PRO FORMA INVOICE

Pro forma for an export sale. It is the offer, set out as an invoice: it tells the buyer what they will receive, at what price, on which delivery terms and how they will pay. This document is not a tax invoice.

HEADER

Seller / exporter	*Company name, full address, VAT number, EORI number, phone and email.*
Buyer	*Company name and full address, the buyer's tax or business number, and the person handling the order.*
Consignee	*Only if different from the buyer, for example the freight forwarder's warehouse.*
Pro forma number	*Your own numbering, kept separate from your invoices.*
Date	
Valid until	*The date until which prices and terms stand.*
Reference	*The buyer's enquiry or order, with its number and date.*
Country of destination	
Incoterms® 2020 rule and place	*The rule with the exact place, for example FCA Bari, carrier's warehouse. The three letters alone are never enough.*
Currency	*As a code: EUR, USD, CAD. A $ sign on its own doesn't say which dollar.*
Transport and expected shipment	*Sea, road or air, and when the goods will be ready.*

GOODS

Description of goods	HS code	Origin	Pack ages	Qty	Net weight (kg)	Gross weight (kg)	Unit price	Total

Describe each item precisely: what it is, the pack size, how many units per package. "Food products" or "samples" won't do. HS code: the first six digits of the Harmonized System, the same in every country that uses it. Use the same description and code on the commercial invoice and the packing list.

TOTALS

Goods total	
Freight	*Only if the Incoterms rule puts it on the seller. Otherwise write "paid by the buyer".*
Insurance	*As above.*
Pro forma total	*With the currency.*
Total packages, net and gross weight	

PAYMENT

Payment terms	*For example: 30% on order confirmation, balance before collection, by bank transfer.*
Amount due now	*The advance or the full amount, with the currency.*
Bank, IBAN and BIC/SWIFT	
Payment reference	*The number of this pro forma, so the payment can be matched.*

For the seller, delete before sending: under Italian VAT law an advance received on a pro forma triggers an invoice for the amount paid (DPR 633/1972, article 6(4), in force until 31 December 2026; from 2027 the VAT consolidated act). How to issue it is a question for your accountant.

STATEMENTS

This document is not a tax invoice.

Prices and terms are valid until the date shown in the header. The commercial invoice will be issued with the final shipping details.

SIGNATURE

Place and date	
Name and signature	

Free template produced by Itria. It does not reproduce any official form. What a pro forma is, what goes in it and when an advance payment triggers the invoice (page in Italian):
itria.io/fattura-proforma-export

Template built by Itria. Not an official form. Have your freight forwarder or accountant check it before you use it.

If you redo this by hand for every order, an AI agent can do it from the data you already have and leave it for a person to approve. A couple of lines on WhatsApp to +39 350 574 3578 or an email to info@itria.io. How it works: itria.io/en/documenti-per-esportare-ai