Creating a Proposal from the Customer Screen

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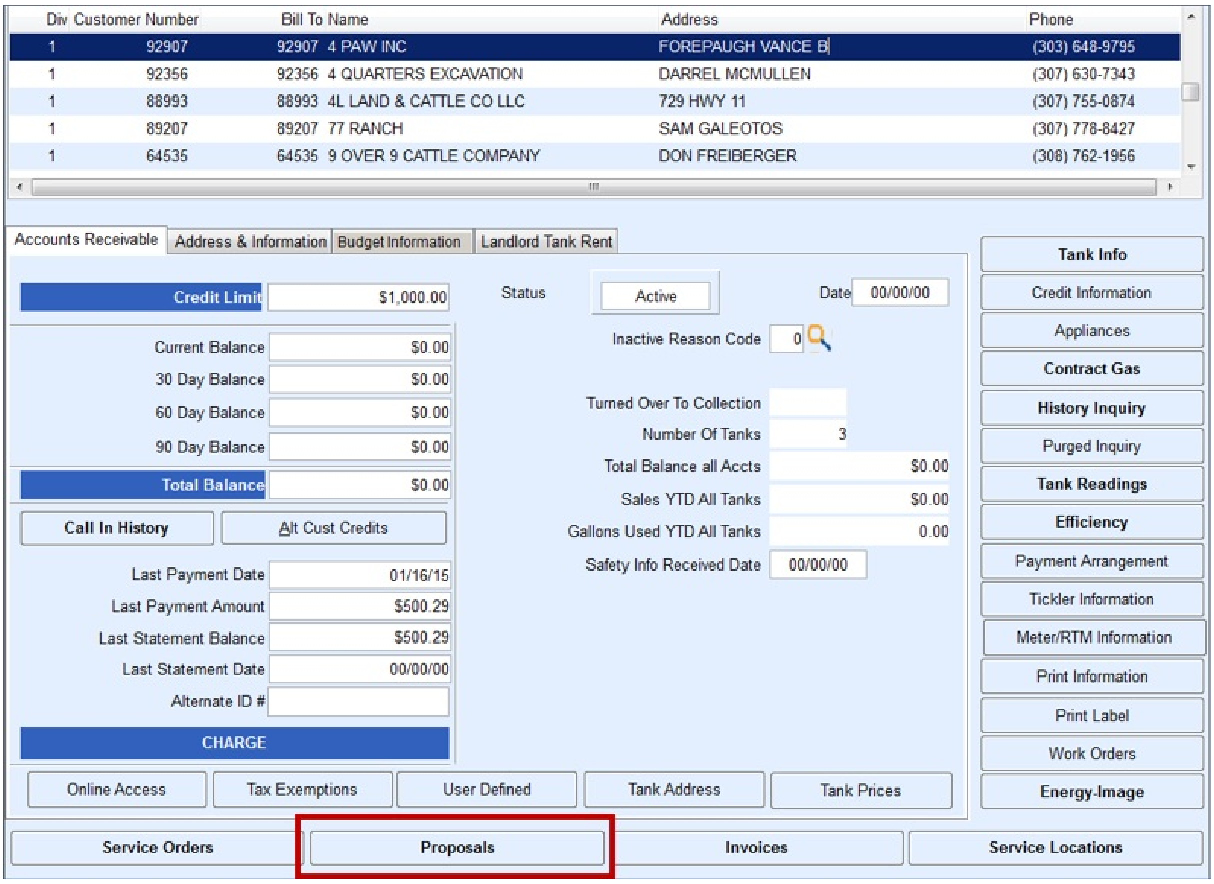
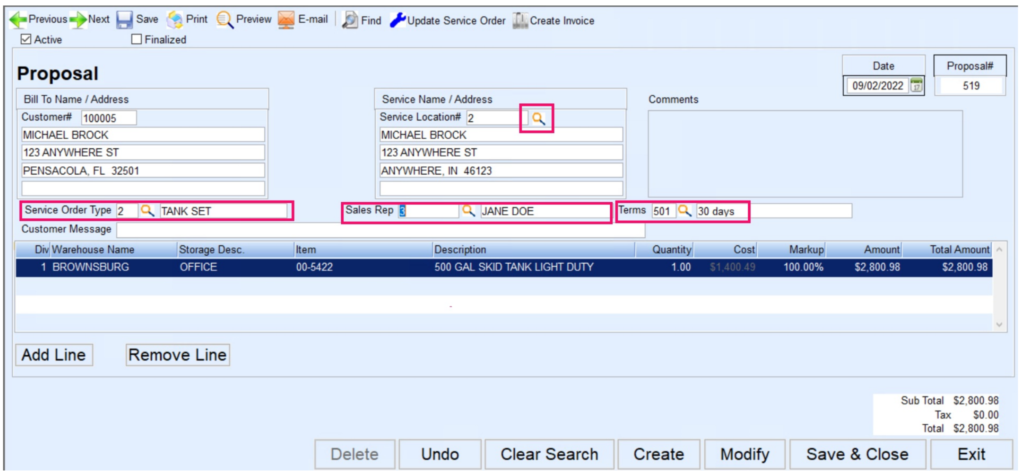
1. Select the Customer from the *Customer Maintenance* screen.
2. Choose **Proposals**.



3. If a Proposal already exists for this customer, it will be present on the *Proposal* screen.
4. Select **Create** to create a new Proposal. If this is the first time entering a Proposal for the customer, *Create* will be the default mode.
5. Select the Service Location by pressing **F5** or selecting the **Search** icon. Input the *Service Order Type*, *Sales Rep*, and Terms Code. Enter any applicable Customer Comments that will appear on the Proposal when printed.



6. Follow step 4 through 10 listed in the Open Proposal section of this manual.

7. Select **Save and Close**. This will return to the *Customer Maintenance* screen.

Once the Proposal has been created, it can be modified at any time. If *Finalized* was selected, items can be added but the overall *Total* cannot be modified. Select **Modify** located at the bottom of the screen.