

How to Create Proforma Invoice (Without Inventory Movement)

The video will show the user how to create Proforma Invoice (Price Includes Tax)

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.
-