

Add/Edit Proposal (Accounts) - Updates to Window Title and Selections in Status Field (17470)

Last Modified on 11/12/2024 8:45 am PST

The Add/Edit Proposal window has been updated with the following enhancements:

1. Renamed to "Add/Edit Document - Proposal" for clarity.
2. The **Status** drop down now displays options specific to the selected Document Format.

The screenshot shows the 'ADD DOCUMENT - PROPOSAL' window. The window title is 'ADD DOCUMENT - PROPOSAL' with a red circle containing the number '1' next to it. The window has a blue header bar with a question mark icon and a close button. Below the header is a navigation bar with tabs: Settings, Services, History, Attachment, Master Agreement, Term Addendums, and Surcharge Rates. The main content area shows the account information: 'ACCOUNT 49232 / Caribou Coffee'. Below this are several fields: 'DOCUMENT FORMAT' (Proposal), 'DOCUMENT TYPE' (A-New Service), 'STATUS' (Open), and 'SOURCE'. The 'STATUS' dropdown menu is open, showing options: Open, Lost, Open, Submitted to Client, and Void. A red circle with the number '2' is next to the 'STATUS' label. A mouse cursor is pointing at the 'Lost' option. Below the 'STATUS' dropdown is a 'SOURCE' dropdown with a close button. To the right of the 'SOURCE' dropdown is a link: 'Linked Leads (0)'. Below the 'SOURCE' dropdown are fields for 'NOTE', 'DATE', 'SALES REP' (Aliena Somers - Admin-NS (A)), and 'SOLD BY'. There is a green button labeled 'Add Sales Rep Signature'. Below these are fields for 'TITLE' and 'PO NUMBER'. At the bottom, there are fields for 'EFFECTIVE DATE' (11/12/2024), 'DELIVERY DATE' (11/12/2024), 'ESTIMATED CLOSE DATE' (11/12/2024), and 'CLOSE PROBABILITY' (Medium).

Pathway: Accounts > Orders, Quotes and Contracts