

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

-		e Equipment	Locations Contract	Finance / HR	Sales Orders - BPO: Inventory Mainter	nance / Projects		acturing Pro		Service	Reporting	Utilities		×
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	OR0000207	HOP001	Hope Works (Pty) Ltd	New order	1234	628.27		07/08/2017	Bianca Du Toit	1.00		11:48:45		
	OR0000212	TIN001	Tinas Coffee Shop	New order	test	24,071.10		14/08/2017	Bianca Du Toit	1.00		11:18:17		
	OR0000218 OR0000220	BET0001	Betties Summer Shop		1234	23.029.07		21/08/2017	Bianca Du Toit	1.00		11:49:29		
	OR0000220	HOP001	Hope Works (Pty) Ltd	New order	12.54	4,745.59		04/09/2017	Bianca Du Toit	1.00		14:49:36		
	OR0000222	SAM001	Samanthas Diner	New order	test	402.85		04/09/2017	Bianca Du Toit	10.00		02:50:18		
	OR0000224	JOE0001	Joes Carpentry Shop	New order	test	458.85		25/10/2017	Bianca Du Toit	1.00		08:57:54		
	OR0000243	HOP001	Hope Works (Ptv) Ltd	New order	Generate Order -	6,156,00		26/03/2018	Bianca Du Toit	1.00		11:39:12		
	OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60		09/04/2018	Bianca Du Toit	1.00	15.00	10:18:06		
	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26		
	OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30		
	OR0000279	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		
	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
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	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
	en Windows 🔻								User : JulandaK	02/03/2021				-

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*.



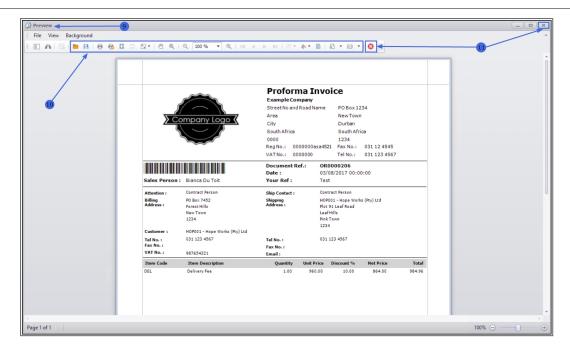
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	OR0000212	HOP001	Hope Works (Pty) Ltd	New order	1234	628.27	ZAR	07/08/2017	Bianca Du Toit	1.00	1.00	11:48:45		
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	OR0000220	BET0001	Betties Summer Shop	New order Ho	ome				ca Du Toit	1.00	14.00	11:49:29		
	OR0000221	HOP001	Hope Works (Pty) Ltd	New order					ca Du Toit	1.00	14.00	14:49:36		
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	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		

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

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. 0	R0000020	YES001	Young Electric	Pro-forma	QT12345	1,769.85	ZAR	13/05/2014	Karlien Jessica				
0	R0000022	HOP001	Hope Works (Pty) Ltd	Pro-forma	test	285.00	ZAR	30/05/2014	Belinda Sharman		x		11
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0	R0000164	HOP001	Hope Works (Pty) Ltd	Pro-forma	prj178	7,208.47	ZAR	16/02/2017	Judith Mudzengi		1.00 1	4.00 16:46:35	
0	R0000169	HOP001	Hope Works (Pty) Ltd	Pro-forma	testo3	5,700.00	ZAR	02/03/2017	Judith Mudzengi		1.00 1	4.00 10:41:14	
0	R0000170	HOP001	Hope Works (Pty) Ltd	Pro-forma	test	342.00	ZAR	16/03/2017	Bianca Du Toit		1.00 1	4.00 16:36:59	
0	R0000172	HOP001	Hope Works (Pty) Ltd	Pro-forma	1234	3,534.00	USD	12/04/2017	Bianca Du Toit		5.00 1	4.00 11:55:49	
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0	R0000183	HOP001	Hope Works (Pty) Ltd	Pro-forma	Orders - Call	6,156.00	ZAR	25/05/2017	Bianca Du Toit		1.00 1	4.00 14:28:30	
0	R0000185	HOP001	Hope Works (Pty) Ltd	Pro-forma	Orders - PRJ	114.00	ZAR	25/05/2017	Bianca Du Toit		1.00 1	4.00 14:51:43	
0	R.0000206	HOP001	Hope Works (Pty) Ltd	Pro-forma	Test	984.96	ZAR	03/08/2017	Bianca Du Toit		1.00 1	4.00 01:06:12	
0	R0000210	BOT0001	Bothas Networking inc	Pro-forma	test	71.25	USD	07/08/2017	Bianca Du Toit		10.00	0.00 11:41:28	
0	R0000211	HOP001	Hope Works (Pty) Ltd	Pro-forma		2,210.59	ZAR	07/08/2017	Bianca Du Toit		1.00 1	4.00 11:43:06	

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

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OR0000164 HOP001 Hope Works (Pty) Ltd Pro-forma prj178 7,208.47 ZAR 16/02/2017 Judith Mudzengi 1.00 14.00 16:46	19
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OR0000169 HOP001 Hope Works (Pty) Ltd Pro-forma testo3 5,700.00 ZAR 02/03/2017 Judith Mudzengi 1.00 14.00 10:41	14
OR0000170 HOP001 HopeWorks (Pty) Ltd Pro-forma test 342.00 ZAR 16/03/2017 Blanca Du Toit 1.00 14.00 16:36	59
OR0000172 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
OR0000173 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
OR0000183 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
OR0000185 HOP001 Hope Works (Pty) Ltd Pro-forma Orders - PRJ 114.00 ZAR 25/05/2017 Blanca Du Toit 1.00 14.00 14:51	43
OR0000206 HOP001 Hope Works (Pty) Ltd Pro-forma Test 984.96 ZAR 03/08/2017 Bianca Du Toit 1.00 14.00 01:06	12
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OR0000211 HOP001 Hope Works (Pty) Ltd Pro-forma 2,210.59 ZAR 07/08/2017 Blanca Du Toit 1.00 11:43	06

- 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*.



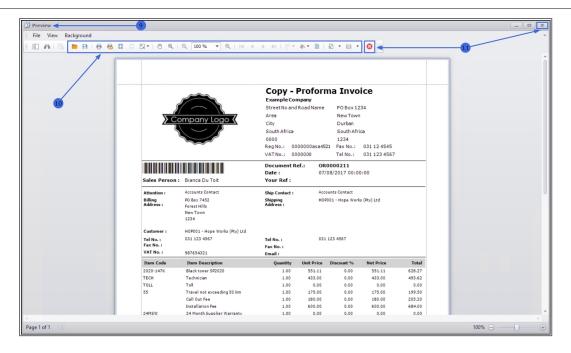
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	OR0000170	HOP001	Hope Works (Pty) Ltd	Pro-forma	test	Accept	Cancel					1.00	14.00	16:36:59		
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	OR0000183	HOP001	Hope Works (Pty) Ltd	Pro-forma	Orders - Ca	-						1.00	14.00	14:28:30		
	OR0000185	HOP001	Hope Works (Pty) Ltd	Pro-forma	Orders - PF							1.00	14.00	14:51:43		
	OR0000206	HOP001	Hope Works (Pty) Ltd	Pro-forma	Test							1.00	14.00	01:06:12		
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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