

SALES

ORDERS - PRINT / EMAIL A PROFORMA INVOICE

Where payment is required before a new deal installation begins, print a **ProForma Invoice** for client payment.

See also [Sales Invoices: Print ProForma Invoice](#).

Ribbon Select **Sales > Orders**



- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where the Sales Order is located.
 - The example has **KwaZulu-Natal** selected.
- Select the **Status**.
 - The image has **New Order** selected.
- Select the **row** of the Sales Order that you wish to print a ProForma Invoice for.
- Click on **Print ProForma Invoice**.

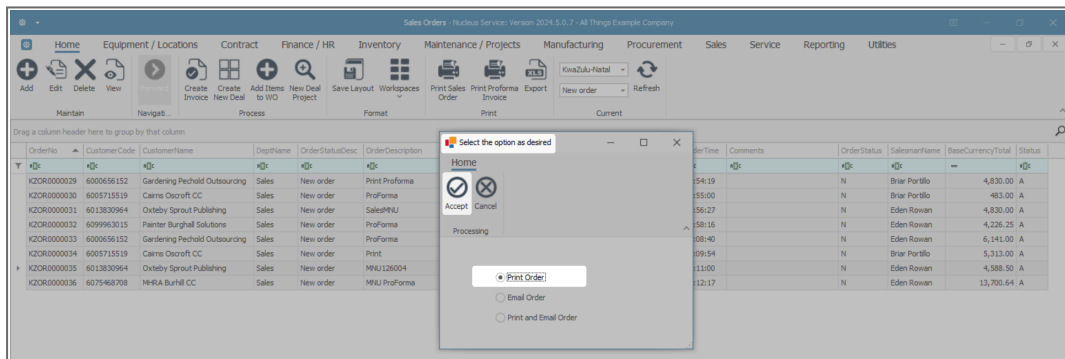
The screenshot shows the 'Sales Orders' listing screen. The 'Print Proforma Invoice' button is highlighted. The table below lists several sales orders with their details.

OrderNo	CustomerCode	CustomerName	OrderName	OrderStatusDesc	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	OrderDate	OrderTime	Comments	OrderStatus	SalesmanName	BaseCurrencyTotal	Status
KZOR000029	600556152	Gardening Pechold Outsourcing	Sales	New order	Print Proforma	4,830.00	ZAR	1.00	15.00	02 Aug 2024	09:54:19		N	Brian Portillo	4,830.00	A
KZOR000030	6005715519	Carnie Oscroft CC	Sales	New order	ProForma	483.00	ZAR	1.00	15.00	14 Aug 2024	09:53:00		N	Brian Portillo	483.00	A
KZOR000031	6013830964	Oxtbody Sprout Publishing	Sales	New order	Sales@RU	4,830.00	ZAR	1.00	15.00	01 Aug 2024	09:56:27		N	Eden Rowan	4,830.00	A
KZOR000032	6099963015	Painter Burghal 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
KZOR000033	600056152	Gardening Pechold Outsourcing	Sales	New order	ProForma	6,141.00	ZAR	1.00	15.00	15 Aug 2024	09:08:40		N	Eden Rowan	6,141.00	A
KZOR000034	6005715519	Carnie Oscroft CC	Sales	New order	Print	5,313.00	ZAR	1.00	15.00	09 Aug 2024	09:09:54		N	Brian Portillo	5,313.00	A
KZOR000035	6013830964	Oxtbody Sprout Publishing	Sales	New order	MNU126004	4,588.50	ZAR	1.00	15.00	15 Aug 2024	09:11:00		N	Eden Rowan	4,588.50	A
KZOR000036	6075468708	HRRA Burhill CC	Sales	New order	MNU Proforma	13,700.64	ZAR	1.00	15.00	01 Aug 2024	09:12:17		N	Eden Rowan	13,700.64	A

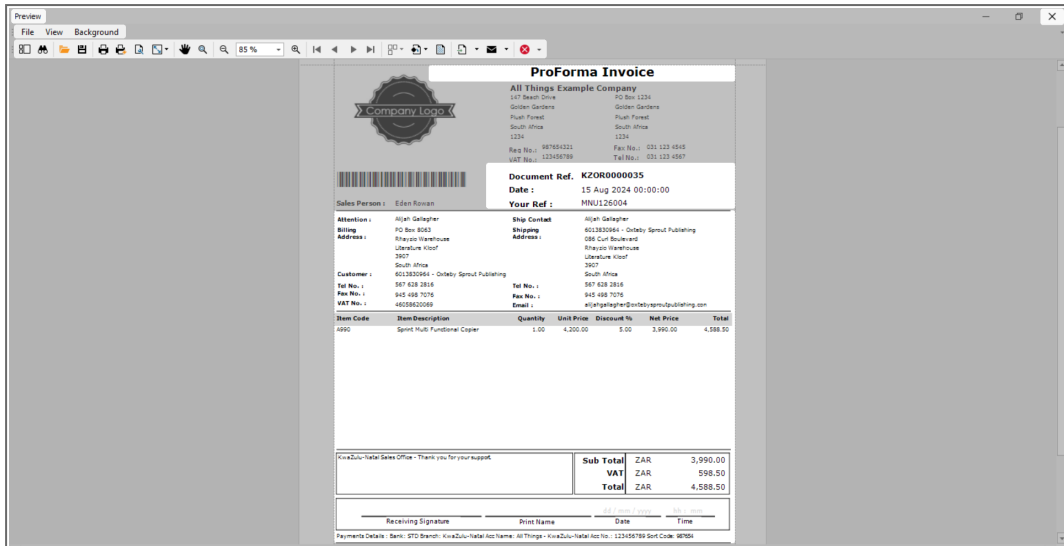
- The **Select the option as desired** screen will display with the following options:
- Click on the **radio button** to select the option you require:
 - **Print Order** (will open the Order in Report Preview to view, print, export, or email).
 - **Email Order** (can attach documents, add recipients, the system will create a .pdf and email the Order).
 - **Print and Email Order** (both the Report Preview and Email screens will pop up).

PRINT SALES ORDER

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



- The **Report Preview** screen will display.
- You can make cosmetic changes to the document from this screen, as well as **Save, Print, Add a Watermark, Export, or Email** the ProForma Invoice.
- **Close** the Report Preview screen when done.



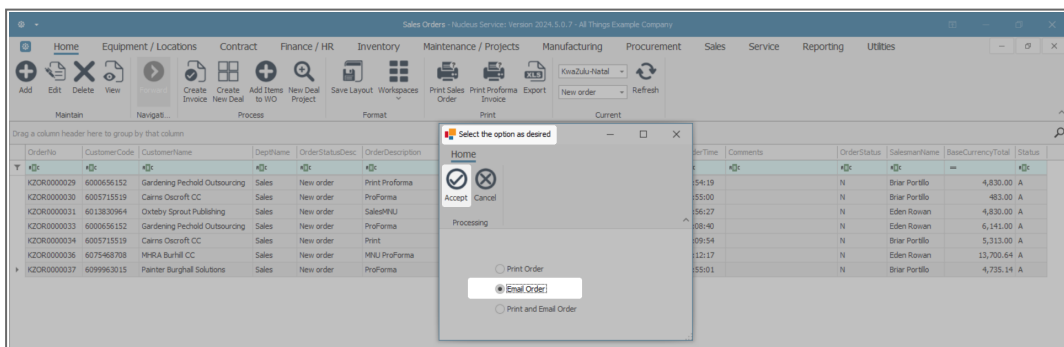
- You will return to the **Sales Orders** listing screen.

EMAIL INVOICE / PRINT AND EMAIL SALES ORDER



If you get an error when trying to email the document, ask your administrator to make sure that the correct shared folder location has been configured in Nucleus Service and that you have the relevant folder rights to access the shared folder on the server.

- From the **Select the option as desired** screen, select **Email Order** or **Print and Email Order**.
 - The example has **Email Order** selected.
- Click **Accept**.



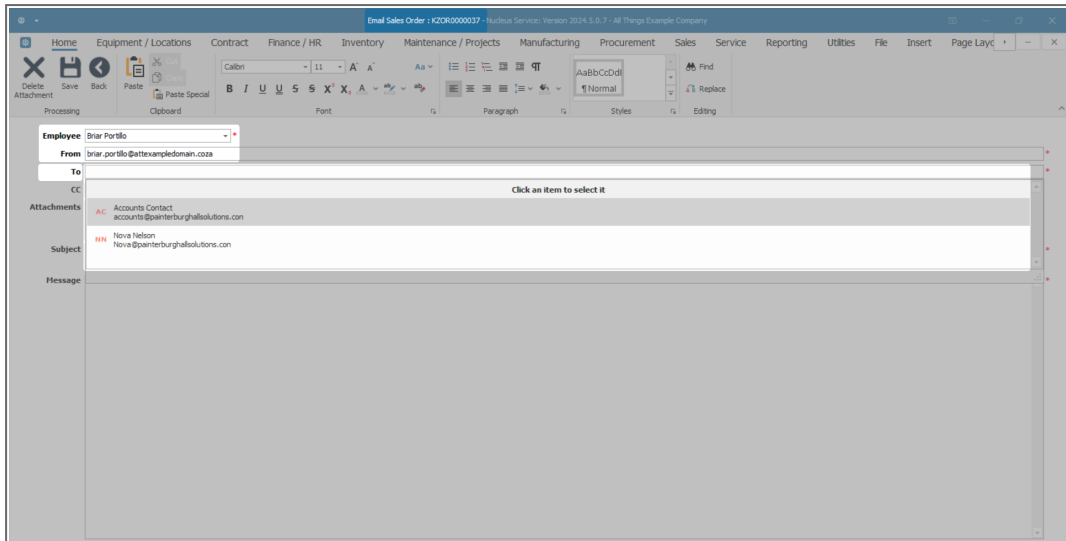
- The **Email Sales Order: []** screen will display, for both Email Invoice or Print and Email Invoice options.

EMAIL HEADER INFORMATION

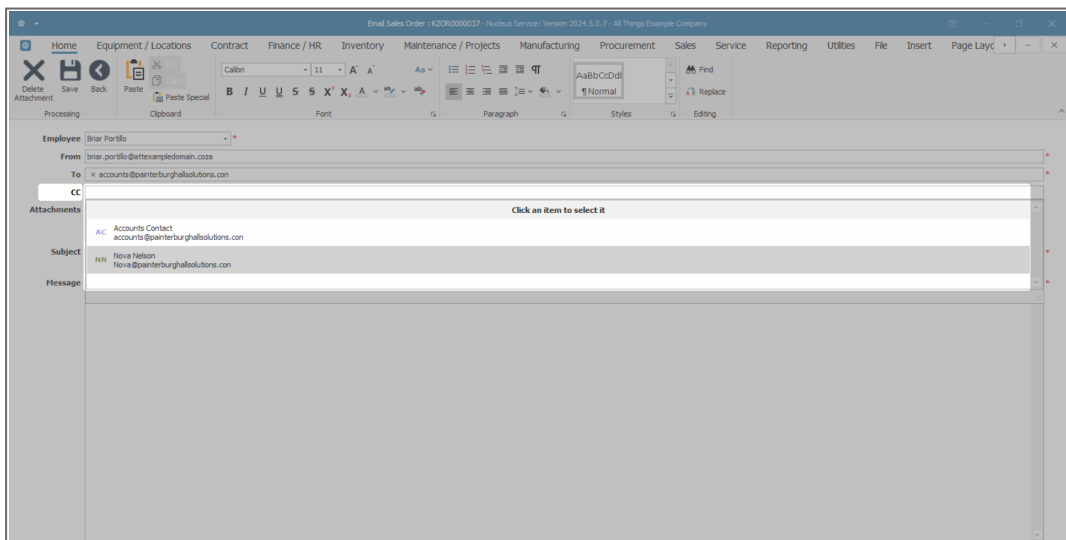
- **Employee:** The employee who is currently logged onto the system will display in the employee field. Click on the **drop-down arrow** to choose an alternative employee name, if required.
- **From:** The email address for the employee, selected in the employee field above, will display in this field. This field can be edited if required.

SEARCHING FOR AND ADDING A SECOND EMAIL ADDRESS

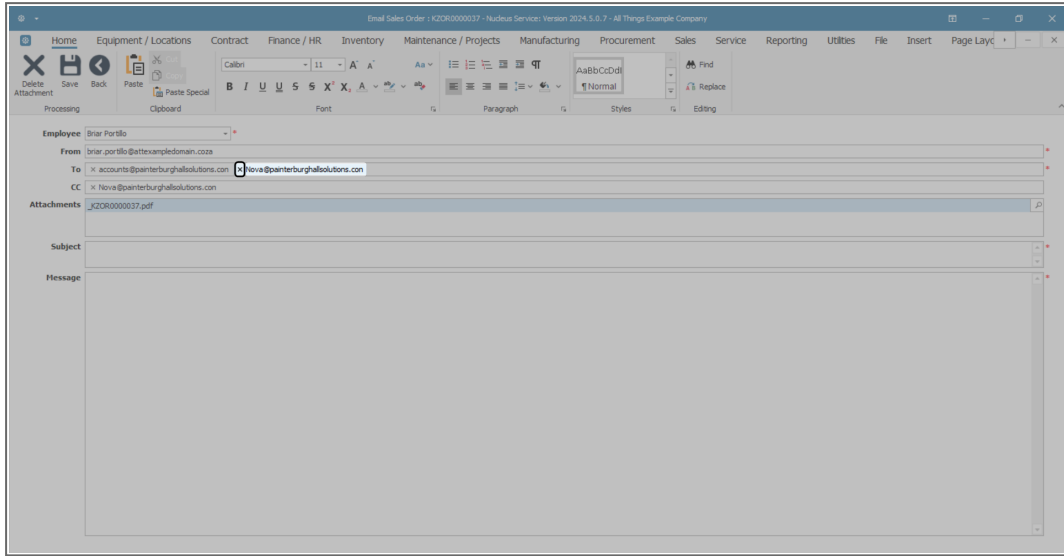
- **To:** This field will auto populate with the email address created for the contact person at the customer. To choose an alternative email or to add a second email address:
 - Click in the **row** to display a **drop-down menu** with the linked email address(es) for this customer.
 - Click on the **email address** of the contact that you wish to add.
 - The selected email address will be added.
 - To add an additional contact person, click in the **row** again to select from the **drop-down menu** and add the contact to the email. The additional email address will be added.



- **CC:** If a group email address has been set up on the order or accounts contact, then the group email address will display here.
 - Alternatively click in the **row** to display a **drop-down menu** with the linked email addresses for this customer.
 - Click on the **email address** of the contact that you wish to add.
 - The selected email address(es) will be added to the row.



- If you wish to **remove** an email address from the row, click on the **X** icon.



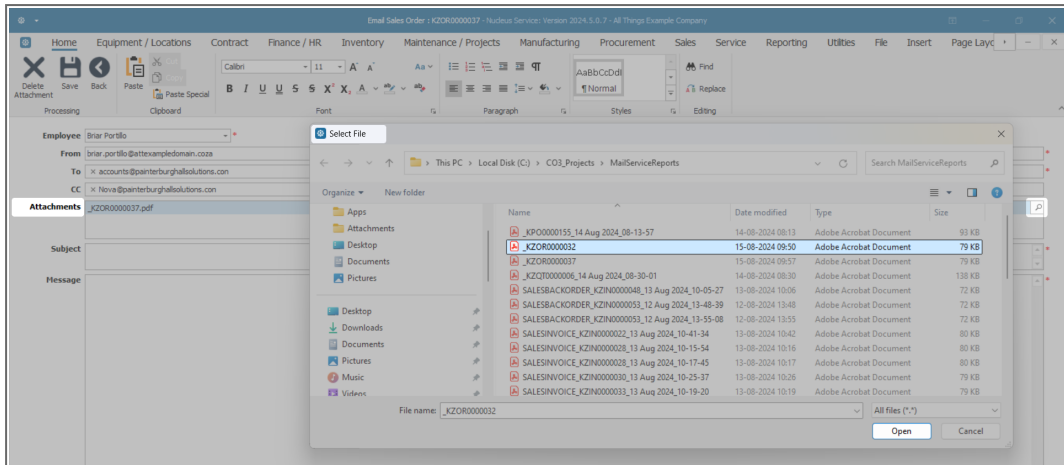
EMAIL ATTACHMENTS

- **Attachments:** Nucleus Service will create a PDF of the order and attach it automatically (you can attach additional documentation if required).



Note that if there are outstanding parts that have not been issued, a Back Order report will also be attached.

- To add additional documents to the email, click on the **search** button in the **Attachments** field to display the Select File screen.
- **Browse** to find the file location, then click on the file you wish to attach.
- Once you have selected the file, click on **Open**.

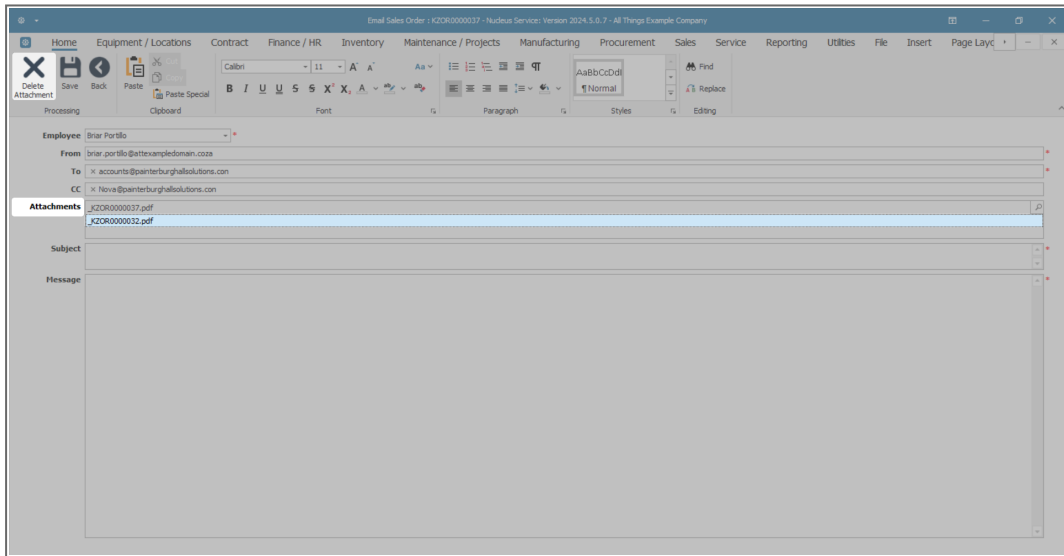


- The attachment will display in the **Attachments** field.

DELETE AN ATTACHMENT

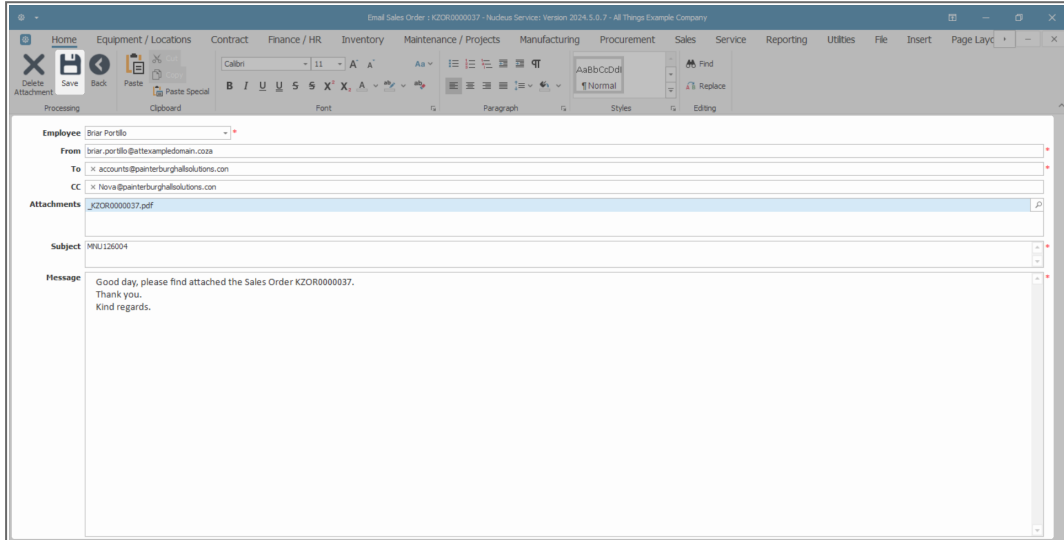
You may choose to remove an attached document.

- Click on the **attachment** you wish to remove.
- Click on **Delete Attachment**.



EMAIL SUBJECT AND MESSAGE

- **Subject:** Type the email subject line. Keep in mind that this will be the first reference to the email that your Customer will see.
- **Message:** Type the email text message.
- Once you have completed your email, click on **Save**.



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

Related Topics

- [Add a Sales Order](#)
- [Edit a Sales Order](#)
- [Delete a Sales Order](#)
- [View a Sales Order](#)
- [Print / Email a Sales Order](#)
- [Print Proforma Invoice](#)
- [Export Sales Order List](#)
- [Create Sales Invoice from Sales Order](#)
- [Create New Deal Sale / Rental \(creates a call\)](#)
- [Create New Deal Project Sale / Rental](#)

MNU.126.004