

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 with columns: Service Order#, Order Date, Order Time, Invoice#, Customer#, Service Loc#, Name, Division/Zone, Type, Status, Sched. Date, and Sched. Time. The table contains three rows of data. Below the table are two input fields: 'Service Order Status' (SCHEDULED) and 'Service Order Type' (TANK SWAP OUT). To the right of these fields is a calendar for January 2026. At the bottom of the screen is a toolbar with several buttons: 'Inv Sel', 'Create', 'Modify', 'Print SO', 'Save', 'Create and Open Proposal' (which is highlighted with a red box), '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. Below these are two input fields: 'Bill To Name / Address' (Customer# 100005) and 'Service Name / Address' (Service Location# 530). To the right of these fields is a 'Comments' area and a date field set to 01/22/2026. Further down, there is a 'Service Order Type' field (2, TANK SET), a 'Sales Rep' field (3, JANE DOE), and a 'Terms' field (501, 30 days). The main area of the screen is a table for entering items, with columns: Div, Warehouse Name, Storage Desc., Item, Description, Quantity, Amount, and Total Amount. At the bottom of the table are buttons for 'Add Line' and 'Remove Line'. Below the table is a summary row with Sub Total (\$0.00), Tax (\$0.00), and Total (\$0.00). At the very bottom are buttons for 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.

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.

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

Selected Items

Division	Warehouse Name	Location#	Storage	Item	Description	Category	Sale Price

Buttons: Save Selections, Cancel

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.

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

Buttons: Add Line, Remove Line, Delete, Undo, Clear Search, Create, Modify, Save & Close, Exit

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.

Proposal				
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 Customer# 100005 BROCK,MICHAEL 123 ANYWHERE ST PENSACOLA, FL 32501	Service Address 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	