



Idea Implementation

Invoice Application for “Ultrakey IT Solutions Private Limited”



Prepared By:
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Sr. Project Manager
12th May 2025

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

The start date of the fiscal year

Year End

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

X
Item 1

Qty	Item Title	Rate (%)	Rate (₹)	Amount (₹)
1		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

Logo of your business. If no logo is added, the name of your business will be used instead.



Business Name

Address

Flat No. 204, 2nd Floor, Cyber Residency,
Indira Nagar, Gachibowli,
Hyderabad, Telangana, India-500032
support@ultrakeyit.com

Add your full address and format it anyway you like. Basic HTML is allowed.

Extra Business Info

GST No: 36AADCU5062A1ZO

Extra business info such as Business Number, phone number or email address and format it anyway you like. Basic HTML is allowed. You can add your VAT number or ABN here.

Website

3. Settings→Quotation

Quote Settings

Here you will find all the settings for Quotes.

Prefix
Prefix before each Quote number. Can be left blank if you don't need a prefix.

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

Auto Increment ☒ Yes, increment Quote numbers by one. Recommended.

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

Quotes Valid For
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 ☐ Yes, hide the Adjust field on line items. I won't need this field.

Terms & Conditions

This is a fixed price quote. If accepted, we require a 60% deposit upfront before work commences.

Terms and conditions displayed on the Quote. Can be overridden on individual Quotes.

Footer

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

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

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

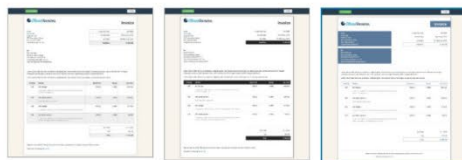
☐ Quote Viewed

☒ Quote Accepted

Template Design

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

Template



Custom CSS

body {}

Add custom CSS to your Quotes

4. Settings→Invoices

General
Business
Quotes
Invoices
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Tax
Emails
PDF
Translate
Extras
Licenses

Invoice Settings

Here you will find all the settings for Invoices.

Prefix
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
The next number to use for auto incrementing. Can use leading zeros.

Due Date
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.

 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

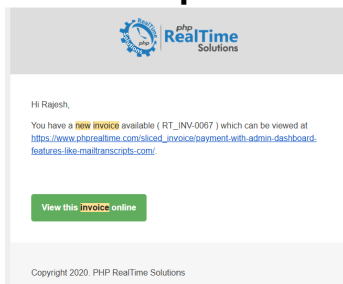




Custom CSS

body {}

Add custom CSS to your Invoices

5. Mail Example: Email Invoice / Quotation Mail Template



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

Thousand Separator

Decimal Separator

Number of Decimals

Payment Page

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

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

Tax Name

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

B I U

Hi %client_first_name%,

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

P

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

B I U

Hi %client_first_name%,

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

P

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

B I U

Thanks for your payment, %client_first_name%.

Your recent payment for %last_payment% on invoice %number% has been successful.

P

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).

Content

B I U

Hi %client_first_name%,

Just a friendly reminder that your invoice %number% for %total% %is_worth% due on %due_date%.

P

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

Wildcards For Emails

The following wildcards can be used in email subjects and email content:

- %client_first_name%: Client's first name
- %client_last_name%: Client's last name
- %client_business%: Client's business
- %client_email%: Client's email address
- %link%: URL to the quote
- %number%: The quote or invoice number
- %quote%: The quote or invoice total
- %last_payment%: The amount of the last payment. (returns "N/A" if no payments)
- %balance%: The balance outstanding on the quote or invoice
- %created%: The quote or invoice created date
- %valid_until%: The date the quote is valid until
- %due_date%: The date the invoice is due
- %today%: Today's date. Useful on Payment emails
- %order_number%: The order number of the invoice
- %is_worth%: If due date of invoice is past, displays "not" otherwise displays "is"

Footer Text

B I U

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

10. Translate

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

[Add New Invoice](#)

Add New Invoice

Enter Invoice title

Description

- + Add Media+ Add Form+ Add Contact FormVisualCode

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P

Line Items

- X 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 itemAdd Another ItemRemove Item

Invoice Totals

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

Payments

- X Payment 1

Date	Amount (₹)	Payment Method	Payment ID	Status
		Generic ▾		▾

MemoAdd Remove Payment
- X Payment 2

Date	Amount (₹)	Payment Method	Payment ID	Status
		▾		▾

MemoAdd Remove Payment
- Add Another Payment

Terms & Conditions

- VisualCode
- 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

Screen OptionsHelpPublish

Invoice Details

- ClientEdit ClientAdd New ClientChoose clientStatusDraftInvoice NumberAKEEY- 0126Order NumberCreated Date02/11/2024Due Date02/11/2024Payment SettingsCurrencyDefault CurrencyCurrency Symbol₹Payment MethodsGenericTax SettingsPrices entered with taxNo. I will enter prices exclusiTax Rate (%)18

Thank you for using Bank.Math!

<div> <div>All (106) Published (106) Cancelled (13) Draft (0) Overdue (35) Paid (56) Unpaid (2) Pillar Content (0) Cornerstone content (0)</div> <div> <input type="text"/> <input type="button" value="Search invoices"/> </div> </div>									
<div> <div>Bulk actions ▼</div> <div> <input type="button" value="Apply"/> <div> All dates ▼ Choose client ▼ View all statuses ▼ All SEO Scores ▼ All Readability Scores ▼ Rank Math ▼ Filter <input type="button" value="Export as CSV"/> </div> </div> <div>106 items < > 1 of 3 < ></div> </div>									
<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	<div>📅 02/11/2024</div> <div>Due: 02/11/2024</div>	Total: ₹4,366.00	<div>📄 📧</div> <div>Sent 1 month ago</div>	Published 2025/04/11 at 4:46 pm	<div>📊</div>
<input type="checkbox"/>	Employee Transfer from Ultrakey to Sainbiz One Time Service Fee	AKEYI-0124	Sainbiz Solutions Pvt. Ltd. sainbiz.vaka@sainbiz.com	Paid	<div>📅 02/11/2024</div> <div>Due: 02/11/2024</div>	Total: ₹25,000.00	<div>📄 📧</div>	Published 2025/04/10 at 5:30 am	<div>📊</div>

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

All (33) Published (33) Accepted (0) Cancelled (1) Declined (0) Draft (0) Expired (27) Sent (5) Pillar Content (0) Cornerstone content (0)									
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									
<input type="checkbox"/>	Title	Number	Client	Statuses	Created	Total	Actions		Date
<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 Sent 1 year ago		2024/03/18 at 5:32 pm
<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 Sent 2 years ago		2024/02/25 at 6:20 pm
<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 Sent 2 years ago		2024/02/25 at 8:20 pm

15. Add New Quote

Enter Quote title

Description

Add Media

Add Form

Add Contact Form

Visual Code

B

I

U

ABC

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

Remove Item

Add Another Item

Quote Totals

Sub Total

GST (18%)

Discount

Total Due

₹0.00

₹0.00

-₹0.00

₹0.00

Terms & Conditions

Discussion

☒ Allow comments

☐ Allow trackbacks and pinobacks

Publish

Publish

Quote Details

Client

Edit Client

Add New 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

**INVOICE****From:**

Ultrakey IT Solutions Private Limited
Flat No. 204, 2nd Floor, Cyber Residency,
Indira Nagar, Gachibowli,
Hyderabad, Telangana, India-500032
support@ultrakeyit.com
GST No: 36AADCU5062A1ZO

Invoice Number AKEYI-0124

Invoice Date 02/11/2024

Due Date 02/11/2024

TOTAL DUE ₹0.00**To:**

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

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



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: 36AADCU5062A1ZO

To:
 PrepMode Education
 Flat No. 204, 2nd Floor, Cyber Residency,
 Inidra Nagar, Gachibowli,
 Hyderabad, Telangana, India-500032
 support@ultrakeyit.com
 GST No: 36AADCU5062A1ZO

INVOICE

Invoice Number AKEYI-0125
Invoice Date 18-04-2025
Due Date 18-04-2025
TOTAL DUE ₹ 98,000.00

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

Payment Methods:
 1. 60% Advance Payment
 2. Remaining 40% Final Settlement

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

Pay Invoice amount via one of the options mentioned in the below
Option 1: Gpay (or) Phonepe Number: 6300440316
Option 2: Direct To Organization Current A/C
 Account Number: 50200092611852
 Name: Ultrakey IT Solutions Pvt. Ltd.
 IFSC: HDFC0000968
 Branch: GACHIBOWLI

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