

Pro-Forma Invoice

A pre-payment invoice requesting payment before goods or services are supplied.

How to use

1. Fill in your business details in the blue footer cells at the bottom of the Pro-Forma Invoice sheet.
2. Enter the customer details in the blue BILL TO card on the left.
3. Complete the pro-forma number, issue date, valid until date, customer reference and payment terms on the right.
4. Add line items in the blue columns. Net, VAT and Amount calculate automatically.
5. The colour band updates with the pro-forma number, issue date, valid until date and total due.

Clearing the sample data

Select rows 19 to 30 on the Pro-Forma Invoice sheet, then press Delete to clear the sample data. The totals and colour band will reset automatically.

Removing the footer credit

The footer credit ('OpenSheets.co.uk · free templates for UK small businesses · MTD-ready tools at aligned.tax') appears on printed pages only. To remove it, go to Page Layout > Print Titles > Header/Footer tab and delete the footer.

Notes

Blue cells are your inputs. White cells contain formulas that calculate automatically — do not overwrite them.

The sheet is protected to prevent accidental formula deletion. No password is set — click Review > Unprotect Sheet if you need to make structural changes.

[OpenSheets.co.uk](https://www.opensheets.co.uk)

Free Excel templates for UK small businesses

aligned.tax

MTD-ready bookkeeping tools for sole traders and small businesses

Pro-Forma Invoice

Add your logo here

BILL TO

Sample Co Ltd
12 High Street
London
Greater London
EC1A 1BB
020 7946 0000
info@sampleco.co.uk

Pro-Forma No PF-2024-001
Issue Date 25/06/2026
Valid Until 09/07/2026
Customer Ref CUST-007
Payment Terms Payment with order

PRO-FORMA NO PF-2024-001	ISSUE DATE 25/06/2026	VALID UNTIL 09/07/2026	TOTAL DUE £2,484.00
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Description	Qty	Unit Price	Net	VAT %	VAT	Amount
Custom furniture - oak dining tabl	1	£1,200.00	£1,200.00	20%	£240.00	£1,440.00
4x dining chairs - matching oak	4	£180.00	£720.00	20%	£144.00	£864.00
Delivery and installation	1	£150.00	£150.00	20%	£30.00	£180.00

Net Total £2,070.00
VAT £414.00

TOTAL DUE £2,484.00

Notes

This is a pro-forma invoice. Goods will be despatched upon receipt of cleared payment.

Issued by / Signature:

Your business name
Your address, town, county and postcode
Telephone, email, VAT number