

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 with columns for Div, Customer Number, Bill To Name, Address, and Phone. Below this is a detailed view for a selected customer, showing various tabs like 'Accounts Receivable', 'Address & Information', 'Budget Information', and 'Landlord Tank Rent'. The 'Accounts Receivable' tab is active, displaying fields for Credit Limit, Current Balance, 30 Day Balance, 60 Day Balance, 90 Day Balance, and Total Balance. There are also fields for Status, Date, Inactive Reason Code, and Safety Info Received Date. A sidebar on the right contains buttons for Tank Info, Credit Information, Appliances, Contract Gas, History Inquiry, Purged Inquiry, Tank Readings, Efficiency, Payment Arrangement, Ticker Information, Meter/RTM Information, Print Information, Print Label, Work Orders, and Energy Image. At the bottom, there are buttons for Online Access, Tax Exemptions, User Defined, Tank Address, Tank Prices, Service Orders, Proposals (highlighted with a red box), 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 are navigation buttons: Previous, Next, Save, Print, Preview, E-mail, Find, Update Service Order, and Create Invoice. Below this is a form for creating a proposal. The form has several sections: 'Bill To Name / Address' with fields for Customer#, Name, and Address; 'Service Name / Address' with fields for Service Location#, Name, and Address; 'Comments' with a text area; 'Service Order Type' with a dropdown menu; 'Sales Rep' with a dropdown menu; and 'Terms' with a dropdown menu. There is also a 'Customer Message' field. Below the form is a table with columns for Div, Warehouse Name, Storage Desc, Item, Description, Quantity, Cost, Markup, Amount, and Total Amount. The table contains one line item: 1 BROWNSBURG OFFICE 00-5422 500 GAL SKID TANK LIGHT DUTY 1.00 \$1,400.49 100.00% \$2,800.98 \$2,800.98. At the bottom right, there is a summary box showing Sub Total \$2,800.98, Tax \$0.00, and Total \$2,800.98. At the bottom, there are 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.