



Proforma Invoice

Megan De Freitas - 2024-11-22 - Reporting

Overview

The *Proforma Invoice* security setting allows users to see the Proforma Invoice default report in the report manager. This report can be copied and edited in report designer. See the Reports documentation for more information on this functionality and other default reports.

Usage

The Proforma Invoice report is used as a statement of the commitment on the part of the seller to deliver the products and services to the buyer at a specified price. Once you enable the *Proforma Invoice* security the report will be visible in Report Manager.

The screenshot shows the SalesPad Report Manager interface. On the left, a list of reports is displayed with columns for Report, ReportID, and a checkbox. The 'Proforma Invoice' report is selected. On the right, the 'Report Preview' section shows a sample document titled 'COMMERCIAL INVOICE'. The document includes fields for Date (22/Apr/17), Your Order No. (2000000000), and Document No. (2000000000). It also lists the Seller (Javier Salazar) and Buyer (Business Office). A table of items is shown with columns for Item Number, Description, Unit, and Amount. The total amount is \$199.95. Below the table, there is a section for 'PACKAGING INFORMATION' with a table for 'NET WEIGHT'.

Report	ReportID	
BOD ORDER	SalesPad Order	<input checked="" type="checkbox"/>
Copy of Invoice	SalesPad Invoice	<input checked="" type="checkbox"/>
Copy of Bill of Lading	SalesPad Bill of Lading	<input checked="" type="checkbox"/>
Copy of Quote	Quote	<input checked="" type="checkbox"/>
Copy of Proforma Invoice	Proforma Invoice	<input checked="" type="checkbox"/>
Copy of Packing Slip	Packing Slip	<input checked="" type="checkbox"/>
Copy of Internal RGA	Internal RGA	<input checked="" type="checkbox"/>
Copy of Dangerous Goods Declaration	Dangerous Goods Declaration	<input checked="" type="checkbox"/>
Copy of Customer RGA	Customer RGA	<input checked="" type="checkbox"/>
Copy of Purchase Order	Purchase Order	<input checked="" type="checkbox"/>
Copy of AR Transaction Report	AR Transaction Report	<input checked="" type="checkbox"/>
Sales/Word Document	Sales/Word Document	<input type="checkbox"/>
Summary Packing Slip	Summary Packing Slip	<input type="checkbox"/>
Shippers Letter of Instruction	Shippers Letter of Instruction	<input type="checkbox"/>
Return	SalesPad Return	<input type="checkbox"/>
Quote	Quote	<input type="checkbox"/>
Proforma Invoice	Proforma Invoice	<input checked="" type="checkbox"/>
End Of Day Quick Report	End Of Day Quick Report	<input type="checkbox"/>
Picking Ticket	Picking Ticket	<input type="checkbox"/>
Packing Slip	Packing Slip	<input type="checkbox"/>
Order Confirmation	SalesPad Order Confirmation	<input type="checkbox"/>
Order	SalesPad Order	<input type="checkbox"/>
Nafta Certificate of Origin	Nafta Certificate of Origin	<input type="checkbox"/>
Invoice	SalesPad Invoice	<input type="checkbox"/>

Report Preview

Sample Doc:

Test

Date: 22/Apr/17
Your Order No.: 2000000000
Document No.: 2000000000

SELLER: Javier Salazar
BUYER: Business Office
100 West 40th Ave
Cary, IN 46400-3655
P: (219) 330-0100
F: (219) 330-0100

*These commodities, technology or software were exported from the United States in accordance with the Export Administration Regulations. These commodities are licensed by the U.S. for export. Diversion contrary to U.S. law are prohibited.

ITEM	Item Number	QTY	Container	Description	Net Each	Amount
	10000	1	Each	1" Monitor	\$199.95	\$199.95
						Total: \$199.95

PACKAGING INFORMATION

	POUNDS	KILOG
Pkg No.		
Package	10000	10000

Security

Proforma Invoice – Allows users to see and use the default Proforma Invoice report