



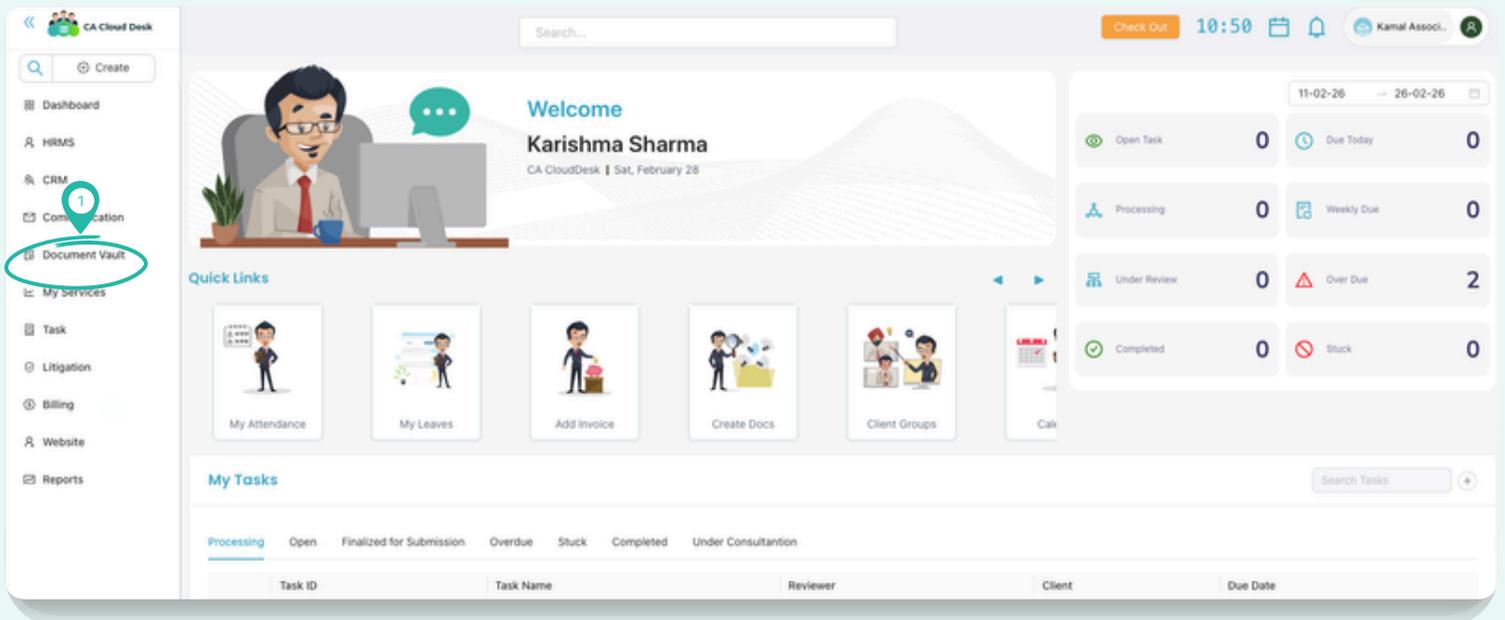
# Create Documents

# CA CloudDesk



## Login and open Create Document.

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 **Create Document** option.



CA Cloud Desk

Search...

Check Out 10:50

Kamal Associ...

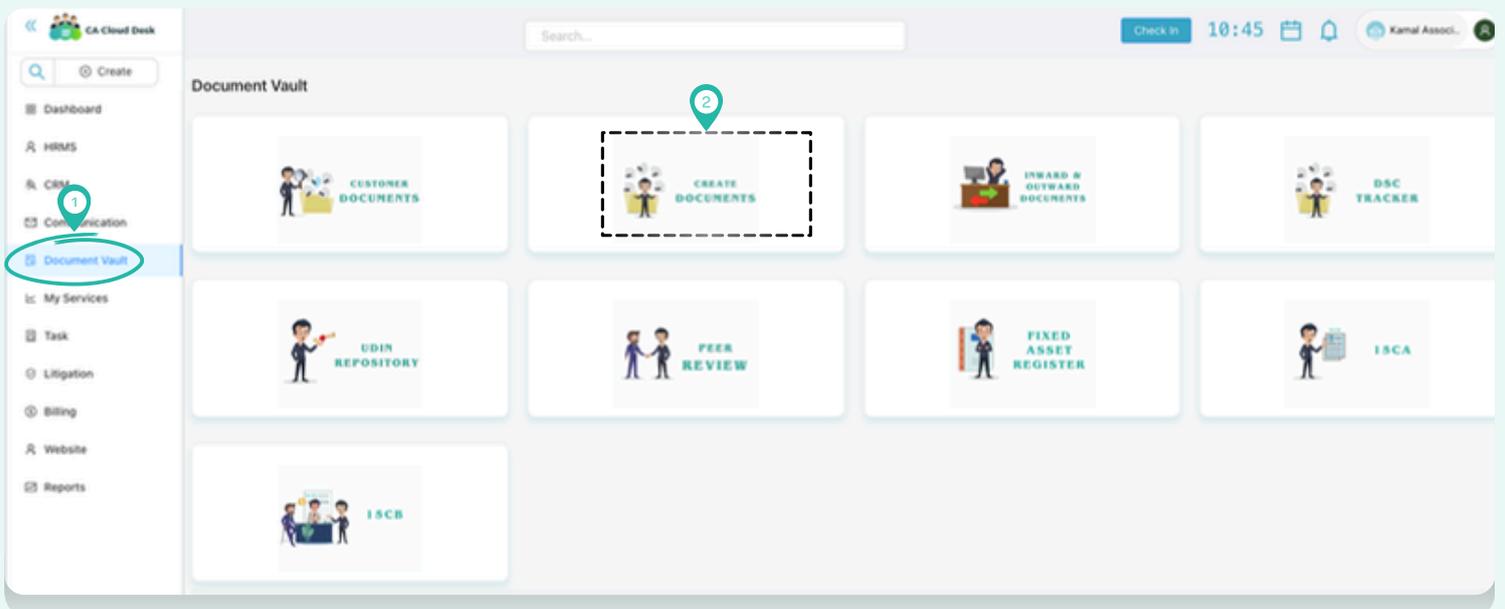
Welcome  
Karishma Sharma  
CA CloudDesk | Sat, February 28

Quick Links

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

My Tasks

Task ID	Task Name	Reviewer	Client	Due Date



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



## Create a Document (Template Based)

On the Create document tab you select a template and fill the basic information.

1. Fill the basic information:

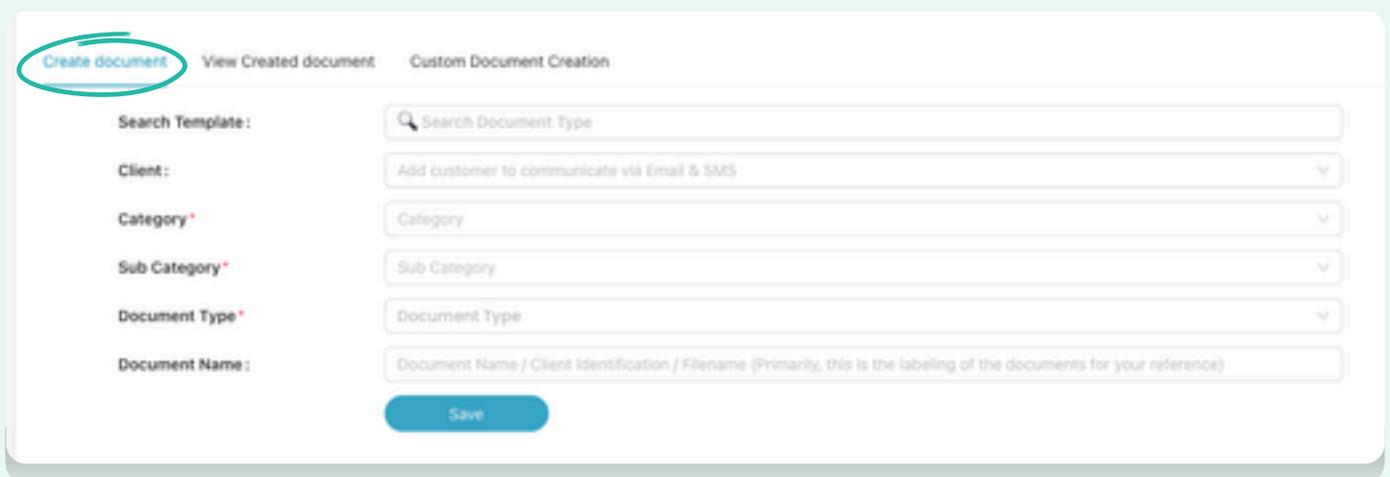
- **Customer (optional)** – Select the client if this document is for a specific customer. This allows you to share or send it to them later.
- **Category** – Choose the main category (for example, Agreement & Resolution, Application, etc.).
- **Sub Category** – Select the related sub-category (for example, Registration, CA Certificates, etc.).
- **Document Type** – Pick the exact format you want to generate (for example, SH-1 Share Certificate, NOC – Company).
- **Document Name (optional)** – Give a label to easily identify this document later (e.g. "NOC – Company\_987881").

2. Fill the variable fields:

3. Once you choose the Document Type, CA Cloud Desk automatically shows all the required fields for that template (for example Owner Name, Company Name, Directors, Address, Date, etc.). Fill all mandatory details carefully.

4. Save and generate the document:

5. Click Save. Wait for 10–15 seconds – the system will auto-generate the final document based on your inputs.



The screenshot shows the 'Create document' form in the CA CloudDesk interface. The 'Create document' tab is selected and circled in red. The form includes the following fields:

- Search Template:** A search bar with the placeholder text 'Search Document Type'.
- Client:** A dropdown menu with the placeholder text 'Add customer to communicate via Email & SMS'.
- Category\*:** A dropdown menu with the placeholder text 'Category'.
- Sub Category\*:** A dropdown menu with the placeholder text 'Sub Category'.
- Document Type\*:** A dropdown menu with the placeholder text 'Document Type'.
- Document Name:** A text input field with the placeholder text 'Document Name / Client Identification / Filename (Primarily, this is the labeling of the documents for your reference)'.

A blue 'Save' button is located at the bottom of the form.

Search Template :	NOC - Company
Client :	RAVI KUMAR ENTERPRISES
Category *	GST
Sub Category *	Registration
Document Type *	NOC - Company
Document Name :	Document Name / Client Identification / Filename (Primarily, this is the labeling of the documents for your reference)
Owner Name :	Owner Name
Owner's Father Name :	Owner's Father Name
Owner Residence Address :	Owner Residence Address
Business premises address with PIN Code :	Business premises address with PIN Code
Firm/Company Name :	Firm/Company Name
Director no -1 :	Director no -1
Director no -2 :	Director no -2
Director no -3 :	Director no -3
Director no -4 :	Director no -4
Place :	Place
Date :	Date

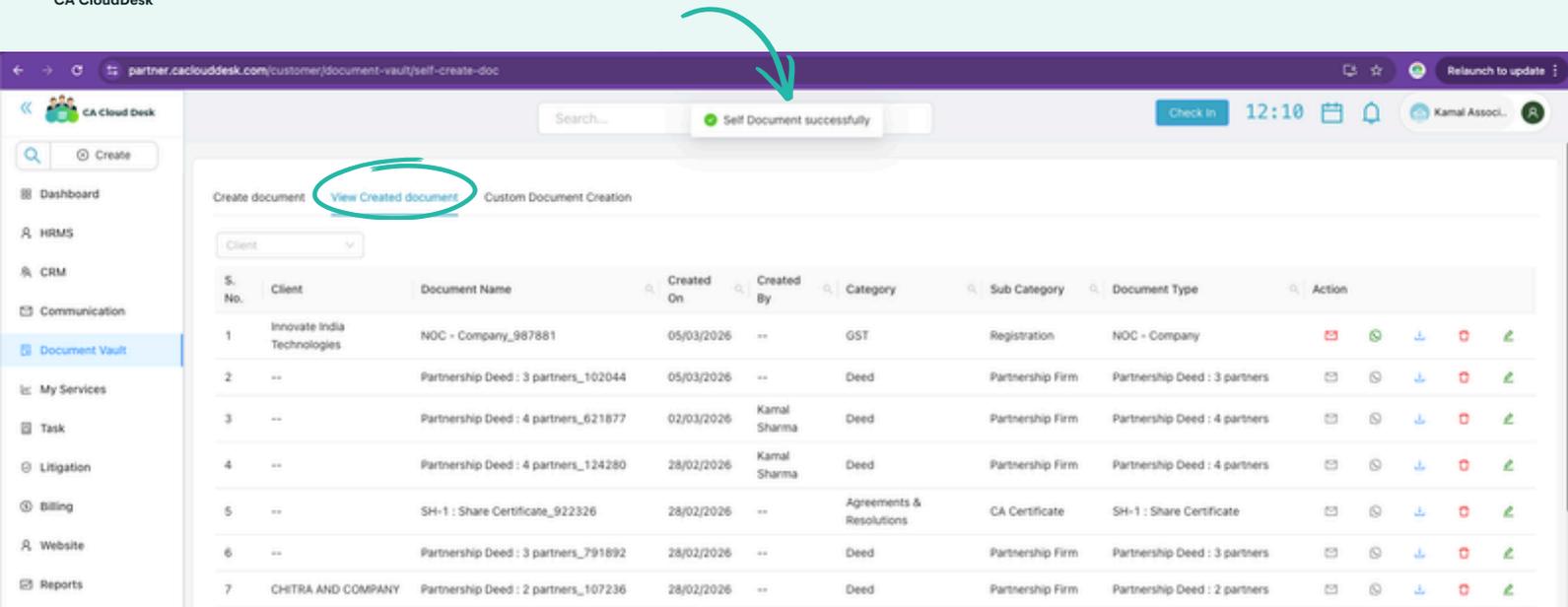
Save

After choosing a template (e.g. NOC – Company), fill all the variable fields shown on the screen.

## View Created Documents

Once a document is generated, you can manage it from the View Created document tab.

1. Click **View Created document** at the top of the Create Document screen.
2. Use **Client** or the **search bar** if you want to filter by customer or document name.
3. In the list you can see details like **Client, Document Name, Created On, Category, Sub Category, and Document Type.**



Search... Self Document successfully

Check In 12:10

CA CloudDesk

Create document **View Created documents** Custom Document Creation

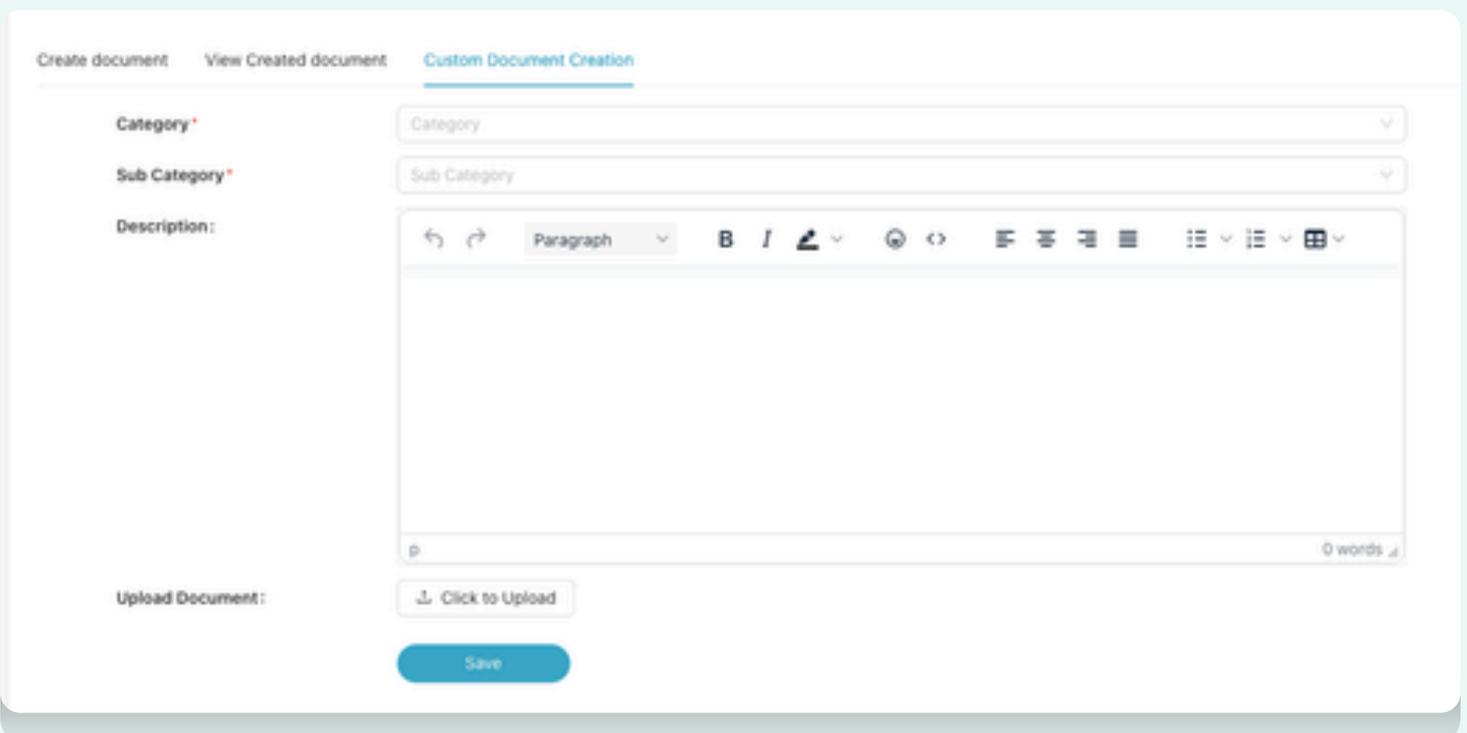
Client

S. No.	Client	Document Name	Created On	Created By	Category	Sub Category	Document Type	Action
1	Innovate India Technologies	NOC - Company_987881	05/03/2026	--	GST	Registration	NOC - Company	✉ 📄 ⬇️ 🗑️ 🌱
2	--	Partnership Deed : 3 partners_102044	05/03/2026	--	Deed	Partnership Firm	Partnership Deed : 3 partners	✉ 📄 ⬇️ 🗑️ 🌱
3	--	Partnership Deed : 4 partners_621877	02/03/2026	Kamal Sharma	Deed	Partnership Firm	Partnership Deed : 4 partners	✉ 📄 ⬇️ 🗑️ 🌱
4	--	Partnership Deed : 4 partners_124280	28/02/2026	Kamal Sharma	Deed	Partnership Firm	Partnership Deed : 4 partners	✉ 📄 ⬇️ 🗑️ 🌱
5	--	SH-1 : Share Certificate_922326	28/02/2026	--	Agreements & Resolutions	CA Certificate	SH-1 : Share Certificate	✉ 📄 ⬇️ 🗑️ 🌱
6	--	Partnership Deed : 3 partners_791892	28/02/2026	--	Deed	Partnership Firm	Partnership Deed : 3 partners	✉ 📄 ⬇️ 🗑️ 🌱
7	CHITRA AND COMPANY	Partnership Deed : 2 partners_107236	28/02/2026	--	Deed	Partnership Firm	Partnership Deed : 2 partners	✉ 📄 ⬇️ 🗑️ 🌱

You can perform the following actions from the Action column:

- **Send to Customer** – Email or WhatsApp the document directly to the linked customer (only available if you selected a customer while creating the document).
- **Download** – Download the generated file as PDF for your records.
- **Edit** – Re-open the document form, update the variable fields, and save again to regenerate.
- **Delete** – Remove the entry if the document is no longer required.

## Custom Document Creation.



Create document View Created document **Custom Document Creation**

Category\*

Sub Category\*

Description:

Paragraph **B** *I*

Upload Document:

If your format is not available in the ready templates, you can still store it inside CA Cloud Desk using Custom Document Creation.

1. Click the Custom Document Creation tab at the top.

2. Fill the basic details:

- **Category** – Choose where this document belongs (for example Application).
- **Sub Category** – Pick the related sub category (for example Bank).
- **Description** – Write a short description so your team knows what this document is about.

3. **Upload Document:** Click Click to Upload and attach your prepared Word / PDF file.

4. Click **Save** to store this document under the selected category and sub category.

