Deactivate a Proposal Development Record

How do I deactivate a Proposal Development (PD) record?

Proposals cannot be deleted, but deactivating the proposal will remove it from the general search. If you keep the number of the PD, you can look it up in the Proposal Search by its PD#.

☐ Click on the **More Actions** button in the upper right corner.

☐ Choose **Deactivate Proposal** from the dropdown menu.

The user will receive a notification email that states the PD record has been deactivated.