

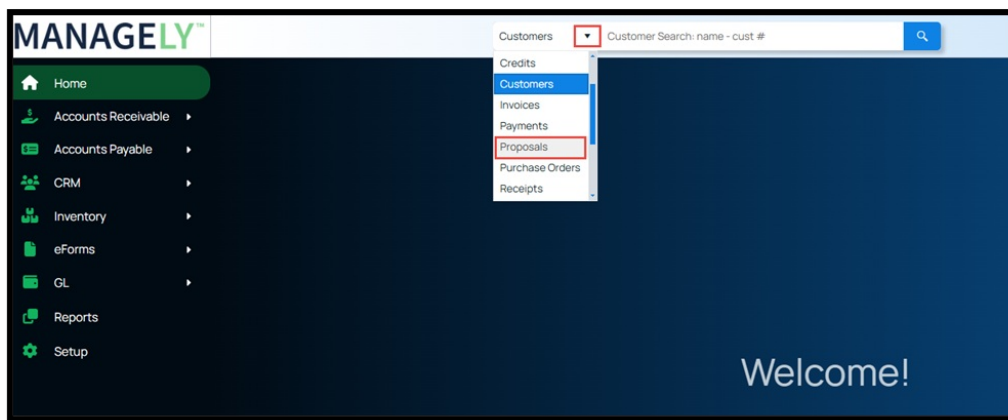
Multiple ways of looking up a proposal (Managely)

11/15/2024 7:38 am EST

In Managely a proposal can be looked up in multiple ways.

There are multiple ways of looking up a proposal payment in Managely by the proposal number.

1. Switch the search criteria from the top drop-down from Customers to Proposals (then type the proposal number in the search area and push the Enter key or click the magnifying glass icon):



2. Search proposals from the main menu by accessing CRM -> Proposals



Home



Accounts Receivable



Accounts Payable



CRM



Customers



Inventory



Proposals



eForms



GL



Reports



Setup