

# Simple Proforma Invoice Template in PDF Format

*Simple Proforma Invoice Template* was initially released on <http://www.InvoicingTemplates.com> on Thursday, October 09, 2014, and is categorized as [Proforma](#). As always **Simple Proforma Invoice Format** was published in two editions - one free **Simple Proforma Invoice Template**, and another Uniform Invoice Software version that is able to turn **Simple Proforma Invoice Template** into a complete invoicing system. This "**Simple Proforma Invoice Template in PDF Format**" document includes brief description about the template, as well as a PDF invoice form exported from "simpleproforma.xlsx".

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## Simple Proforma Invoice Template Features and Facts

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Simple Proforma Invoice Template is the simplified version of our Proforma Invoice Template. Although the invoice layout is customized, the form still contains all the common fields that are required.

As compared to our previous [Proforma Invoice Template](#) (Template# c7010), **Simple Proforma Invoice Template** does not contain the "Taxable" checkbox column on the invoice detail section, assuming all items invoiced are all taxable. Furthermore, Simple Proforma Invoice Template has only one tax set on the bottom form, with the name set as Sales Tax. The other samples of Proforma Invoicing Templates here on InvoicingTemplates.com include: [Proforma \(1st Sample of Customization\)](#), demonstrating how to change the color theme of the proforma invoice template; [Proforma \(2nd Sample of Customization\)](#), demonstrating how to enter your business information and replace the default logo image; [Proforma \(3rd Sample of Customization\)](#), demonstrating how to add a drop-down list to an existing proforma invoice template, so that you can choose the currency for the current transaction from a list, instead of typing in manually; [Proforma Invoice Template \(4th Sample, Landscape Page Orientation\)](#), demonstrating how to change the paper orientation so that the proforma invoices created with the template could be printed on papers with landscape paper orientation.

Note that all the proforma invoice templates we published here on InvoicingTemplates are offered in two editions - one freeware edition that you can download and use for free; and another edition that should be used with Uniform Invoice Software installed. Besides that, a PDF proforma invoice is also available that is editable and fillable with proper programs installed.

In order to create **Simple Proforma Invoice Template** from the original [Proforma Invoice Template \(c7010\)](#), we firstly set the taxing mode of the template to one tax by using Uniform Invoice Software.

If you use the [Uniform Invoice Software](#) version of **Simple Proforma Invoice Template**, there are additional taxing options on the Taxes tab of the Settings window. The first is the option for choosing the number of tax items; you have 3 choices - no tax, one tax and two taxes. Secondly, you can set the names and rates in percentage for each tax, such as VAT, GST or PST, or simply Sales Tax. Thirdly, there are a group of checkbox options on the dialog box, including: "Tax invoice total including shipping cost", which adds the shipping cost to the taxable amount when checked; "Tax 2 is applied to tax 1", which adds the amount of "tax 1" to the taxable amount if checked; and "tax rate can be zero", which allows you to set any of the tax rates to be the value of zero. If you modify the options on this dialog box, the invoice form will be changed accordingly if needed.

Secondly, we move the "Taxable" cells out of the print area of the **proforma invoicing form**.

The printable area, or print area, is the area with white background on the center of the **Simple Proforma Invoice Template** spreadsheet. By default Microsoft Excel prints the entire worksheet when you issue the print command, but if the worksheet has a print area defined, such as what we do for **Simple Proforma Invoice Template**, only the print area will print. You can add cells to expand the print area as needed, and you can clear the print area to print the entire worksheet again. If you need to recreate the print area definition, here are what to do: On the "Invoice" worksheet of the **Simple Proforma Invoice Template**, select the cells that you want to define as the print area; On the Page Layout tab, in the Page Setup group, click Print Area, and then click Set Print Area.

Once Simple Proforma Invoice Template is unprotected and switched into design mode, you can now move the controls to the new location you like. To do this, click to select a control, or push the CTRL on your keyboard and then select all the controls you want to move using mouse. Then, drag (one of) the select controls to move them to the new location.

Note that if you use the Uniform Invoice Software and need to show the control on an extracted invoice, then the control should be named with an "oknWidget\_" prefix. For example, if you move the Taxable checkboxes into the printable invoice form, then the checkboxes should be named with "oknWidget\_" prefix, such as oknWidget\_taxable1, oknWidget\_taxable2, oknWidget\_taxable3...

Thirdly, we modify the tax formulas of the template, so that all items on the template are taxable by ignoring the state of the checkbox.

As you can see from **Simple Proforma Invoice Template**, one benefit of using Excel as your invoice creator, as compared to other invoice template formats like Microsoft Word invoice template and PDF invoice template, HTML invoice template or even Photoshop invoice template, is that you can easily apply formulas to do calculations. This means that, once the basic figures are entered on the form, like Quantity and Unit Price, or Hours and Hourly Rate, or Days and Daily Rate, the calculation of totals and taxes is done automatically.

## **Simple Proforma Invoice Template - PDF Format**

**Your Business Name**

**PRO FORMA INVOICE**



Street Address  
 City, ST ZIP Code  
[Phone Number, Web Address, etc.](#)

**DATE:**  
**INVOICE #:**  
**DATE OF EXPIRY:**  
**CUSTOMER #:**  
**SALES REP. NAME:**

BILL TO	SHIP TO
Name	Name
Address	Address
City, State ZIP	City, State ZIP
Country	Country
Phone	Contact

SHIPPING DETAILS			
P.O.#		Mode of Transportation	
P.O. Date		Transportation Terms	
Letter of Credit		Number of Packages	
Currency		Est. Gross Weight	
Payment Term		Est Net Weight	
Est. Ship Date		Carrier	

ITEM #	DESCRIPTION	UNIT OF MEASURE	QUANTITY	UNIT PRICE	LINE TOTAL

\*\*\* This is not a VAT invoice

**Incoterm**

**Special Notes, Terms of Sale**

SUBTOTAL	-
TAXABLE SUBTOTAL	-
TAX 8.000%	-
SHIPPING & HANDLING	-
INSURANCE	-
LEGAL/CONSULAR	-
[other]	-
[other]	-
<b>TOTAL</b>	<b>-</b>