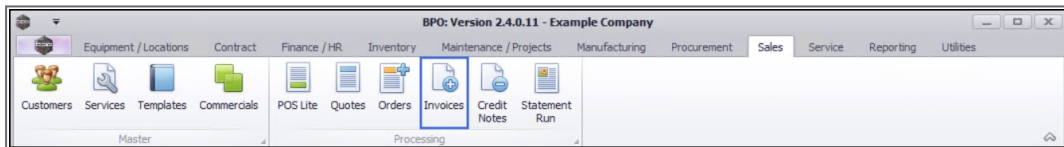# SALES

INVOICES – PRINT PROFORMA INVOICES

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

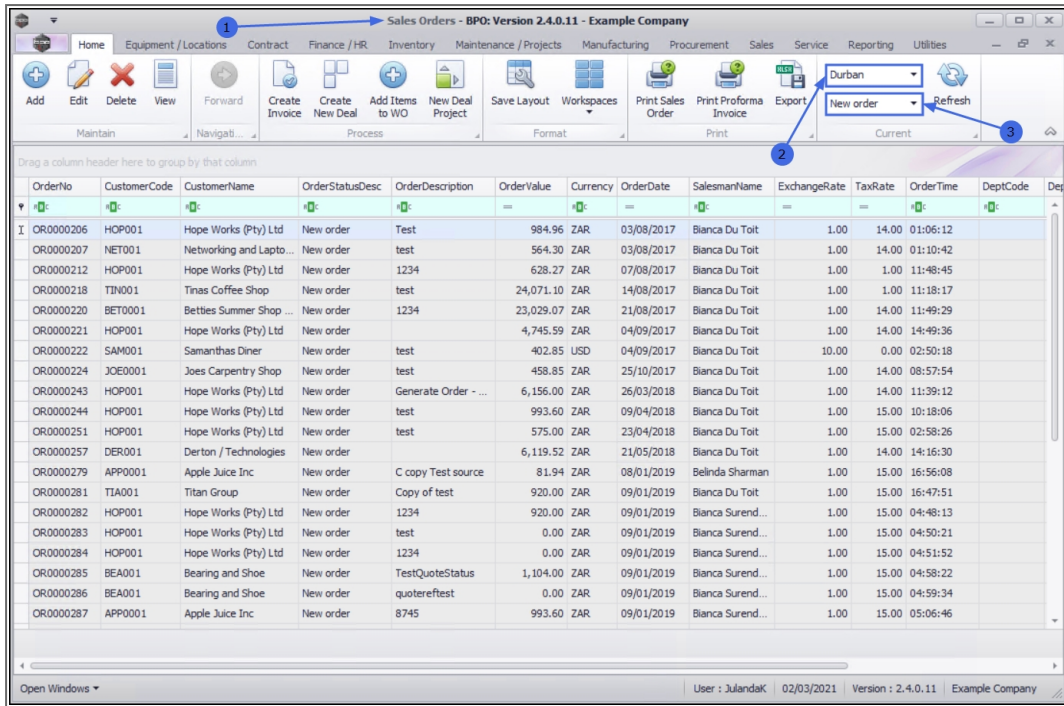This process can *only* be done from the **Sales Orders** listing screen.

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.
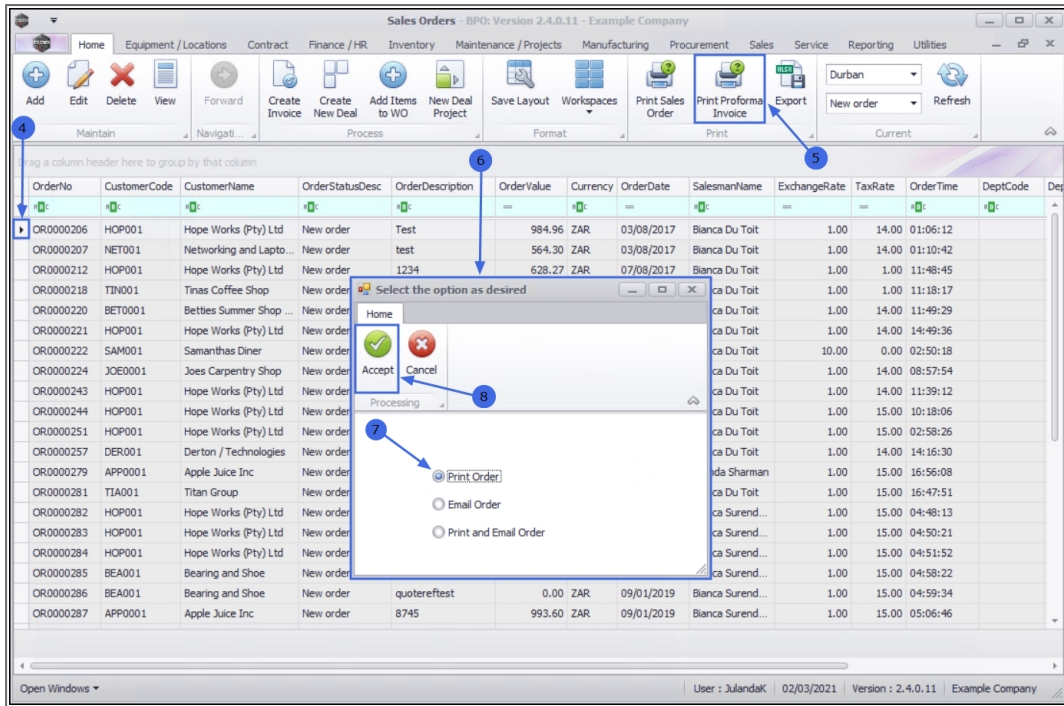3. For printing a New ProForma Invoice ensure that the *Status* is set to *New Order*.

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

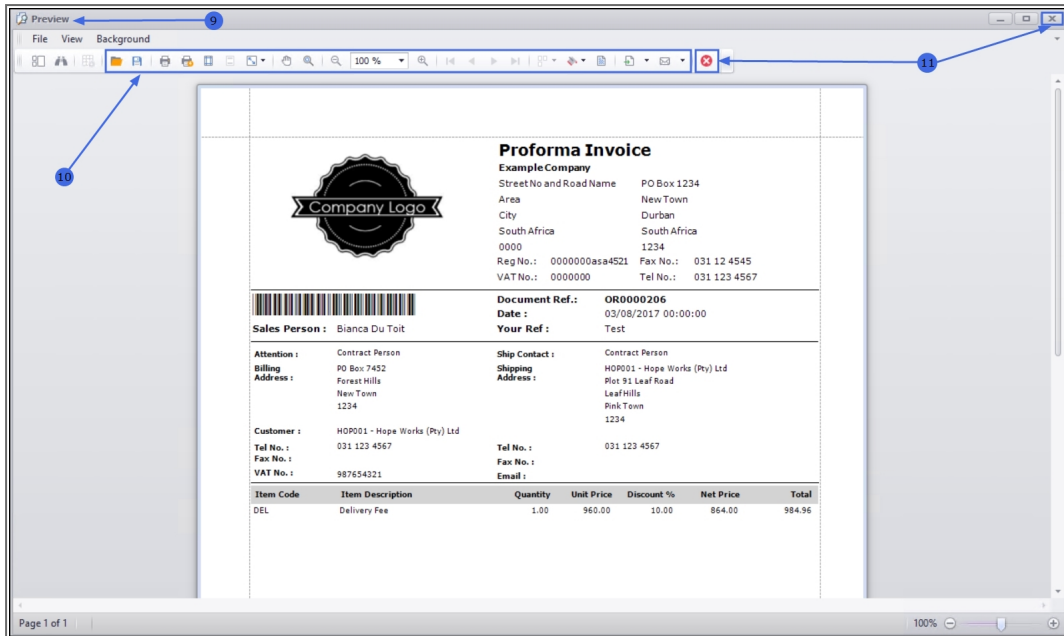7. Click on the *Print Order* radio button.
8. Click on *Accept*.

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_.
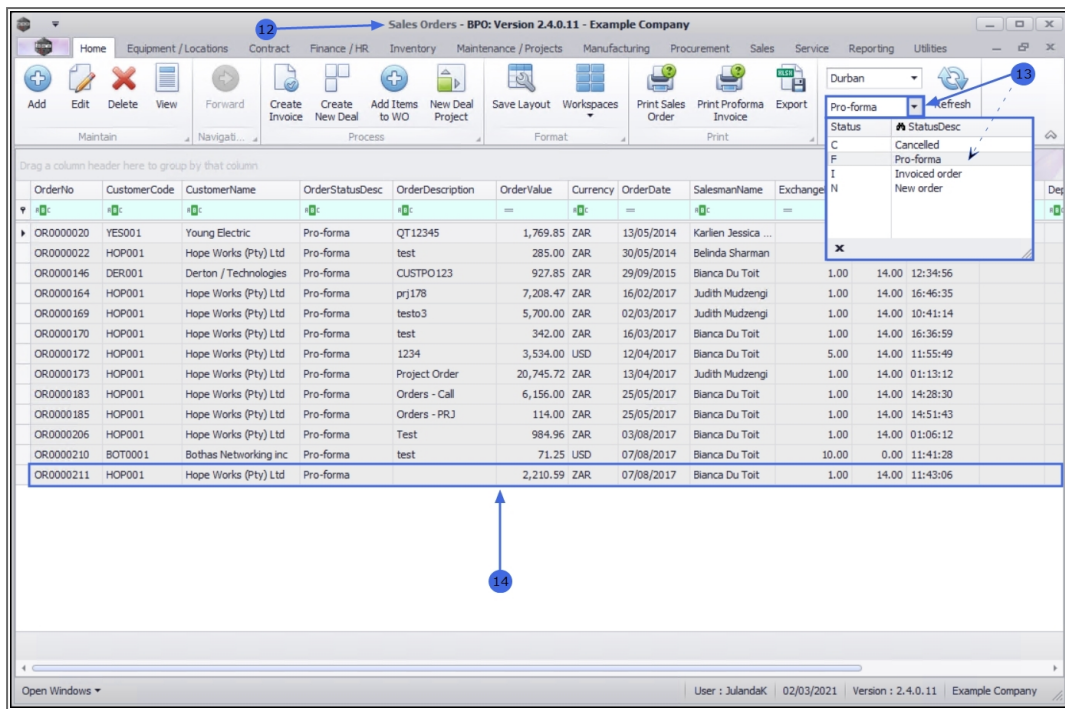
10. From the preview screen you can make cosmetic changes to the document, as well as **_Save_**, **_Zoom_**, **_Add a Watermark_**, **_Export_** or **_Email_** the Proforma Invoice.

11. **_Close_** the Report Preview screen when done.

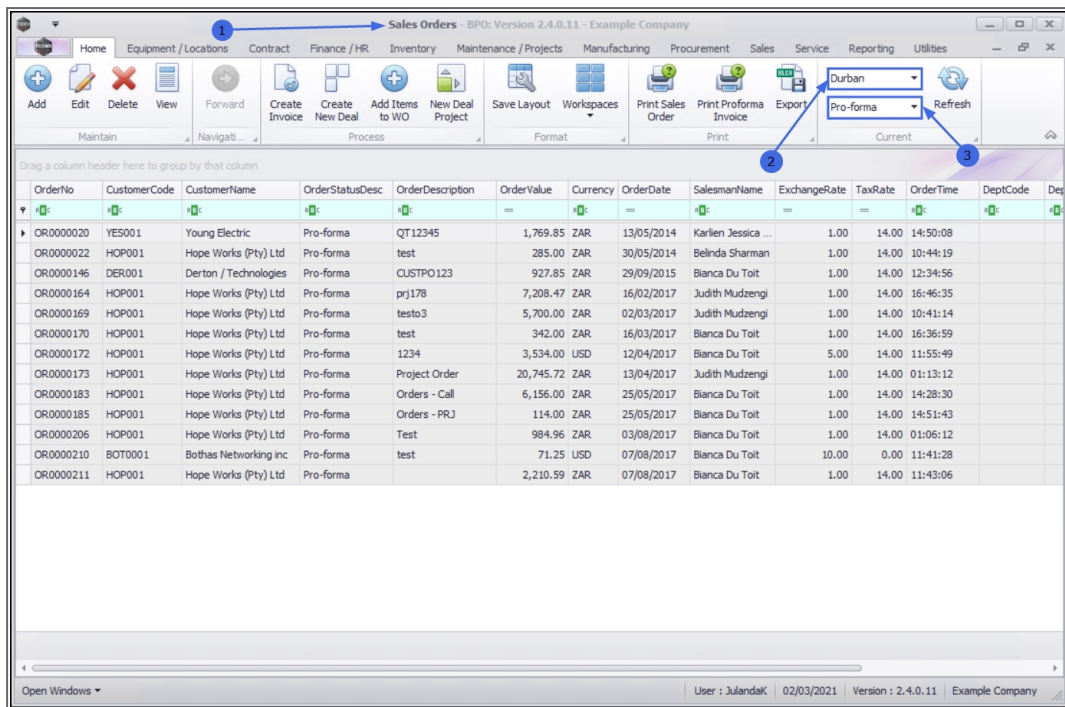12. You will return to the *Sales Orders* listing screen.

VIEW PRINTED PROFORMA

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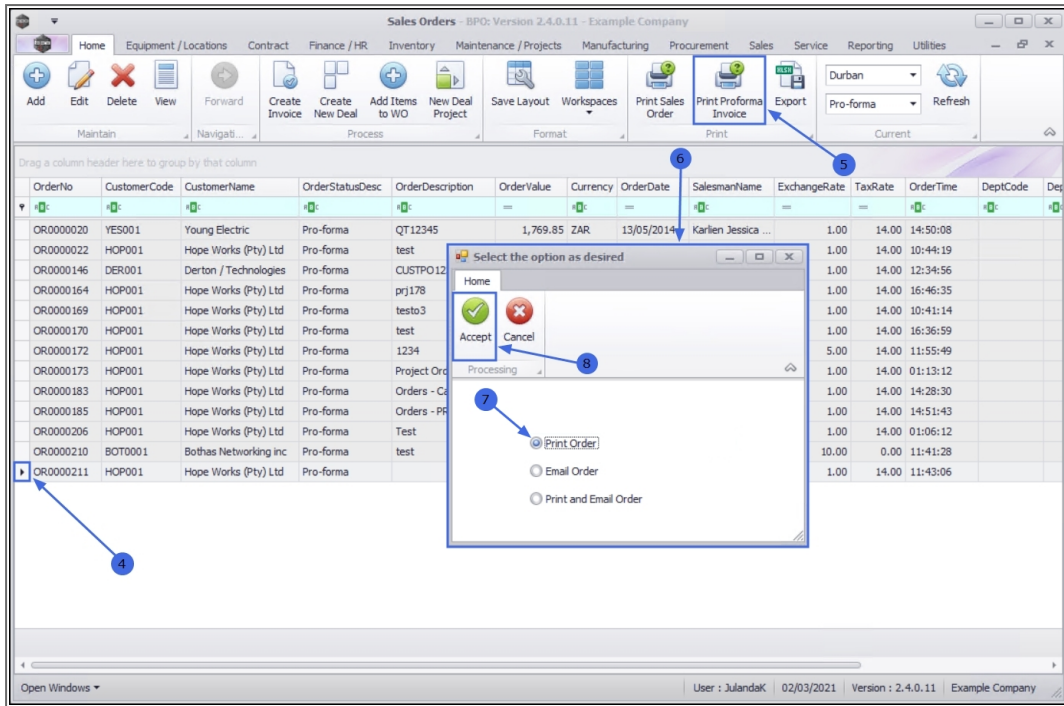
PRINT PROFORMA INVOICE – COPY

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*.

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.
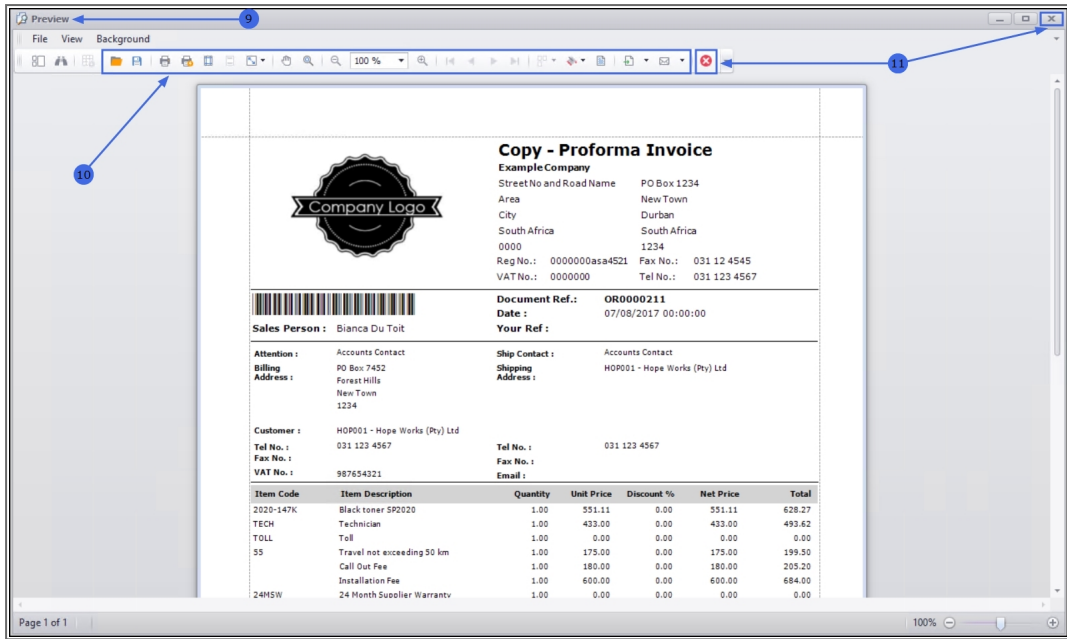8. Click on **Accept**.

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

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

10. 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

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