

# Proforma (2nd Sample of Customization) in PDF Format

*Proforma (2nd Sample of Customization)* was initially released on <http://www.InvoicingTemplates.com> on Wednesday, October 30, 2013, and is categorized as **Proforma**. As always **Proforma Invoicing Form** was published in two editions - one free **Proforma (2nd Sample of Customization)**, and another Uniform Invoice Software version that is able to turn **Proforma (2nd Sample of Customization)** into a complete invoicing system. This "**Proforma (2nd Sample of Customization) in PDF Format**" document includes brief description about the template, as well as a PDF invoice form exported from "proforma-2nd-sample.xlsx".

Like *Proforma (2nd Sample of Customization)*? Visit [Proforma \(2nd Sample of Customization\)](#) to download it.

## Proforma (2nd Sample of Customization) Features and Facts

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This is the 2nd sample on how to create a new design for [pro forma invoice template](#), focused on entering company information and replacing InvoicingTemplates logo image.

With the first sample on how to customize the proforma invoice template, we learnt how to unprotect the Invoice worksheet and how to modify Excel color palette to change the color theme of an existing template. This second sample of customizing the pro forma invoicing template will be focused on how to enter your company information and replace the default "InvoicingTemplates" logo image.

Most of the templates available here on InvoicingTemplates.com have the Invoice worksheet protected to avoid accidental modifications on form layout and formula. This is useful and necessary since once the design of the form is finished, you'll not change the design for a long time. However before using the invoice template, you at least need to do two things that are to enter your company information, and to replace the default logo image. Before you do, you first need to unprotect the Invoice worksheet, as detailed in the [previous sample](#).

Once the invoice spreadsheet is unprotected, it's straightforward to enter your own company information. Simply click a text label such as "Your Company Name", and then start typing in your own text. In the sample template that you can download here, we replace the placeholder text labels with our own company name.

The next step is to replace the default "InvoicingTemplates" logo image. To do this, you need to switch the invoice form into design mode, which is done by clicking the "design mode" command on the Developer ribbon tab. If your Excel does not show the Developer ribbon tab, here is how to make it visible.

1. Start Excel as usual. On the File tab, choose the Options button.
2. In the Excel Options dialog box, choose the Customize Ribbon button.
3. In the list of main tabs, select the Developer check box.
4. Choose the OK button to close the Options dialog box.

Now you can find the Design Mode button in the Controls group on the Developer ribbon tab. Click the Design Mode button once to put the template into design mode - in the design mode, Excel lets you change the properties of controls, such as the image control we used for the logo image. If you are using Uniform Invoice Software, our invoicing software that uses Excel templates as the front-end, the software program stops reaction to clicks on the button.

Now right-click the InvoicingTemplates logo image and choose Properties from the shortcut menu. The Properties box appears. Look for the Picture property, and click the button on that line. Excel shows you a dialog box that allows you to browse to and specify your own logo image. Depending on your Excel version, the supported image file formats may vary, but JPG, PNG and GIF formats are good choices for storing your logo image that are likely supported by your Excel.

Once you have specified your own logo image, exit design mode, and then protect the Invoice worksheet again. Save the invoice template once to make the changes persistent.

## **Proforma (2nd Sample of Customization) - PDF**

### **Format**

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# Uniform Software Ltd

Street Address  
 City, ST ZIP Code  
 Phone Number, Web Address, etc.

# PRO FORMA INVOICE

**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 #	TAX	DESCRIPTION	UNIT OF MEASURE	QUANTITY	UNIT PRICE	LINE TOTAL
	<input type="checkbox"/>					
	<input type="checkbox"/>					
	<input type="checkbox"/>					
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\*\*\* This is not a VAT invoice

SUBTOTAL	-
TAXABLE SUBTOTAL	-
TAX 1 8.000%	-
TAX 2 6.000%	-
SHIPPING & HANDLING	-
INSURANCE	-
LEGAL/CONSULAR	-
[other]	-
[other]	-
<b>TOTAL</b>	<b>-</b>

**Special Notes, Terms of Sale**