

We are currently updating our site; thank you for your patience.

SALES

INVOICES – PRINT PROFORMA INVOICES

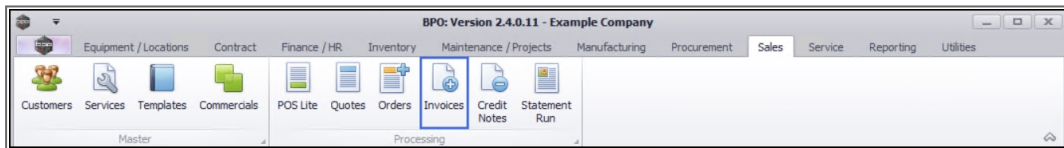
Where payment is required **before** an item or service is rendered, a **Proforma Invoice** can be raised for client payment.

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

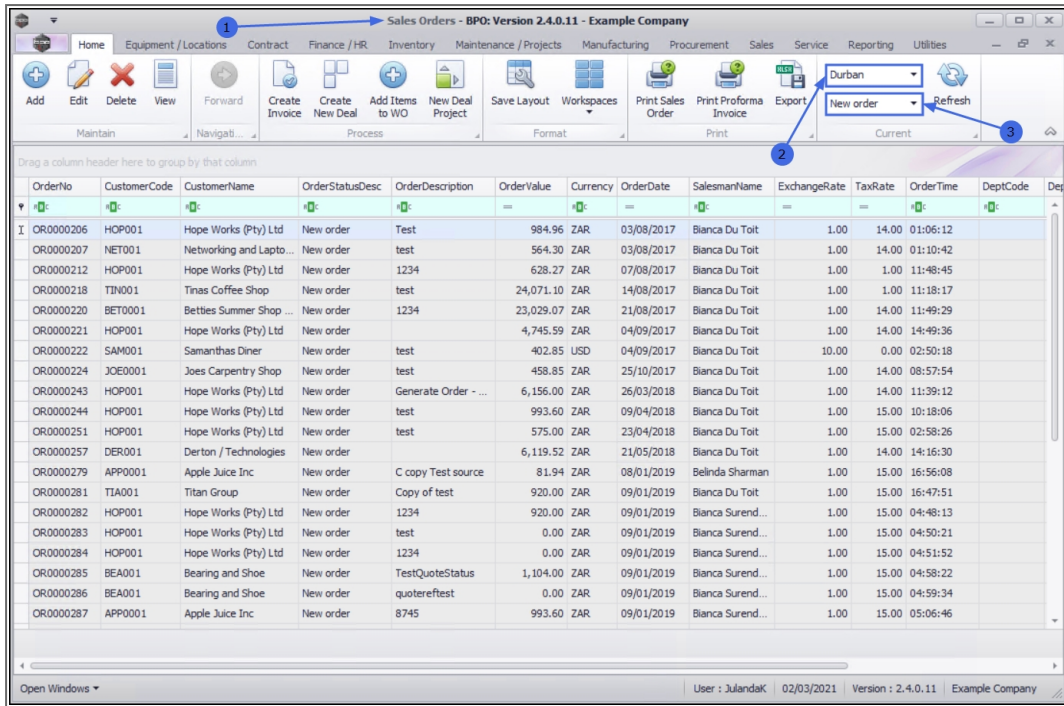
You can print a **New** Proforma Invoice or a **Copy** - Proforma Invoice.

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**.

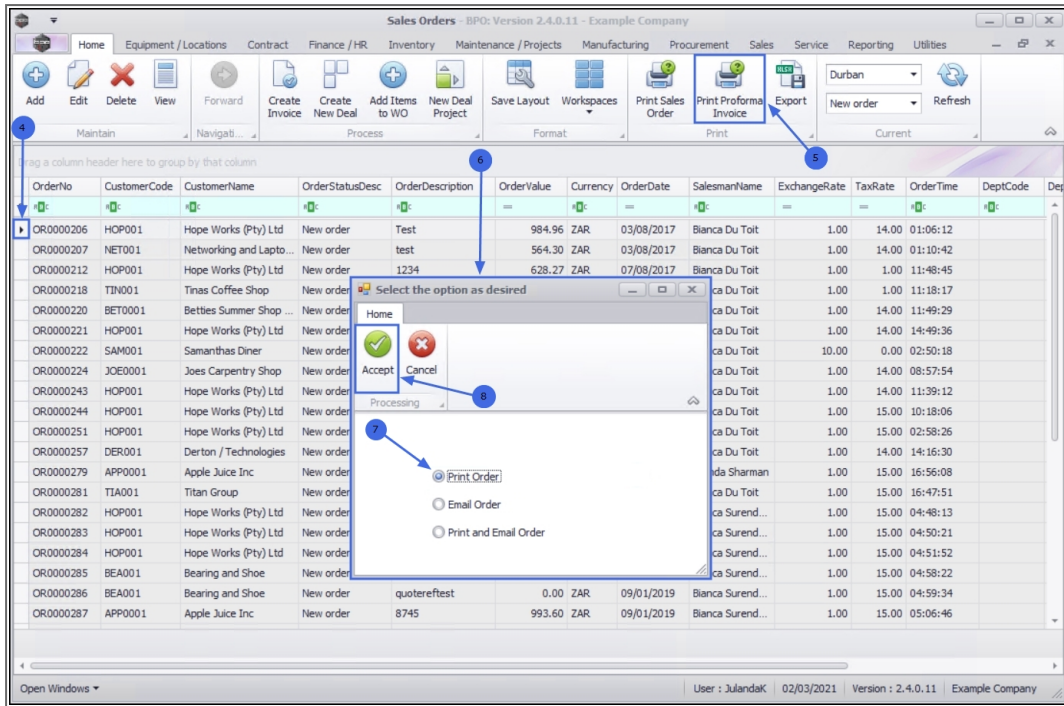


PRINT PROFORMA INVOICE – NEW

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**.



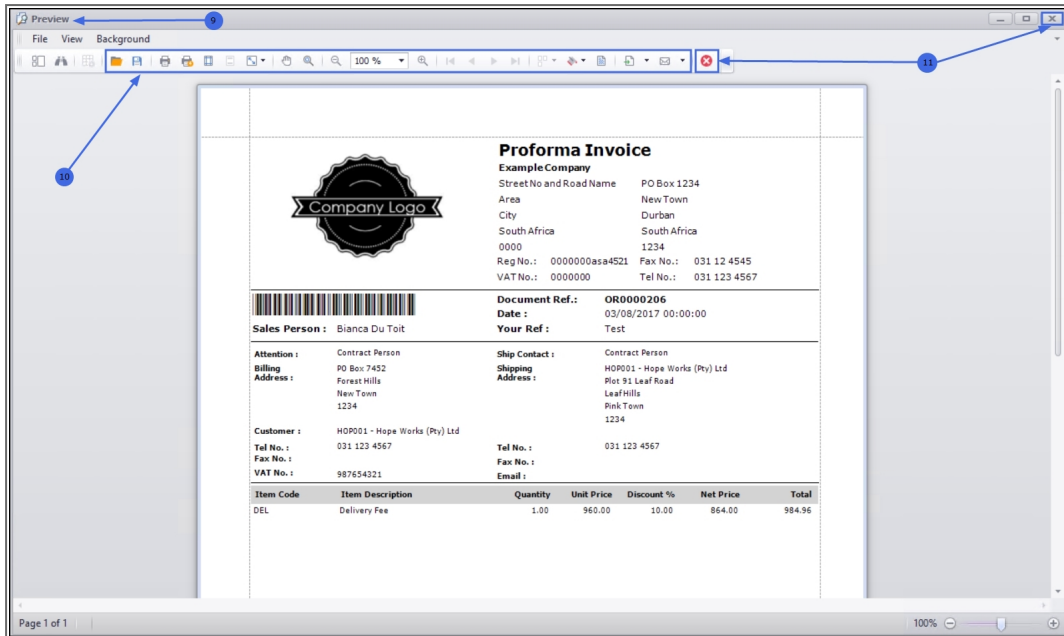
9. The **Report Preview** screen will display.



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.

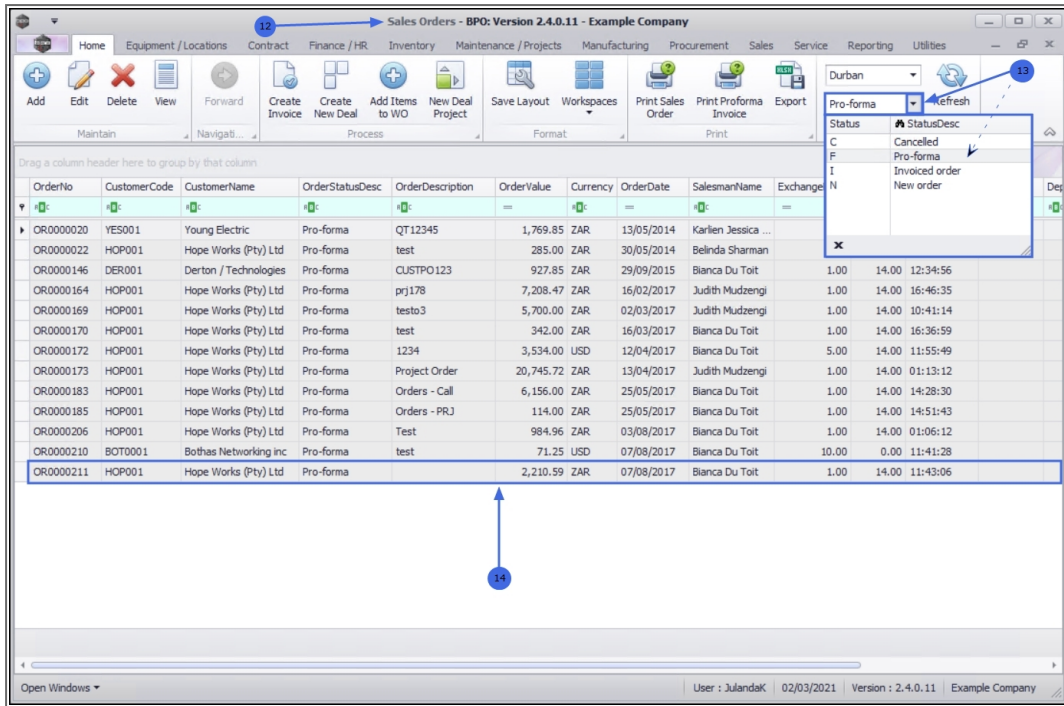
11. **Close** the Report Preview screen when done.



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

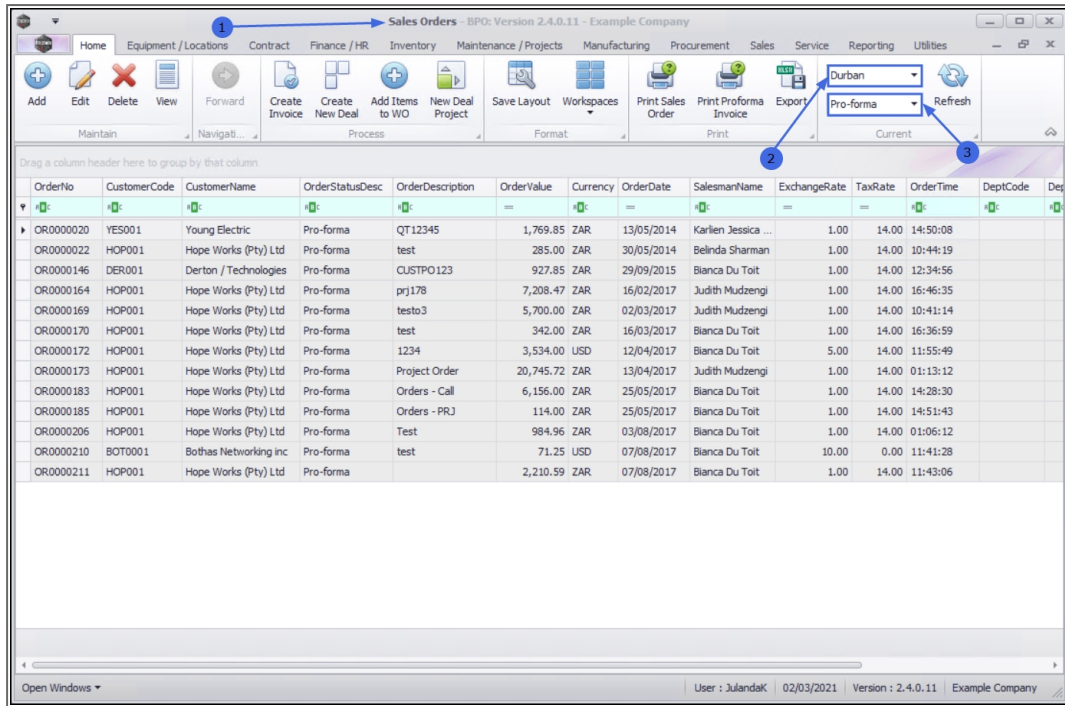
VIEW PRINTED PROFORMA

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**.

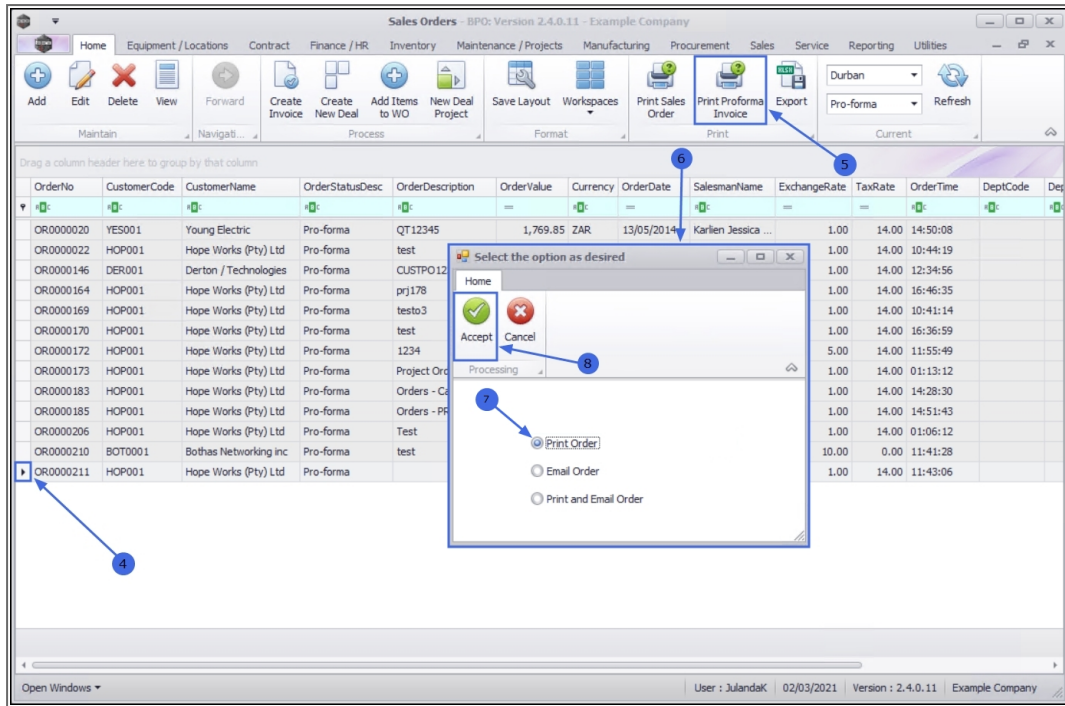


PRINT PROFORMA INVOICE – COPY

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**.

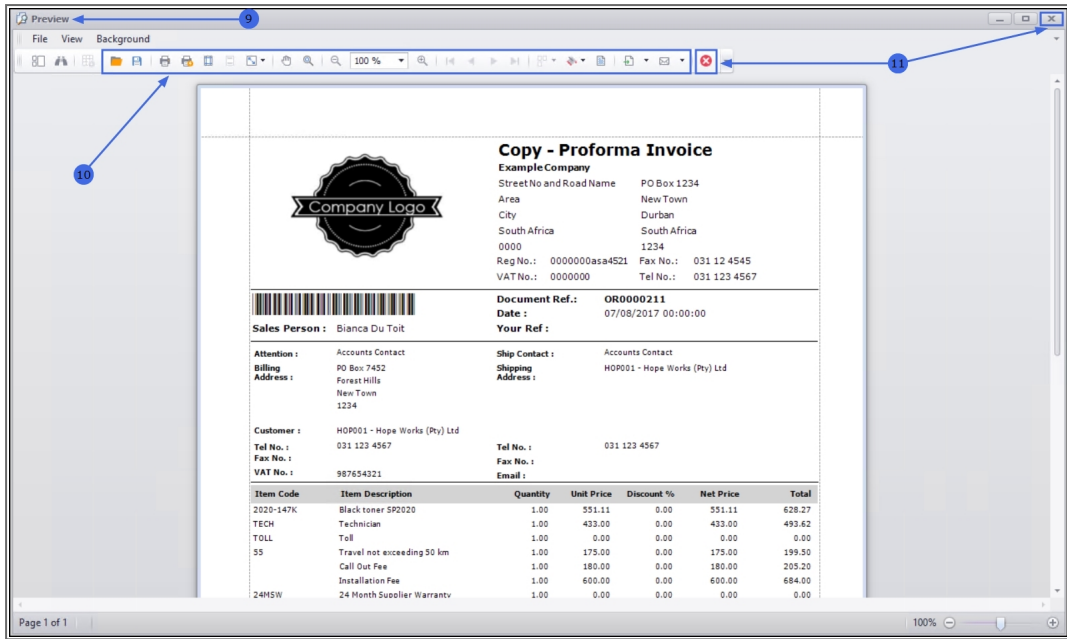


9. The **Report Preview** screen will be displayed.



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**.

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

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