Proforma Invoice

POS & Sales · https://spos.pk/docs/proforma-invoice/

A proforma invoice is an estimated bill sent to a customer before the sale is final, showing what they will pay and what they will receive. It is often used for quotations, advance orders and business customers who need approval before they confirm a purchase.

Proforma invoice

1. Open the POS screen or the sales section in Smart POS and add the products the customer is asking about, with quantities and prices.
2. Select the customer and check the total, including any tax or delivery charge, so the estimate is complete.
3. Save the transaction as a proforma invoice or draft, rather than completing it as a final sale.
4. Print or share the proforma invoice with the customer, making clear that it is an estimate and not a final bill.
5. When the customer confirms, open the proforma invoice and convert it into a final sale, then take the payment and issue the tax invoice.

Tip: Label every proforma invoice clearly as an estimate, so customers never mistake it for a final bill or a payment demand.