



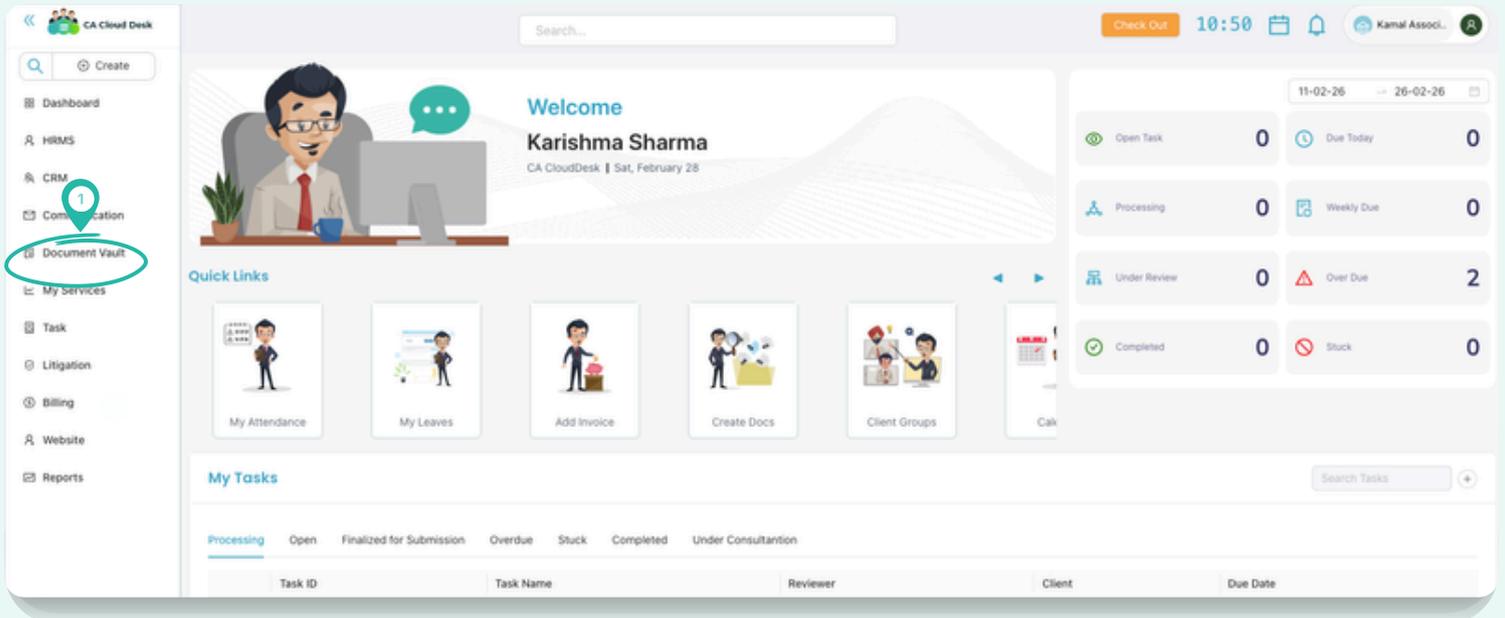
Inward/Outward Document

CA CloudDesk



Step 1: Login and open Inward/ Outward Document Option .

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 **Inward/Outward Document option**.



CA Cloud Desk

Search...

Check Out 10:50

Kamal Associ...

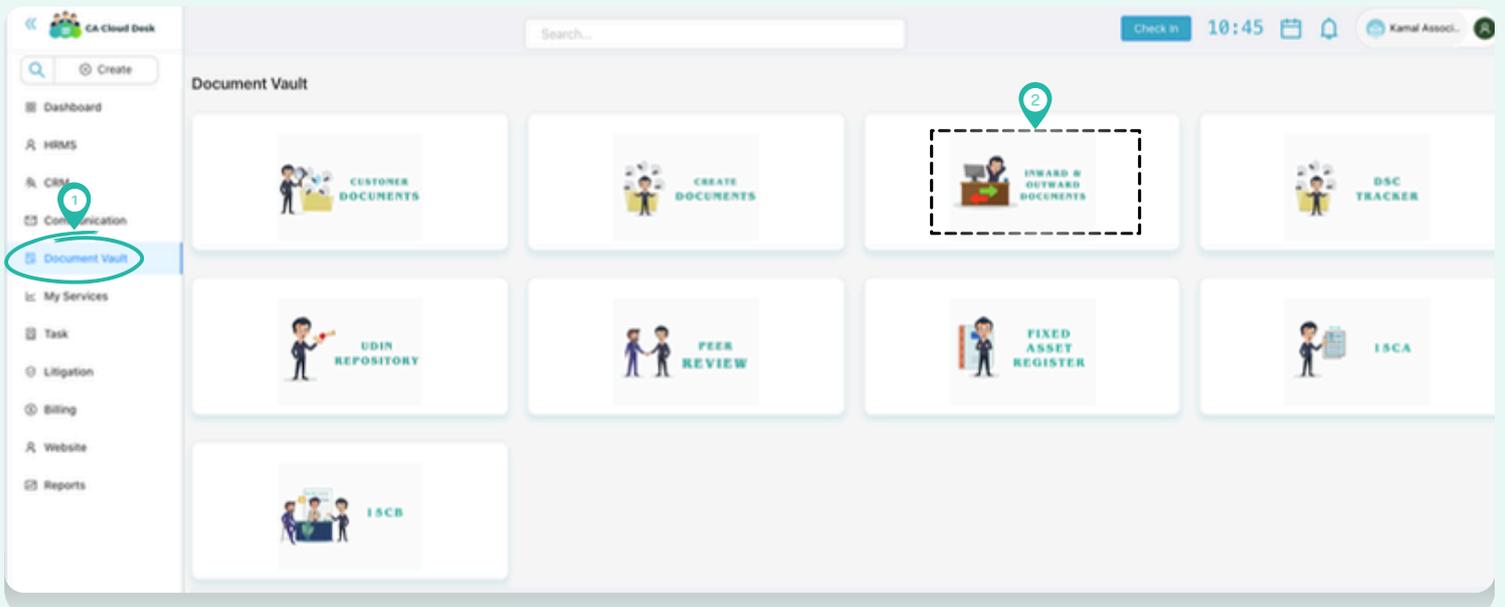
Welcome Karishma Sharma
CA CloudDesk | Sat, February 28

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

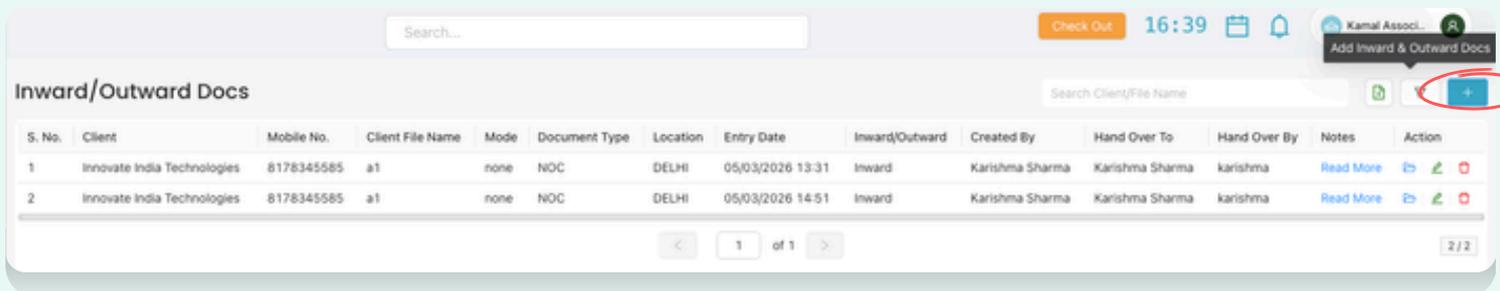


Step 2: Create an Inward Document

1. On the Inward/Outward Docs list, click the **“+” button** on the top-right.
2. The Add Inward/Outward Docs form opens.
3. Under Type, select Inward.
4. Fill the remaining fields (see field-wise explanation below) and click **Save**.

After saving, the new Inward entry appears in the list with status **Inward**.

Add Inward/ outward Document



Search...

Check Out 16:39

Kamal Associ...
Add Inward & Outward Docs

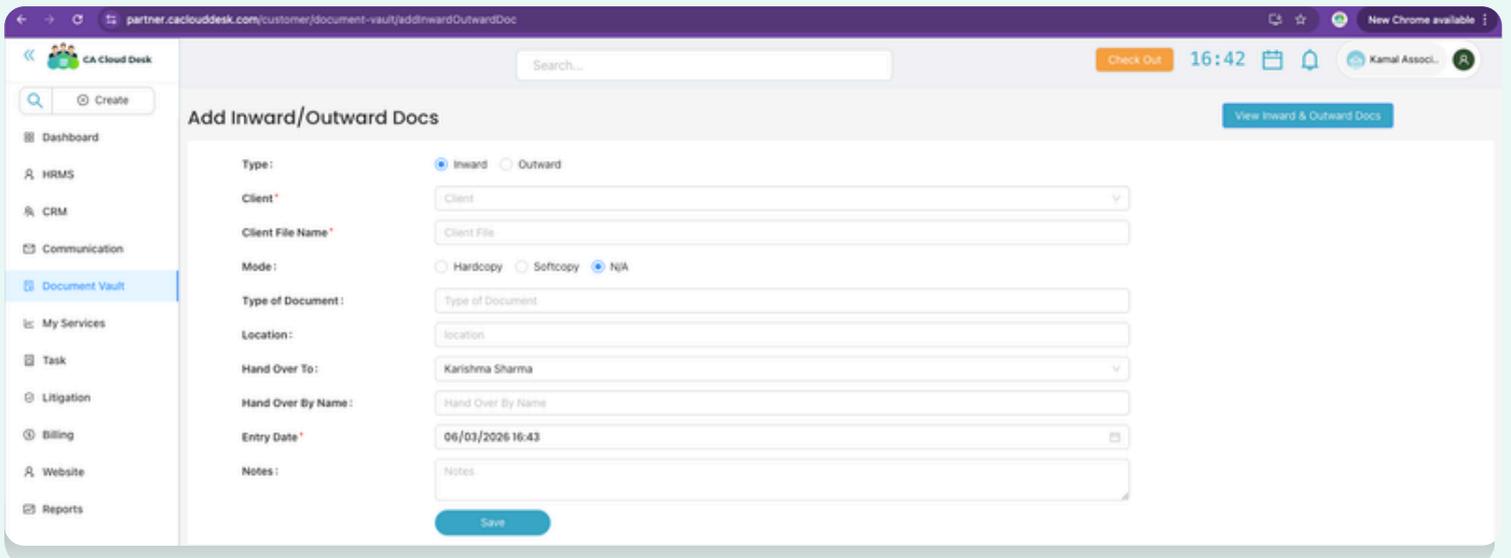
Inward/Outward Docs

Search Client/File Name

S. No.	Client	Mobile No.	Client File Name	Mode	Document Type	Location	Entry Date	Inward/Outward	Created By	Hand Over To	Hand Over By	Notes	Action
1	Innovate India Technologies	8178345585	a1	none	NOC	DELHI	05/03/2026 13:31	Inward	Karishma Sharma	Karishma Sharma	karishma	Read More	+ - x
2	Innovate India Technologies	8178345585	a1	none	NOC	DELHI	05/03/2026 14:51	Inward	Karishma Sharma	Karishma Sharma	karishma	Read More	+ - x

1 of 1

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partner.cacloudesk.com/customer/document-vault/addInwardOutwardDoc

Search...

Check Out 16:42

Kamal Associ...

CA Cloud Desk

Create

Dashboard

HRMS

CRM

Communication

Document Vault

My Services

Task

Litigation

Billing

Website

Reports

Add Inward/Outward Docs

View Inward & Outward Docs

Type: Inward Outward

Client*

Client File Name*

Mode: Hardcopy Softcopy N/A

Type of Document:

Location:

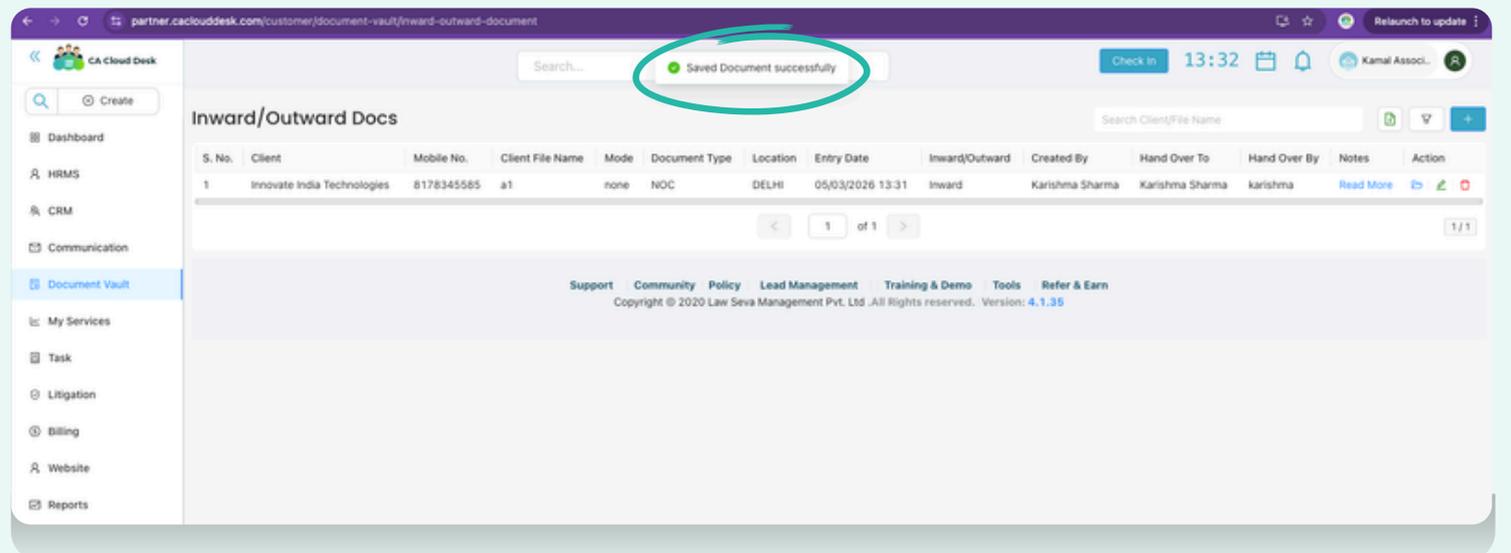
Hand Over To:

Hand Over By Name:

Entry Date*

Notes:

Save



partner.cacloudesk.com/customer/document-vault/inward-outward-document

Search...

Check In 13:32

Kamal Associ...

CA Cloud Desk

Create

Dashboard

HRMS

CRM

Communication

Document Vault

My Services

Task

Litigation

Billing

Website

Reports

Inward/Outward Docs

Search Client/File Name

S. No.	Client	Mobile No.	Client File Name	Mode	Document Type	Location	Entry Date	Inward/Outward	Created By	Hand Over To	Hand Over By	Notes	Action
1	Innovate India Technologies	8178345585	a1	none	NOC	DELHI	05/03/2026 13:31	Inward	Karishma Sharma	Karishma Sharma	karishma	Read More	+ - x

1 of 1

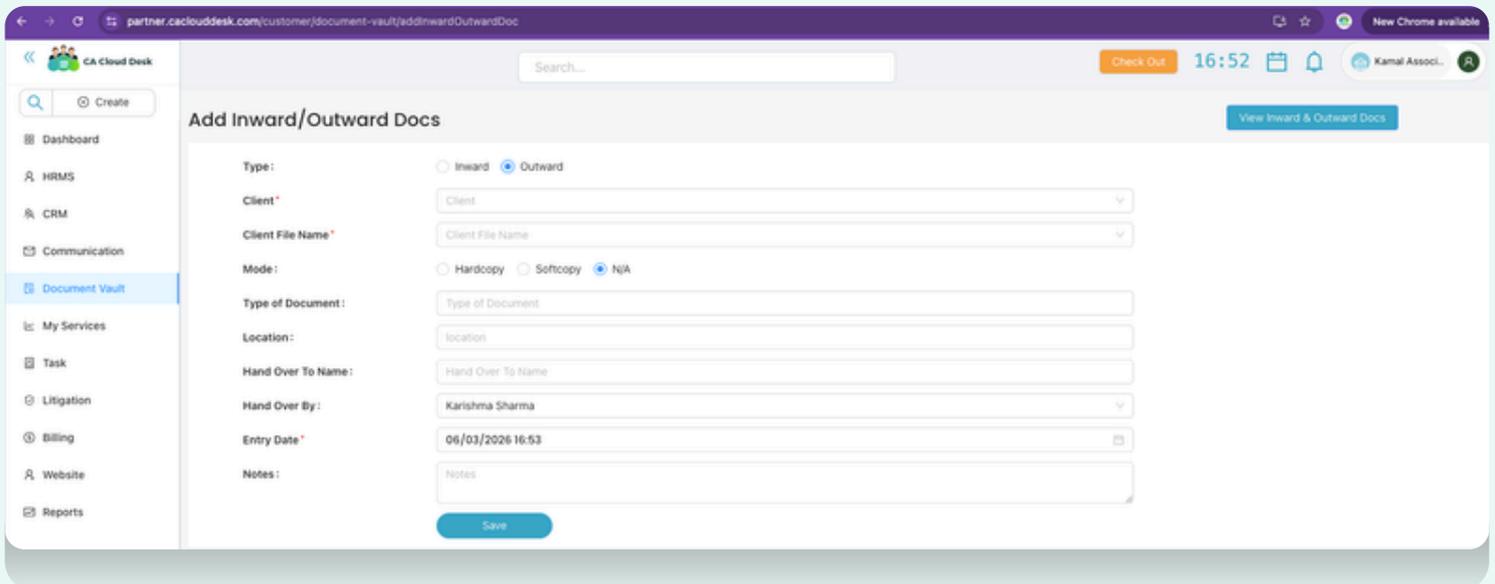
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Support Community Policy Lead Management Training & Demo Tools Refer & Earn

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Step 3: Create an Outward Document

1. On the Inward/Outward Docs list, click the "+" button.
2. In the Add Inward/Outward Docs form, under Type select Outward.
3. Fill the same details as Inward (Client, Client File Name, Mode, Type of Document, Location, etc.).
4. In addition, make sure you correctly enter the Hand Over To Name and Hand Over By for outward movement.
5. Click **Save**. The Outward entry is added to the list with status Outward.



The screenshot shows the 'Add Inward/Outward Docs' form in the CA CloudDesk interface. The form is titled 'Add Inward/Outward Docs' and has a search bar at the top. The form fields are as follows:

- Type:** Radio buttons for Inward and Outward (Outward is selected).
- Client*:** A dropdown menu with 'Client' selected.
- Client File Name*:** A dropdown menu with 'Client File Name' selected.
- Mode:** Radio buttons for Hardcopy, Softcopy, and N/A (N/A is selected).
- Type of Document:** A text input field with 'Type of Document' as the placeholder.
- Location:** A text input field with 'location' as the placeholder.
- Hand Over To Name:** A text input field with 'Hand Over To Name' as the placeholder.
- Hand Over By:** A dropdown menu with 'Karishma Sharma' selected.
- Entry Date*:** A date and time picker showing '06/03/2026 16:53'.
- Notes:** A text area with 'Notes' as the placeholder.

A 'Save' button is located at the bottom of the form. The interface also includes a sidebar with navigation options like Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task, Litigation, Billing, Website, and Reports. The top right corner shows a 'Check Out' button, the time '16:52', and the user 'Kamal Assoc.'.

View and Manage Inward/Outward Entries

All saved entries appear in the Inward/Outward Docs list.

- Use the search box on the top-right to search by Client or Client File Name.
- Use filters (if available) to narrow down by Type, Entry Date, or other columns.
- The table shows key details like Client, Mobile No., Client File Name, Mode, Document Type, Location, Entry Date, Inward/Outward, and Created By.

From the Action column you can typically edit or delete an entry if any detail changes.