



CA CloudDesk

Create Invoice

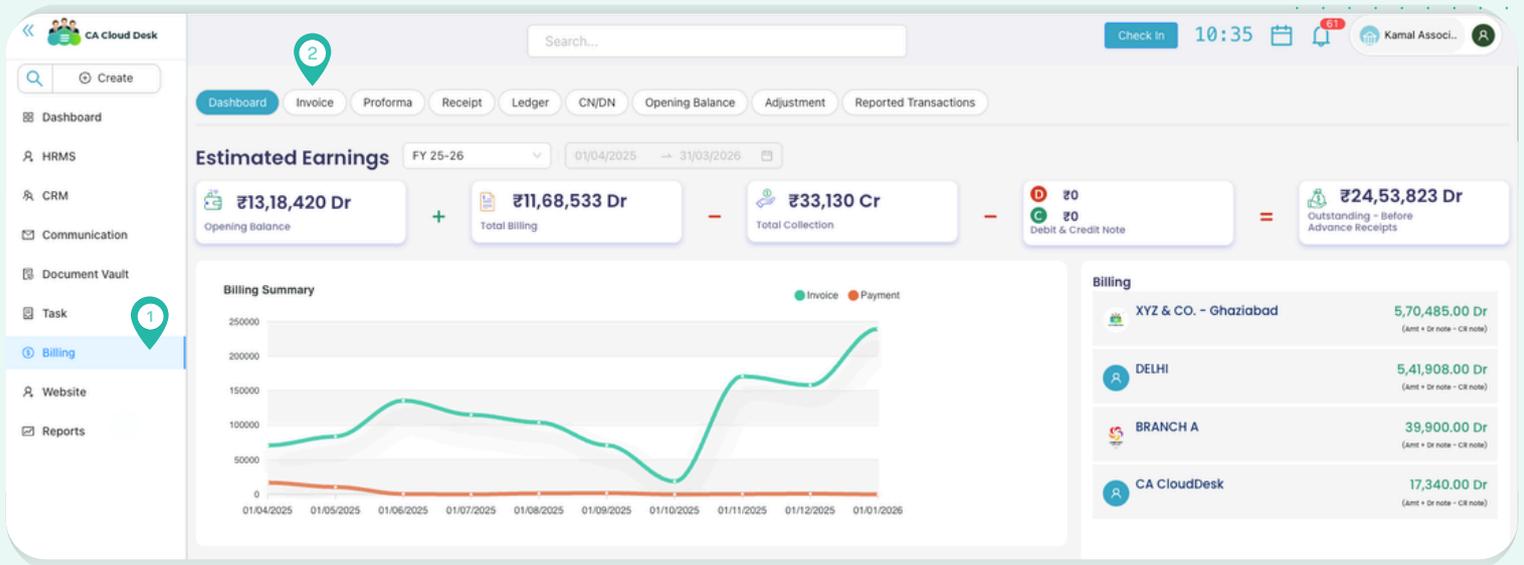
CA CloudDesk

Invoice



STEP 1: OPEN BILLING MODULE

- From the left-side navigation panel, Click on Billing.
- This opens the Billing Dashboard, where you can view estimated earnings, billing summaries, & client-wise billing details.



1 Click on Billing.

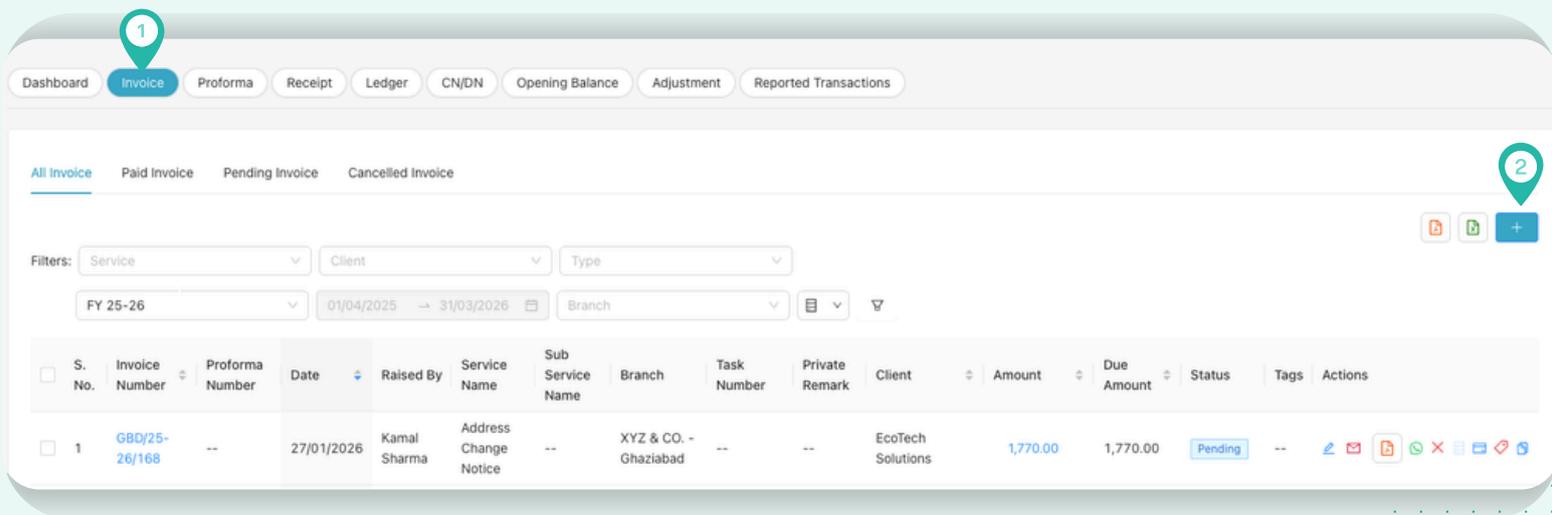
2 Click on the Invoice tab

STEP 2: SELECT INVOICE

- Click on the Invoice tab to view the list of all invoices.
- To create a new invoice, click on Add Invoice (+).



- 1 Click on Billing.
- 2 Click on Add Invoice (+).



Dashboard **Invoice** Proforma Receipt Ledger CN/DN Opening Balance Adjustment Reported Transactions

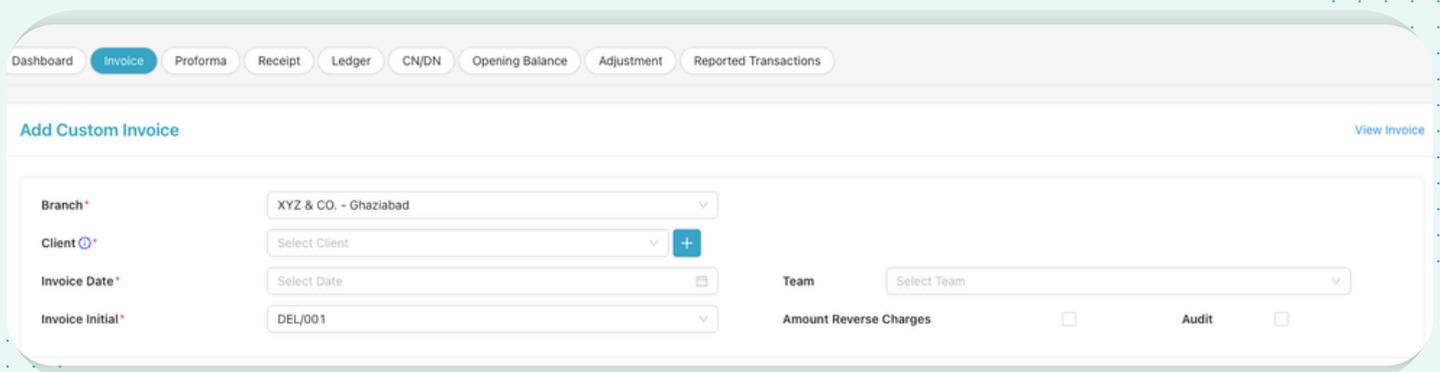
All Invoice Paid Invoice Pending Invoice Cancelled Invoice

Filters: Service Client Type
FY 25-26 01/04/2025 → 31/03/2026 Branch

| S. No. | Invoice Number | Proforma Number | Date | Raised By | Service Name | Sub Service Name | Branch | Task Number | Private Remark | Client | Amount | Due Amount | Status | Tags | Actions |
|--------|-------------------------------|-----------------|------------|--------------|-----------------------|------------------|-----------------------|-------------|----------------|-------------------|----------|------------|---------|------|---|
| 1 | GBD/25-26/168 | -- | 27/01/2026 | Kamal Sharma | Address Change Notice | -- | XYZ & CO. - Ghaziabad | -- | -- | EcoTech Solutions | 1,770.00 | 1,770.00 | Pending | -- |      |

STEP 3: ADD INVOICE DETAILS

- Select the branch and client, then enter the invoice date, invoice initial, & team details.
- Enable reverse charges or audit options if applicable.



Dashboard Invoice Proforma Receipt Ledger CN/DN Opening Balance Adjustment Reported Transactions

Add Custom Invoice [View Invoice](#)

Branch* XYZ & CO. - Ghaziabad

Client* Select Client +

Invoice Date* Select Date

Invoice Initial* DEL/001

Team Select Team

Amount Reverse Charges Audit

STEP 4: ADD INVOICE ITEMS

- Select the particular/service, enter the description, amount, quantity, & discount.
- The final invoice value is calculated automatically.



Dashboard Invoice Proforma Receipt Ledger CN/DN Opening Balance Adjustment Reported Transactions

Add Custom Invoice View Invoice

Branch* CA CloudDesk

Client* (123) RAVI KUMAR ENTERPRISES

Invoice Date* 22/01/2026

Invoice Initial* 001

Ledger Balance : 15,65,009.83 Dr

Unbilled Tasks : 74000

Unused Expense : view

Team Select Team

Amount Reverse Charges Audit

| S. No. | Particular | Description | Amount | Quantity | Discount | Final Value | Action |
|--------------|------------|----------------|----------|----------|----------|--------------|--|
| 1 | Expenses | Description... | Amount | 1 | Discount | Final Amount | + - |
| Total | | | 0 | 1 | 0 | 0 | |

STEP 5: ADD TERMS & REMARKS

- Enter Terms and Conditions and Public Remarks (if required).
- Enable Show remarks in invoice to display them on the invoice.



Term And Conditions

Paragraph

0 words

No data

Public Remarks

Paragraph

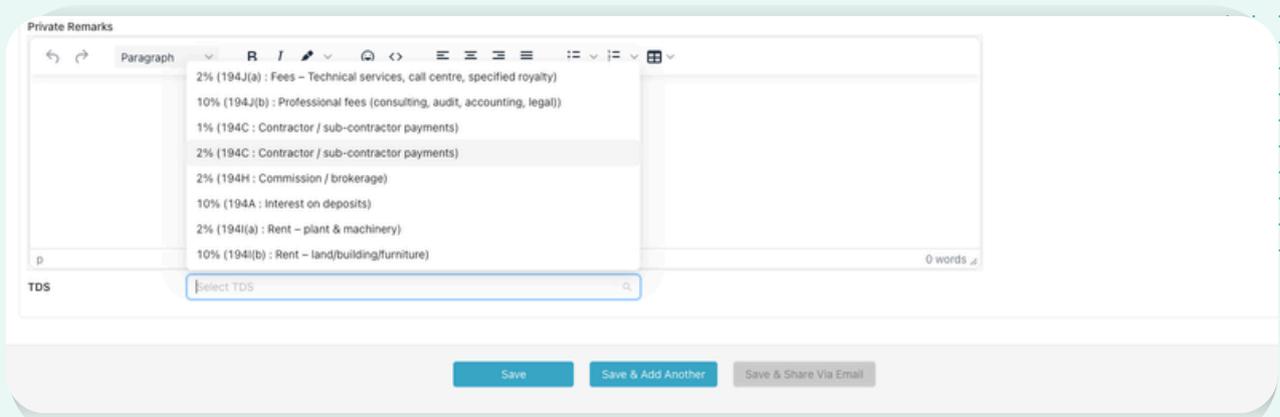
Thanks for Business

3 words

Show remarks in invoice

STEP 6: ADD PRIVATE REMARKS & TDS

- Enter Private Remarks for internal reference and select the applicable [TDS section](#) from the list.



STEP 7: SAVE INVOICE

- Click Save to create the invoice, or Save & Add Another to create a new invoice immediately.
- You may also use Save & Share via Email to send the invoice to the client.



FINAL STEP: INVOICE GENERATED SUCCESSFULLY

- After clicking Save, a confirmation popup appears with the message "Custom Invoice updated successfully." ✓

