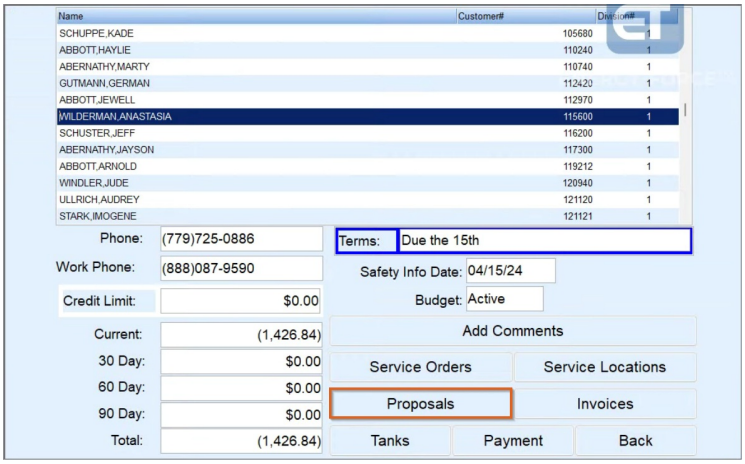
Unscheduled Service Calls - Proposals

Last Modified on 06/23/2026 5:34 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.



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.
    - If a customer signature is required, have the customer sign in the *Customer Signature* area.
    - To print, select **Print** at the top left of the screen.
    - To save, select the **Save & Close** button. The Proposal will be saved to the customer account and may be accessed at a later time.
    - 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.