

SALES

INVOICES - PRINT PROFORMA INVOICES

Where payment is required *before* an item or service is rendered, a **Proforma Invoice** can be raised for client payment.

This process can **only** be done from the **Sales Orders** listing screen.

You can print a **New** Proforma Invoice or a **Copy** - Proforma Invoice.

See also Orders - Print Proforma Invoice .

Ribbon Access: Sales >Orders



- 1. The *Sales Orders* listing screen will display.
- 2. Select the *Site* where the invoice was created.
 - The example has *Durban* selected.
- For printing a New ProForma Invoice ensure that the *Status* is set to *New Order*.



Print ProForma Invoices

٢	₹				1-			Sales Orders - BPC	: Version 2.4.0.	11 - Exan	nple Company	¥					×
		Home	e Equip	ment /	Locations Co	ontract	Finance / HR	Inventory Mainte	nance / Projects	Manufa	acturing Pro	curement Sale	s Service	Reporting	Utilities	_ 8	×
6	(×		(5)	2	80 (2	S.		<u></u>	<u>_</u>	Duri	ban	-		
1	Add	Edit	Delete	View	Forward	Create	Create Ad	d Items New Deal	Save Layout	Norkspaces	s Print Sales	Print Proforma	Export Nev	order	- Refresh		
		Maint	ain		Navigati	Invoice	Process	Wo Hoject	Formal		order	Print		Ourres	at	3	6
-		T Tull T			a mangaa a		1100000	4	Torna		4		2	Curren			
													-				
	Order	Vo	Customer	Code	CustomerName		OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	De
٩	REC		яПс		n∎c		R O C	n 🖬 c	-	1 0 0	-	*DC	-	-	#Ec	A D C	
I	OR000	0206	HOP001		Hope Works (Pt	y) Ltd	New order	Test	984.96	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:06:12		
	OR000	0207	NET001		Networking and	Lapto	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:10:42		
	OR000	0212	HOP001		Hope Works (Pt	y) Ltd	New order	1234	628.27	ZAR	07/08/2017	Bianca Du Toit	1.00	1.00	11:48:45		
	OR000	0218	TIN001		Tinas Coffee Sh	юр	New order	test	24,071.10	ZAR	14/08/2017	Bianca Du Toit	1.00	1.00	11:18:17		
	OR000	0220	BET0001		Betties Summer	Shop	New order	1234	23,029.07	ZAR	21/08/2017	Bianca Du Toit	1.00	14.00	11:49:29		
	OR000	0221	HOP001		Hope Works (Pt	y) Ltd	New order		4,745.59	ZAR	04/09/2017	Bianca Du Toit	1.00	14.00	14:49:36		
	OR000	0222	SAM001		Samanthas Dine	er	New order	test	402.85	USD	04/09/2017	Bianca Du Toit	10.00	0.00	02:50:18		
	OR000	0224	JOE0001		Joes Carpentry	Shop	New order	test	458.85	ZAR	25/10/2017	Bianca Du Toit	1.00	14.00	08:57:54		
	OR000	0243	HOP001		Hope Works (Pt	y) Ltd	New order	Generate Order	6,156.00	ZAR	26/03/2018	Bianca Du Toit	1.00	14.00	11:39:12		
	OR000	0244	HOP001		Hope Works (Pt	y) Ltd	New order	test	993.60	ZAR	09/04/2018	Bianca Du Toit	1.00	15.00	10:18:06		
	OR000	0251	HOP001		Hope Works (Pt	y) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26		
	OR000	0257	DER001		Derton / Techno	ologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30		
	OR000	0279	APP0001		Apple Juice Inc		New order	C copy Test source	81.94	ZAR	08/01/2019	Belinda Sharman	1.00	15.00	16:56:08		
	OR000	0281	TIA001		Titan Group		New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR000	0282	HOP001		Hope Works (Pt	y) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR000	0283	HOP001		Hope Works (Pt	y) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR000	0284	HOP001		Hope Works (Pt	y) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR000	0285	BEA001		Bearing and Sho	be .	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
	OR000	0286	BEA001		Bearing and Sho	be .	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR000	0287	APP0001		Apple Juice Inc		New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
1																	•

PRINT PROFORMA INVOICE - NEW

- 4. Click on the *row* of the invoice you wish to print.
- 5. Click on Print Proforma Invoice.
- 6. The *Select the option as desired* screen will display.
 - Print Invoice will open the Invoice in Report Preview

to view, print, export or email.

• Email Invoice will attach documents, add recipients,

the system will create a .pdf and email the Invoice.

• Print and Email Invoice will display both the Report

Preview and Email screens.

PRINT PROFORMA INVOICE

- 7. Click on the *Print Order* radio button.
- 8. Click on *Accept*.



				Sales Orders - BPO): Version 2.4.0.	11 - Exan	ple Company	4					X
- (ome Equipmen	t / Locations Contract	Finance / HR	Inventory Maint	enance / Projects	Manufa	acturing Pro	curement Sales	Service I	Reporting	Utilities	- 8	x
c) 🕻	2 🗙 📘			€ 🔒	23		4	P	Durb	ban	•		
Add Edi	t Delete Vie	w Forward Crea	ite Create Ar ice New Deal	dd Items New Deal to WO Project	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice	Export New	order	 Refresh 		
м	aintain	Navigati	Proces	is a	Format			Print		Curren	nt		6
rag a column	header here to g	oup by that column		e					5				
OrderNo	CustomerCod	e CustomerName	OrderStatusDes	c OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	D
8 0 0	R O C	* 0 4	R O C	n 🗖 c	-	* 0 ¢	-	1 0 0	-	-	10c	#BC	
OR000020	HOP001	Hope Works (Pty) Ltd	New order	Test	984.96	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:06:12		
OR000020	7 NET001	Networking and Lapto.	New order	test	564.30	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:10:42		
OR000021	2 HOP001	Hope Works (Pty) Ltd	New order	1234	628.27	ZAR	07/08/2017	Bianca Du Toit	1.00	1.00	11:48:45		
OR000021	B TIN001	Tinas Coffee Shop	New order	Select the option as	desired			× ca Du Toit	1.00	1.00	11:18:17		
OR000022	BET0001	Betties Summer Shop	. New order Ho	me				ca Du Toit	1.00	14.00	11:49:29		
OR000022	HOP001	Hope Works (Pty) Ltd	New order			_		ca Du Toit	1.00	14.00	14:49:36		
OR000022	SAM001	Samanthas Diner	New order	🥖 🥴				ca Du Toit	10.00	0.00	02:50:18		
OR000022	4 JOE0001	Joes Carpentry Shop	New order Acc	ept Cancel				ca Du Toit	1.00	14.00	08:57:54		
OR000024	B HOP001	Hope Works (Pty) Ltd	New order		2			ca Du Toit	1.00	14.00	11:39:12		
OR000024	HOP001	Hope Works (Pty) Ltd	New order	rocessing 🖌				ca Du Toit	1.00	15.00	10:18:06		
OR000025	HOP001	Hope Works (Pty) Ltd	New order					ca Du Toit	1.00	15.00	02:58:26		
OR000025	7 DER001	Derton / Technologies	New order					ca Du Toit	1.00	14.00	14:16:30		
OR000027	APP0001	Apple Juice Inc	New order	Print Or	der			da Sharman	1.00	15.00	16:56:08		
OR000028	TIA001	Titan Group	New order	0				ca Du Toit	1.00	15.00	16:47:51		
OR000028	2 HOP001	Hope Works (Pty) Ltd	New order	C Email O	rder			ca Surend	1.00	15.00	04:48:13		
OR000028	B HOP001	Hope Works (Pty) Ltd	New order	Print and Pri	d Email Order			ca Surend	1.00	15.00	04:50:21		
OR000028	HOP001	Hope Works (Pty) Ltd	New order					ca Surend	1.00	15.00	04:51:52		
	5 BEA001	Bearing and Shoe	New order					ca Surend	1.00	15.00	04:58:22		
OR000028				quotereftect	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
OR000028 OR000028	BEA001	Bearing and Shoe	New order	quoterentest									

9. The *Report Preview* screen will display.

The header reads *Proforma Invoice*. The *first time* a proforma invoice is printed, it will state *Proforma Invoice*. Each time *thereafter*, it will state *Copy* - *Proforma Invoice*.

- From the preview screen you can make cosmetic changes to the document, as well as *Save*, *Zoom*, *Add a Watermark*, *Export* or *Email* the Proforma Invoice.
- 11. *Close* the Report Preview screen when done.





12. You will return to the *Sales Orders* listing screen.

VIEW PRINTED PROFORMA

- The sales order that you have printed will no longer be available in the New order Status. Change the *Status* to *Pro-forma*.
- The *printed* proforma sales order (invoice) is now listed in the *Sales Orders* listing screen where the status is set to *Pro-forma*.



Print ProForma Invoices

ې چ ش	Home	e Equipment	12-	Einance / HR	Sales Orders - BPC	: Version 2.4.0.	11 - Exam Manufa	cturing Pro	r ourement Saler	s Servio	e Rep	arting Utilities		x
Ð											Durban	· Condets	13	
Add	Edit	Delete View	Forward Crea	te Create Add	Items New Deal	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice	Export	Pro-form	a 🗸 Kefresh	1	
	Maint	tain	A Navigati	Process		Format		4	Print	4	Status	A StatusDesc	i i	\$
								-			F	Pro-forma		1
											Ι	Invoiced order		
Orde	rNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	Exchange	Ν	New order		De
₽ # □ C		R C	REC	RBC	RBC	-	* O C	-	R D C	-				R 🖬
• ORO	000020	YES001	Young Electric	Pro-forma	QT12345	1,769.85	ZAR	13/05/2014	Karlien Jessica					
ORO	000022	HOP001	Hope Works (Pty) Ltd	Pro-forma	test	285.00	ZAR	30/05/2014	Belinda Sharman		×			
ORO	000146	DER001	Derton / Technologies	Pro-forma	CUSTPO 123	927.85	ZAR	29/09/2015	Bianca Du Toit		1.00	14.00 12:34:56		
ORO	000164	HOP001	Hope Works (Pty) Ltd	Pro-forma	prj178	7,208.47	ZAR	16/02/2017	Judith Mudzengi		1.00	14.00 16:46:35		
ORO	000169	HOP001	Hope Works (Pty) Ltd	Pro-forma	testo3	5,700.00	ZAR	02/03/2017	Judith Mudzengi		1.00	14.00 10:41:14		
ORO	000170	HOP001	Hope Works (Pty) Ltd	Pro-forma	test	342.00	ZAR	16/03/2017	Bianca Du Toit		1.00	14.00 16:36:59		
ORO	000172	HOP001	Hope Works (Pty) Ltd	Pro-forma	1234	3,534.00	USD	12/04/2017	Bianca Du Toit		5.00	14.00 11:55:49		
ORO	000173	HOP001	Hope Works (Pty) Ltd	Pro-forma	Project Order	20,745.72	ZAR	13/04/2017	Judith Mudzengi		1.00	14.00 01:13:12		
ORO	000183	HOP001	Hope Works (Pty) Ltd	Pro-forma	Orders - Call	6,156.00	ZAR	25/05/2017	Bianca Du Toit		1.00	14.00 14:28:30		
ORO	000185	HOP001	Hope Works (Pty) Ltd	Pro-forma	Orders - PRJ	114.00	ZAR	25/05/2017	Bianca Du Toit		1.00	14.00 14:51:43		
ORO	000206	HOP001	Hope Works (Pty) Ltd	Pro-forma	Test	984.96	ZAR	03/08/2017	Bianca Du Toit		1.00	14.00 01:06:12		
ORO	000210	BOT0001	Bothas Networking inc	Pro-forma	test	71.25	USD	07/08/2017	Bianca Du Toit		10.00	0.00 11:41:28		
ORO	000211	HOP001	Hope Works (Pty) Ltd	Pro-forma		2,210.59	ZAR	07/08/2017	Bianca Du Toit		1.00	14.00 11:43:06		
						14								
• ===														
Open W	/indows 🕶								User : JulandaK	02/03/20	21 Ven	sion : 2.4.0.11 Exampl	e Compan	iy

PRINT PROFORMA INVOICE - COPY

- 1. From the *Sales Orders* listing screen,
- 2. Select the *Site* where the invoice was created.
 - The example has *Durban* selected.
- 3. Ensure that the *Status* is set to *Pro-forma*.



Print ProForma Invoices

\$	Ŧ				1			Sale	orders - BP	D: Version 2.4.0.	11 - Exan	nple Compan	Y					
		Home	e Equip	ment /	Locations Co	ontract	Finance / HR	Inve	ntory Maint	enance / Projects	Manufa	acturing Pro	ocurement Sale	s Service	Reporting	Utilities	- 6	P x
(÷		×		6			Ð		Z		4	P		ban	- 🕹		
1	Add	Edit	Delete	View	Forward	Create	Create New Deal	Add Item to WO	s New Deal Project	Save Layout	Norkspaces	s Print Sales Order	Print Proforma	Export Pro	-forma	- Refresh		
		Maint	ain		Navigati		Proce	ess		Format	t	4	Print		Curre	nt		\Diamond
(10000 A										_	-			3				
																		1
	Order	No.	Customer	Code	CustomerName		OrderStatusDe	esc Ord	erDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCod	le Dep
٩	8 C		ROC		RBC		R BC	REC		-	* 0 ¢	-	8 0 0	-	-	ROC	R O C	R Q ¢
۲	OR000	0020	YES001		Young Electric		Pro-forma	QT	2345	1,769.85	ZAR	13/05/2014	Karlien Jessica	1.00	14.00	14:50:08		
	OR000	0022	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	tes		285.00	ZAR	30/05/2014	Belinda Sharman	1.00	14.00	10:44:19		
	OR000	0146	DER001		Derton / Techno	ologies	Pro-forma	CUS	TPO123	927.85	ZAR	29/09/2015	Bianca Du Toit	1.00	14.00	12:34:56		
	OR000	0164	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	prj:	.78	7,208.47	ZAR	16/02/2017	Judith Mudzengi	1.00	14.00	16:46:35		
	OR000	0169	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	tes	:03	5,700.00	ZAR	02/03/2017	Judith Mudzengi	1.00	14.00	10:41:14		
	OR000	0170	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	tes		342.00	ZAR	16/03/2017	Bianca Du Toit	1.00	14.00	16:36:59		
	OR000	0172	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	123	4	3,534.00	USD	12/04/2017	Bianca Du Toit	5.00	14.00	11:55:49		
	OR000	0173	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	Pro	ect Order	20,745.72	ZAR	13/04/2017	Judith Mudzengi	1.00	14.00	01:13:12		
	OR000	0183	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	Ord	ers - Call	6,156.00	ZAR	25/05/2017	Bianca Du Toit	1.00	14.00	14:28:30		
	OR000	0185	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	Ord	ers - PRJ	114.00	ZAR	25/05/2017	Bianca Du Toit	1.00	14.00	14:51:43		
	OR000	0206	HOP001		Hope Works (Pt	y) Ltd	Pro-forma	Tes	t	984.96	ZAR	03/08/2017	Bianca Du Toit	1.00	14.00	01:06:12		
	OR000	0210	BOT0001		Bothas Network	ing inc	Pro-forma	tes		71.25	USD	07/08/2017	Bianca Du Toit	10.00	0.00	11:41:28		
	OR000	0211	HOP001		Hope Works (Pt	y) Ltd	Pro-forma			2,210.59	ZAR	07/08/2017	Bianca Du Toit	1.00	14.00	11:43:06		
1	pen Wi	ndows 🕶											User : JulandaK	02/03/2021	Version : 2	.4.0.11 Exa	mple Compa	any /

- 4. Click on the *row* of the *invoice* you wish to print.
- 5. Click on *Print Proforma Invoice*.
- 6. When the *Select the option as desired* screen display,
- 7. Click on the *Print Order* radio button.
- 8. Click on *Accept*.



1	Ŧ					Sales Order	s - BPO:	Version 2.4.0	0.11 - Exar	nple Compan	ıy						IX
	Hom	e Equipmer	nt / Locations Co	ontract	Finance / HR	Inventory	Mainten	ance / Project	s Manuf	acturing Pr	ocurement Sale	s Serv	rice i	Reporting	Utilities	- 4	y x
Ð		×			8	€	Þ	2		4	4		Durb	an	- 🕄		
Add	Edit	Delete Vie	ew Forward	Create Invoice	Create Add New Deal to	Items New WO Pro	Deal	Save Layout	Workspace	s Print Sale Order	s Print Proforma Invoice	Export	Pro-	forma	 Refresh 		
	Maint	tain	A Navigati A		Process			Form	at	4	Print			Currer	nt		\Diamond
	a column héi										•		5				
Or	derNo	CustomerCod	le CustomerName		OrderStatusDesc	OrderDescr	iption	OrderValue	Currency	OrderDate	SalesmanName	Exchang	geRate	TaxRate	OrderTime	DeptCod	le Dep
9 F		a 🗖 c	# 0 0		R C	R C		-	* 0 ¢	=	8 0 0	-		-	R C	* 0 :	800
OR	0000020	YES001	Young Electric		Pro-forma	QT12345		1,769.8	5 ZAR	13/05/2014	Karlien Jessica		1.00	14.00	14:50:08		
OR	.0000022	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	test	Sel	ect the ontio	n as desir	ed		X	1.00	14.00	10:44:19		
OR	0000146	DER001	Derton / Techno	ologies	Pro-forma	CUSTPO 12	en sen	cae are opero	in us ucon				1.00	14.00	12:34:56		
OR	0000164	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	prj178	Home						1.00	14.00	16:46:35		
OR	0000169	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	testo3							1.00	14.00	10:41:14		
OR	.0000170	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	test	Accent	Cancel					1.00	14.00	16:36:59		
OR	0000172	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	1234	riccept						5.00	14.00	11:55:49		
OR	0000173	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	Project Ord	Proce	essing 🖌	8			\sim	1.00	14.00	01:13:12		
OR	0000183	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	Orders - Ca	9						1.00	14.00	14:28:30		
OR	0000185	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	Orders - PR							1.00	14.00	14:51:43		
OR	0000206	HOP001	Hope Works (Pt	y) Ltd	Pro-forma	Test	est © Print Order								01:06:12		
OR	0000210	BOT0001	Bothas Network	ing inc	Pro-forma	test									11:41:28		
> OR	0000211	HOP001	Hope Works (Pt	y) Ltd	Pro-forma			O Em	ail Order				1.00	14.00	11:43:06		
								O Pri	nt and Emai	Order							
												1.					
		4															
4 -														_			
0.000	Mindawa										Unar a Julandal	02/02/	2021	Versien 1 2	4.0.11 Euro	ala Cama	-
Open	windows *										User : Julandak	02/03/.	2021	version : 2.	4.0.11 Exar	ipie Compa	iny //.

9. The *Report Preview* screen will be displayed.

Note the header details '*Copy - Proforma Invoice*'. The *first time* a proforma invoice is printed, it will state: *Proforma Invoice*. Each time *thereafter*, it will state *Copy - Proforma Invoice*.

- From the preview screen you can make cosmetic changes to the document, as well as *Save*, *Zoom*, *Add a Watermark*, *Export* or *Email* the Proforma Invoice.
- 11. *Close* the Report Preview screen when done.





Related Topics

- Print Invoice
- View Invoice
- Send Invoices To Print Queue

MNU.063.009