Proforma Invoice Inbox

Module Guide: Proforma Invoice Inbox

Module Location

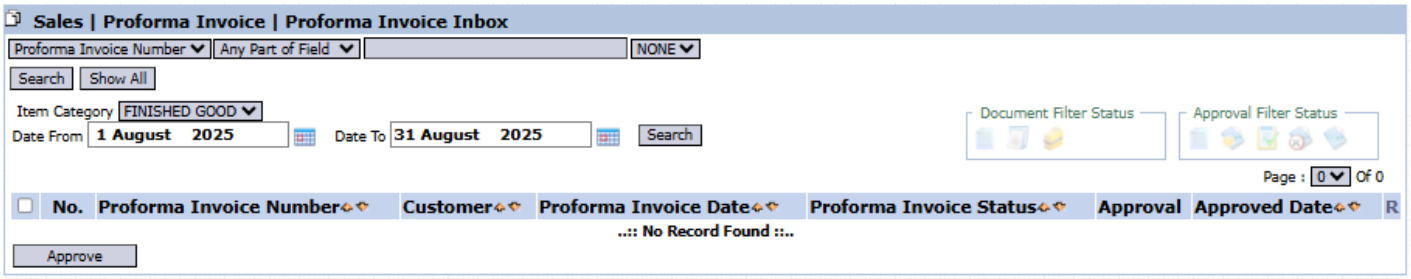
Sales > Proforma Invoice > Proforma Invoice Inbox

Module Objective

The **Proforma Invoice Inbox** module serves as the approval center for all **Proforma Invoice** documents that have been created and submitted. This module is used by a superior or manager to conduct a final review and provide approval before the Proforma Invoice can be sent to the customer.

1. Main View (Proforma Invoice List)

The main page of this module is an "inbox" that displays all Proforma Invoices requiring your action.



View Explanation & Filters

This page provides a summary of all Proforma Invoices that are awaiting approval.

- **Filters**: You can search for a specific document by **Proforma Invoice Number**, **Item Category**, or a **Date From** and **Date**

To range.

- **Request List**: The table below will display all documents awaiting action. The table currently shows "...No Record Found...".

Column Explanation

- **Proforma Invoice Number**: The unique number of the submitted Proforma Invoice document.
- **Customer**: The name of the customer who will receive the Proforma Invoice.
- **Proforma Invoice Date**: The date the document was created.
- **Proforma Invoice Status / Approval**: Icons that indicate the document's status and the approval process status.

Button Functions

- **Approve**: The main action button to approve one or more selected Proforma Invoices.

2. Approval Process Steps

The following is the standard workflow for an approver.

Step 1: Access the Inbox

Open the **Proforma Invoice Inbox** module to see the list of documents that require approval.

Step 2: Review the Proforma Invoice Details

Click on one of the rows in the table to open its detail view. In the detail view, you can check all the information that has been input, such as the product details, prices, and payment terms.

Step 3: Provide Approval

After you have reviewed and are certain about the submitted Proforma Invoice's content:

1. Return to the main **Inbox** page.
2. Check the box in the leftmost column for one or more rows you wish to approve.
3. Click the **Approve** button located in the bottom-left section of the page to process the approval. 

3. Workflow & Integrated Business Process

1. **Submission**: A salesperson creates a document in the **Proforma Invoice** module and clicks **Confirm**.
2. **Entering the Queue**: The confirmed Proforma Invoice automatically enters the queue in this **Proforma Invoice Inbox** module.
3. **Review & Approval**: A manager or approver opens this module, reviews, and provides approval.
4. **Finalization**: After approval, the Proforma Invoice becomes an official document, its status is updated, and it is ready to be printed and sent to the customer for further payment processing.

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