



Idea Implementation

Invoice Application for “Ultrakey IT Solutions Private Limited”



Invoices Settings:

1. Settings→General Settings

General Business Quotes Invoices Payments Tax Emails PDF Translate Extras Licenses

General Settings

Just some general options.

Year Start	01 Apr	The start date of the fiscal year
Year End	31 Mar	The end date of the fiscal year
Pre-Defined Line Items	1 .com/.in Domain Registration Charges per year 1600 Domain Registration Per Year 1 Hosting Plan for 1 year 2500 Web Hosting Space for 1 year 1 SSL Certificate for 1 Year 1200 SSL Certificate for 1 Year	

Add 1 line item per line in this format: Qty | Title | Price | Description. Each field separated with a | symbol. Price should be numbers only, no currency symbol.
If you prefer to have an item blank, you still need the | symbol like so: 1 | Web Design || Designing the web

Save

Pre-Defined Line Items Like below (or) as per existing plan

Item 1					Amount (%)	Rate (₹)	Amount (₹)
Qty	Item Title				0	0.00	₹0.00
Description							
Brief description of the work carried out for this line item (optional)							

2. Settings→Business Tab

Business Settings

All of the Business Details below will be displayed on the Quotes & invoices.

Logo	https://ultrakeyit.com/wp-content/uploads/2024	Add or Upload File
Business Name	Ultrakey IT Solutions Private Limited	
Address	Flat No. 204, 2nd Floor, Cyber Residency, Indira Nagar, Gachibowli, Hyderabad, Telangana, India-500032 support@ultrakeyit.com	
Extra Business Info	 GST No: 36AADCU5062A1Z0	
Website	https://ultrakeyit.com	

3. Settings→Quotation

Quote Settings

 Here you will find all the settings for Quotes.

Prefix	<input type="text" value="AKEYQ-"/>
Prefix before each Quote number. Can be left blank if you don't need a prefix.	
Suffix	<input type="text"/>
Suffix after each Quote number. Can be left blank if you don't need a suffix.	
Auto Increment	<input checked="" type="checkbox"/> Yes, increment Quote numbers by one. Recommended.
Next Number	<input type="text" value="52"/>
The next number to use for auto incrementing. Can use leading zeros.	
Quotes Valid For	<input type="text" value="15"/>
Number of days each Quote is valid for. This will automatically set the date in the 'Valid Until' field. Can be overridden on individual Quotes.	
Hide Adjust Field	<input type="checkbox"/> Yes, hide the Adjust field on line items. I won't need this field
Terms & Conditions	<p>This is a fixed price quote. If accepted, we require a 60% deposit upfront before work commences.</p> <p>Terms and conditions displayed on the Quote. Can be overridden on individual Quotes.</p>
Footer	<p>Thanks for choosing Ultrakey IT Solutions Private Limited support@ultrakeyit.com</p> <p>The footer will be displayed at the bottom of each Quote. Basic HTML is allowed.</p>

Accepting Quotes

Accept Quote Button Yes, show the "Accept Quote" button on Quotes.

Accepted Quote Action

Actions to perform automatically when client accepts a Quote.

Accept Quote Text

**Please Note: After accepting this Quote an Invoice will be automatically generated. This will then become a legally binding contract.

Text to add on the "Accept Quote" popup. Basic HTML is allowed.

This should provide some indication to your client of what happens after accepting the Quote.

Accepted Quote Message

You have accepted the Quote.
We will be in touch shortly.

Message to display if client accepts the Quote. Basic HTML is allowed.

Leave blank for the default message.

Decline Reason Required

Yes, make the "Reason for declining" field required.

Declined Quote Message

You have declined the Quote.
We will be in touch shortly.

Message to display if client declines the Quote. Basic HTML is allowed.

Leave blank for the default message.

Admin Notices

These settings allow you to choose which notices may be displayed in your WordPress Admin area. (Note: this is different from admin emails, which you can configure on the Email Settings tab.)

Show me notices when

Quote Viewed

Quote Accepted

Template Design

For information on customizing your templates, please see our guide [here](#).

Template



Custom CSS

Add custom CSS to your Quotes

4. Settings→Invoices

General Business Quotes Invoices Payments Tax Emails PDF Translate Extras Licenses

Invoice Settings

Here you will find all the settings for invoices.

Prefix: AKEYI-
Prefix before each Invoice number. Can be left blank if you don't need a prefix.

Suffix:
Suffix after each invoice number. Can be left blank if you don't need a suffix.

Auto Increment: Yes, increment Invoice numbers by one. Recommended.

Next Number: 0126
The next number to use for auto incrementing. Can use leading zeros

Due Date: 14
Number of days each Invoice is due after the created date. This will automatically set the date in the 'Due Date' field. Can be overridden on individual Invoices.

Hide Adjust Field: Yes, hide the Adjust field on line items. I won't need this field

Terms & Conditions:
Payment is due within 14 days from date of invoice. Late payment is subject to fees of 5% per month.
< b> Payment Methods:
Terms and conditions displayed on the Invoice. Can be overridden on individual Invoices.

Footer:
Thanks for choosing Ultrakey IT Solutions Private Limited | support@ultrakeyit.com

The footer will be displayed at the bottom of each Invoice. Basic HTML is allowed.

Admin Notices

These settings allow you to choose which notices may be displayed in your WordPress Admin area. (Note: this is different from admin emails, which you can configure on the [Email Settings](#) tab.)

Show me notices when:

Invoice Viewed Invoice Paid

Template Design

For information on customizing your templates, please see our guide [here](#).

Template: 

Custom CSS: body {}
Add custom CSS to your invoices

5. Mail Example: Email Invoice / Quotation Mail Template

Hi Rajesh,

You have a [new invoice](#) available (RT_INV-0067) which can be viewed at https://www.phprealtime.com/sliced_invoice/payment_with_admin_dashboard_features_like_mailtranscriptc.com/

[View this invoice online](#)

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6. Settings→Payments

General Business Quotes Invoices **Payments** Tax Emails PDF Translate Extras Licenses

Payment Settings

Here you will find all of the Payment related settings.

Currency Symbol	₹
Currency Position	Left (\$100.00)
Thousand Separator	,
Decimal Separator	.
Number of Decimals	2
Payment Page	Payment

Choose a page to use for PayPal and other [available payment gateway](#) messages and other confirmations. A blank page named Payment would be perfect.

Payment Page Footer

Thanks for choosing Ultrakey IT Solutions Private Limited | support@ultrakeyit.com

The footer will be displayed at the bottom of the payment page. Basic HTML is allowed. Use this to provide additional payment instructions, if desired.

Payment Methods

Bank
Displayed on the Invoice

Add your bank account details if you wish to allow direct bank deposits. HTML is allowed.

Generic Payment
Displayed on the Invoice

Pay Invoice amount via one of the options mentioned in the below

1. Click here for Online Payment through Razorpay -

Set a generic message or include further instructions for the user on how to pay. HTML is allowed.

PayPal Gateway

Save

7. Settings->Tax

Tax Settings

Here you will find all Tax-related settings.

Prices entered with tax

Yes, I will enter prices inclusive of tax
 No, I will enter prices exclusive of tax

Tax Percentage

18
Default tax percentage. Set to 0 or leave blank for no tax.

Tax Name

GST (18%)
The name of the tax for your country/region. GST, VAT, Tax etc

Save

8. Settings->Emails

Email Settings

Here you will find all of the Email-related settings.
(PRO) The [PDF & Email Extension](#) adds a few extra options here for customizing emails.

Email Address

The email address to send and receive notifications (probably your business email).

Email Name

The name on emails to send and receive notifications (probably your business name).

Bcc on Client Emails
 Yes, send myself a copy of all client emails (Bcc). Recommended.
This ensures you have a copy of the email on record.

Quote Available
Sent to the client manually, when you click the email button.

Subject

The subject of the email (wildcards are allowed).

Content
Visual | Code

Hi %client_first_name%,
You have a new quote available (%number%) which can be viewed at %link%.

The content of the email (wildcards and HTML are allowed).

Button text

The "view this quote online" button.

Invoice Available
Sent to the client manually, when you click the email button.

Subject

The subject of the email (wildcards are allowed).

Content
Visual | Code

Hi %client_first_name%,
You have a new invoice available (%number%) which can be viewed at %link%.

The content of the email (wildcards and HTML are allowed).

Button text

The "view this invoice online" button.

Payment Received
Sent to the client automatically, when they make a payment.

Subject

The subject of the email (wildcards are allowed).

Content
Visual | Code

Thanks for your payment, %client_first_name%.
Your recent payment for %last_payment% on invoice %number% has been successful.

The content of the email (wildcards and HTML are allowed).

Payment Reminder
Sent to the client automatically on the chosen days.

When to Send

 7 days before Due Date
 1 day before Due Date
 On the Due Date
 1 day after Due Date
 7 days after Due Date
 14 days after Due Date
 21 days after Due Date
 30 days after Due Date
Check when you would like payment reminders sent out.

Subject

The subject of the email (wildcards are allowed).

Ultrakey
SOLUTIONS PRIVATE LIMITED

Wildcards For Emails
The following wildcards can be used in email subjects and email content:
%client_first_name% : Clients first name
%client_last_name% : Clients last name
%client_email% : Clients email address
%client_email% : Client's email address
%link% : URL to the quote
%number% : The quote or invoice number
%total% : Total amount of the quote
%due_date% : The date the quote or invoice is due
%last_payment% : The amount of the last payment. Returns "N/A" if no payments
%balance% : The balance outstanding on the quote or invoice
%created_date% : The date the quote or invoice was created
%today% : The date the quote or invoice is due
%date% : Today's date. Useful on Payment emails
%order_number% : The order number of the invoice
%is_overdue% : If due date of invoice is past, displays "true" otherwise displays "false"

Footer Text
Visual | Code

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9. PDF – Once we click the download button the Invoice or Quotation will be able to downloadable as per template selected in the setting.

10. Translate

General Business Quotes Invoices Payments Tax Emails PDF **Translate** Extras Licenses

Translate Settings

Here you can translate strings into your own language, or simply change the text to suit your needs.
 (PRO) The [Easy Translate Extension](#) adds many more fields here, allowing you to translate every piece of text your client sees on your quotes and invoices.

Quote Label	Quote
You can change this from Quote to Estimate or Proposal (or any other word you like).	
Quote Label Plural	Quotes
The plural of the above	
Invoice Label	Invoice
You can change this from Invoice to Tax Invoice (or any other word you like).	
Invoice Label Plural	Invoices
The plural of the above	
Hrs/Qty	Hrs/Qty
Service	Service
Rate/Price	Rate/Price
Adjust	Adjust
Sub Total	Sub Total
Discount	Discount
Total	Total
Total Due	Total Due

Save

11. Add New Client

Add New Client

To create a new client, choose either an existing WordPress user to associate with the client, or create a new user. For help see our support page about [Clients](#).

Add new client from:

Existing User
 Create New User

Business/Client Name*

E-mail*

Username*

Password* Show password

Address

Extra Info

First Name

Last Name

Website

Add New Client

Add New Client

To create a new client, choose either an existing WordPress user to associate with the client, or create a new user. For help see our support page about [Clients](#).

Add new client from:

Existing User

Select Existing User:

Business/Client Name*

Address

Extra Info

Add New Client

Create New User

12. Add New Invoice

Add New Invoice

Enter Invoice title

Description

Line Items

Item 1

Qty	Item Title	Adjust (%)	Rate (₹)	Amount (₹)
1		0	0.00	₹0.00

Description
Brief description of the work carried out for this line item (optional)

Taxable

Add a pre-defined line item

Add Another item

Invoice Totals

Sub Total	₹0.00
GST (18%)	₹0.00
Discount edit	-₹0.00
Paid edit	-₹0.00
Total Due	₹0.00

Payments

Payment 1

Date	Amount (₹)	Payment Method	Payment ID	Status
		Generic		

Memo

Add Another Payment

Payment 2

Date	Amount (₹)	Payment Method	Payment ID	Status

Memo

Add Another Payment

Terms & Conditions

Payment is due within 14 days from date of invoice. Late payment is subject to fees of 5% per month.

Payment Methods:

- 60% Advance Payment for Commencement

Thank you for using Rank Math

13. Invoices Display Example and Make Sure add pagination in the Bottom Right

All (106) | Published (106) | Cancelled (13) | Draft (0) | Overdue (35) | Paid (56) | Unpaid (2) | Pillar Content (0) | Cornerstone content (0)

Bulk actions All dates View all statuses All Readability Scores Filter 106 items 1 of 3

<input type="checkbox"/>	Title	Number	Client	Statuses	Created	Total	Actions	Date	Stats
<input type="checkbox"/>	First Partner Consultancy Services Renewal	AKEYI-0125	First Partner Consultancy support@firstpartnerconsulting.com	Overdue	02/11/2024 Due: 02/11/2024	Total: ₹4,366.00	<input type="button" value="Send 1 month ago"/> <input type="button" value="Email"/>	Published 2025/04/11 at 4:46 pm	
<input type="checkbox"/>	Employee Transfer from Ultrakey to Sainbiz One Time Service Fee	AKEYI-0124	Sainbiz Solutions Pvt. Ltd. sankara.vaka@sainbiz.com	Paid	02/11/2024 Due: 02/11/2024	Total: ₹25,000.00	<input type="button" value="Send 1 month ago"/> <input type="button" value="Email"/>	Published 2025/04/10 at 5:30 am	

14. Quotes Display Example and Make Sure add pagination in the Bottom Right

Bulk actions							Apply	All dates	Choose client	View all statuses	All SEO Scores	All Readability Scores	Rank Math	Filter	Export as CSV	33 items	<	1	of 2	>	>>	Search Quotes
<input type="checkbox"/>	Title	Number	Client	Statuses	Created	Total																
<input type="checkbox"/>	VPS Hosting Charges for Infasta per Year	AKEYQ-51	Nagaraj accounts@infasta.com	Expired	02/11/2024 Valid: 02/11/2024	Total: ₹25,016.00			Published													
<input type="checkbox"/>	Charges for Goldenkey Meraki Brochure – Design	AKEYQ-49	Chikki Pranay Raj sales@goldenkey.in	Expired	02/11/2024 Valid: 02/11/2024	Total: ₹42,902.00			Published													
<input type="checkbox"/>	charges for Sai Gayatri Curry Point relevant website in Woocommerce	AKEYQ-48	DRK Chowdary drkchowdary5@gmail.com	Expired	02/11/2024 Valid: 02/11/2024	Total: ₹66,700.00			Published													

15. Add New Quote

Description

Visual
Code

Line Items

Qty	Item Title	Adjust (%)	Rate (₹)	Amount (₹)
1		0	0.00	₹0.00

Description

Brief description of the work carried out for this line item (optional)

Add a pre-defined line item

Quote Totals

Sub Total	₹0.00
GST (18%)	₹0.00
Discount <input type="text" value="0.00"/>	-₹0.00
Total Due	₹0.00

Terms & Conditions

Discussion

Allow comments

Allow trackbacks and pingbacks

Publish

Quote Details

Client

Choose client

Status

Draft

Quote Number

AKEYQ- 52

Created Date

02/11/2024

Valid Until Date

02/11/2024

Payment Settings

Currency

Default Currency

Currency Symbol

₹

Tax Settings

Prices entered with tax

No, I will enter prices exclusi

Tax Rate (%)

18

16. Paid Invoice Sample attached below



From:
 Ultrakey IT Solutions Private Limited
 Flat No. 204, 2nd Floor, Cyber Residency,
 Inidra Nagar, Gachibowli,
 Hyderabad, Telangana, India-500032
 support@ultrakeyit.com
GST No: 36AADCU5062A1Z0

To:
 Sainbiz Solutions Pvt. Ltd.
 VUDA Layout,
 Madhavadhara,
 Visakhapatnam - 530018
<https://sainbiz.com/>
 sankara.vaka@sainbiz.com

INVOICE

Invoice Number	AKEYI-0124
Invoice Date	02/11/2024
Due Date	02/11/2024
TOTAL DUE	₹0.00

HRS/QTY	SERVICE	RATE/PRICE	ADJUST	SUB TOTAL
1	Employee Transfer from Ultrakey to Sainbiz One Time Service Fee Employee Name: Avala Madhukar Reddy	₹25,000.00	0.00%	₹25,000.00

	Sub Total	₹25,000.00
	GST (18%)	₹0.00
	Paid	-₹25,000.00
	TOTAL DUE	₹0.00

Pay Invoice amount via one of the options mentioned in the below

1. Click here for Online Payment through Razorpay - Debit/Credit Card/UPI etc.,
2. Gpay (or) Phonepe Number: 6300440316

Payment is due within 14 days from date of invoice. Late payment is subject to fees of 5% per month.

Payment Methods:

- 60% Advance Payment for Commencement
- Remaining 40% Final Settlement

Thanks for choosing Ultrakey IT Solutions Private Limited | support@ultrakeyit.com

17. Invoice another Example Template screenshot attached below

INVOICE																	
 <p>From:</p> <p>Ultrakey IT Solutions Private Limited Flat No. 204, 2nd Floor, Cyber Residency, Inidra Nagar, Gachibowli, Hyderabad, Telangana, India-500032 support@ultrakeyit.com</p> <p>GST No: 36AADCU5062A1ZO</p>	<p>Invoice Number AKEYI-0125 Invoice Date 18-04-2025 Due Date 18-04-2025 TOTAL DUE ₹ 98,000.00</p> <p>Payment is due within 14 days from date of invoice. Late payment is subject to fees of 5% per month.</p> <p>Payment Methods:</p> <ol style="list-style-type: none"> 1. 60% Advance Payment 2. Remaining 40% Final Settlement 																
<p>To:</p> <p>PrepMode Education Flat No. 204, 2nd Floor, Cyber Residency, Inidra Nagar, Gachibowli, Hyderabad, Telangana, India-500032 support@ultrakeyit.com</p> <p>GST No: 36AADCU5062A1ZO</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #005a8b; color: white; padding: 5px;">HRS/QTY</th> <th style="background-color: #005a8b; color: white; padding: 5px;">SERVICE DETAILS</th> <th style="background-color: #005a8b; color: white; padding: 5px;">RATE/PRICE</th> <th style="background-color: #005a8b; color: white; padding: 5px;">SUB TOTAL</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; padding: 5px;">1</td> <td style="padding: 5px;">Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year</td> <td style="text-align: right; padding: 5px;">₹ 55,000.00</td> <td style="text-align: right; padding: 5px;">₹ 55,000.00</td> </tr> <tr> <td style="text-align: center; padding: 5px;">1</td> <td style="padding: 5px;">Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year</td> <td style="text-align: right; padding: 5px;">₹ 3,400.00</td> <td style="text-align: right; padding: 5px;">₹ 3,400.00</td> </tr> <tr> <td style="text-align: center; padding: 5px;">1</td> <td style="padding: 5px;">Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year</td> <td style="text-align: right; padding: 5px;">₹ 65,000.00</td> <td style="text-align: right; padding: 5px;">₹ 65,000.00</td> </tr> </tbody> </table> <p>Pay Invoice amount via one of the options mentioned in the below</p> <p>Option 1: Pay (or) Phonepe Number: 6300440316</p> <p>Option 2: Direct To Organization Current A/C Account Number: 50200092611852 Name: Ultrakey IT Solutions Pvt. Ltd. IFSC: HDFC0000968 Branch: GACHIBOWLI</p>	HRS/QTY	SERVICE DETAILS	RATE/PRICE	SUB TOTAL	1	Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year	₹ 55,000.00	₹ 55,000.00	1	Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year	₹ 3,400.00	₹ 3,400.00	1	Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year	₹ 65,000.00	₹ 65,000.00
HRS/QTY	SERVICE DETAILS	RATE/PRICE	SUB TOTAL														
1	Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year	₹ 55,000.00	₹ 55,000.00														
1	Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year	₹ 3,400.00	₹ 3,400.00														
1	Hosting Plan Renewal for 1 Year Hosting Plan Renewal for 1 Year	₹ 65,000.00	₹ 65,000.00														
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #005a8b; color: white; padding: 5px;">Sub Total</th> <th style="background-color: #005a8b; color: white; padding: 5px;">₹ 1,23,400.00</th> </tr> </thead> <tbody> <tr> <td style="text-align: center; padding: 5px;">Discount</td> <td style="text-align: center; padding: 5px;">₹ 23,400.00</td> </tr> <tr> <td style="text-align: center; padding: 5px;">GST (18%)</td> <td style="text-align: center; padding: 5px;">₹ 18,000.00</td> </tr> <tr> <td style="text-align: center; padding: 5px;">Paid</td> <td style="text-align: center; padding: 5px;">₹ 20,000.00</td> </tr> <tr> <td style="text-align: center; padding: 5px;">TOTAL DUE</td> <td style="text-align: center; padding: 5px;">₹ 98,000.00</td> </tr> </tbody> </table>	Sub Total	₹ 1,23,400.00	Discount	₹ 23,400.00	GST (18%)	₹ 18,000.00	Paid	₹ 20,000.00	TOTAL DUE	₹ 98,000.00						
Sub Total	₹ 1,23,400.00																
Discount	₹ 23,400.00																
GST (18%)	₹ 18,000.00																
Paid	₹ 20,000.00																
TOTAL DUE	₹ 98,000.00																
Thanks for choosing Ultrakey IT Solutions Pvt. Ltd. support@ultrakeyit.com +91 63004 40316																	