

Creating a Proposal from a Service Order

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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**.

The screenshot shows the Service Order screen. At the top, there is a table listing service orders:

Service Order#	Order Date	Order Time	Invoice#	Customer #	Service Loc#	Name	Division	Zone	Type	Status	Sched. Date	Sched. Time
503	08/16/2023	10:57 AM		530	100005	530 MICHAEL BROCK	1	3	4	3	08/17/2023	10:00 AM
502	03/31/2023	10:48 AM		100005	530	MICHAEL BROCK	1	3	2	**	04/03/2023	10:57 AM
501	06/22/2018	08:14 AM		521	100005	2 MICHAEL BROCK	1	1	2	1	01/31/2023	10:00 AM

Below the table, the Service Order Status is **SCHEDULED** and the Service Order Type is **TANK SWAP OUT**. The Customer Info section shows:

Service Address: 123 ANYWHERE ST
City: AVON State: IN
First Name: MICHAEL Last Name: BROCK
Requested By: [blank]
Mail Address 1: 123 ANYWHERE ST
Address 2: [blank]
City2: PENSACOLA State: FL Zipcode: 32501-
Home Phone: (317)555-1212
Work Phone: () -
Cell Phone: () -
Order taken by: sflaherty
Service Zone: 3 ZONE 3

On the right, there is a calendar for January 2026 and a list of buttons: Inv Sel, Create, Modify, Print SO, Save, **Create and Open Proposal** (highlighted), Open Invc., and Exit.

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.

The screenshot shows the Proposal screen. At the top, there are buttons for Save, Print, Preview, E-mail, and Create Invoice. The Proposal section shows:

Bill To Name / Address: Brock, Michael
Customer#: 100005
123 ANYWHERE ST
PENSACOLA, FL 32501

Service Name / Address: Brock, Michael
Service Location#: 530
123 ANYWHERE ST
AVON, IN 46112

Comments: [blank]

Service Order Type: 2 TANK SET
Sales Rep: 3 JANE DOE
Terms: 501 30 days

Customer Message: [blank]

At the bottom, there is a table with columns: Div, Warehouse Name, Storage Desc., Item, Description, Quantity, Amount, and Total Amount. Below the table are buttons for Add Line, Remove Line, Delete, Undo, Clear Search, Create, Modify, Save & Close, and Exit.

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.

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

Div	Warehouse Name	Loc Storage	Item	Dept#	Description	Category	Sale Price	Qty
<input type="checkbox"/>			00-1178	999	500 GAL OIL TANK DOI	TANK INSTALL PARTS	2561.22	0.00
<input type="checkbox"/>			00-1178	999	500 GAL OIL TANK DOI	TANK INSTALL PARTS	2561.22	10.00
<input type="checkbox"/>			00-5423	999	500 GAL SKID TANK DI	TANK INSTALL PARTS	2246.54	7.00
<input type="checkbox"/>			00-5422	999	500 GAL SKID TANK LI	TANK INSTALL PARTS	2100.74	1.00
<input type="checkbox"/>			00-5403	999	500 GAL SKID TANK SI	TANK INSTALL PARTS	2019.33	20.00
<input type="checkbox"/>			00-5403	999	500 GAL SKID TANK SI	TANK INSTALL PARTS	2019.33	2.00
<input type="checkbox"/>			00-2403	999	500 GAL UNDERGRD	TANK INSTALL PARTS	4598.78	15.00

- The *Select Inventory Item* screen displays the *Description* and the current *Qty* on hand. *Sale Price* information is present as well.
- Highlight the line item and choose **Select** to return to the *Proposal* screen.
- Input the number of items in the *Quantity* area.
- 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.

Div	Warehouse Name	Storage Desc	Item	Description	Quantity	Amount	Total Amount
			00-1178	500 GAL OIL TANK DOUBLE WALL U G	2.00	\$2,561.22	\$5,122.44

- To add another item to the proposal, press the **Down Arrow** key on the keyboard or press **F4** to insert a new line.
- 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.
- 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*.
- Once all line items have been added, select **Save and Close** located in the bottom right of the screen. To print

Proposal

Date	Proposal #
01/22/2026	532

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