

Proposals - History Tab to Display Status Changes (14585)

Last Modified on 05/24/2023 10:12 am EDT

The "Edit Proposal" has been updated to include all status changes for the proposal document in the History tab. This allows tracking of any status changes from the creation of the proposal through customer receipt.

The screenshot shows the 'EDIT PROPOSAL - 3810' interface. At the top, there are tabs for 'Settings', 'Services', 'History' (with a red notification badge '3'), 'Attachment', and 'Master Agreement'. Below the tabs, there are fields for 'CREATED ON' (05/24/2023), 'APPROVED ON', 'REVIEWED ON', and 'PERIOD ID' (2023-05). To the right, there are fields for 'CREATED BY', 'APPROVED BY', and 'REVIEWED BY'. A search bar is located at the bottom right of the form area. Below the form, there is a table with the following columns: 'DATE', 'USER', 'TYPE', and 'DESCRIPTION'. The table contains three rows of history entries.

DATE ↓	USER	TYPE	DESCRIPTION
05/24/2023 7:05 am	Aliena Somers	Proposal / Agreement	Email sent to [redacted]@navusoft.com Dear [redacted] Thank you for discussing your needs with..
05/24/2023 7:05 am	Aliena Somers	Status Update	Status Changed to Submitted to Client
05/24/2023 7:04 am	Aliena Somers	Document Created	Document created with status Open

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