



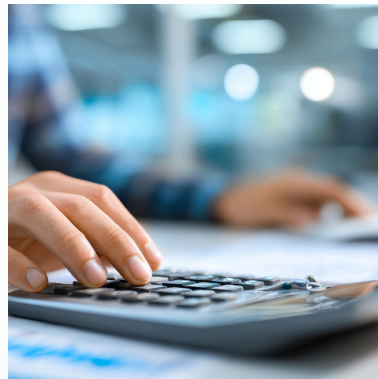
# CA CloudDesk

One Platform. Endless Possibilities

# About Us

CA Cloud Desk is a SAAS platform for busy CAs to manage Office , employee & Clients

Developed by Law Seva Management Pvt. Ltd. (incorporated in Feb 2020), we provide secure, reliable, and future ready solutions for CAs in India.







# CA CLOUDDesk

CA Cloud Desk is an easy-to-use practice management software built for CAs, CS, Advocates, and MSMEs to simplify tasks, documents, HRMS, and client collaboration.



Active CA Firms

**500+**



Modules Available

**7+**



Acess Anytime Anywhere

**24/7**



# DASHBOARD

## Real-Time Control, One View

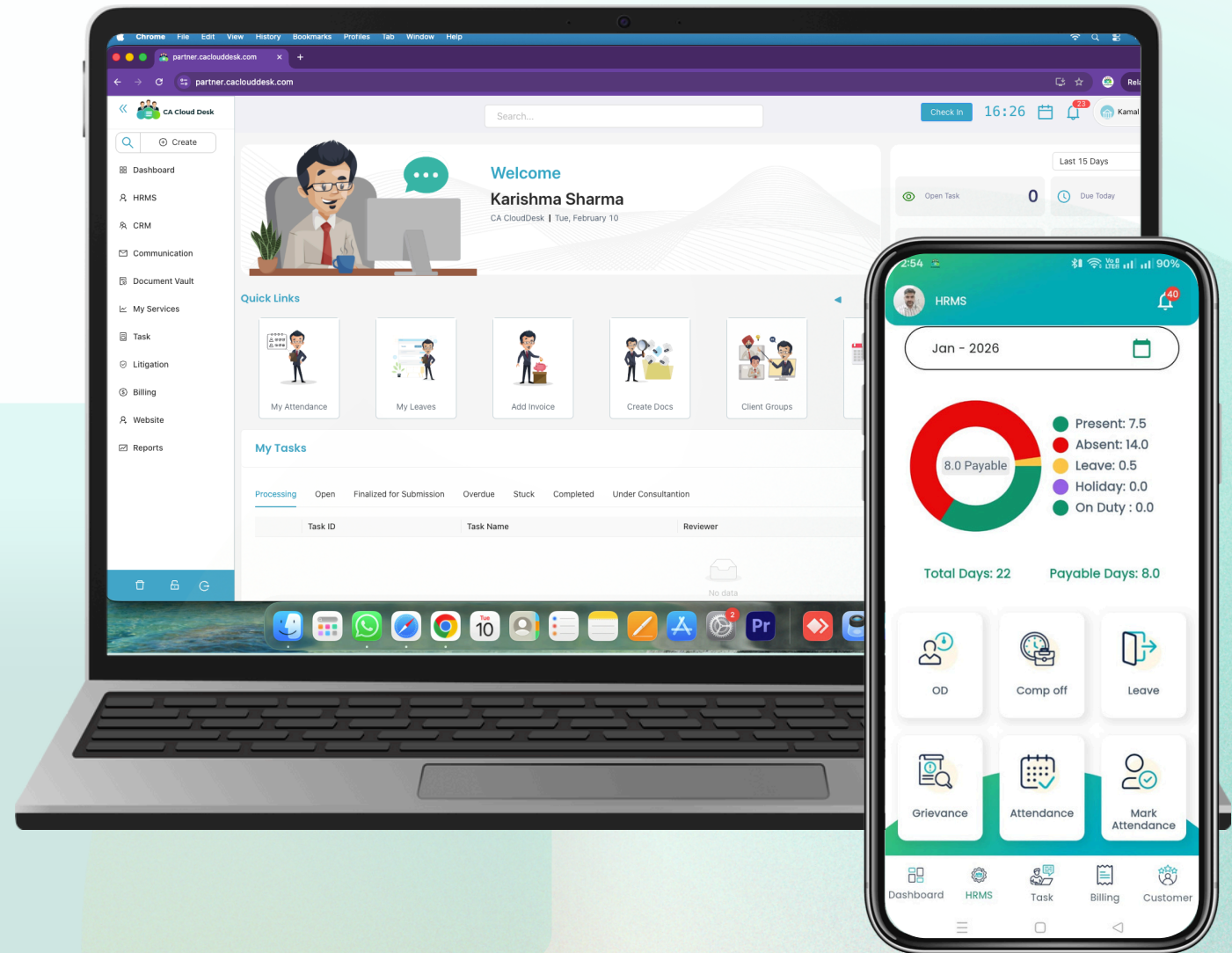
The Smart Dashboard gives users instant visibility into key metrics, tasks, and performance indicators.

**45%**

Faster Task

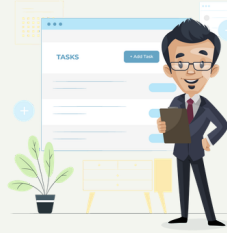
**+32%**

Team Output



## TASK MANAGEMENT

Create, assign, and track tasks with clear deadlines & ownership.



## HRMS & PAYROLL

Manage staff attendance, payroll, roles, and performance seamlessly.



## CRM & CLIENT DESK

Manage client relationships & provide real-time client access.



# 7 Powerful Modules

That Run Your Entire CA Practice



## DOCUMENT VAULT

Securely store, organize, & share client documents in one place.



## BILLING

Generate invoices, track payments, & manage recurring billing effortlessly.



## LITIGATION

Track case details, hearings, deadlines, & legal documentation.



## MARKETING

Manage campaigns, leads, follow-ups, & client engagement.



TASK MANAGEMENT



# 7 POWERFUL MODULES

That Run Your Entire CA Practice



HRMS & PAYROLL



CRM & CLIENT DESK



DOCUMENT VAULT



BILLING



LITIGATION



MARKETING





# Why to Choose CA CloudDesk

## Business Impact That Matters

CA CloudDesk is purpose-built for CA firms to manage clients, compliances, workflows, billing, and teams on a single platform. It replaces manual tracking and disconnected tools with a structured, automated system that brings clarity and control to daily operations.

**40%**

### Less Manual Work

Automation removes repetitive tasks and accelerates operations.

**4x**

### Quicker Insights

Real-time dashboards enable faster, data-driven decisions.

**100%**

### Cost Optimization

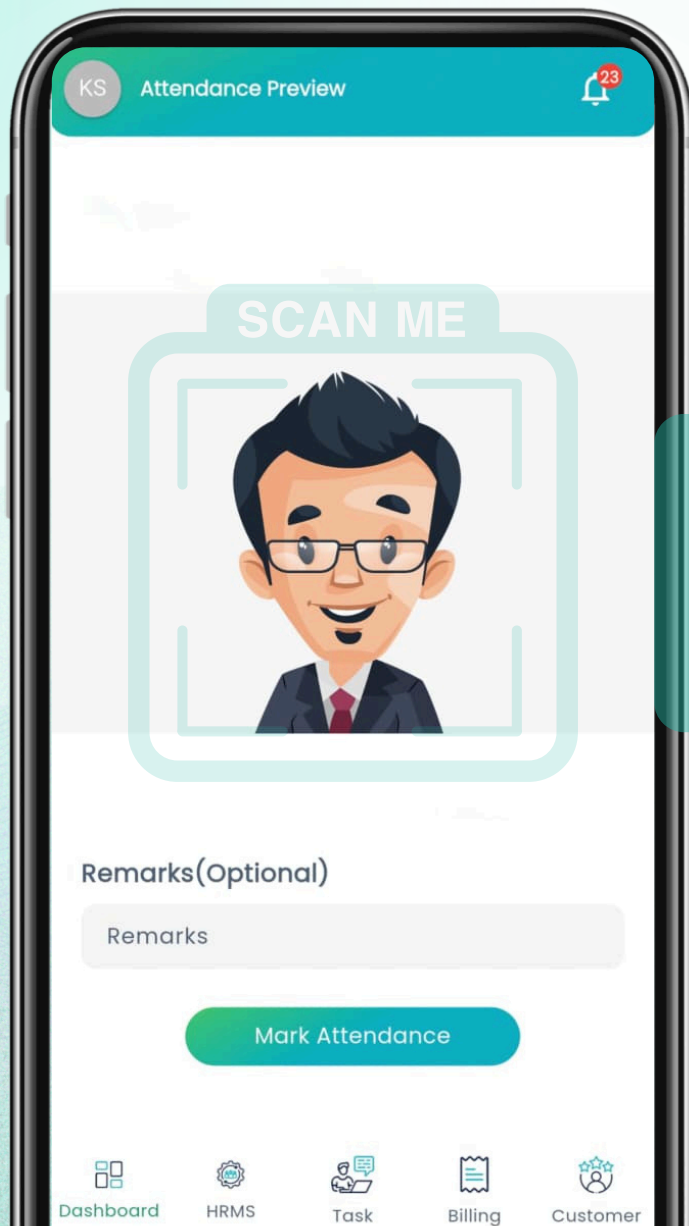
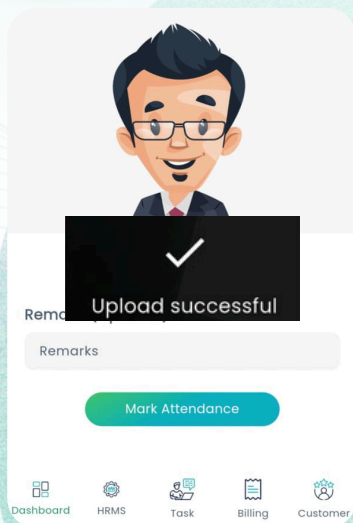
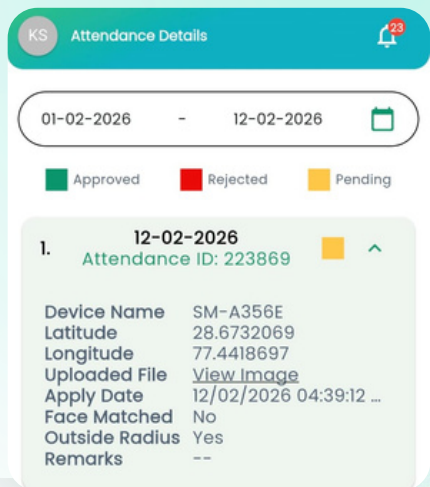
Streamlined workflows reduce overhead and improve resources.



### Scalable Growth

Built to support teams as they grow without performance issues.





**5K+**

Our App has reached  
over  
5K+ downloads

# Geo-Tagged Attendance

Access [CA CloudDesk](#) anytime, anywhere through the mobile application - enabling your team to mark attendance, manage tasks, track updates, and stay connected even while working remotely.

# Task Management

CA Cloud Desk's Task Management helps create, assign, and track tasks easily. It supports templates, deadlines, and progress tracking, making work more organized and efficient.



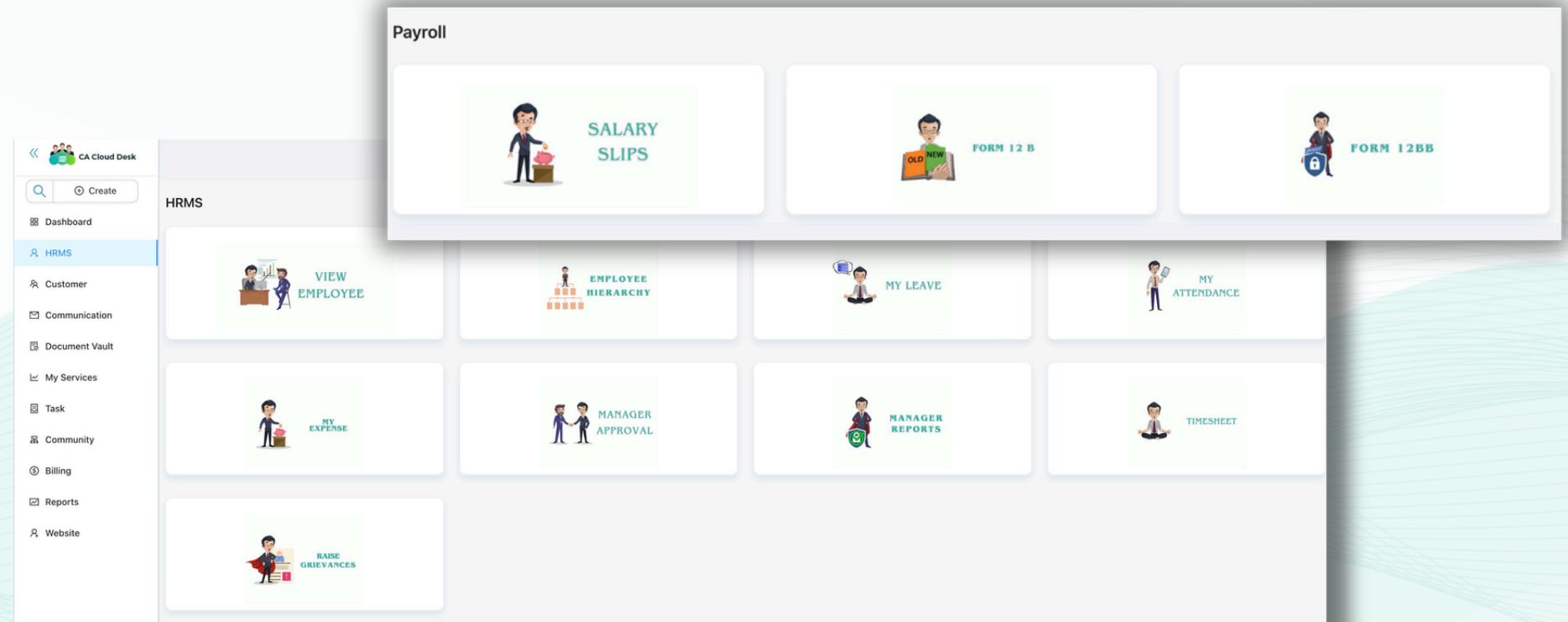
The screenshot shows the CA Cloud Desk Task Management interface. On the left is a sidebar with navigation options: Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task (highlighted), Litigation, Billing, Website, and Reports. The main area has a search bar and a 'Tasks' tab. Below the tab is a table with columns: Task Name, TASK ID, Cust Photo, Firm /Co Name, Assignee, Reviewer, Description, Status, Period, Priority, Invoice Status, and Service. The table contains four rows of task data. At the bottom, there is a footer with links for Support, Community, Policy, Lead Management, Training & Demo, Tools, and Refer & Earn, along with copyright information and version details.

| Task Name | TASK ID  | Cust Photo | Firm /Co Name | Assignee | Reviewer | Description | Status     | Period              | Priority | Invoice Status | Service                |
|-----------|----------|------------|---------------|----------|----------|-------------|------------|---------------------|----------|----------------|------------------------|
| Task 4200 | TSK01120 | --         | --            | +4       | DA       |             | PROCESSING | Jan/2026 - Dec/2026 | High     | Not Allowed    | Annual Tax audit       |
| AUDIT     | TSK01132 | --         | --            | +2       | DA       |             | OPEN       | Jan/2026 - Dec/2026 | Medium   | Not Allowed    | Tax Audit              |
| ABC       | TSK01102 | --         | --            |          | DA       |             | PROCESSING | Jan/2026 - Mar/2027 | Medium   | Not Allowed    | 24G Return             |
| TDS 1234  | TSK01100 | --         | --            |          | DA       |             | OPEN       | Jan/2026 - Jan/2027 | Medium   | Not Allowed    | Filing of Return - TDS |

Support | Community | Policy | Lead Management | Training & Demo | Tools | Refer & Earn  
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# HRMS & Payroll

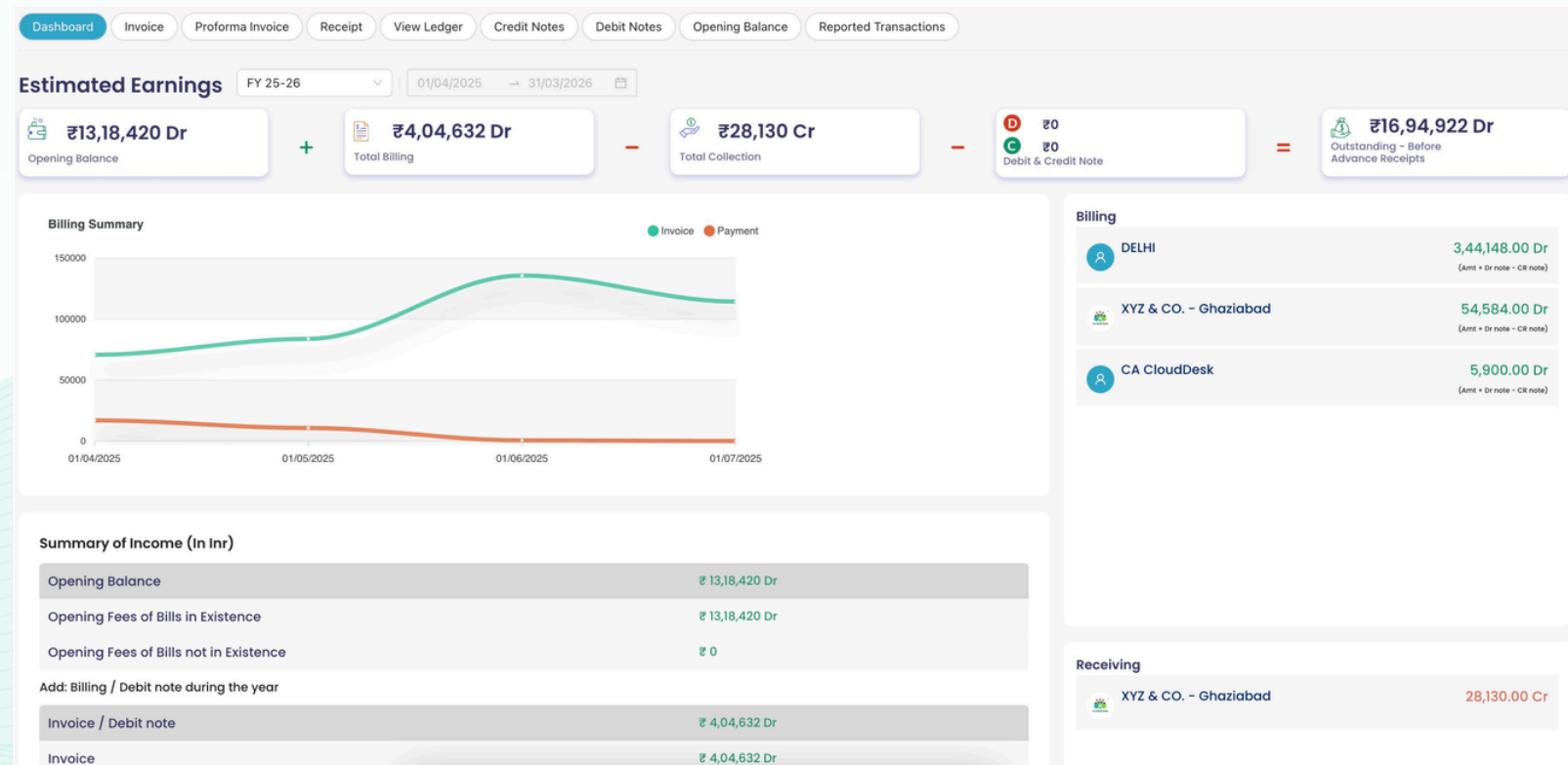
HRMS automates & manages HR functions like recruitment, payroll, attendance, leave, performance, and employee data. It helps improve efficiency, reduce manual work, and ensure compliance with HR policies and regulations.





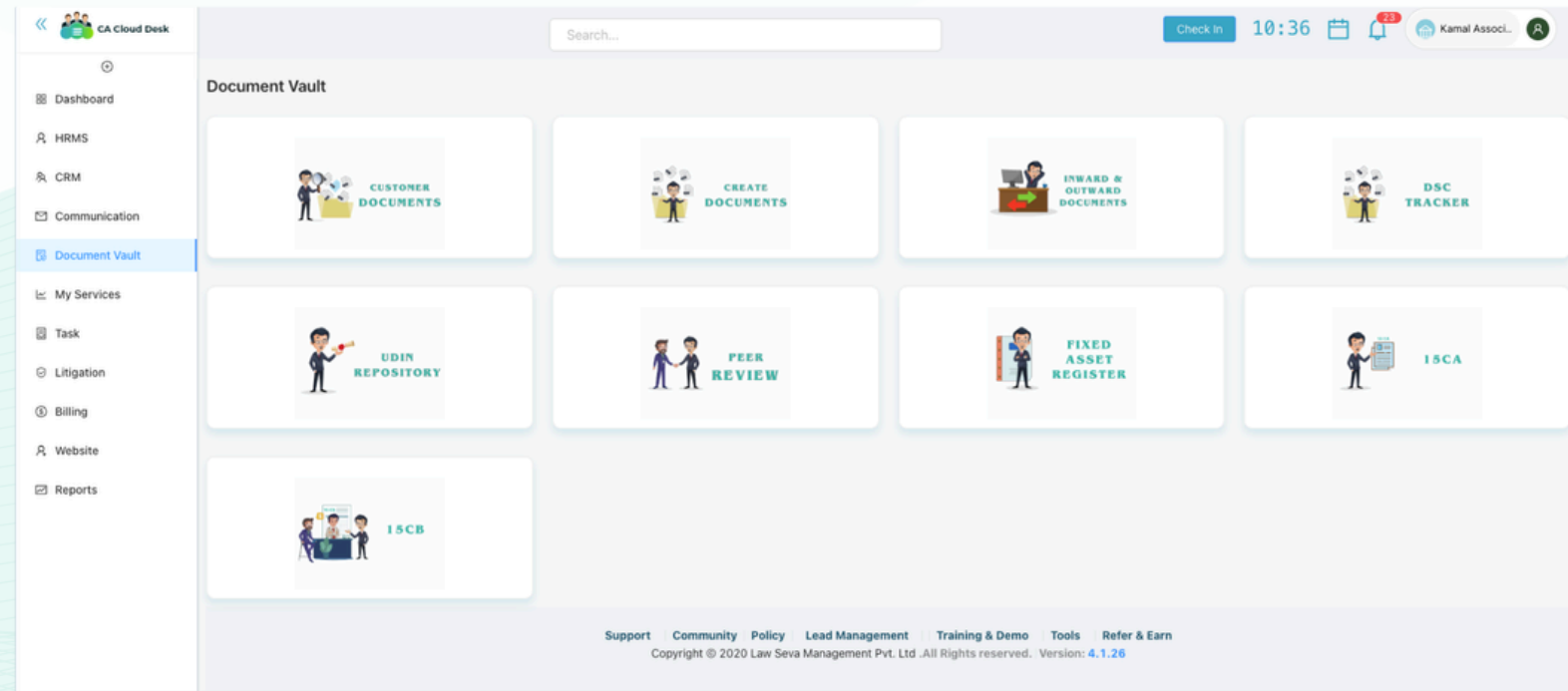
# Billing

Billing in CA Cloud Desk tracks and charges for services provided. It supports time-based billing, automated invoicing, customizable rates, and detailed reports to ensure accurate and efficient cost management.



# Document Vault

CA Cloud Desk's Document Management allows secure storage, sharing, and easy access to files. It helps organize documents by clients or tasks, reducing paperwork and improving collaboration.



# Document Creator

The Document Creator in CA Cloud Desk lets users generate formatted documents using templates. It saves time by auto-filling client and task details, ensuring accuracy and consistency.



[Create document](#) [View Created document](#) [Custom Document Creation](#)

Search Template:

Customer:

Category\*

Sub Category\*

Document Type\*

Document Name:

Save

Document Vault

CUSTOMER DOCUMENTS

CREATE DOCUMENTS

INWARD & OUTWARD DOCUMENTS

DSC TRACKER

UDIN REPOSITORY

PEER REVIEW

[Support](#) [Policy](#) [Lead Management](#) [Training & Demo](#) [Tools](#)

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# CRM & Client DESK

CRM in CA Cloud Desk helps store and organize all client information in one place. It makes communication, document sharing, and task tracking easier, ensuring better service and stronger client relationships.



|                         |                                  |                      |               |                      |                 |      |            |            |             |             |
|-------------------------|----------------------------------|----------------------|---------------|----------------------|-----------------|------|------------|------------|-------------|-------------|
| Dashboard               | HRMS                             | CRM                  | Communication | Document Vault       | My Services     | Task | Litigation | Billing    | Website     | Reports     |
| Active Inactive Deleted |                                  |                      |               |                      |                 |      |            |            |             |             |
| Client Name / GST       |                                  |                      |               |                      |                 |      |            |            |             |             |
| File No.                | Firm Name                        | Email Id             | Mobile No.    | Alternate Mobile No. | GSTIN           | Tags | Team       | Pan Number | Receivables | Enable      |
| SA117927                | SB Saurabh Bhardwaj              | info@caclouddesk.com | 0000000000    | --                   | --              | ⊙    | --         | --         | ₹ 0         | Not Allowed |
| 1117534                 | 1 1                              | --                   | --            | --                   | --              | ⊙    | --         | --         | ₹ 0         | Not Allowed |
| DO117423                | DV DODDIAH VASANTH NAVEEN KUMAR  | --                   | --            | --                   | 29AITPV8115E1ZM | ⊙    | --         | --         | ₹ 0         | Not Allowed |
| DE117419                | DH DENSO HARYANA PRIVATE LIMITED | --                   | --            | --                   | 06AAACD6817F1ZW | ⊙    | --         | --         | ₹ 0         | Not Allowed |
| P.116661                | PR P.N. RAGHAVENDRA RAO & CO     | --                   | --            | --                   | 33AABFP6432E1ZN | ⊙    | --         | AABFP6432E | ₹ 0         | Not Allowed |
| CO116483                | C2 Company 2                     | --                   | 8171082760    | --                   | --              | ⊙    | --         | --         | ₹ 0         | Not Allowed |

# Service Management

Service Management in CA Cloud Desk helps define and manage the services offered by your firm. It streamlines task creation, pricing, timelines, and workflow stages for each service, improving consistency and efficiency.



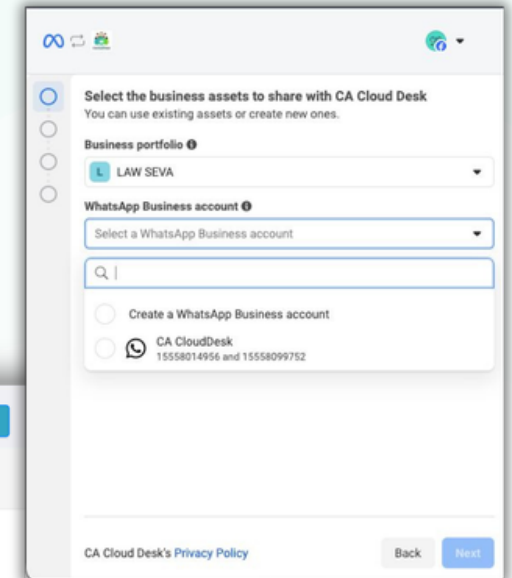
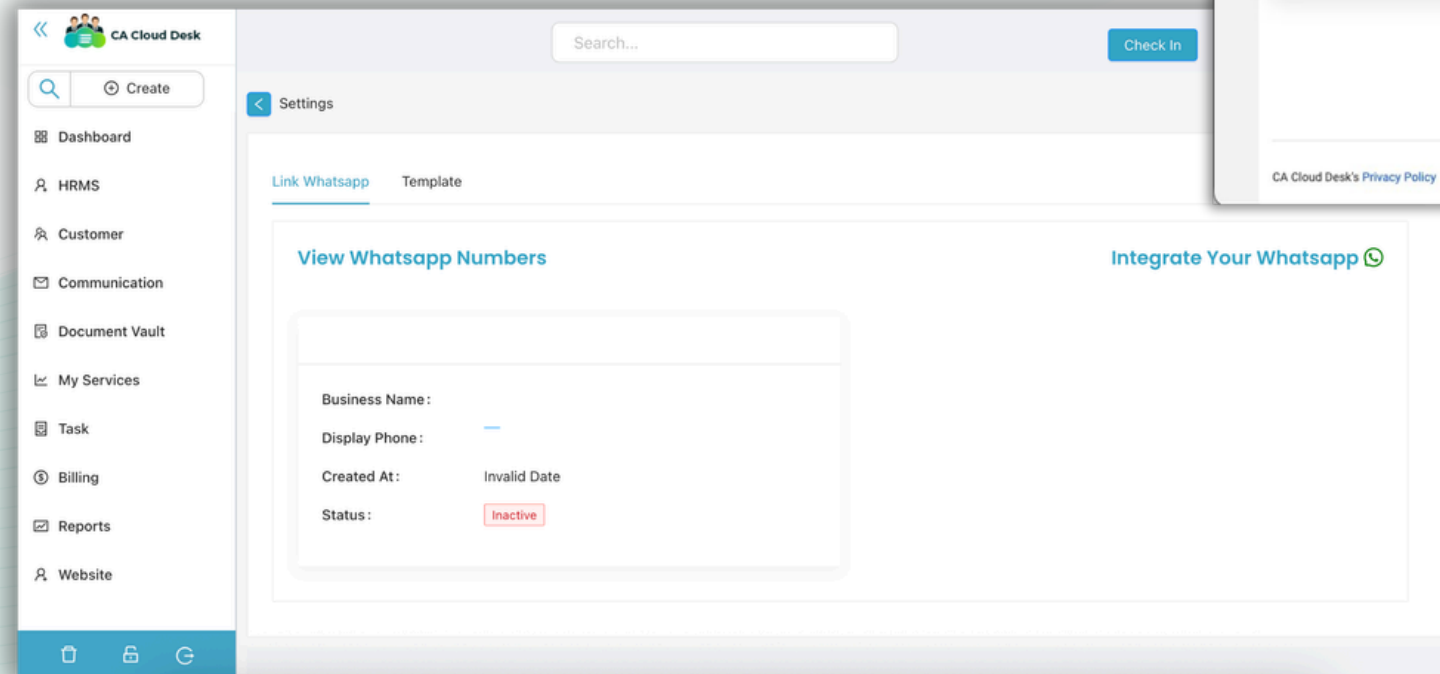
| My Services    |                                |        |           |           |                   |             |      |
|----------------|--------------------------------|--------|-----------|-----------|-------------------|-------------|------|
| Search Service |                                |        |           |           |                   |             |      |
| S.No.          | Service Name                   | HSN    | Frequency | Customers | Short Description | Description | FAQ  |
| 1              | ITR                            | 998232 | View      | 1         | View              | View        | View |
| 2              | Incorporation of Pvt Ltd / LLP | 998216 | View      | 0         | View              | View        | View |
| 3              | GST License                    | NA     | View      | 1         | View              | View        | View |
| 4              | GST Filing                     | 998231 | View      | 1         | View              | View        | View |
| 5              | FSSAI - Food License           | NA     | View      | 0         | View              | View        | View |
| 6              | ESI   PF Registration & Filing | NA     | View      | 0         | View              | View        | View |

|   |                                |        |      |   |   |      |
|---|--------------------------------|--------|------|---|---|------|
| 1 | ITR                            | 998232 | View | 1 | + | View |
| 2 | Incorporation of Pvt Ltd / LLP | 998216 | View | 0 | + | View |
| 3 | GST License                    | NA     | View | 1 | + | View |
| 4 | GST Filing                     | 998231 | View | 1 | + | View |
| 5 | FSSAI - Food License           | NA     | View | 0 | + | View |
| 6 | ESI   PF Registration & Filing | NA     | View | 0 | + | View |
| 7 | Book Keeping                   | NA     | View | 0 | + | View |
| 8 | Audit                          | 998221 | View | 0 | + | View |

| Task      |            |      |               |  | Enable for |
|-----------|------------|------|---------------|--|------------|
| Completed | Processing | Open | Total Created |  |            |
| 255       | 1          | 2    | 258           |  | Self Cust  |
| 9         | 0          | 0    | 10            |  | Self Cust  |
| 29        | 0          | 1    | 30            |  | Self Cust  |
| 365       | 1          | 13   | 380           |  | Self Cust  |
| 3         | 0          | 0    | 3             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 9         | 0          | 0    | 9             |  | Self Cust  |
| 4         | 4          | 1    | 9             |  | Self Cust  |
| 365       | 1          | 13   | 380           |  | Self Cust  |
| 3         | 0          | 0    | 3             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 9         | 0          | 0    | 9             |  | Self Cust  |
| 4         | 4          | 1    | 9             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 0         | 0          | 0    | 0             |  | Self Cust  |
| 2         | 0          | 0    | 2             |  | Self Cust  |

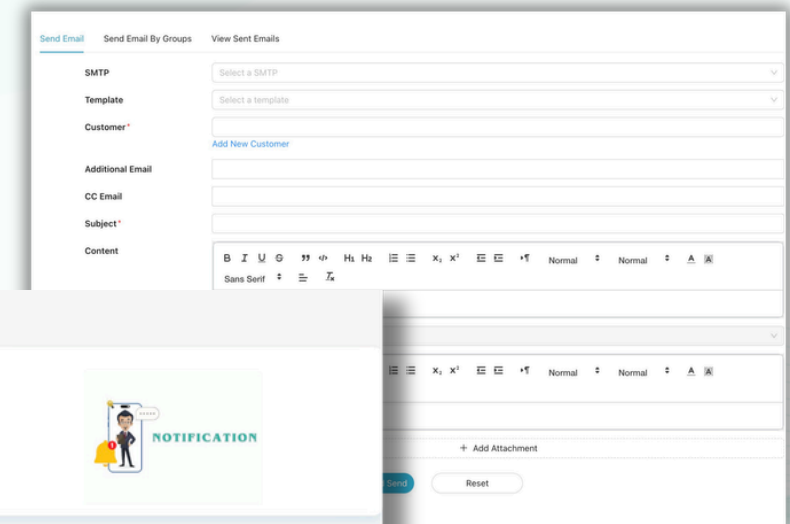
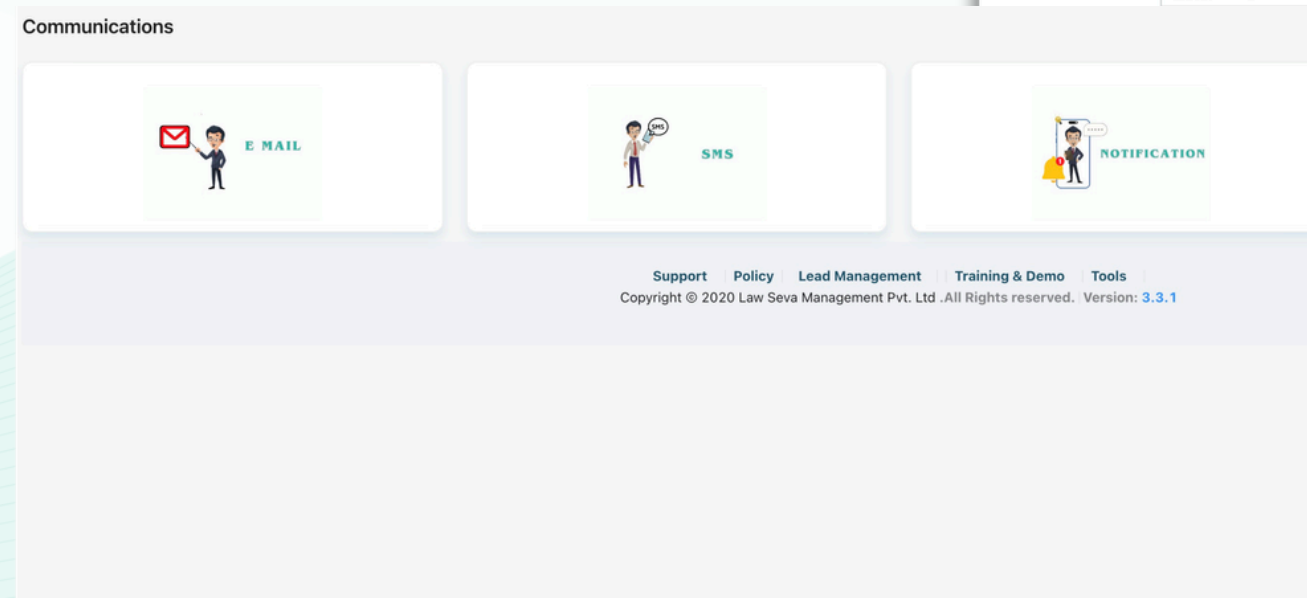
# Whatsapp API

Enable seamless WhatsApp communication to automate follow-ups, share updates, send reminders, and enhance client interaction – all managed securely within the CA CloudDesk platform.



# Communication

Communication in CA Cloud Desk enables seamless interaction between users, agents, and teams through tickets, emails, and notifications, ensuring timely updates and effective issue resolution.





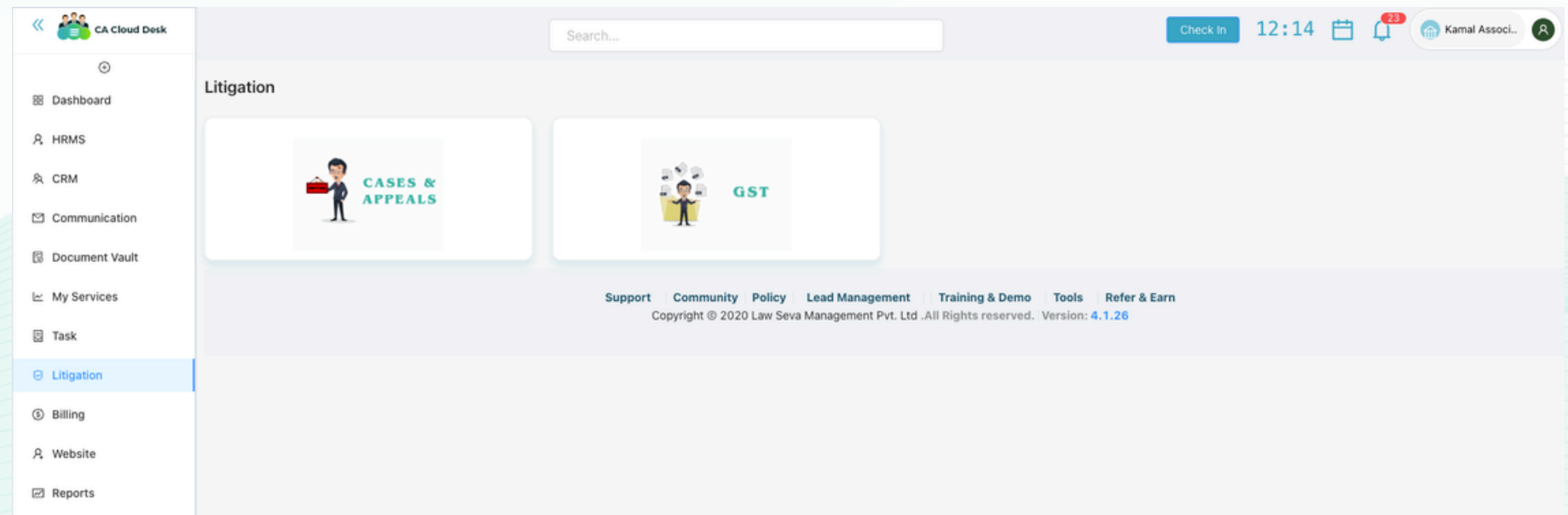
# SMTP Configuration

Configure your firm's SMTP settings to send secure, reliable emails directly from CA CloudDesk—enabling automated notifications, billing communication, compliance reminders, and seamless client correspondence.

A screenshot of the CA CloudDesk web application interface. The top navigation bar includes tabs for Profile, HRMS, Payroll, Import Utility, Notification, Accounts, Services, and Settings (which is highlighted). Below the navigation bar, there are five main configuration cards: SMTP CONFIGURATION, CUSTOM FIELD Customer Form, CUSTOMER POLICY, WHATSAPP, and TAG. The SMTP CONFIGURATION card is selected, and a modal window titled 'SMTP Configuration' is open. This modal has two tabs: 'SMTP Configuration' (active) and 'View SMTP'. The 'SMTP Configuration' tab contains form fields for Email, Password, Host, and Port, each with a red asterisk indicating it is required. There is also a 'Default' checkbox. A blue 'Save' button is at the bottom right of the modal.

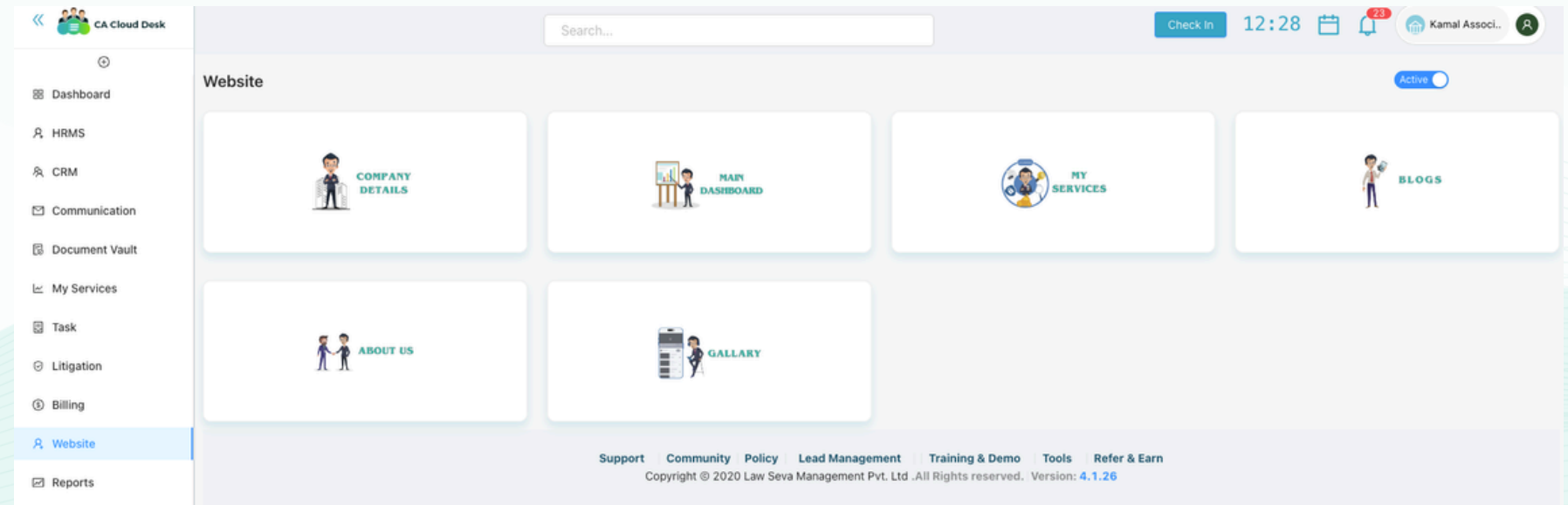
# Litigation

Track and manage complete case information, including client details, court hearings, important deadlines, case status updates in one centralized system- ensuring accuracy, compliance, and timely action.



# Website

Track and manage complete case information, including client details, court hearings, important deadlines, case status updates in one centralized system- ensuring accuracy, compliance, and timely action.



# Infographic

Create visually engaging infographics including festive posts, deadline alerts, important last-date reminders, and other related posts effortlessly within the platform all generated in one centralized system .



EXPLORE OUR CATEGORIES

## Discover Diverse Infographic Templates

Browse through our extensive collection of Infographic templates designed to cater to various needs of accountants, tax professionals, and more.



Tax Tips

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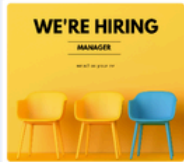
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MANAGER

HIRING

Job

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FESTIVAL

Onam

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Search...

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FILE YOUR TAXES ON TIME

4.8 ★ (10K+) Tax Filing

Tax

★★★★★

"These infographic templates have transformed how I present complex financial data to clients. Easy to use and highly professional!"

Priya S  
Chartered Accountant



5 Steps to File an ITR

4.8 ★ (10K+) ITR Filing

Accounting



# Features



Task Management



HRMS



Invoice



SMTP



Attendance



Document Management



Payroll



Proforma Invoice



Add Receipts



Inward & Outward



Document Creator



Timesheet



15 CA & CB



My leave



DSC Tracker



Create Infographics



Fetch GST Notices



Form 12B/12BB



Raise Grievance



Peer Review



WhatsApp API



Mobile App



View Employee



Salary Slip



UDIN Repository



Multi Branch Billing



Client Desk



Litigation



My Expense



Reports

# Get in Touch

Have questions or need a demo? We're just a message away.

Connect with us today and take the next step towards smarter practice management.



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[www.cacloud.com](http://www.cacloud.com)



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