

Print a Pro forma Invoice

A pro forma is not a formal invoice but is an "advance" of the actual invoice. The pro forma says clearly, "Please do not pay from this Pro forma. This is not an official invoice. An official invoice will be mailed within 24 hours." Pro formas can be used to mail with additional documentation required for the billing or for viewing and editing an invoice you created before it has been processed and posted. The pro forma invoice will not have the payment coupon on it.

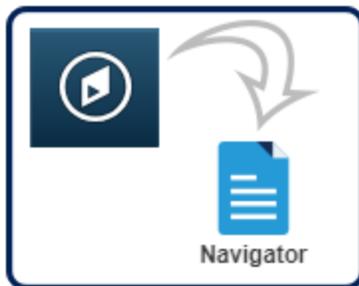
Since you are producing a sample invoice, you can generate a pro forma anytime after you save an invoice. Printing pro formas also enables you to view the invoice and correct errors before bills go through the overnight process. Pro formas only print the day you create the invoice and before the overnight processing. **Remember: Once billings go through the updating process, you cannot make changes to them, so corrections must be done the same day.** After that you would have to process an adjustment invoice.

Navigation Options



Navigation Collection Tile

Billing | Create Billing Invoices | Standard Billing



NavBar:Navigator

Billing | Maintain Bills | Standard Billing

1. Navigate to the **Bill Entry** search page.

Bill Entry
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit = UMSYS

Invoice begins with **INV0370332**

Bill Status =

Customer begins with

Contract begins with

Bills in Business Unit =

Template Invoice Flag =

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

- a. In the **Find an Existing Value** tab, enter or search for an invoice number in the **Invoice** field.
 - b. Click the **Search** button.
2. The **Header - Info 1** page for the selected invoice opens.

Header - Info 1 | Line - Info 1

Unit: UMSYS | Invoice: INV0370332 | Pretax Amt: 674.10 USD

Status: HLD | Invoice Date: 11/13/2018 | Cycle ID: DAILY

Type: COP | Source: | Frequency: Once

Customer: 000021630 | SubCust1: | SubCust2: | View Activity

Invoice Form: NOVA CTR INC | From Date: | To Date: | STANDARD

Accounting Date: | Pay Terms: N30 | Pay Method: Check

Remit To: 10601 | Bank Account: CAL | Final Invoice:

Sales: N/A | Billing Inquiry Phone: | Collector: CASRESCT

Credit: N/A | Billing Authority: CASRESCT

Billing Specialist: CASRESCT

Assessment Resource Center@573-882-4694 | Assessment Resource Center@573-882-4694

Go to: Notes | Header Info 2 | Express Entry | Address | Copy Address | Attachments

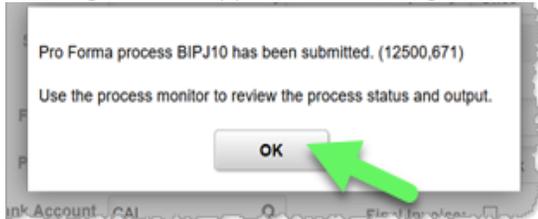
Summary | Bill Search | Line Search | Navigation: Header - Info 1 | Page Series: Prev Next

Save | Return to Search | Notify | Refresh | Add | Update/Display

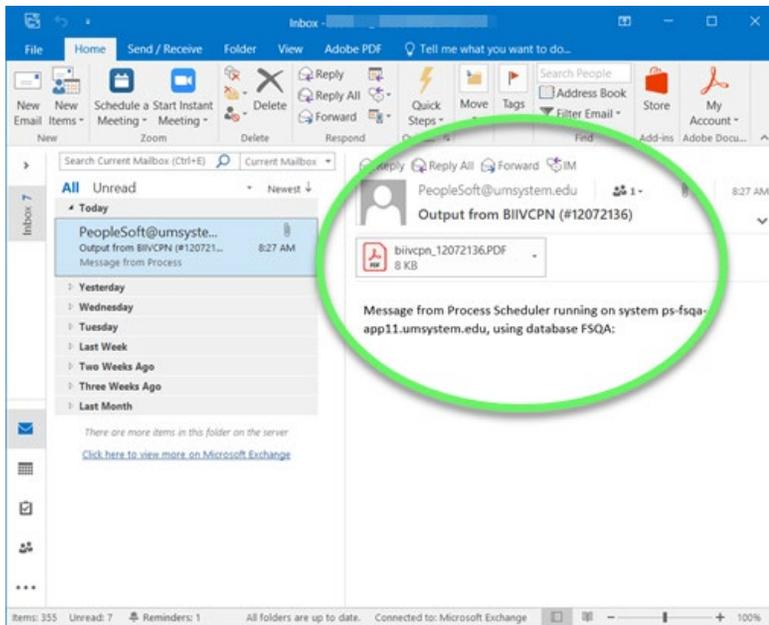
- a. Click the **Pro Forma** icon (located to the right of the Pretax Amt near the top of the page).



- b. A dialog window appears, confirming that the Pro Forma process has been submitted. Click the **OK** button.



- c. You will receive an email with a PDF of the invoice attached momentarily. Use the PDF to print the pro forma.



END OF PROCEDURE.