Using Customer Orders– Pro Forma Invoice

Pro forma invoices have several advantages

1. When printed the show invoice totals for all items on the order – including items that are backordered.
2. They cannot be posted. This protects the order from being finalized until payment approval and any edits have been completed.

To create a pro forma invoice you simply select the option at the top of the Customer Order screen named "pro forma invoice" and add your items to the Customer Order as usual.
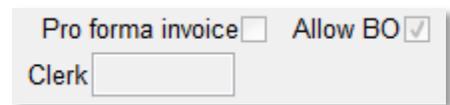
When your are ready to send out the invoice for approval –

- Choose F10 Save
- Then F11 Print
  - On the CO Print screen choose the options you prefer – typically "Invoice" is all that is required.
  - Choose the output
    - Printer
    - Preview
    - File – if you choose file you'll need to select the type of file and also provide a location and file name.
  - Choose Print
- The resulting document or file will contain all the information your customer needs to make an informed choice of what items they want or don't want.
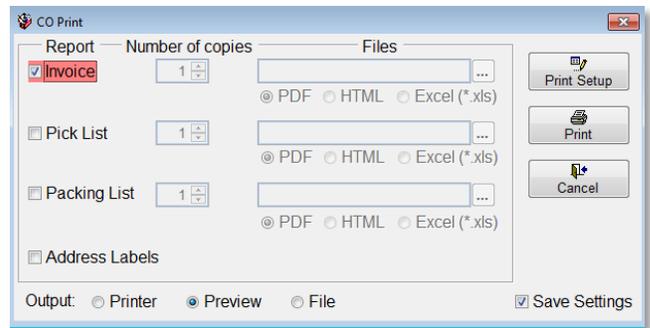
When we receive the informatiom back from our customer we simply "uncheck" the pro forma invoice option, adjust the quantities if needed – apply the tender and post the order through.

NOTE: remember to mark Allow BO if you'll be backordering items. With this unchecked any item not shipping will be canceled.