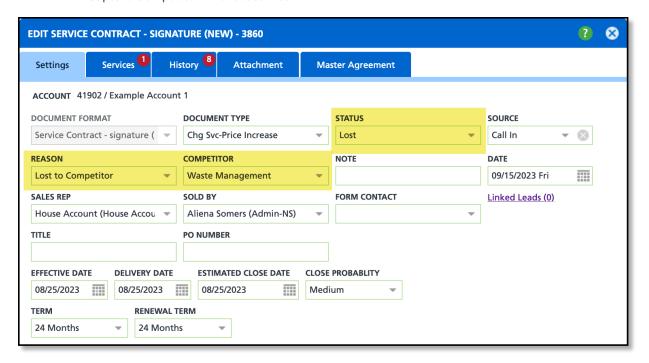
Proposals/Quotes and Contracts - Field Logic Updates (14545) [Enhancement]

Last Modified on 09/15/2023 2:37 pm EDT

The following logic updates have been applied to the Reason and Competitor fields for 'Lost' proposals/contracts:

- 1. Reason is hidden until "Lost" is selected from the Status drop down.
- 2. The Reason field has been relocated to the left of the Competitor field.
- 3. The Competitor field is hidden unless:
 - a. A specific value selected from the 'Reason' field where (Setup) *Document Type > Reason Code* has "Capture Competitor Info" set to 'Yes.'



Pathway: Accounts > Customer Service Screen > Orders, Quotes and Contracts