

# Document Formats - Naming Updates (15200)

Last Modified on 05/11/2023 4:41 pm EDT

The Proposal Type Setup screen in *Setup > Document Formats > Type* has been renamed to 'Document Type Setup'. Naming was also updated to the customer service documents to relate them back to the setup screens.

**DOCUMENT TYPE SETUP**

ID	NAME	FORM TYPE
1	New Service	Proposal
11	New Service-noPreAuth\Auto a...	Service Contract
21	New Service	Services Change Form
36	Chg Svc-Price Decrease	Proposal
48	Chg Svc-Price Decrease	
60	Chg Svc-Price Decrease	
78	Chg Svc-Price Increase	
79	Chg Svc-Price Increase	
80	Chg Svc-Price Increase	
81	Chg Svc-Service Decrease	
82	Chg Svc-Service Increase	
83	Chg Svc-Service Increase	
84	Chg Svc-Service Decrease	
85	Chg Svc-Service Decrease	
86	Chg Svc-Service Increase	
87	End Svc-End Svc	
88	Add-Change in LOB/Equipment	

**EDIT PROPOSAL - NO SIGNATURE (NEW) - 3770**

Settings Services 1 History 1 Attachment Master Agreement

ACCOUNT 48936 / Tails and Scales

DOCUMENT FORMAT: Proposal - no signature (NEV) | DOCUMENT TYPE: New Business-From Competit | STATUS: Open

SALES REP: House Account (House Acco... | SOLD BY: | FORM CONTACT:

TITLE: | PO NUMBER:

EFFECTIVE DATE: 03/17/2025 | DELIVERY DATE: 03/17/2025 | ESTIMATED CLOSE DATE: 03/17/2025 | CLOSE PROBABILITY: Medium

TERM: Proposal

Accounting: Business-Acquisition, Business-From Competitor, Proposal

Document Formats: Format, Type, Proposal

Operations: Proposal

Products: Proposal

Report Formats: Proposal

Pathway: *Setup > Document Formats > Format and Type*