

How to Create Proforma Invoice

The video will show the user how to Create Proforma Invoice.

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

STEP-BY-STEP:

1. Go to Sales menu
 2. Select Proforma Invoice
 3. Click Create New.
 4. Fill in the header info, i.e. document date, customer to send the invoice to, deliver to and location.
(mandatory fields in red color or marked with red x)
 5. Click Save button
 6. Add 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.
 7. In the Taxes tab, user can view the tax details for the proforma.
 8. In the Notes/Attachments tab, user can add notes and attachment files for the Proforma Invoice document
 9. Click Confirm Proforma Invoice when done editing
 10. Click Approve Proforma Invoice button to approve the proforma.
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