

SALES

INVOICES – PRINT PROFORMA INVOICES

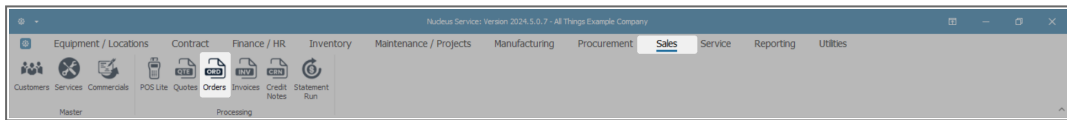
Where payment is required **before** an item or service is rendered, a **ProForma Invoice** can be raised for client payment.

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 Select Sales > Orders

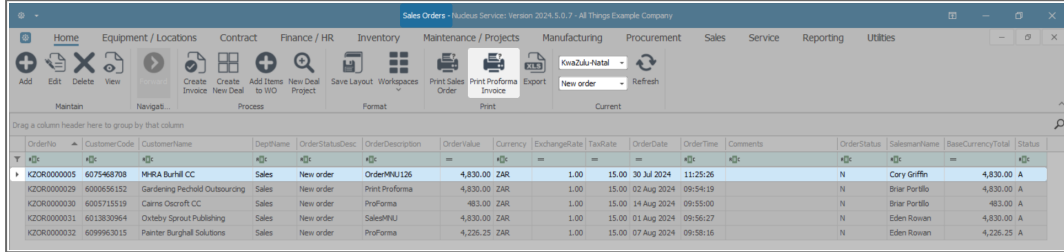


- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where the invoice was created.
 - The example has **Kwa-Zulu Natal** selected.
- For printing a New ProForma Invoice, ensure that the **Status** is set to **New Order**.

OrderNo	CustomerCode	CustomerName	DeptName	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	Comments	OrderStatus	SalesmanName	BaseCurrencyTotal	Status
KZOR000005	6075468708	MIRA Burhl CC	Sales	New order	OrderMNU126	4,830.00	ZAR	1.00	15.00	30 Jul 2024	11:25:26		N	Cory Griffin	4,830.00	A
KZOR000029	6090696152	Gardening Techold Outsourcing	Sales	New order	Print Proforma	4,830.00	ZAR	1.00	15.00	02 Aug 2024	09:54:19		N	Blair Porllo	4,830.00	A
KZOR000030	6051715119	Carma Oostvult CC	Sales	New order	Proforma	483.00	ZAR	1.00	15.00	14 Aug 2024	09:55:00		N	Blair Porllo	483.00	A
KZOR000031	6013830964	Outsby Sprout Publishing	Sales	New order	SalesPHU	4,830.00	ZAR	1.00	15.00	01 Aug 2024	09:56:27		N	Eden Rowan	4,830.00	A
KZOR000032	6099963015	Painter Burghall Solutions	Sales	New order	Proforma	4,226.25	ZAR	1.00	15.00	07 Aug 2024	09:58:16		N	Eden Rowan	4,226.25	A

PRINT PROFORMA INVOICE – NEW

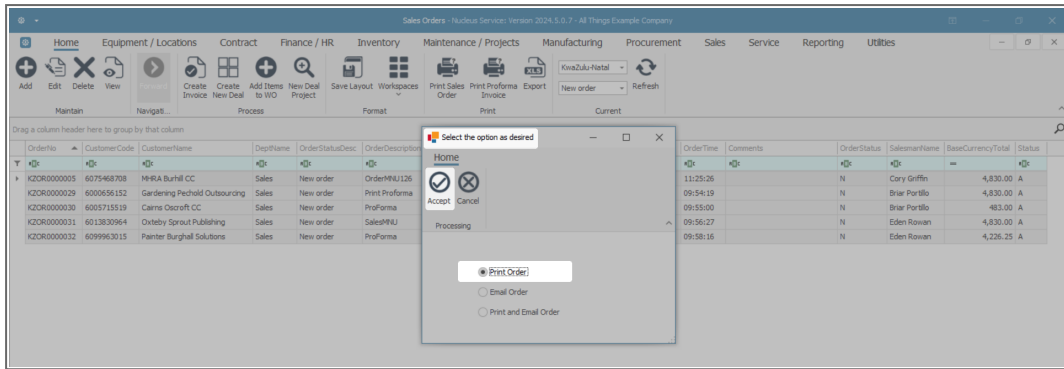
- Select the **row** of the invoice you wish to print.
- Click on **Print ProForma Invoice**.



- 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

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

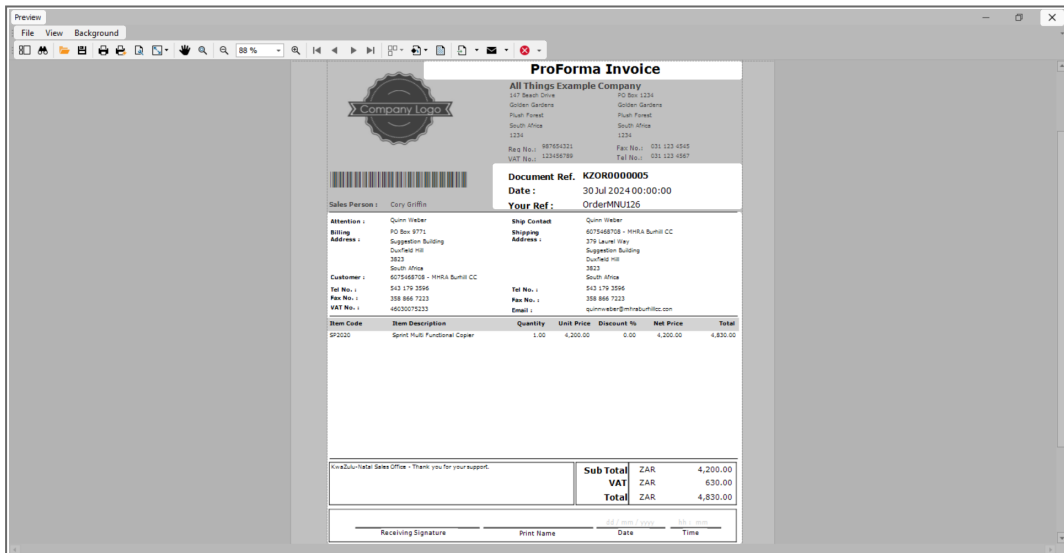


- The **Report Preview** screen will display.



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**.

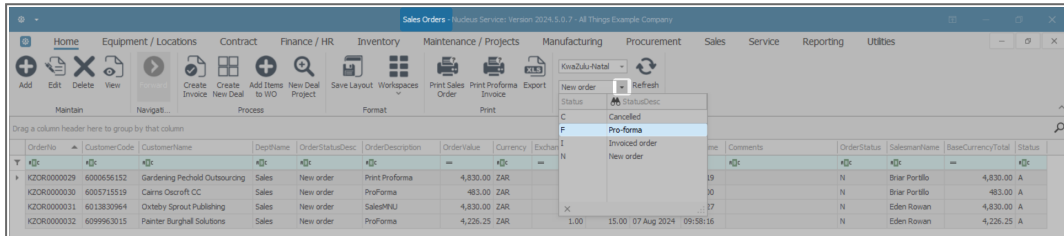
- From the preview screen you can make cosmetic changes to the document, as well as **Save**, **Zoom**, **Add a Watermark**, **Export**, or **Email** the ProForma Invoice.
- **Close** the Report Preview screen when done.



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

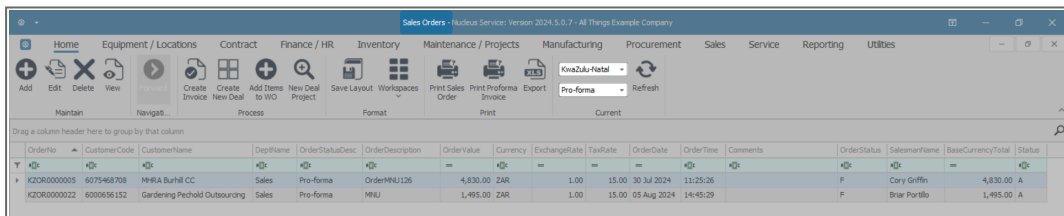
VIEW PRINTED PROFORMA

- 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**.

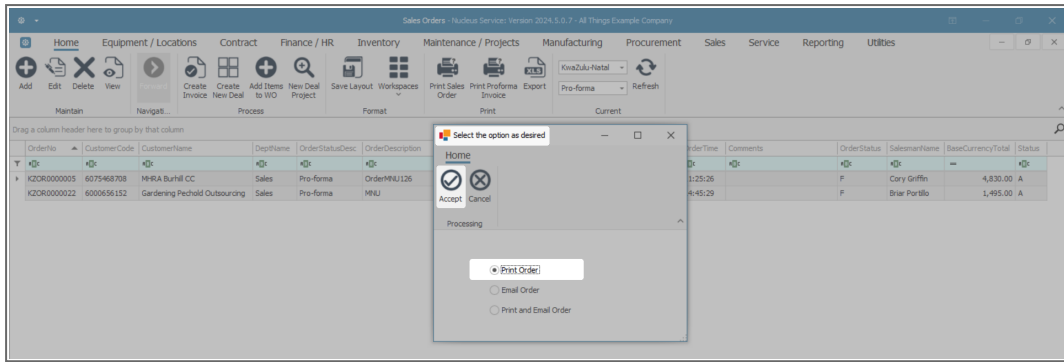


PRINT PROFORMA INVOICE – COPY

- From the **Sales Orders** listing screen,
- Select the **Site** where the invoice was created.
 - The example has **Kwa-Zulu Natal** selected.
- Ensure that the **Status** is set to **ProForma**.



- Select the **row** of the **invoice** you wish to print.
- Click on **Print ProForma Invoice**.
- When the **Select the option as desired** screen displays -
- Click on the **Print Order** radio button.
- Click on **Accept**.

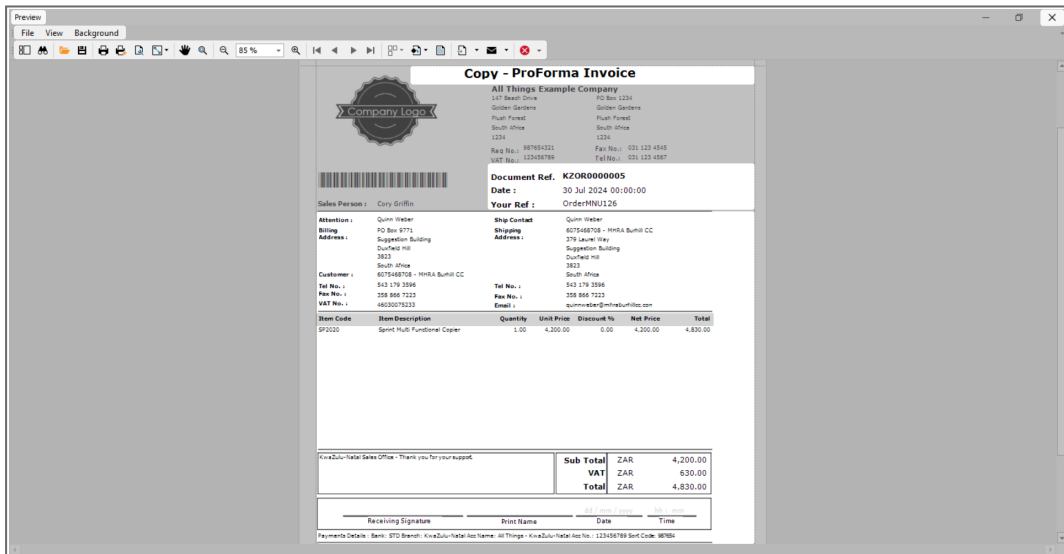


- The **Report Preview** screen will be displayed.



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.
- **Close** the Report Preview screen when done.



Related Topics



Print ProForma Invoices

- [Print Invoice](#)
- [View Invoice](#)
- [Send Invoices To Print Queue](#)
- [Print ProForma Invoice](#)

MNU.063.009