

Print / Fax / E-mail Proforma Invoice - New with 9.20.00

Tammy Mason - 2017-09-15 - in Customer

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This option is used to print an invoice for your customer as soon as the order is entered. No accounting occurs. Proforma invoices may also be faxed or e-mailed.

A proforma invoice may be printed for an order until the order has been entered into billing or the actual invoice has been printed.

No files will be updated when a proforma invoice is printed for an order. Since no invoice number or invoice date are yet assigned, the order number will print in the Invoice Number field and the order date will be printed in the Invoice Date field. Note: If Company Information is set up to "Print ship date as invoice date", the ship date will be printed in the Invoice Date field.

To have shipping/freight charges printed on a proforma invoice, enter an "SH" line item. "SH" is a line item that is programmed to indicate Shipping Charges. This price will be printed in the Shipping box at the bottom of the invoice.

To recognize a proforma invoices, the letters "PF" will be printed after the Unit # on the invoice. This will be the only indication on the invoice that it was a proforma invoice.

A note will be added to the order's order notes to record the printing/faxing/emailing of a proforma invoice. No permanent PDF file is created for a proforma invoice.

Hint: If you wish to track proforma invoices, we suggest you set up a Source Code specific to proforma invoices. Enter that source code onto those orders. An order history report may then be printed for the proforma orders.