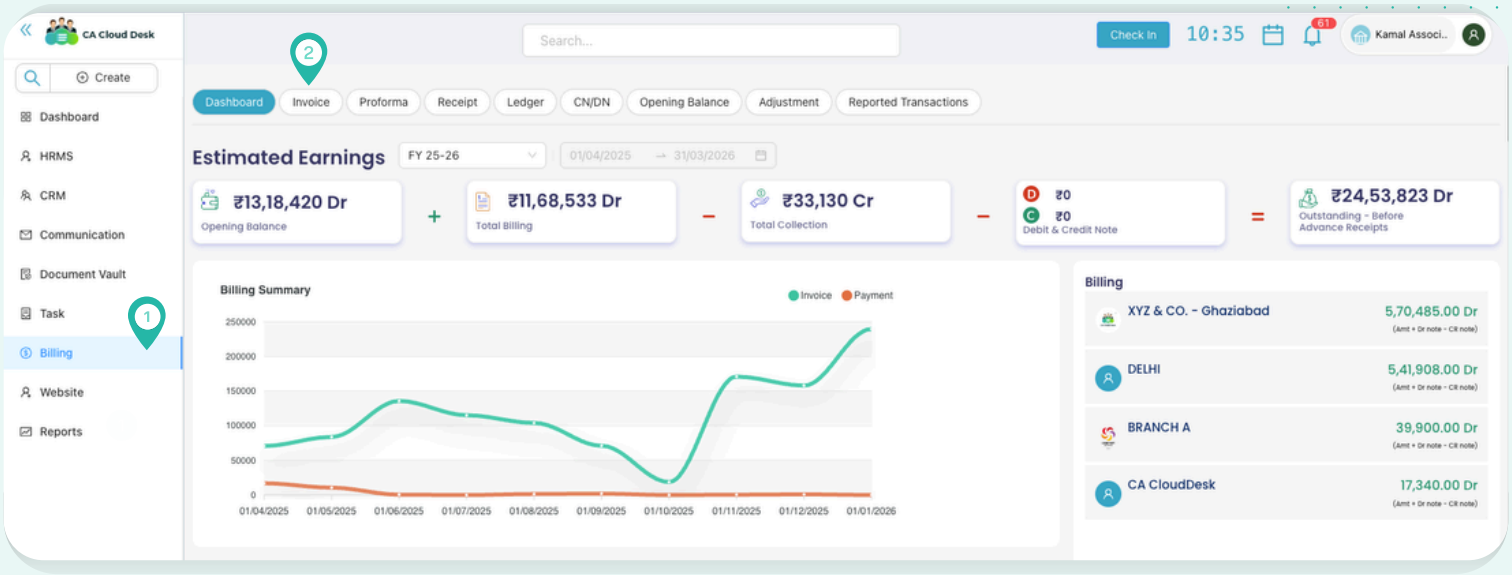
CA CloudDesk®

Create Invoice

CA CloudDesk

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.

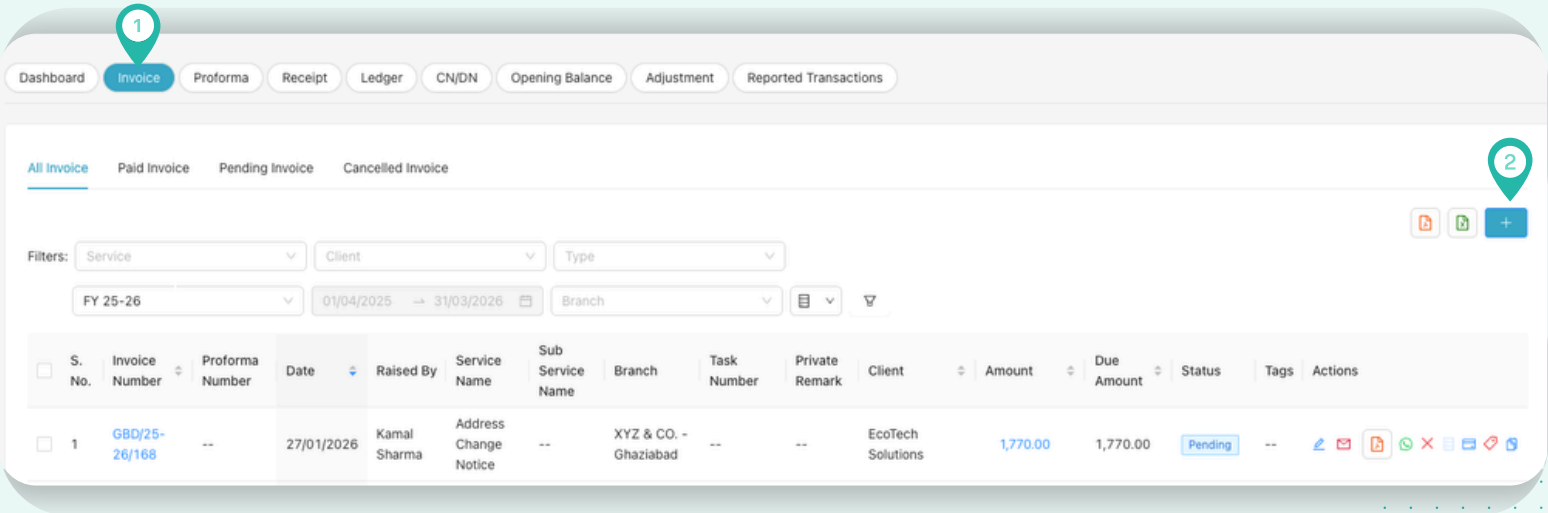


1. Click on Billing.
2. Click on the Invoice tab

STEP 2: SELECT INVOICE

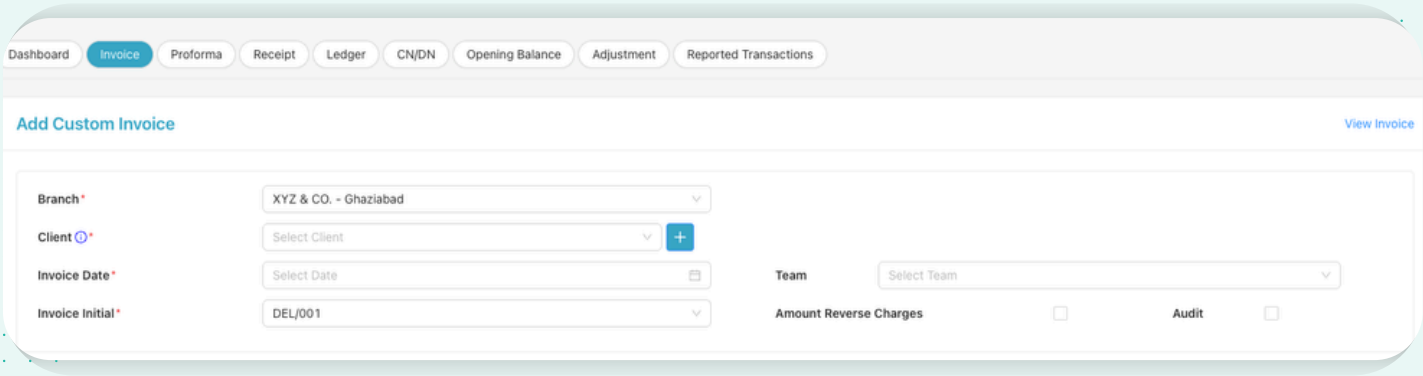
- Click on the Invoice tab to view the list of all invoices.
- To create a new invoice, click on Add Invoice (+).

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



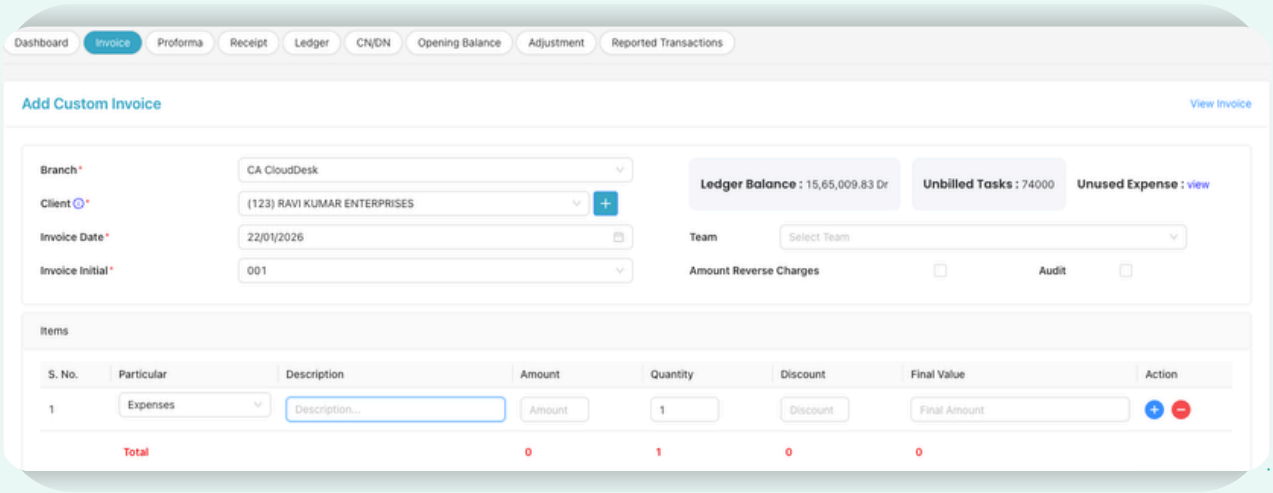
STEP 3: ADD INVOICE DETAILS

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



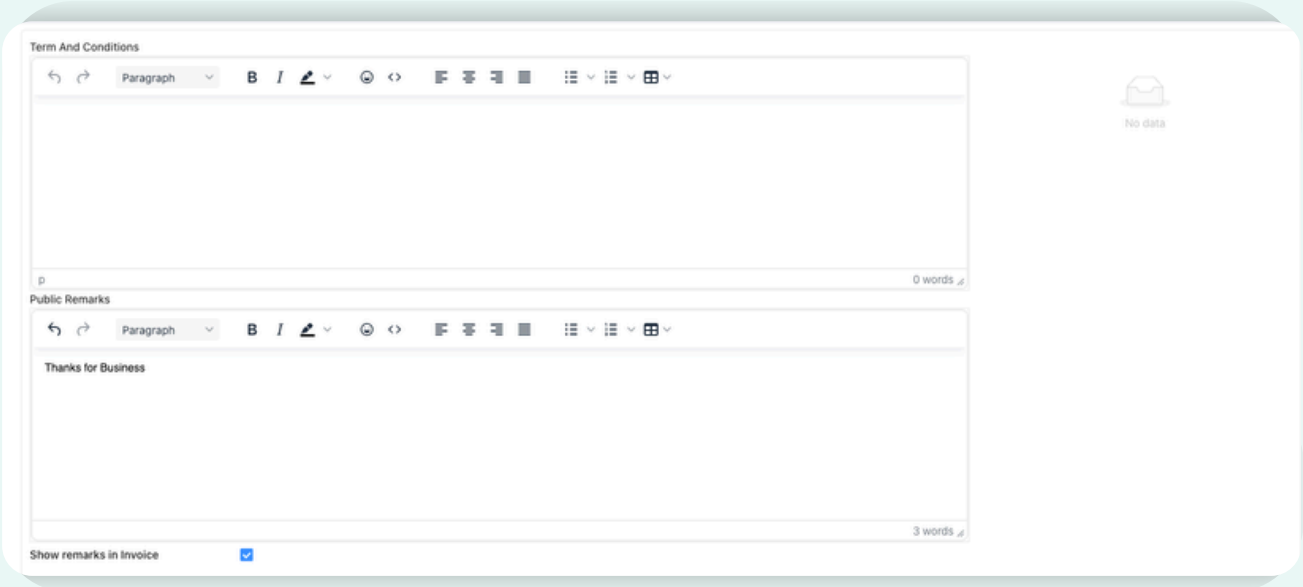
STEP 4: ADD INVOICE ITEMS

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



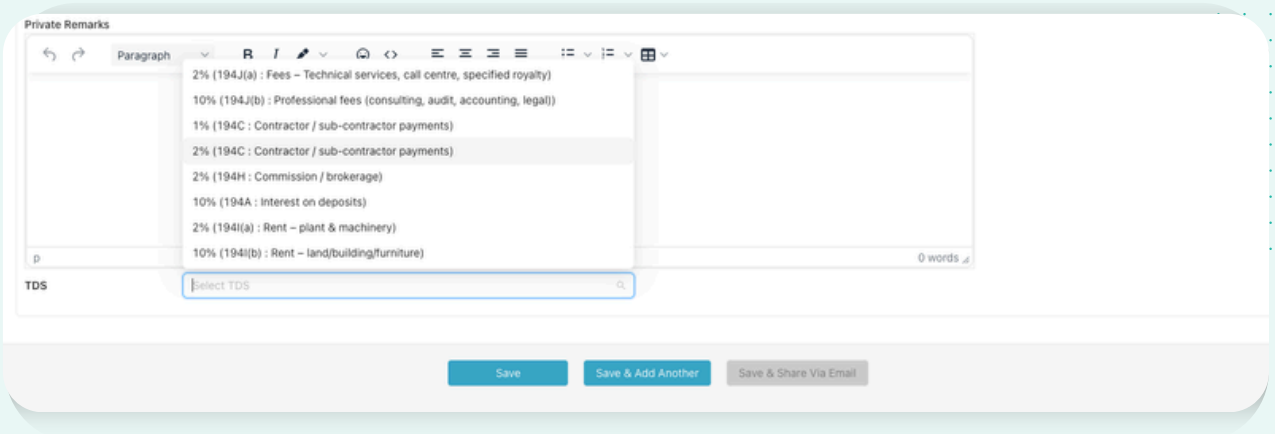
STEP 5: ADD TERMS & REMARKS

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



STEP 6: ADD PRIVATE REMARKS & TDS

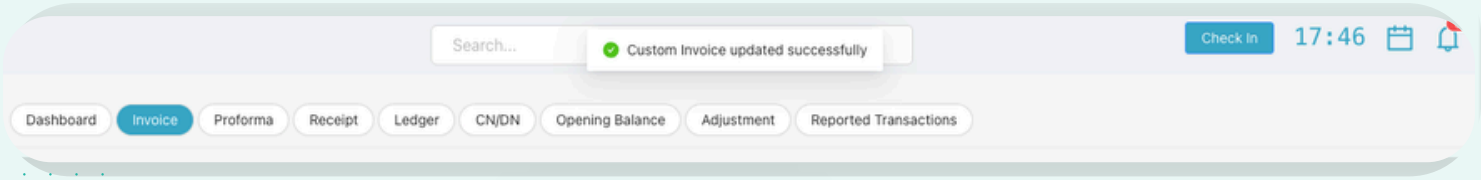
- Enter Private Remarks for internal reference and select the applicable TDS section from the list.



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."✅