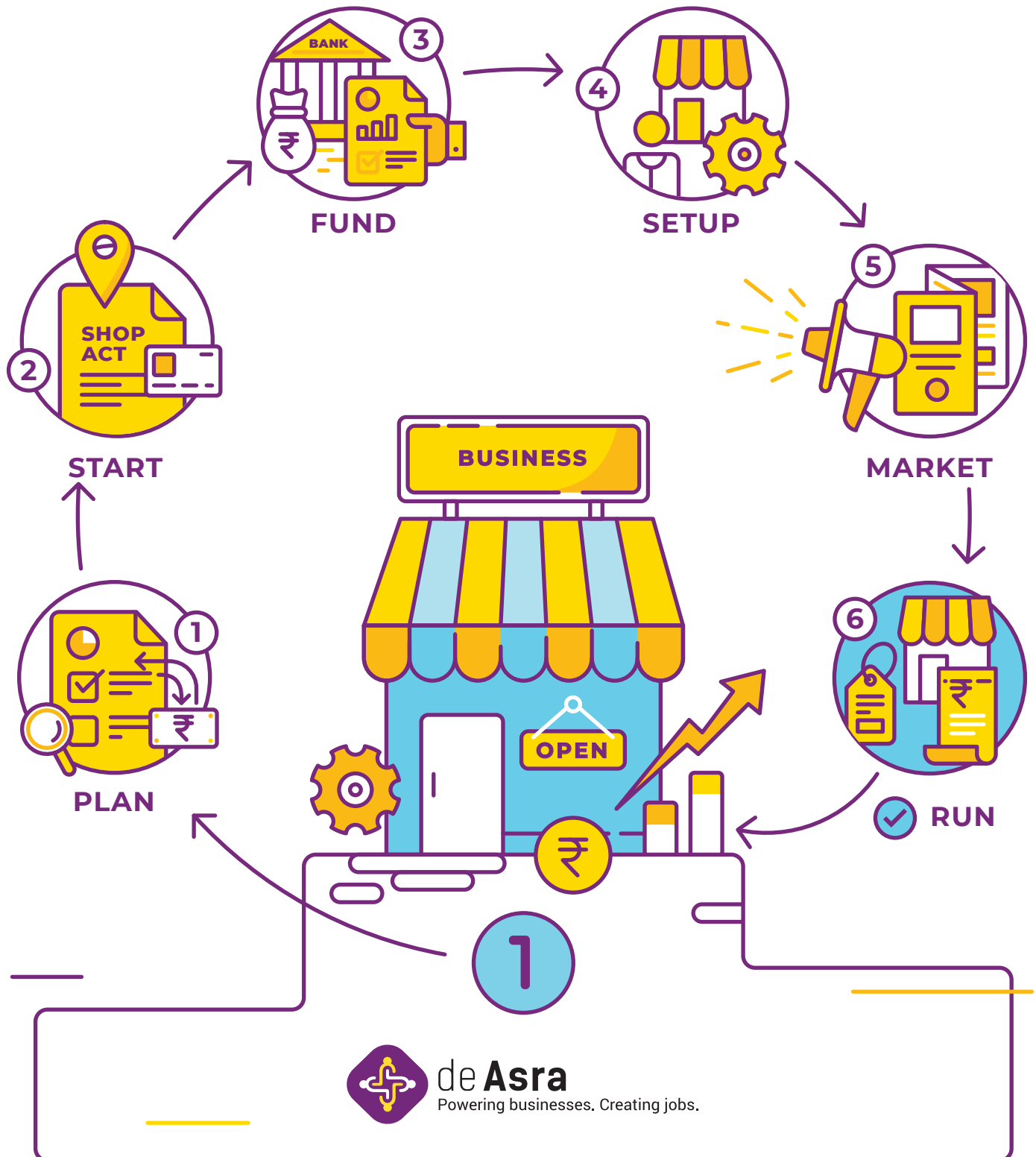


INVOICE & RECEIPT MANAGEMENT CHECKLIST





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Invoice and Receipt Management

1. Introduction

deAzzle Web is a one-stop solution for small businesses to organize themselves and grow, as it helps automate key business processes. One of the crucial aspects of any business is to create invoices, send those to the customers, receive the payments and share receipts with those from whom the payment is received.

Generally, small business owners keep receipt books and invoice books to create invoices manually. However, if the transactions are going to happen online, then it would be necessary to create the receipts and invoices immediately at the time of the transaction and share those automatically. deAzzle Web service caters to this requirement.

2. How deAzzle helps Businesses

- It creates invoices online and sends them through email
- It shares payment link for those invoices
- It receives the payment for the invoices
- It provides for auto-receipt, which is sent by email for customers to have a proof of payment made
- It shows if the invoice is not paid, as unpaid.

3. How to setup your business with deAzzle web

- Go to <https://smartbiz.deazle.in/sign-in>
- Click on 'New Registration'
- Fill up the 'Seller Registration' form with 'Name' and 'Mobile Number'
- Your account is thus created
- Now 'Login' to the panel with mobile number and OTP which is sent on the same mobile no.
- Complete the KYC process
- Create an invoice
- Track and update invoices
- Auto-receipt is sent to the customer after payment is made for the invoice sent

4. List Of Documents For KYC (Only If Online Payment Is A Requirement)

Once you register your business on deAzzle Smartbiz, set up a payment method, for which you will need to get your KYC done. The payment merchant and the documents are listed below:



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Payment Merchant: Instamojo

You need to upload the following documents in order to have your KYC done on Instamojo

- Scanned copy of Shop Act/Udyog Aadhar/Company Registration Certificate
- Scanned copy of current account cheque book's front-page details
- Scanned copy of business PAN Card/ Proprietor PAN Card

5. Packages And Pricing

- Free for one year.
- Payment gateway charges per transaction.

6. Turn Around Time (TAT)

Following is the TAT for all deliverables under this service:

- deAzzle Smartbiz Registration: 5 to 7 mins
- Instamojo KYC: 2 to 3 days

7. Deliverables

You will get the following deliverables:

- deAzzle business account with Instamojo integration for online payment collection if online payment facility is required
- Invoice per sale transaction
- Receipt per receipt of payment



Good Luck For Your Business.



deAsra Foundation

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