



QUICK REFERENCE GUIDE:

4.1 Proposal Sort Order

Background:

For Proposals that have multiple projects and each project will have its own item list (items and categories that are NOT marked to combine into one single bid schedule), you can designate which order you want the projects listed on the Bid Forms.

Roles:

Letting User, Proposal User

Navigation:

Proposal Overview > Proposal > Proposal Summary

1. From the Proposal Summary component, click the **Projects** tab.
2. Click the **Project** link.
3. Click the **Categories and Items** quick link.
4. Click the **Categories** tab.
5. In the **Proposal Sort Order** field, enter the number the project category will appear on the Bid Forms.
6. Click **Save**.
7. Repeat steps 1-6 for all projects on the proposal.

Note: Remember that this only applies if the Combine Like Categories function is not being used and if there are multiple Projects in the Proposal.

Next Steps:

Once the proposal and associated project(s) are valid, the proposal workflow phase must be changed to Assigned to Letting. See QRG - *Managing Proposal Workflow*.