

Creating a Proposal from the Customer Screen

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

The screenshot shows the 'Customer Maintenance' screen. At the top, there is a table listing customers. The customer 'BROCK, MICHAEL' is selected. Below the table, there are tabs for 'Accounts Receivable', 'Address & Information', 'Budget Information', and 'Landlord Tank Rent'. The 'Address & Information' tab is active. On the left, there is a 'Credit Limit' section with a value of \$0.00. In the center, there is a 'Status' section with 'Active' selected. On the right, there is a 'Tank Info' section with various options like 'Safety Form', 'Appliances', 'Contract Gas', etc. At the bottom, there is a row of buttons: 'Service Orders', 'Proposals' (highlighted with an orange border), 'Invoices', and 'Service Locations'.

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.

The screenshot shows the 'Proposal' screen. At the top, there is a toolbar with buttons like 'Previous', 'Next', 'Save', 'Print', 'Preview', 'E-mail', 'Find', 'Update Service Order', and 'Create Invoice'. Below the toolbar, there is a 'Proposal' section with fields for 'Bill To Name / Address', 'Service Name / Address', 'Comments', 'Date', and 'Proposal#'. The 'Bill To Name / Address' field is filled with 'MICHAEL BROCK', '123 ANYWHERE ST', and 'PENSACOLA, FL 32501'. The 'Service Name / Address' field is filled with 'MICHAEL BROCK', '123 ANYWHERE ST', and 'ANYWHERE, IN 46123'. The 'Comments' field contains the text 'This proposal include 3 hours labor, the stove and can be subject to change.' Below the 'Proposal' section, there is a 'Customer Message' section with a table of items. The table has columns for 'Div Warehouse Name', 'Storage Desc', 'Item', 'Description', 'Quantity', 'Amount', and 'Total Amount'. The table contains three rows: 'AMASTO', 'AMANA STOVE', '114BLK45', '114 45 ELBOW BLK 150M', and 'LABOR'. At the bottom, there is a 'Sub Total' section with values: 'Sub Total \$755.96', 'Tax \$0.00', and 'Total \$755.96'. There are also buttons for 'Delete', 'Undo', 'Clear Search', 'Create', 'Modify', 'Save & Close', and 'Exit'.

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.