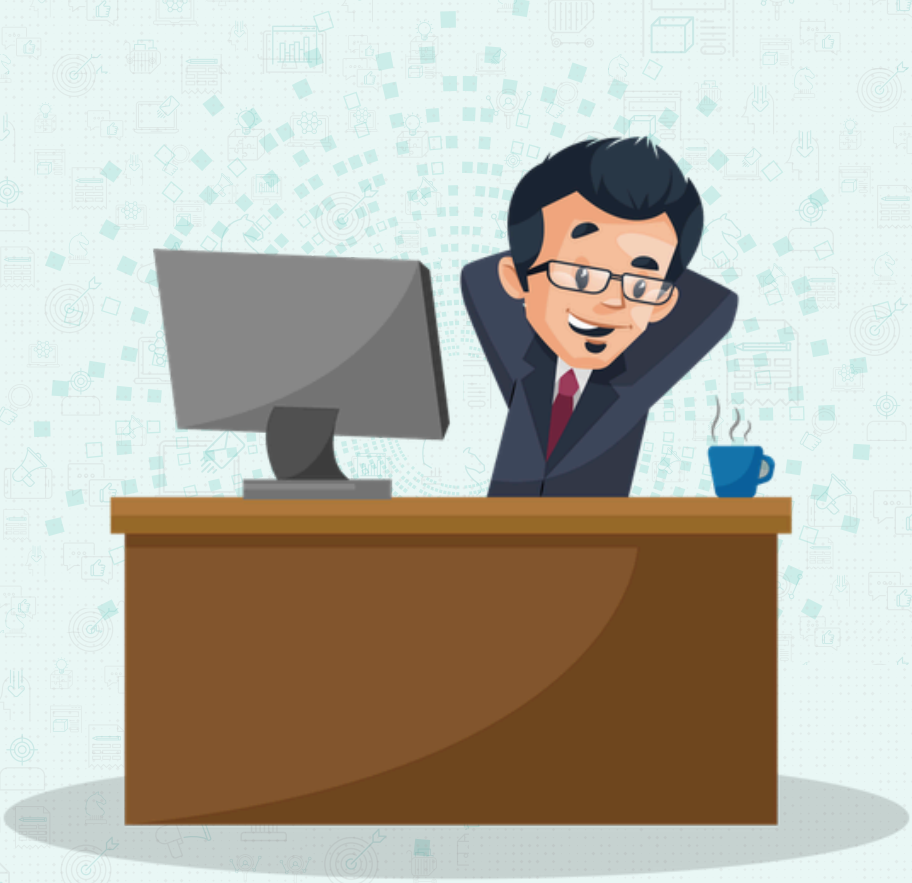
CA CloudDesk®

UDIN Repository

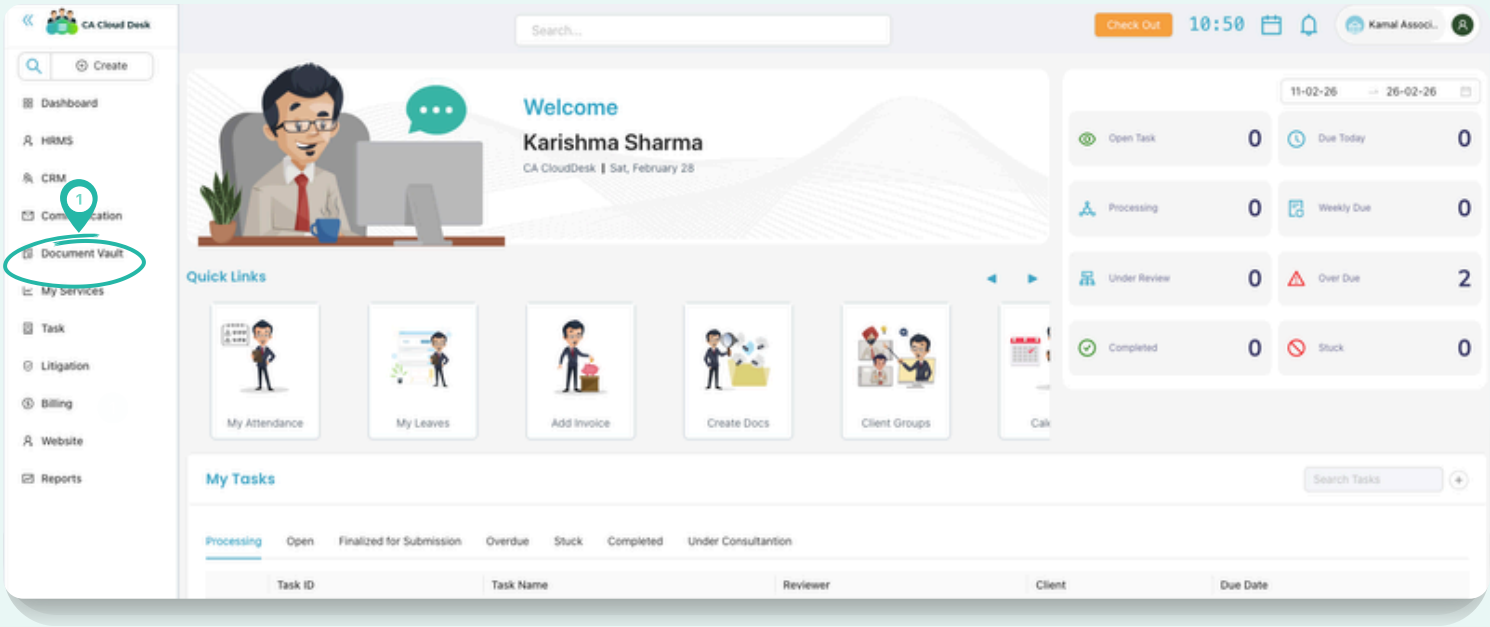
CA CloudDesk

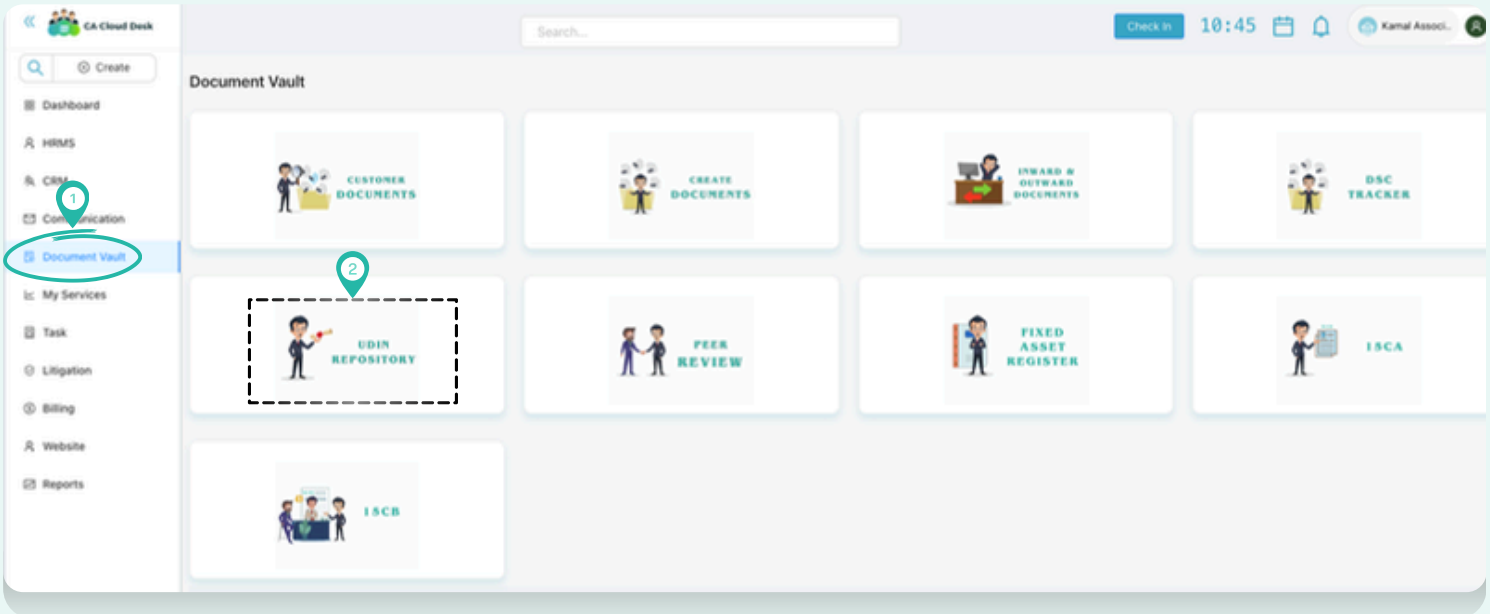


CA CloudDesk

Step 1:Login and open UDIN Repository

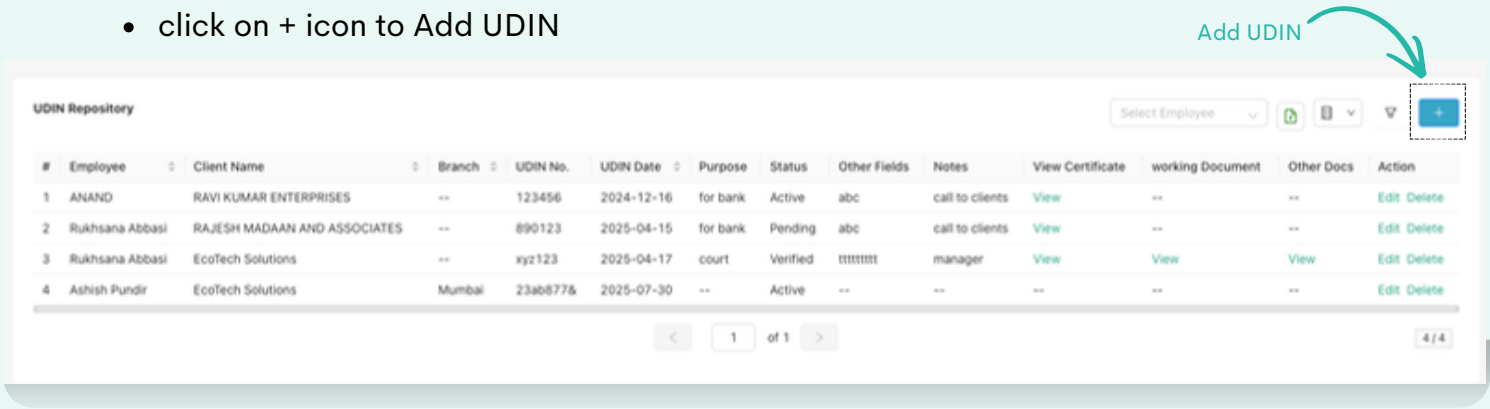
1. Login to your CA Cloud Desk account.
2. From the left panel on the dashboard, click **Document Vault.**
3. On the Document Vault screen, click the **UDIN Repository card.**





Step 2: Understand the UDIN Repository screen.

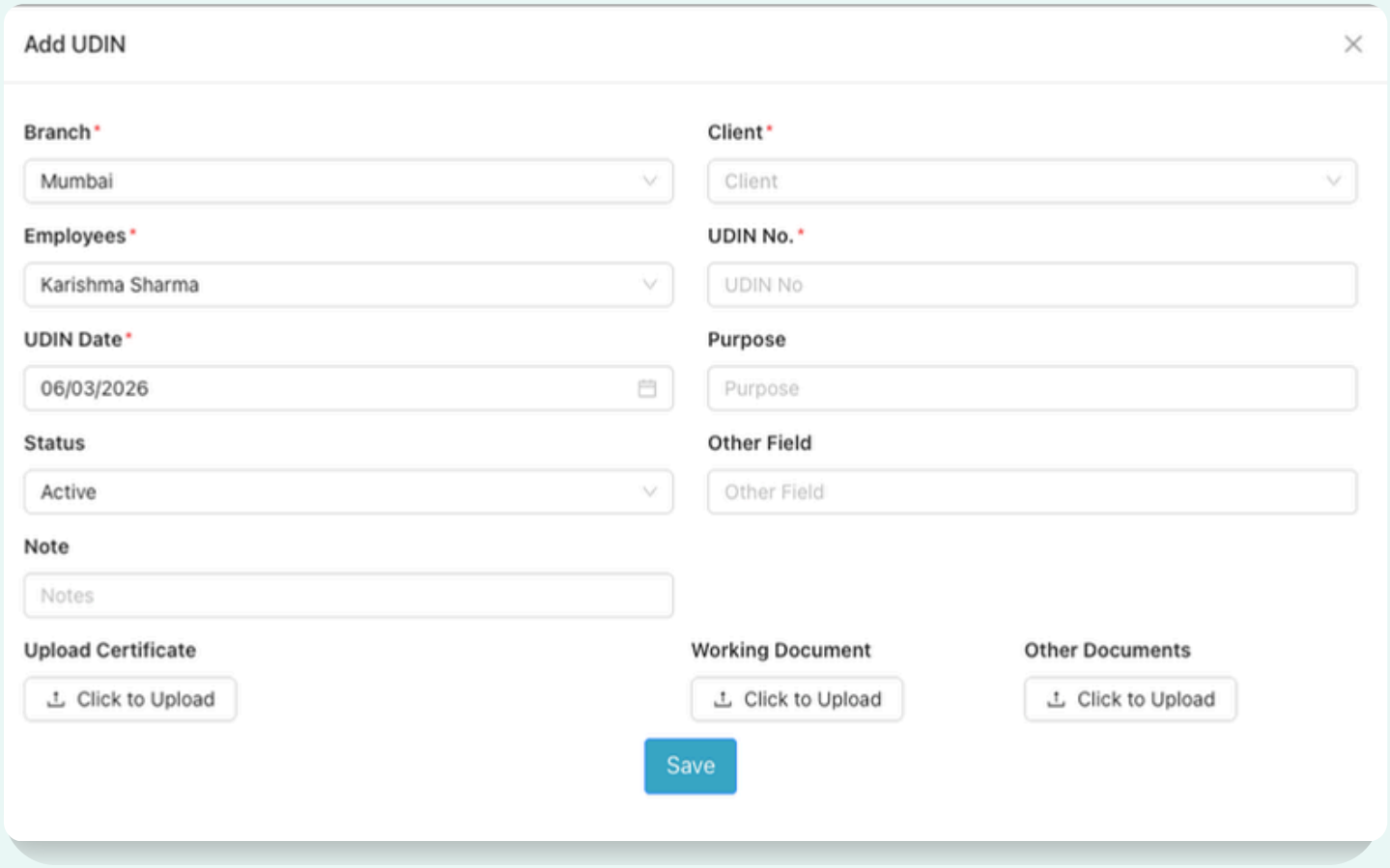
- When the UDIN Repository opens you will see a table listing all UDINs already recorded.
- Each row shows the employee, client name, branch, UDIN number, UDIN date, purpose, status, notes and links to the attached documents.
- click on + icon to Add UDIN

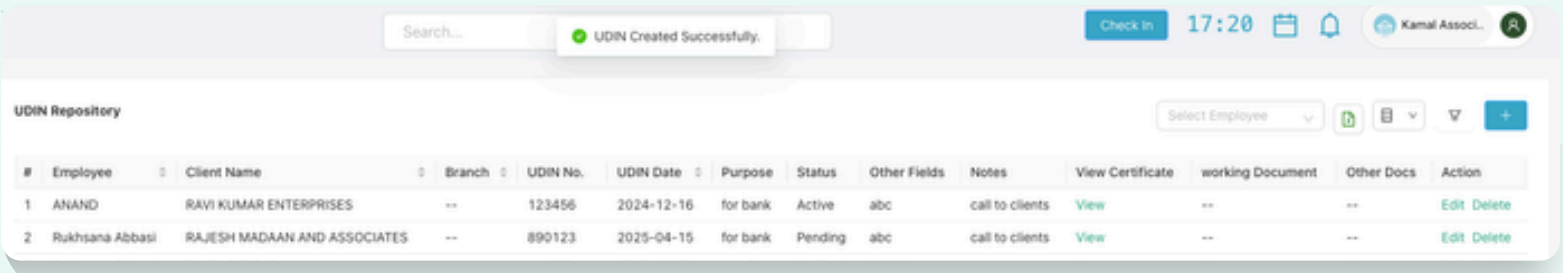


Step 3: Add New UDIN.

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.



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.