Copy a Proposal

How do I copy a Proposal Development record?

There are two ways to copy a proposal.

To copy a proposal from the list of My Proposals:

- Starting at the Proposal tab > My Proposals, click on the More Actions icon.

- The following options will open. Choose the Copy icon.

To copy a proposal from within a proposal record:

- Open the Proposal record that needs to be copied.
Click on the **More Actions** icon and then click on **Copy Proposal**.

Choose all the components to copy by checking the boxes and then click on the **Copy** button.

The copied record will open for editing.