

Invoicing a Proposal

Last Modified on 08/12/2022 10:11 am EDT

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.

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

4. Select the number of Invoices to print.

How many invoices would you like to print?

Print One Invoice

Print Two Invoices

Print Three Invoices

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

02/16/15 12:48
User ID

Sales Posting Journal

Page 1
Posting Date 02/16/15
Journal # 6533

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			
924	1	9811	CASH CUSTOMER	13	0	02/16/15	400	LPG PARTS					
			Y						0	0.5400	120.00	0.00	\$64.80
												\$4.53	\$69.33
924	1	9811	CASH CUSTOMER	13	0	02/16/15	400	LPG PARTS					
			Y						0	41.0000	1.00	0.00	\$41.00
												\$2.88	\$43.88
924	1	9811	CASH CUSTOMER	13	0	02/16/15	400	LPG PARTS					
			Y										

Date	Dnr	Jml	Ticket#	Code	Dept	Posting Reference	Quantity	Gallons	Unit Price	Line Amt	Sales Tax	Debit Amt	Credit Amt	Balance
02/16/15	0	6533	924	13	400	LPG PARTS	1.00	0.00	7.5600	\$7.56	\$0.53	\$8.09		\$1,003.69
02/16/15	0	6533	924	13	400	LPG PARTS	1.00	0.00	73.5200	\$73.52	\$5.14	\$78.66		\$395.60
02/16/15	0	6533	924	13	400	LPG PARTS	1.00	0.00	72.3800	\$72.38	\$5.07	\$77.45		\$916.94
02/16/15	0	6533	924	13	1919	LABOR	1.00	0.00	75.0000	\$75.00	\$1.13	\$76.13		\$839.49

