Updating the Proposal Type

During proposal creation, you will choose the proposal type on the New Proposal Questionnaire. If the incorrect proposal type is chosen, the below are steps to update the proposal.

Proposal Development

1) On the Setup Questions Tab, click the "Change" button next to the sponsor name.

TIP! **To edit, uncomplete Setup Questions by unchecking box in top right.**

3) A new window will open which allows you to update the Sponsor name. Select the correct Proposal Type from the dropdown and click 'Save' on top right of window.

4) A warning will appear letting you know that updating the opportunity could result in the loss of data already entered or attachments uploaded. Click OK.