



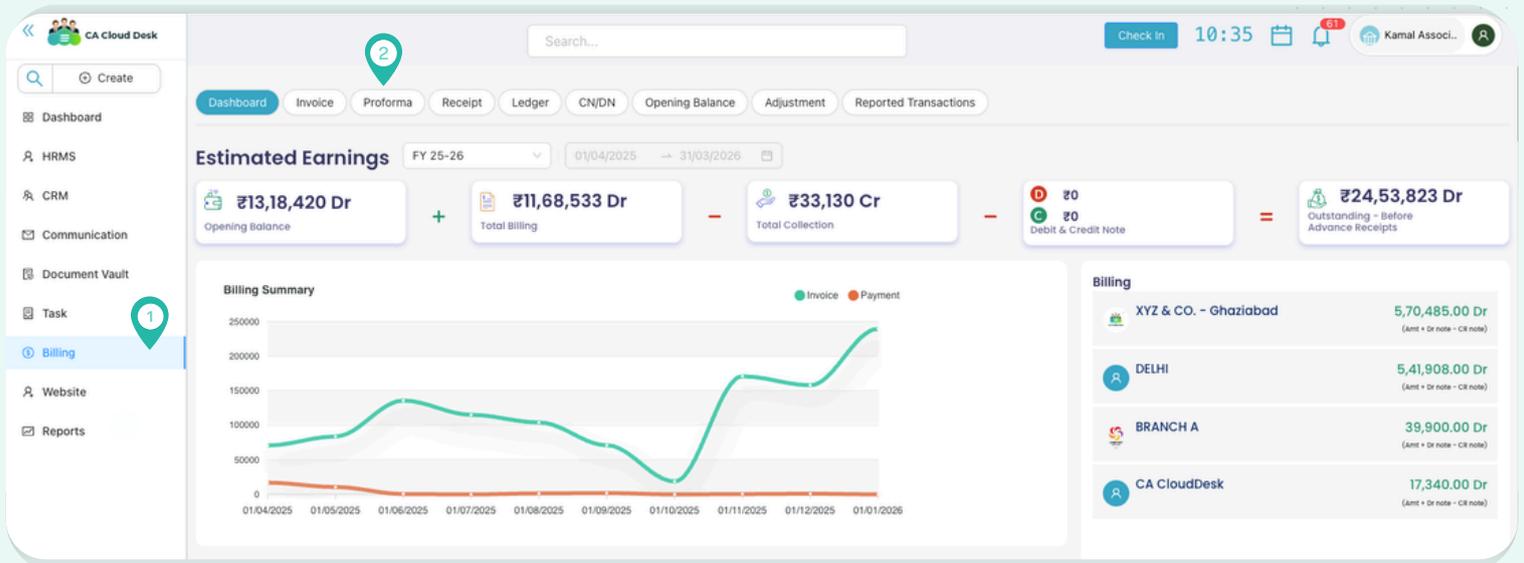
Proforma invoice

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.



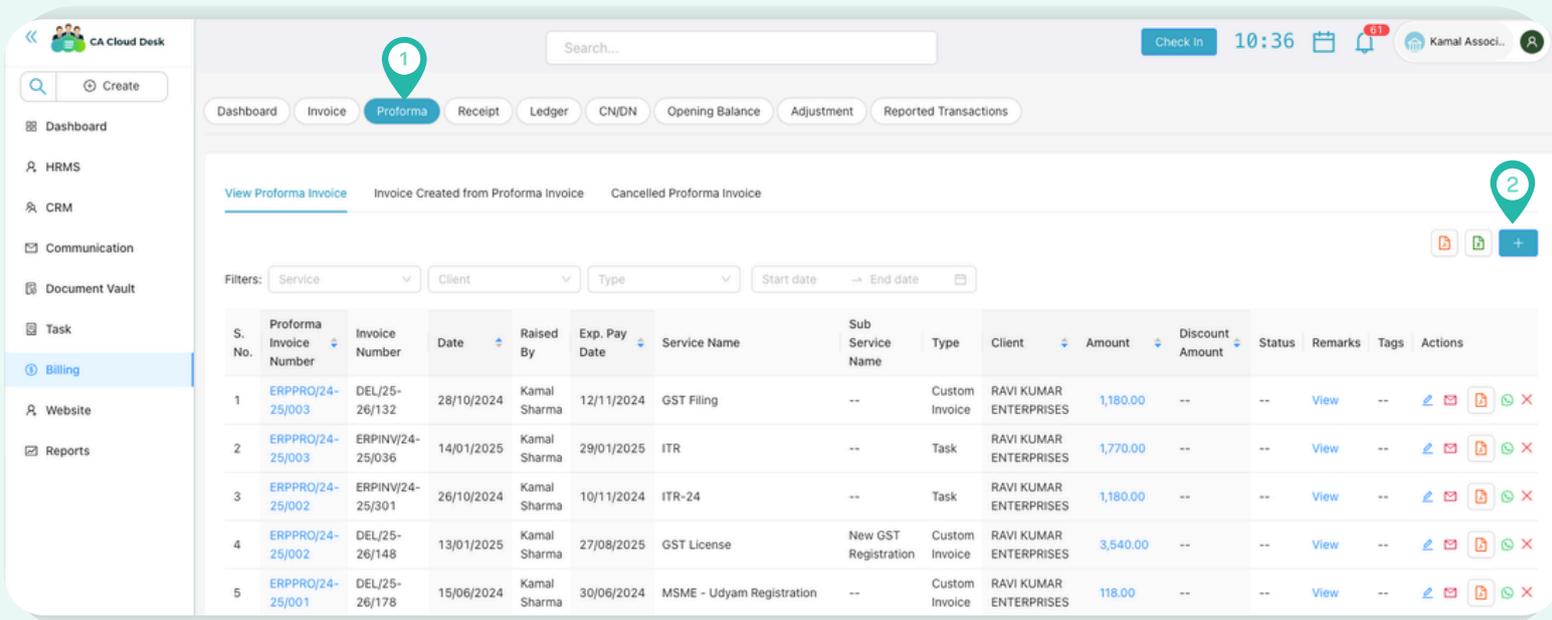
1 Click on Billing.

2 Click on the Proforma tab



STEP 2: SELECT PROFORMA INVOICE

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



CA Cloud Desk

Search...

Check in 10:36

Kamal Associ...

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

View Proforma Invoice Invoice Created from Proforma Invoice Cancelled Proforma Invoice

Filters: Service Client Type Start date End date

S. No.	Proforma Invoice Number	Invoice Number	Date	Raised By	Exp. Pay Date	Service Name	Sub Service Name	Type	Client	Amount	Discount Amount	Status	Remarks	Tags	Actions
1	ERPPRO/24-25/003	DEL/25-26/132	28/10/2024	Kamal Sharma	12/11/2024	GST Filing	--	Custom Invoice	RAVI KUMAR ENTERPRISES	1,180.00	--	--	View	--	   
2	ERPPRO/24-25/003	ERPINV/24-25/036	14/01/2025	Kamal Sharma	29/01/2025	ITR	--	Task	RAVI KUMAR ENTERPRISES	1,770.00	--	--	View	--	   
3	ERPPRO/24-25/002	ERPINV/24-25/301	26/10/2024	Kamal Sharma	10/11/2024	ITR-24	--	Task	RAVI KUMAR ENTERPRISES	1,180.00	--	--	View	--	   
4	ERPPRO/24-25/002	DEL/25-26/148	13/01/2025	Kamal Sharma	27/08/2025	GST License	New GST Registration	Custom Invoice	RAVI KUMAR ENTERPRISES	3,540.00	--	--	View	--	   
5	ERPPRO/24-25/001	DEL/25-26/178	15/06/2024	Kamal Sharma	30/06/2024	MSME - Udyam Registration	--	Custom Invoice	RAVI KUMAR ENTERPRISES	118.00	--	--	View	--	   



1 Click on Billing.

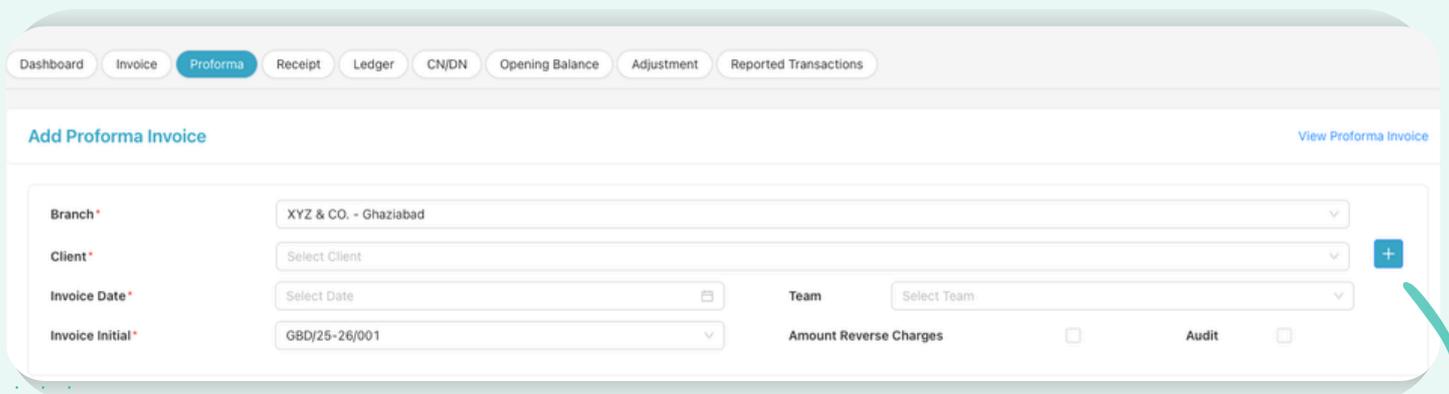
2 Click on Add Proforma Invoice 

STEP 3: ADD PROFORMA INVOICE DETAILS

- Enter the branch, client, invoice date, invoice initial, and team details.
- Fill in the required fields and proceed to add services and charges.

ADD NEW CLIENT (OPTIONAL)

- Click on the Plus (+) icon next to the Client field to quickly add a new client.
- Enter the GSTIN, Client Name, Email, and Mobile Number, then click Submit.



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

Add Proforma Invoice [View Proforma Invoice](#)

Branch* XYZ & CO. - Ghaziabad

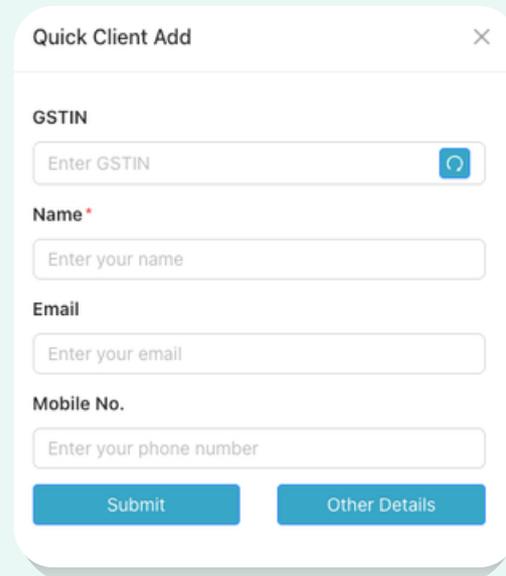
Client* Select Client +

Invoice Date* Select Date

Invoice Initial* GBD/25-26/001

Team Select Team

Amount Reverse Charges Audit



Quick Client Add ×

GSTIN

Enter GSTIN ↻

Name *

Enter your name

Email

Enter your email

Mobile No.

Enter your phone number

Submit **Other Details**

STEP 4: ADD SERVICES AND SAVE PROFORMA INVOICE

- Add the service details by selecting the service, entering description, SAC, amount, quantity, discount, and tax.
- Enter Terms & Conditions and Public Remarks (if required), then click Save or Save & Add Another to create the proforma invoice.

- 1 Select Service
- 2 Add Description
- 3 Select SAC
- 4 Enter Amount
- 5 Enter Quantity
- 6 Enter Discount
- 7 Fill Tax Amount



Add Proforma Invoice [View Proforma invoice](#)

Branch*

Client*

Invoice Date* Team

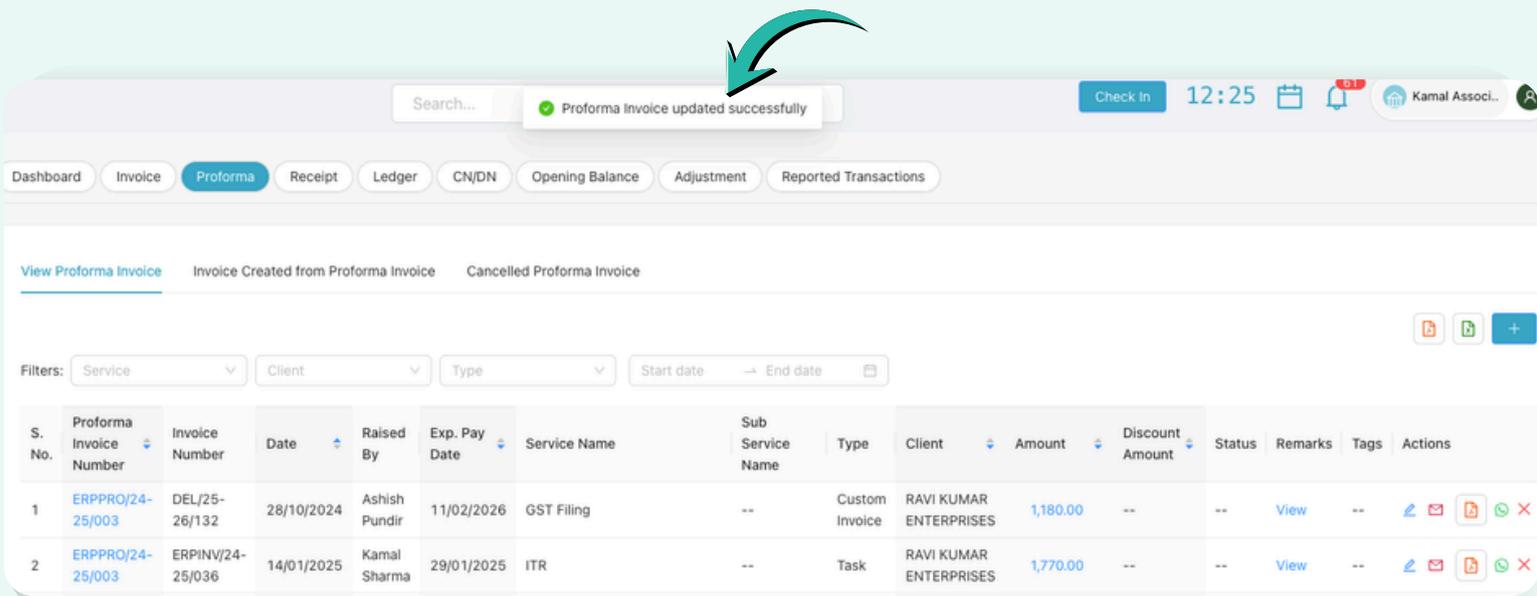
Invoice Initial* Amount Reverse Charges Audit

Items

S. No.	Particular	Description	SAC	Amount	Quantity	Discount	Tax Amount	Final Value	Action
1	<input type="text" value="Select service"/>	<input type="text" value="Description..."/>	<input type="text" value="Select SAC"/>	<input type="text" value="Amount"/>	<input type="text" value="1"/>	<input type="text" value="Discount"/>	<input type="text" value="Tax"/>	<input type="text" value="Final Amount"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Total				0	1	0	0	0	

FINAL STEP: PROFORMA INVOICE CREATED

- After clicking Save or Save & Add Another, a confirmation popup appears with the message "Proforma Invoice created successfully." ✓
- This confirms that the proforma invoice has been generated and saved.



Search... Proforma Invoice updated successfully

Check In 12:25

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

View Proforma Invoice Invoice Created from Proforma Invoice Cancelled Proforma Invoice

Filters: Service Client Type Start date → End date

S. No.	Proforma Invoice Number	Invoice Number	Date	Raised By	Exp. Pay Date	Service Name	Sub Service Name	Type	Client	Amount	Discount Amount	Status	Remarks	Tags	Actions
1	ERPPRO/24-25/003	DEL/25-26/132	28/10/2024	Ashish Pundir	11/02/2026	GST Filing	--	Custom Invoice	RAVI KUMAR ENTERPRISES	1,180.00	--	--	View	--	  
2	ERPPRO/24-25/003	ERPIN/24-25/036	14/01/2025	Kamal Sharma	29/01/2025	ITR	--	Task	RAVI KUMAR ENTERPRISES	1,770.00	--	--	View	--	  

