Tracking BD Time

- ➤ **CLIENT-GEN CODE – Important to Track BD ROI**
  - ❖ **General Client BD not tied to an Opportunity**
  - ❖ **Used for Introductory, Fact Finding, Brown Bag Presentations, etc.**
  - ❖ **Add Client Name at the end of Standard Comment**
  - ❖ **Use Copy from Previous Feature to quickly move proposal #s from one timesheet to the next**

- ➤ **PROPOSAL NUMBERS – Important to Track BD ROI**
  - ❖ **Operate the same as project numbers**
  - ❖ **Can search for the PROP numbers you want**
  - ❖ **Use Copy from Previous Feature to quickly move proposal #s from one timesheet to the next**