

## **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.

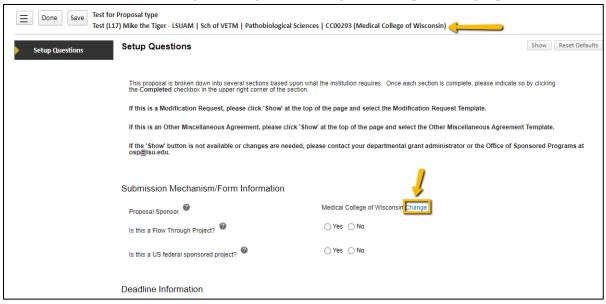


## **Proposal Development**

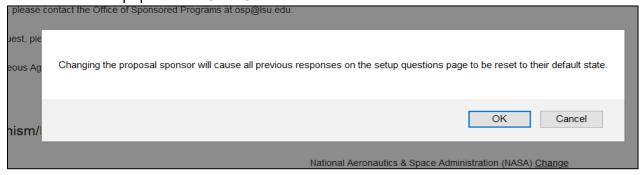
1) On the Setup Questions Tab, click the "Change" button next to the sponsor name.



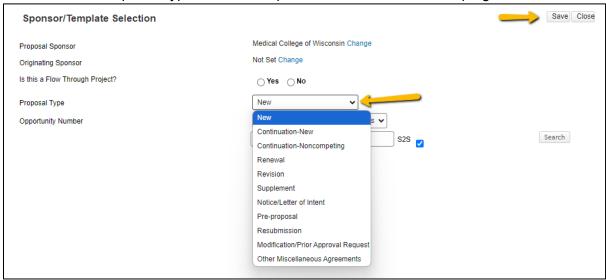
To edit, uncomplete Setup Questions by unchecking box in top right.



2) A warning message will appear letting you know that changing the sponsor will reset all of the setup questions. Click OK.



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.

