

Creating a Budget Proposal

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1. In the customer's account, go to the **Service** tab.
2. Select the **+ New Proposal** button.
3. Click **Budget**.
4. Title it.
5. Select the budget that's built into your account for your company (e.g., "12-Month Budget Plan").
6. Select the template.
7. Choose the budget period.
8. Add any promotions, if applicable.
9. Add in the forecast strategy (how the gallons are calculated for deliveries to estimate the budget period).
10. Select the fuels this will be used for.
11. Add in any downside protection, if applicable.
12. Select **Preview**.
13. Finish.

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