

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**.

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PRINT PROFORMA INVOICE - NEW

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

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- The Select the option as desired screen will display.
 - Print Invoice will open the Invoice in Report Pre-

view to view, print, export or email.

• Email Invoice will attach documents, add recip-

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

• Frint 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.



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• 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.

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		Reg No.: 987654321 Fax No.: 0311234545 VAT No.: 123456789 Tel No.: 0311234567	
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• 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.

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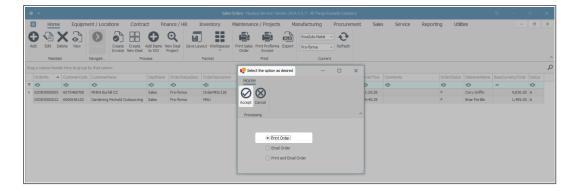
## **PRINT PROFORMA INVOICE - COPY**

- 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**.

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- 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.

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		Reg No.: 90/05/321 Pax No.: 031123 4545 VAT No.: 123456789 Tel No.: 031123 4567	
		Document Ref.         KZOR0000005           Date :         30 Jul 2024 00:00:00	
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	Customer: 6075463708 - MHRA Burhill CC Tel No.: 543 179 3596 Fax No.: 358 866 7223 VAT No.: 46030075233	Skuth Africa Tel No. : 543 179 3966 Fax No. : 326 866 7223 Email : quinnester@m/mburhiles.con	
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	Paymenta Detaila : Bank: STD Branch: KwaZulu-Natal Acc N	ame: All Things - KwaZulu-Natal Ace No.: 123456789 Sort Code: 987654	
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#### **Related Topics**



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

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