What is a Proforma Invoice, and How to Reduce the Number of Cards Included in the ID123 Plan

ID Management System · https://www.id123.io/knowledgebase/what-is-a-proforma-invoice-and-how-to-reduce-the-number-of-cards-included-in-the-id123-plan/

What is the purpose of a Proforma Invoice?

A proforma invoice is sent in advance to provide you with an overview of your account before the actual invoice is generated. It outlines your current subscription plan and the total number of cards currently included in your account. The proforma invoice is meant to help you review your usage and understand what charges to expect for the upcoming billing cycle.

If the proforma invoice includes more card records than needed, you're welcome to reduce them for the next billing period, subject to the minimum order quantity.

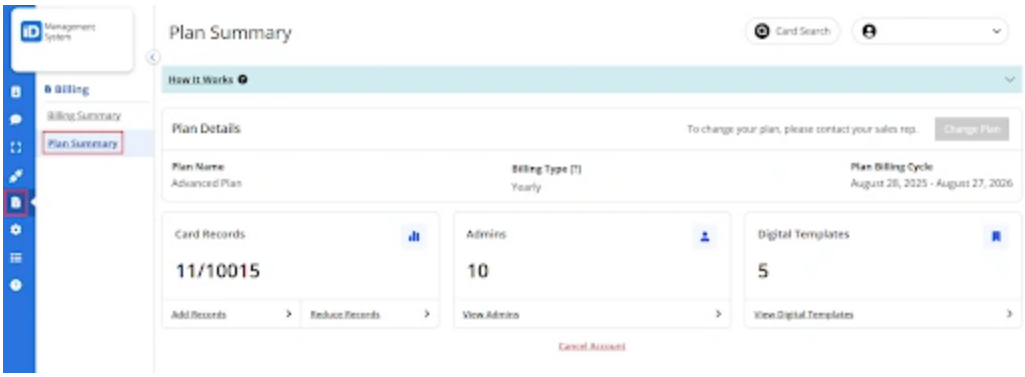
Please note that the total card records cannot be reduced below the minimum number of cards included in your current subscription.

We recommend reviewing the proforma invoice at your earliest convenience and following the instructions below if you would like to decrease the number of card records in your account for the next billing cycle.

How to Reduce the Number of Cards Included in the ID123 Plan

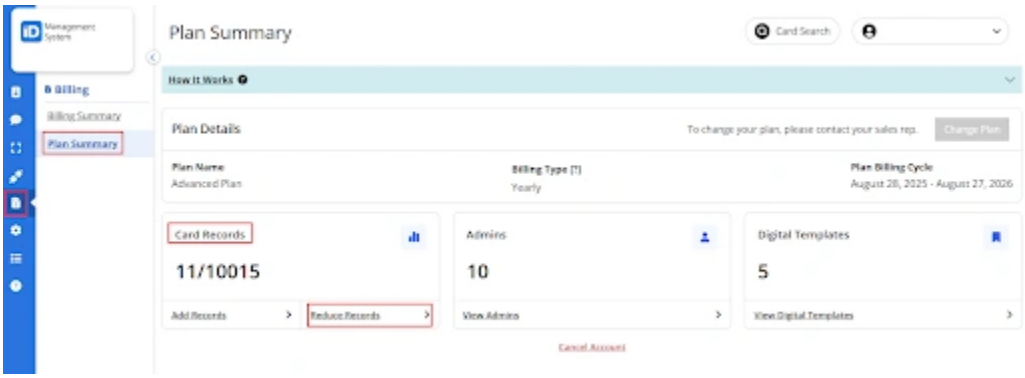
Step 1: Navigate to the Plan Summary Page

Log in to the **ID Management System**, then go to the **"Billing"** section on the left panel and select the **"Plan Summary"** page.



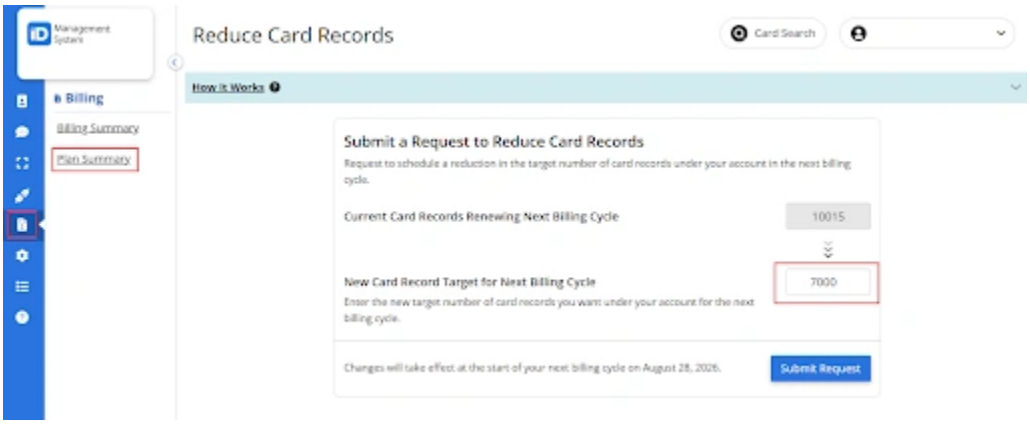
Step 2: Click on Reduce Records

Click on the **Reduce Records** option under the Card Records option.



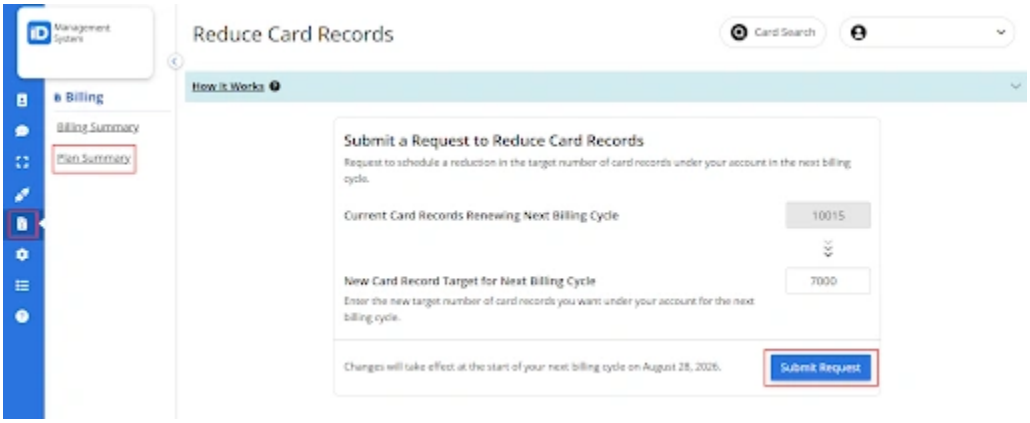
Step 3: Request to Reduce Card Records

On the **“Reduce Card Records”** page, enter the desired target number of card records for the next monthly or yearly billing cycle.

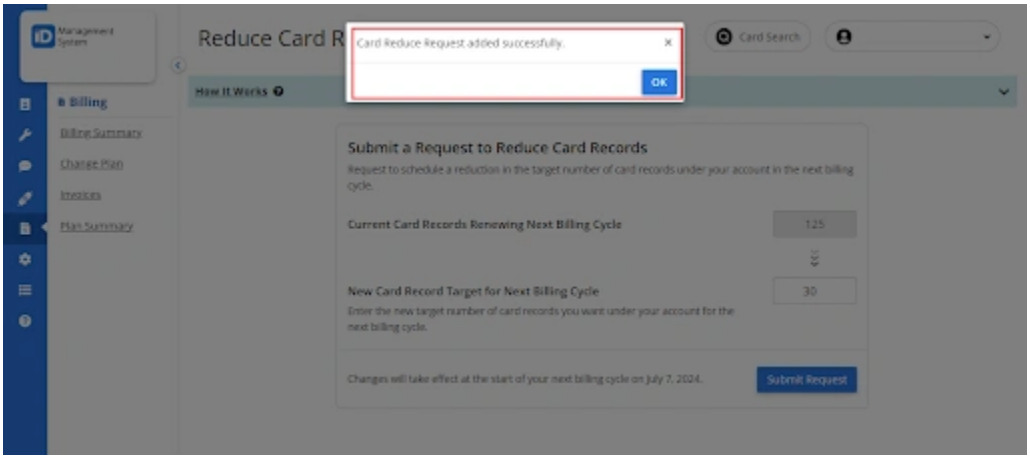


Step 4: Click Submit Request

Once you've entered the desired number of cards, click the **“Submit Request”** button. The request to reduce the number of card records for your account will be processed in the next **monthly or yearly** billing cycle. You can find the next billing cycle date on the “Billing Summary” page.



A confirmation notification will appear once the reduction request has been submitted.



On the **“Plan Summary”** page, a banner will be displayed with the **“New Card Record Target”** count.



That's it! The actual invoice, including the updated number of card records, will be generated on the renewal date. We’re always happy to help with any questions or adjustments.