

# How to Create Proforma Invoice and Receiving the Order

The video will show the user how to create Proforma Invoice and Receiving the Order

Navigate to Purchase, Proforma Invoice, New Entry.  
Fill in document date, vendor, and delivery location.  
Click Confirm and Approve.

## STEP-BY-STEP:

1. Go to Purchase menu
2. Select Proforma Invoice
3. Click Create New
4. Fill in the header info, i.e. document date, vendor, deliver to and location.  
(mandatory fields in red color or marked with red x)
5. Choose "Price Includes Tax" in the Tax type
6. Click Save button
7. Add procurement line items in the table below.  
User can filter the products list by brand, by selecting a brand in the Product Brand drop down list.  
Fill in the line info, i.e. Product, UOM, Qty, Unit Price, and Tax Rate.  
Click + button or press ENTER to save the line entry.
8. Click Confirm Proforma Invoice when done editing
9. Click Approve Proforma Invoice button to approve the procurement.
10. Click on the arrow next to Generate Documents button, and select Generate Purchase Invoice.
11. Click OK button in the creation dialog window.  
It will generate a Purchase Invoice document based on the Proforma Invoice document.
12. Click Confirm Purchase Invoice when done editing / verifying the data.
13. Click Post To Accounts button to post the purchase invoice to accounts.
14. Click Show Receipt Order link.  
It will open Receipt Order document in the Inventory module, for warehouse to process receiving the order.
15. Click Create Shipment Notice button and OK button.
16. Verify the shipment header and lines data

(warehouse, batch info etc).

17. Click Confirm Advance Shipment Notice when done editing / verifying the data.

18. Click Approve Advance Shipment Notice

19. Click Create Goods Receipt button and OK button.

20. Click Confirm Goods Receipt when done editing / verifying the data.

21. Click Post Goods Receipt

22. Click on the Putaway link

23. Verify the lines data (locator and qty).

24. Click Confirm Putaway when done editing / verifying the data.

25. Click Post To Inventory button.

The stock are now available in the warehouse for transactions.

26. Click Generate Report button to preview or print the document

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