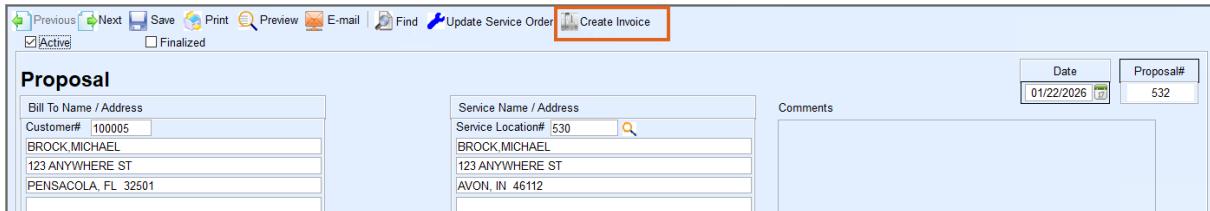


Invoicing a Proposal

Last Modified on 01/27/2026 4:22 pm EST

Once a Proposal has been created and the work has been completed, the customer can be invoiced directly from the Proposal.

1. Select the Proposal from either the *Customer Maintenance* screen or by selecting **Proposals** from the *Service Order* screen.
2. Select **Create Invoice** located at the top of the screen.



The screenshot shows the 'Proposal' screen with various fields and buttons. At the top, there are buttons for Previous, Next, Save, Print, Preview, E-mail, Find, Update Service Order, and Create Invoice. A checkbox for 'Active' is checked, and another for 'Finalized' is unchecked. On the left, there's a 'Proposal' section with 'Bill To Name / Address' and 'Customer#' (100005) fields, followed by 'BROCK, MICHAEL' and '123 ANYWHERE ST' addresses, and 'PENSACOLA, FL 32501'. On the right, there's a 'Service Name / Address' section with 'Service Location#' (530) and 'BROCK, MICHAEL' and '123 ANYWHERE ST' addresses, and 'AVON, IN 46112'. At the bottom right, there are 'Comments' and date/time fields ('Date' 01/22/2026, 'Proposal#' 532). The 'Create Invoice' button is highlighted with a red box.

3. Choose **Modify** to make changes to the Invoice if desired. If the invoice is complete, select **Post**.



The screenshot shows the 'Create Invoice' screen. At the top, there's a 'Sign' button. In the center, there are fields for 'Inactivated by' (empty), 'Inactivated Date/Time' (00/00/0000 00:00:00), and a 'Comments' section. On the right, there are summary totals: Sub Total \$5,122.44, Tax \$0.00, and Total \$5,122.44. Below these are buttons for Undo, Clear Search, Create, Modify, Save & Close, and Post. The 'Post' button is highlighted with a red box.

4. Select the number of Invoices to print.



The screenshot shows a light blue background with the text 'How many copies would you like to print?'. Below it are three rectangular buttons with rounded corners, each containing a text label: 'Print One Copy', 'Print Two Copies', and 'Print Three Copies'. The 'Print One Copy' button is the top one, 'Print Two Copies' is the middle one, and 'Print Three Copies' is the bottom one.

5. A journal is automatically written to the *Sales Posting* screen for this entry and the information will appear on the *Customer History* screen.

01/27/26 15:19

Sales Posting Journal

Page 1

User ID

Posting Date 01/27/26

Journal # 1213

Journal Detail

Ticket	Div	Customer#	Name	Trans	Driver	Date	Dept.	Reference	Parts	Gallons	Line Amount	Sales Tax	Total Amt	
				Tank Serial #		Tax	St %	End %	Mtr Read	Unit Price				
533	1	100005	BROCK,MICHAEL		0	0	01/27/26	999		2.00	0.00	\$5,122.44	\$0.00	\$5,122.44

Totals:

2.00 0.00 \$5,122.44 \$0.00 \$5,122.44

Tank S/N	Tank Name				Tank Size										
Date	Truck#	Div	Jrn#	Ticket#	Code	Dept.	Posting Reference	Quantity	Gallons	Unit Price	Line Amt	Sales Tax	Debit Amt	Credit Amt	Balance
01/27/26	0	0	1213	533	0	b99		2.00	0.00	2,561.2200	\$5,122.44	\$0.00	\$5,122.44		\$8,328.55
08/16/23	0	0	1190	530	0	999		2.00	0.00	19.1300	\$38.26	\$0.00	\$38.26		\$3,206.11
08/16/23	0	0	1190	530	0	999		1.00	0.00	46.6000	46.60	0.00	46.60		42,167.85