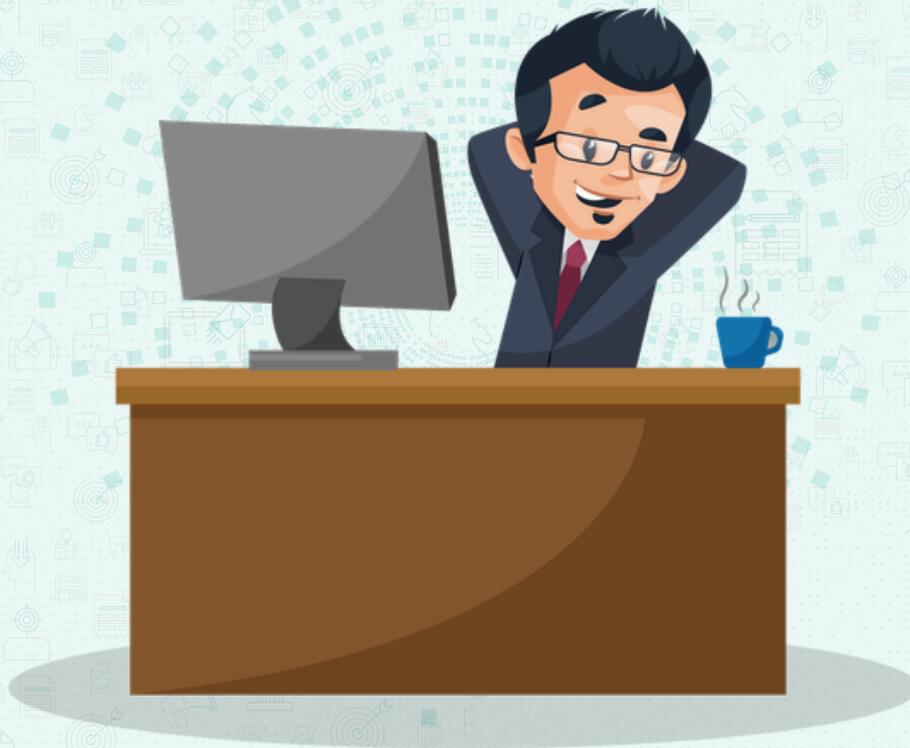




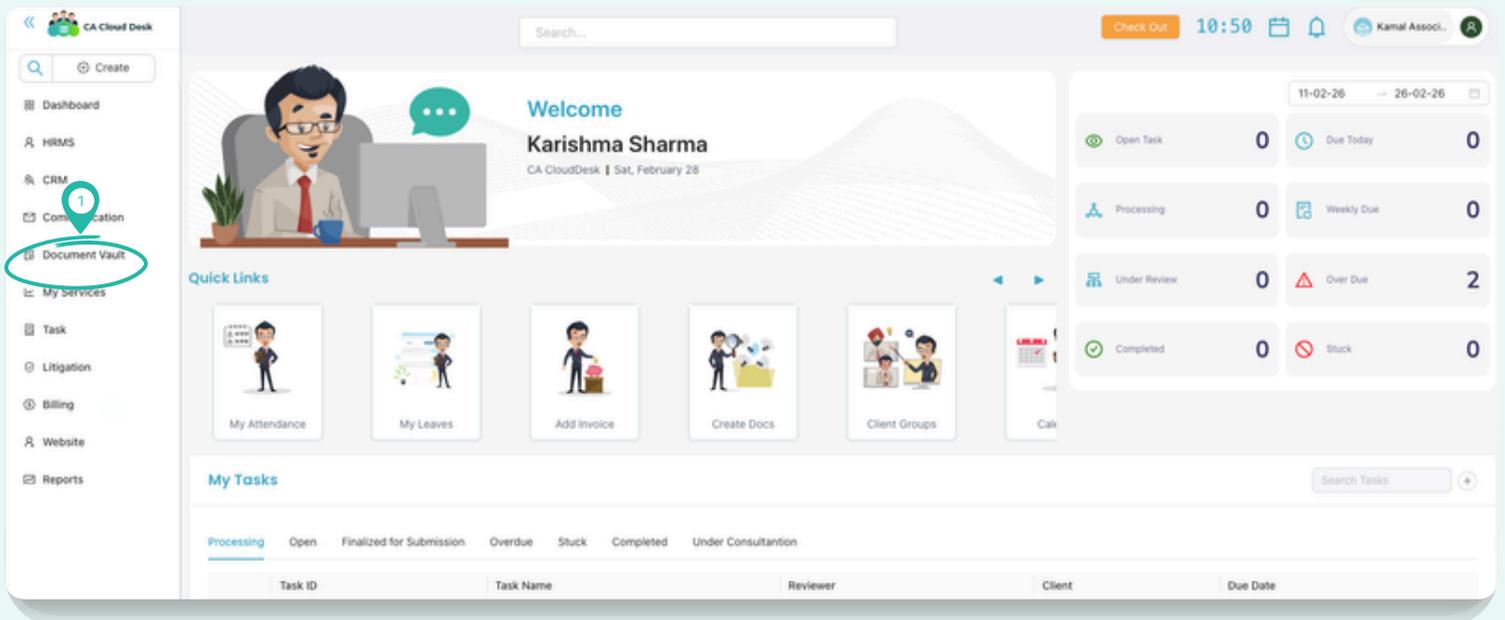
UDIN Repository

CA CloudDesk



Step 1: Login and open UDIN Repository

1. Login to your CA Cloud Desk account.
2. From the left panel on the dashboard, click **Document Vault**.
3. On the Document Vault screen, click the **UDIN Repository** card.



CA Cloud Desk

Search...

Check Out 10:50

Kamal Associ...

Welcome
Karishma Sharma
CA CloudDesk | Sat, February 28

Quick Links

- My Attendance
- My Leaves
- Add Invoice
- Create Docs
- Client Groups
- Cal

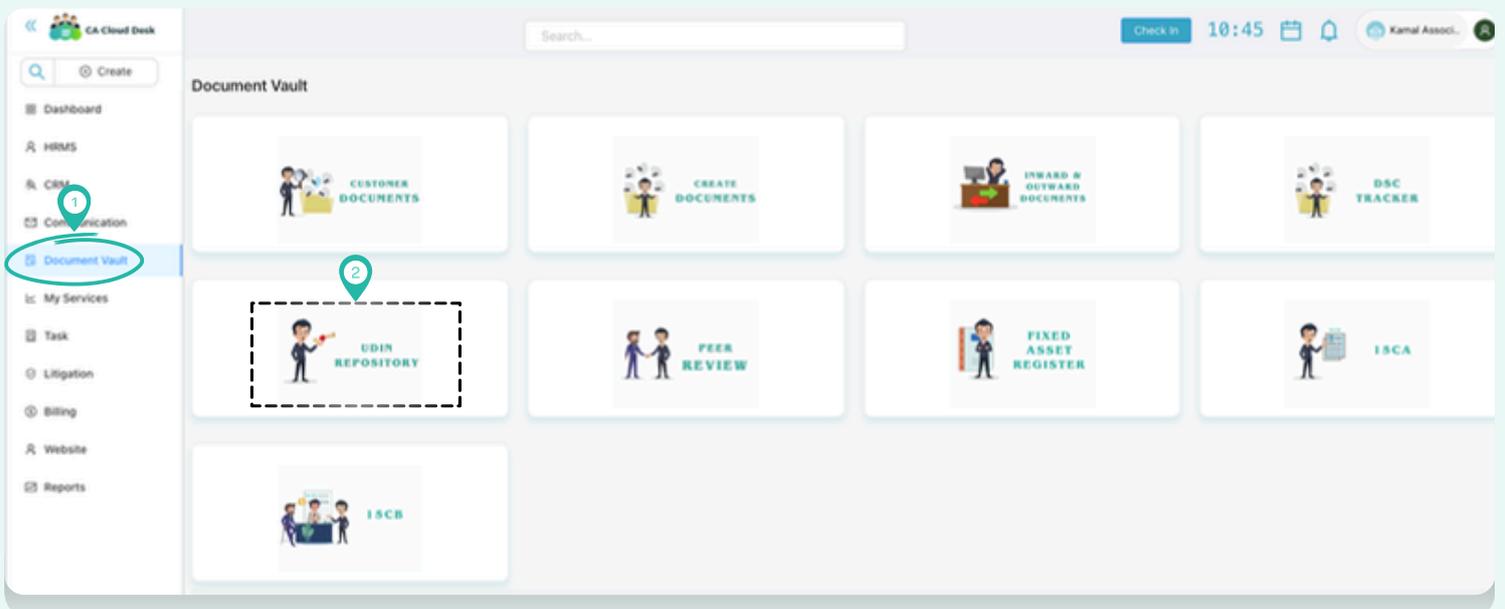
My Tasks

Processing Open Finalized for Submission Overdue Stuck Completed Under Consultation

Task ID	Task Name	Reviewer	Client	Due Date
---------	-----------	----------	--------	----------

Task Status Summary:

Status	Count
Open Task	0
Processing	0
Under Review	0
Completed	0
Due Today	0
Weekly Due	0
Over Due	2
Stuck	0



CA Cloud Desk

Search...

Check in 10:45

Kamal Associ...

Document Vault

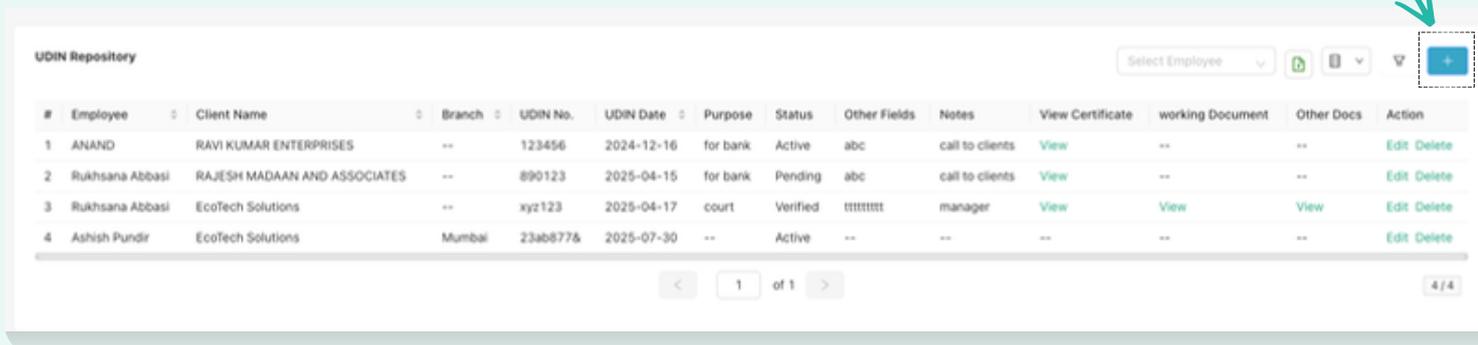
- CUSTOMER DOCUMENTS
- CREATE DOCUMENTS
- INWARD & OUTWARD DOCUMENTS
- BSC TRACKER
- UDIN REPOSITORY
- PEER REVIEW
- FIXED ASSET REGISTER
- ISCA
- ISCB



Step 2: Understand the UDIN Repository screen.

- When the UDIN Repository opens you will see a table listing all UDINs already recorded.
- Each row shows the employee, client name, branch, UDIN number, UDIN date, purpose, status, notes and links to the attached documents.
- click on + icon to Add UDIN

Add UDIN



The screenshot shows the 'UDIN Repository' interface. At the top right, there is a 'Select Employee' dropdown, a search icon, and a '+ Add UDIN' button. Below this is a table with the following data:

#	Employee	Client Name	Branch	UDIN No.	UDIN Date	Purpose	Status	Other Fields	Notes	View Certificate	working Document	Other Docs	Action
1	ANAND	RAVI KUMAR ENTERPRISES	--	123456	2024-12-16	for bank	Active	abc	call to clients	View	--	--	Edit Delete
2	Rukhsana Abbasi	RAJESH MADAAN AND ASSOCIATES	--	890123	2025-04-15	for bank	Pending	abc	call to clients	View	--	--	Edit Delete
3	Rukhsana Abbasi	EcoTech Solutions	--	xyz123	2025-04-17	court	Verified	tttttttt	manager	View	View	View	Edit Delete
4	Ashish Pundir	EcoTech Solutions	Mumbai	23ab877&	2025-07-30	--	Active	--	--	--	--	--	Edit Delete

At the bottom of the table, there is a pagination control showing '1 of 1' and a '4/4' indicator.

Step 3: Add New UDIN.

Fill all details

- **Branch** – Select the branch from which this UDIN is issued (for example, Mumbai).
- **Client** – Choose the client for whom the certificate / report is issued.
- **Employees** – Select the employee responsible for this UDIN (for example, the signing partner or team member).
- **UDIN No.** – Enter the UDIN exactly as generated on the ICAI portal.
- **UDIN Date** – Enter the UDIN date. For example, 05/03/2026.
- **Purpose** – Mention the purpose such as "For bank", "For income tax", "For audit report", etc.
- **Status** – Set the status (for example, Active, Pending, etc. as configured in your firm).
- **Other Field** – Any extra internal information you want to capture (for example, reference number or department).
- **Note** – Write any short note like "Call to client", "For court submission", "Manager approval pending", etc.
- **Upload Certificate** – Attach the signed certificate or report for which UDIN is generated.
- **Working Document** – Upload any working paper, computation or backup working related to this UDIN.
- **Other Documents** – Attach any other supporting documents or correspondence if needed.
- After filling all the mandatory fields, click **Save** to add the UDIN to the repository.

Add UDIN ✕

Branch *
Mumbai

Employees *
Karishma Sharma

UDIN Date *
06/03/2026

Status
Active

Note
Notes

Upload Certificate
Click to Upload

Client *
Client

UDIN No. *
UDIN No

Purpose
Purpose

Other Field
Other Field

Working Document
Click to Upload

Other Documents
Click to Upload

[Save](#)

Step 4: After saving the UDIN

- Once you click Save, CA Cloud Desk confirms that the UDIN is created and adds it to the list.
- See the UDIN in the table along with other entries.
- Use Edit if you need to update any detail later.
- Open View Certificate, Working Document or Other Docs to check the attached files.

Search... ● UDIN Created Successfully. Check In 17:20 Kamal Associ...

UDIN Repository Select Employee

#	Employee	Client Name	Branch	UDIN No.	UDIN Date	Purpose	Status	Other Fields	Notes	View Certificate	working Document	Other Docs	Action
1	ANAND	RAVI KUMAR ENTERPRISES	--	123456	2024-12-16	for bank	Active	abc	call to clients	View	--	--	Edit Delete
2	Rukhsana Abbasi	RAJESH MADAAN AND ASSOCIATES	--	890123	2025-04-15	for bank	Pending	abc	call to clients	View	--	--	Edit Delete