required		Active
84	Chg Svc Service Decrease	Service Contract	Chg. Service Decrease	Yes	No	Not Required	Required		Active
85	Chg Svc Service Decrease	Service Charge Form	Chg. Service Decrease	Yes	No	Not Required	Required		Active
86	Chg Svc Service Increase	Service Charge Form	Chg. Service Increase	Yes	No	Not Required	Required		Active
87	End Svc End Svc	Service Charge Form	End Svc End Svc	Yes	No	Not Required	Required		Active
88	Add Charge in LDR Equipment	Proposal	Add Charge in LDR Equip...	No	No	Not Required	Review required prior to Approval		Inactive
89	New Business Acquisition	Proposal	New Business Acquisition	No	No	Not Required	Review required prior to Approval		Active
90	New Business From Computer	Proposal	New Business From Com...	No	No	Not Required	Review required prior to Approval		Active
91	New Business New Owner	Proposal	New Business New Owner	No	No	Not Required	Review required prior to Approval		Active
92	New Business Temp	Proposal	New Business Temp	No	Yes	Not Required	Review required prior to Approval		Active
93	New Customer	Proposal	New Business	No	No	Not Required	Review required prior to Approval		Active
94	Reversate Bud Debt Cut	Proposal	Reversate Bud Debt Cut	No	No	Not Required	Review required prior to Approval		Active
95	Chg Central Renewal	Proposal	Chg Central Renewal	Yes	No	Not Required	Required		Active
96	Chg P/Bud Back	Proposal	Chg P/Bud Back	Yes	No	Not Required	Required		Active
97	Chg Price Match	Proposal	Chg Price Match	Yes	No	Not Required	Required		Active

Pathway: Setup > Document Format > Type