

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.

Previous Next Save Print Preview E-mail Find Update Service Order **Create Invoice**

☒ Active ☐ Finalized

Proposal

Bill To Name / Address
Customer# 100005
BROCK, MICHAEL
123 ANYWHERE ST
PENSACOLA, FL 32501

Service Name / Address
Service Location# 530
BROCK, MICHAEL
123 ANYWHERE ST
AVON, IN 46112

Comments

Date 01/22/2026 Proposal# 532

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

Sign

Inactivated by: Inactivated Date/Time: 00/00/0000 00:00:00

Sub Total \$5,122.44
Tax \$0.00
Total \$5,122.44

Undo Clear Search Create Modify Save & Close **Post**

4. Select the number of Invoices to print.

How many copies would you like to print?

Print One Copy

Print Two Copies

Print Three Copies

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

01/27/2615:19

Sales Posting Journal

Page1

User ID

Posting Date01/27/26

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							
			N						0	2,561.2200	2.00	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#	Drvr	Jml	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	999		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	19,130.00	\$38.26	\$0.00	\$38.26		\$3,206.11	
08/16/23	0	0	1190	530	0	999		1.00	0.00	55.5000	\$55.50	\$0.00	\$55.50		\$3,150.61	