



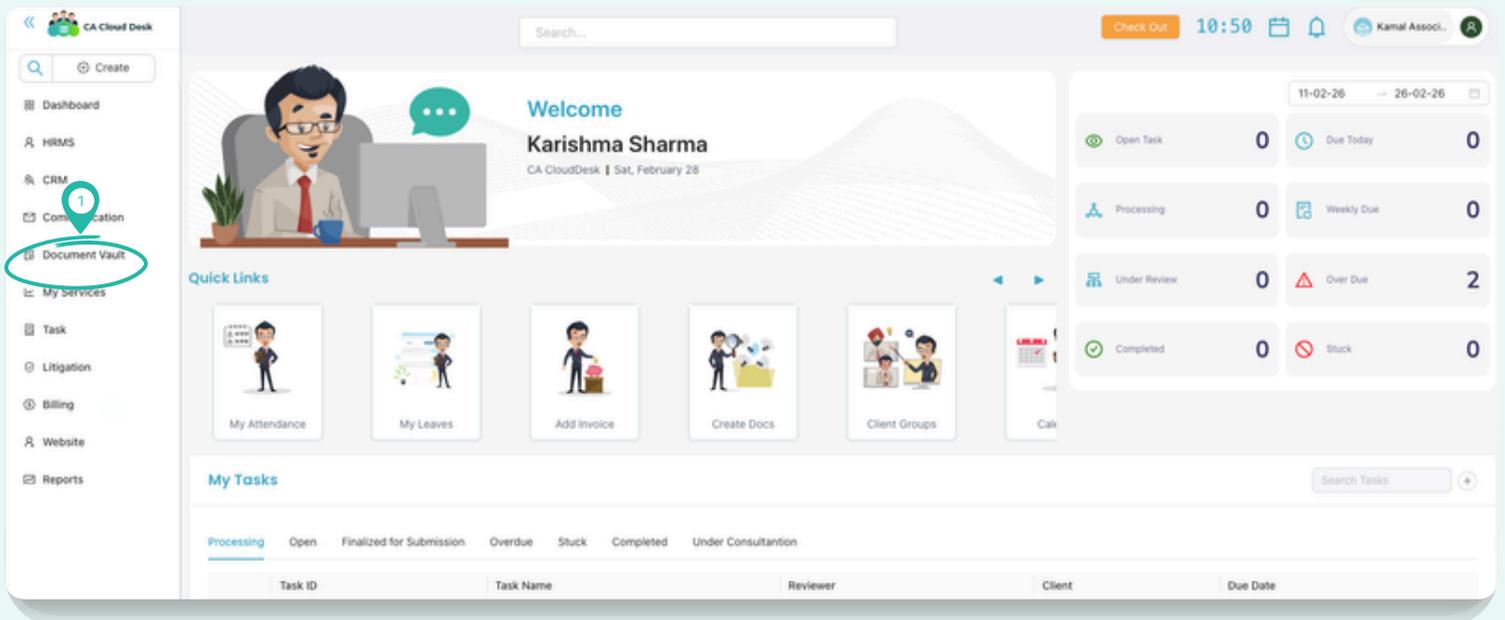
DSC Tracker

CA CloudDesk



Step 1: Login and open DSC Tracker.

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 **DSC Tracker** option.



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

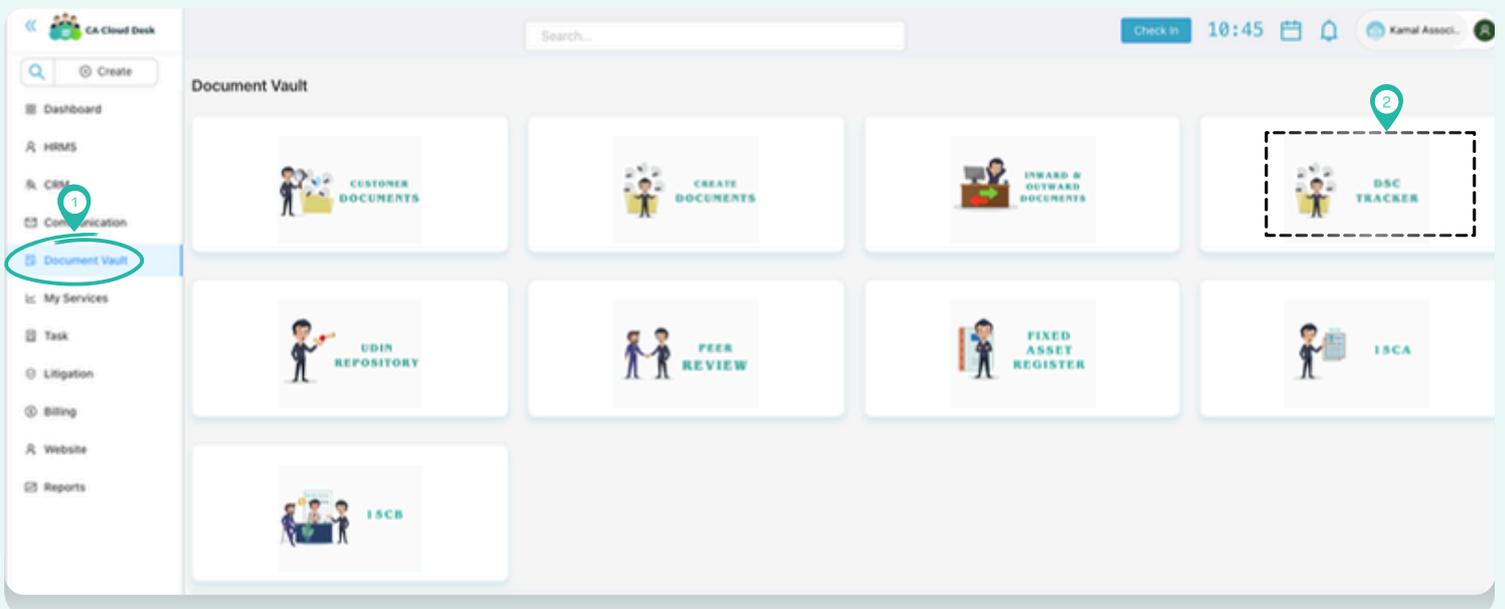
My Tasks

Processing Open Finalized for Submission Overdue Stuck Completed Under Consultation

Task ID	Task Name	Reviewer	Client	Due Date
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Task Status Summary:

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



CA Cloud Desk

Search...

Check in 10:45

Kamal Associ...

Document Vault

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



Step 2: Understand the DSC Tracker Dashboard.

- On the DSC Tracker screen you will see a chart and a list of all DSCs matching your filters.

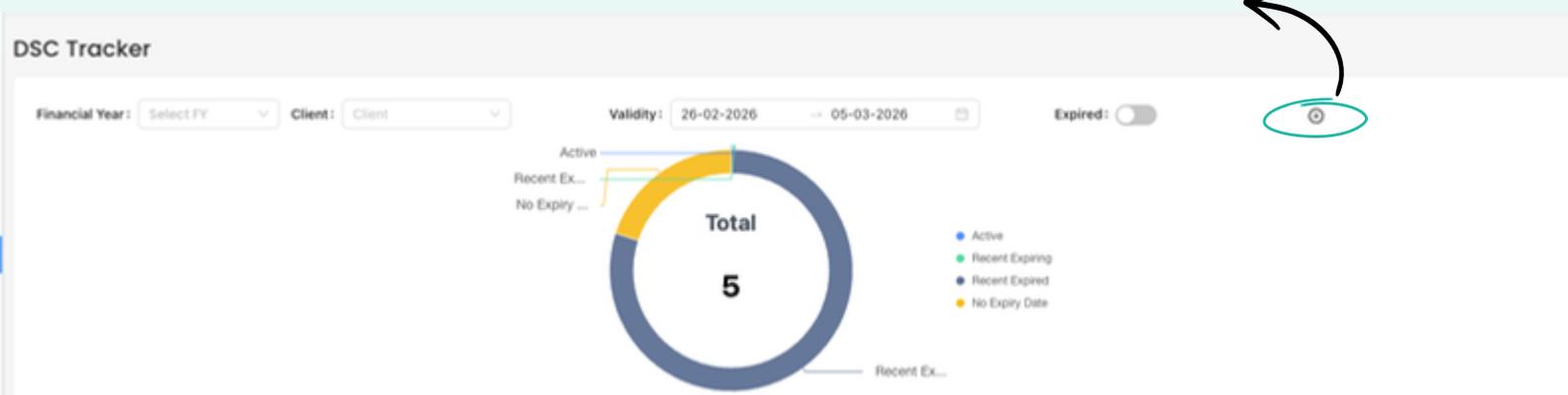
Use the filters at the top:

- **Financial Year** – limit DSCs to a particular FY (optional).
- **Client** – view DSCs for a specific client or keep it blank to see all.
- **Validity** – choose a From and To date to see DSCs valid in that range.
- **Expired toggle** – keep this Off to see active and upcoming expiries only. Turn it On to see expired DSCs (explained below).

Read the chart:

- **Active** – DSCs currently valid.
- **Recent Expiring** – DSCs whose validity is ending soon (near your selected date range).
- **Recent Expired** – DSCs that have just expired.
- **No Expiry Date** – DSCs where no expiry date has been recorded.
- The grid below the chart shows full details for each DSC: client name, DSC holder, signing partner, validity, custodian, receiver, branch, and remarks. You can also use the Excel button to export the current list.

Add DSC



Step 3: Add a New DSC

On the DSC Tracker screen, click the Plus icon (Add DSC) on the top-right.

Fill the details carefully:

- **Client** – Select the client for whom the DSC is issued.
- **PAN No.** – Enter the PAN number of the DSC holder.
- **Name of DSC Holder** – Person or entity whose name is printed on the DSC token.
- **Email and Mobile** – Contact details linked with the DSC.
- **Valid From and Valid To** – Start and end dates of the DSC validity.
- **Service** – Select the service or purpose for which the DSC is used.
- **DSC Type** – Choose the DSC class/type (for example, Class 3, Token, etc.).
- **Password** – Store the DSC token password (as per your firm's policy).
- **DIN No.** – Director Identification Number, if applicable.
- **Physical Location** – Where the DSC token is kept (for example, "Head Office locker" or "Branch – Delhi").
- **Category** – Internal category you want to group this DSC under.
- **DSC Number** – Unique DSC / token number printed on the device or certificate.
- **Is handed over to client** – Turn this on if the token is handed over to the client.
- **Handed Over By and Handed Over On** – Who gave the token and on which date.
- **Received By and Received On** – Who received the token and when (for return / internal handover).
- **Branch** – Select the branch responsible for this DSC.
- **Signing Person** – Partner / authorized signatory who signs using this DSC.
- **Any additional documents** – Attach any supporting files (for example, approval letter or KYC documents).
- **Notes** – Add remarks such as "Use only for GST filings" or "Renew before month-end".
- After filling all mandatory fields, click Save. The new DSC entry will appear in the list and in the chart counts.

Add Dsc



Client * <input type="text" value="Client"/>	DSC Type * <input type="text" value="DSC Type"/>
Pan No. <input type="text" value="Pan No"/>	Password <input type="text" value="Password"/>
Name of DSC Holder <input type="text" value="Name Of DSC Holder"/>	DIN No. <input type="text" value="DIN No."/>
Email * <input type="text" value="Email"/>	Mobile * <input type="text" value="Mobile No."/>
Valid From <input type="text" value="Valid From"/>	Valid To <input type="text" value="Valid To"/>
Service <input type="text" value="Service"/>	<input type="checkbox"/> Is handed over to client
Handed Over By <input type="text" value="Handed Over By"/>	Handed Over On <input type="text" value="Handed Over On"/>
Received By * <input type="text" value="Received By"/>	Received On <input type="text" value="Received On"/>
Physical Location <input type="text" value="Physical Location"/>	Branch <input type="text" value="Branch"/>
Category <input type="text" value="Category"/>	Signing Person <input type="text" value="Signing Person"/>
DSC Number <input type="text" value="DSC Number"/>	
Any additional documents <input type="text" value="+ Add Document"/>	
Notes <input type="text" value="Notes"/>	

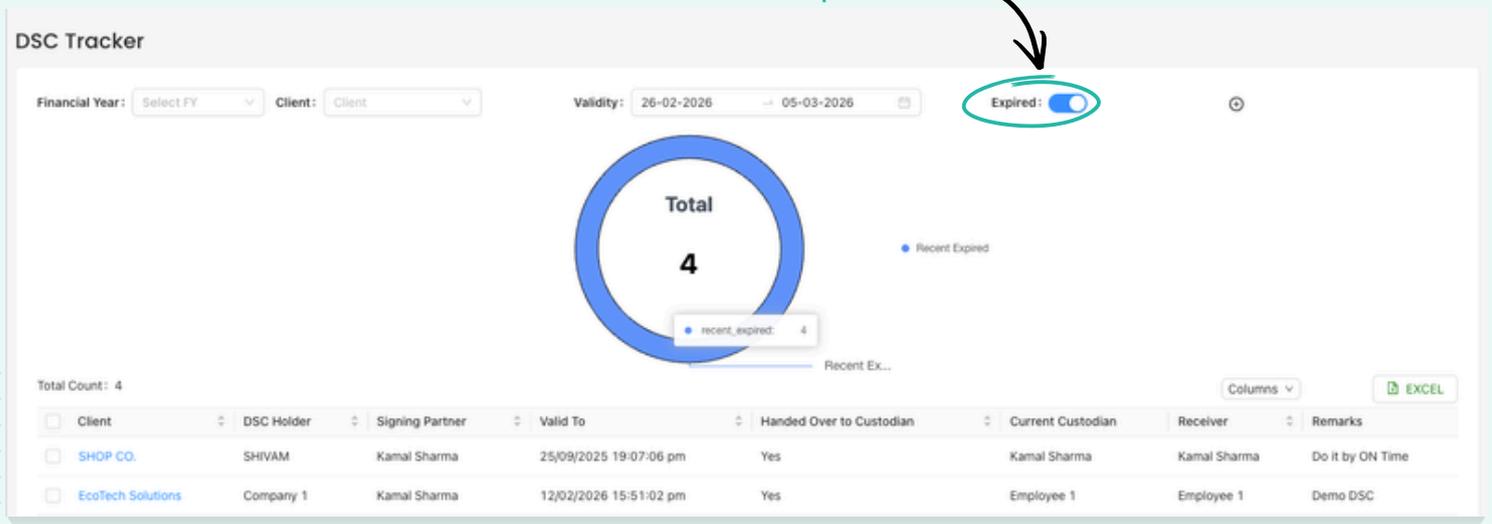
Cancel

Save

Step 4: Track Expiring and Expired DSCs.

1. Once DSCs are recorded, you can easily check which ones are about to expire or already expired.
2. Use the Validity date range to focus on DSCs near a particular period. The donut chart will highlight Recent Expiring and Recent Expired segments.
3. To see only expired DSCs, enable the Expired toggle on the top-right. The chart and list will refresh to show DSCs whose Valid To date has already passed.
4. Use the Excel button to download the expired DSC list and share it with your team for renewal planning.

Enable Expired Button



The screenshot shows the 'DSC Tracker' interface. At the top, there are filters for 'Financial Year' (Select FY), 'Client' (Client), and 'Validity' (26-02-2026 to 05-03-2026). The 'Expired' toggle is highlighted with a red circle and an arrow pointing to it from the text 'Enable Expired Button'. Below the filters is a donut chart showing 'Total 4' and 'Recent Expired' segments. A tooltip for 'recent_expired: 4' is visible. At the bottom, there is a table with columns: Client, DSC Holder, Signing Partner, Valid To, Handed Over to Custodian, Current Custodian, Receiver, and Remarks. An 'EXCEL' button is also present.

Client	DSC Holder	Signing Partner	Valid To	Handed Over to Custodian	Current Custodian	Receiver	Remarks
SHOP CO.	SHIVAM	Kamal Sharma	25/09/2025 19:07:06 pm	Yes	Kamal Sharma	Kamal Sharma	Do it by ON Time
EcoTech Solutions	Company 1	Kamal Sharma	12/02/2026 15:51:02 pm	Yes	Employee 1	Employee 1	Demo DSC