Creating a Proposal from a Service Order

Creating a Proposal from a Service Order gives the ability to enter items that will be used to complete the Service Order and provide the customer with a cost estimate.

1. While on the *Service Order* screen, highlight the *Service Order#* and select **Create and Open Proposal**.

2. The *Bill To Name / Address* and *Service Name / Address* will automatically default based on the information entered into the Service Order. The *Service Order Type* will default as well.

3. Select the **Search** icon to select the *Sales Rep* responsible for preparing the proposal from the list.

4. Select the **Search** button and choose the applicable Proposal Terms.

5. Press **F5** in the *Item* field to bring up the *Select Inventory Items* screen.

6. The *Select Inventory Item* screen displays all items that have been set up in the maintenance tables and will default to the Warehouse Location the Service Location is assigned.

7. The *Select Inventory Item* screen displays the *Description* and the current *Qty* on hand. *Sale Price* information is present as well.

8. Highlight the line item and choose **Select** to return to the *Proposal* screen.

9. Input the number of items in the *Quantity* area.

10. Once a quantity is entered, go to the *Amount* field and edit as necessary. The price *Markup* and *Total Amount* fields will adjust automatically. As items are added to the Proposal, the *Sub Total*, *Tax*, and *Total Amount* of the proposal automatically update.

11. To add another item to the proposal, press the **Down Arrow** key on the keyboard or press **F4** to insert a new line.

12. To enter additional comments for the customer, select **Add Line** and enter comments in the *Description* field. Do not press **F5** for the item number.

13. At the top of the *Proposal* screen, there is a *Finalized* checkbox. Selecting this indicates that the Proposal is guaranteed to the customer and the overall *Total* should remain intact. Other items can be added to the Proposal, but they will not display a price or add into the *Total*.

14. Once all line items have been added, select **Save and Close** located in the bottom right of the screen. To print

the Proposal, reopen the proposal and select **Print** located at the top left of the screen.

<div align="right">Proposal</div>

Date	Proposal #
01/22/2026	532

ABC PROPANE COMPANY
5250 US HWY 36
SUITE 100
AVON, IN 46123
Phone (317)745-6560   FAX (317)250-1234

Valid until: 02/21/2026

Name / Address	Service Address
Customer# 100005 BROCK,MICHAEL 123 ANYWHERE ST PENSACOLA, FL 32501	Location# 530 BROCK,MICHAEL 123 ANYWHERE ST AVON, IN 46112

Item	Description	Qty	Amount	Total
00-1178	500 GAL OIL TANK DOUBLE WALL U G	2.00	$2,561.22	$5,122.44

	Subtotal	$5,122.44
Approved: _____	Sales Tax	$0.00
Date: _____	**Total**	$5,122.44