Invoices: create and customize proforma invoices in Qargo?

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How to create and customize proforma invoices in Qargo

Proforma invoices are essential for businesses to provide customers with a preliminary bill for prepayment. In Qargo, proforma invoices can be created and customized to suit specific requirements. This guide explains the steps to create a proforma invoice, customize templates, and integrate with external systems like Peppol, when required.

Overview of proforma invoices in Qargo

A proforma invoice in Qargo can be created using a custom template. The template can be configured to include the necessary fields and titles, ensuring it meets business needs. Additionally, Qargo supports integration with Peppol for e-invoicing, enabling seamless communication with customers.

Steps to create a proforma invoice

To create a proforma invoice in Qargo:

1. Navigate to **Configuration > Templates** in Qargo.
2. Create a new template and select **Quote** as the template type.
3. Change the title of the template to **Proforma**.
4. Add or remove fields to match the requirements and save the template.
5. Set up a task or workflow step to generate and send the proforma document to the customer for prepayment.

🧰 If the process involves Peppol e-invoicing, the Peppol integration must be enabled first.
Click here to learn about processing sales invoices via Peppol.

Customizing templates and editing limitations

While Qargo allows templates to be customized, there are limitations to what can be edited directly within the platform:

- If the terms or other text are part of the uploaded PDF background of the template, they cannot be edited directly in Qargo.
- To update such elements, modify the source template (e.g., the PDF background) externally and then upload the updated background to the template in Qargo.

Integration with external systems
For businesses using Peppol e-invoicing, Qargo provides an integration option. Once it is enabled, the process of sending invoices to customers electronically can be streamlined.

These steps and guidelines help create and manage proforma invoices efficiently in Qargo, ensuring they meet business and customer requirements.