

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 with the following details:

- Customer List:** A table showing customer information with columns for Div, Customer Number, Name, Address, and Phone.
- Accounts Receivable:** A section showing current balance, 30-day balance, 60-day balance, 90-day balance, and total balance.
- Call In History:** A section showing the last payment date (06/20/18), amount (\$20.00), statement balance (\$672.25), and statement date (07/31/18).
- Status:** Set to Active.
- Tank Info:** A sidebar with various tank-related options like Safety Form, Appliances, and Contract Gas.
- Proposals Tab:** The tab is highlighted with an orange border.

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 with the following details:

- Customer:** MICHAEL BROCK, 123 ANYWHERE ST, PENSACOLA, FL 32501.
- Service Location:** MICHAEL BROCK, 123 ANYWHERE ST, ANYWHERE, IN 46123.
- Comments:** This proposal include 3 hours labor, the stove and can be subject to change.
- Service Order Type:** APPLIANCE INSTALLATION.
- Sales Rep:** JOHN SMITH.
- Terms:** 30 days.
- Items:** A table showing items, descriptions, quantities, and amounts.
- Buttons:** Add Line, Remove Line, Delete, Undo, Clear Search, Create, Modify, Save & Close, 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.