

Unscheduled Service Calls - Proposals

Last Modified on 06/09/2022 12:51 pm EDT

Proposals can be created for a customer from either the *Scheduled* or *Unscheduled Service Order* screens. If creating a proposal from *Scheduled*, highlight the Service Order and select Create and Open Proposal. From the *Unscheduled* screen, select the customer and press the Proposals button.

Name	Customer#	Division#
CASH CUSTOMER	3611	1
SMITH WALDON	20297	1
STERLING RONALD	20572	1
WOODS CLYDE	22238	1
A & W WATER SERVICE	22841	1
ANDERSON & SHAW CONSTRUCT	22858	1
ABERNATHY ROBERT & JOHANN	22933	1
ACHZIGER ROBERT	22970	1
ACKERMAN & ROBINSON AGENC	22987	1
ACKLIN BILL	23010	1
ADAMS JACK P	23070	1
ADAMS PAUL	23104	1
ADAMS ROBERT / ADAMSCRAFT	23108	1
ADAMSON ALAN	23128	1
ADRIAN CAROL	23176	1
AFDAHL JUEL & TAMI	23182	1
AGUIRRE EDWIN M	23254	1
AHLBRANDT MARY HELEN	23260	1

Phone: () -
Work Phone: () -
Credit Limit: \$1.00
Current: (918.06)
30 Day: \$0.00
60 Day: \$0.00
90 Day: \$0.00
Total: (918.06)

Terms: CASH CHECK ONLY
Safety Info Date: 00/00/00

Add Comments
Service Orders Service Locations
Proposals Invoices
Tanks Payment Back

1. Double tap in the *Service Location#*, *Service Order Type*, and *Sales Rep* fields to make the appropriate selections.
2. Enter *Comments* if applicable.
3. Double tap in the *Item* field. This will display the *Inventory Search* screen. Select the applicable items and choose **Save Selections**.
4. Tap the *Quantity* field and enter the quantity.
5. Once all items have been added to the Proposal, print the Proposal or **Save & Close**. Additionally, invoice the customer from this screen.
 - o If a customer signature is required, have the customer sign in the *Customer Signature* area.
 - o To print, select **Print** at the top left of the screen.
 - o To save, select the **Save & Close** button. The Proposal will be saved to the customer account and may be accessed at a later time.
 - o To invoice the customer, select **Create Invoice** located at the top of the screen. The screen will change to the customer *Invoice* screen. Select **Finalize & Print**.
6. Optionally update a customer Service Order if one applies to the Proposal. Select **Update Service Order** and enter the information as it applies.