



CA CloudDesk

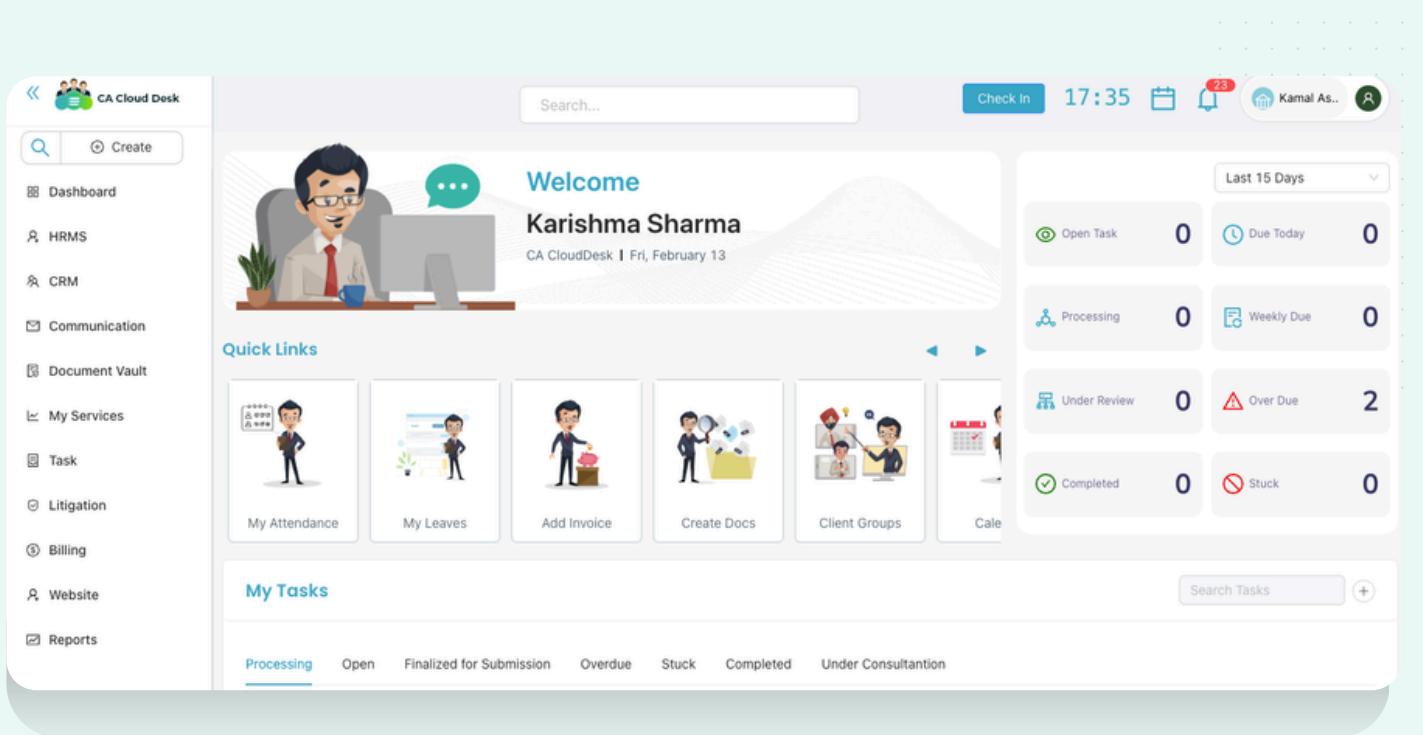
Add Branch

CA CloudDesk



Step 1: Open CA CloudDesk Dashboard

From the main Dashboard, click your profile icon in the top-right corner to open your profile area.



The screenshot shows the CA CloudDesk dashboard for Karishma Sharma. The left sidebar includes links for Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task, Litigation, Billing, Website, and Reports. The main area features a welcome message, a cartoon character, and a search bar. It displays sections for Quick Links (My Attendance, My Leaves, Add Invoice, Create Docs, Client Groups, and Calender) and My Tasks (Processing, Open, Finalized for Submission, Overdue, Stuck, Completed, Under Consultation). A summary of tasks for the last 15 days is shown on the right.

STEP 2: From My Profile, select Branch Data

On the Profile page, use the secondary navigation tabs & select Branch Data.

- 1 Profile
- 2 Branch Data





02

Profile HRMS Payroll Import Utility Notification Accounts Services Settings

My Profile Organization Data Branch Data Credits Organization Document

My Profile

Name: Karishma Sharma
Email Id: sharmakarishma1018@gmail.com
Mobile: 8178345585
Designation: Digital Marketing Executive
Manager: (KA54) Kamal Sharma

Cloud Storage (4% full)
781.88 MB of 20 GB used
Get More Storage

Mobile Apps
Android iOS

Upload Profile Picture

STEP 3: Click the plus icon to add a branch



Click (+) button to start adding a new branch.

My Profile Organization Data Branch Data Credits Organization Document

My Branch

Filters: State

S. No.	Name	Tag Line	GST NO.	PAN NO.	Udyam Reg No	Mobile	City	Default Branch	Take Actions
1	CA CloudDesk	--	--	--	--	9599101735	GHAZIABAD	No	

STEP 4: Complete the step-wise Add Branch flow

Basic Details → Billing → Payment → Social Media → Support.

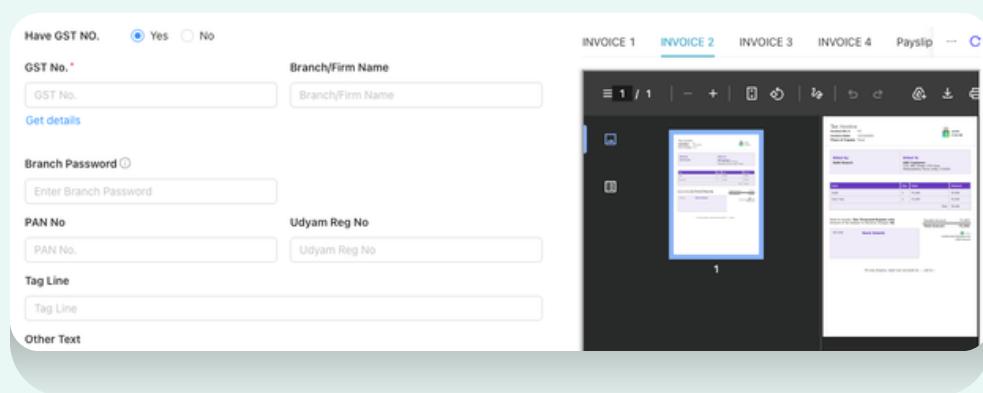
The first step is Basic Details.

Add Branch

Basic Details Billing Payment Social Media Support

STEP 5: Fill Basic Details

In the Basic Details step, fill in the following. Where applicable, choose Yes or No (e.g. for GST, Allow Outside Radius, Allow Face Recognition, Auto Timesheet Approval). Optionally check Make this branch as default branch, then click Save and Next to proceed to Billing.



The screenshot shows the 'Basic Details' section of the CA CloudDesk software. It includes fields for GST Number, Branch/Firm Name, Branch Password, PAN Number, Udyam Registration Number, Tag Line, and Other Text. There are tabs for INVOICE 1, INVOICE 2, INVOICE 3, INVOICE 4, and Payslip, with INVOICE 2 currently selected. A preview window shows two mobile devices displaying invoice documents.

Mobile No	Email*	
<input type="text" value="Mobile No."/>	<input type="text" value="Email"/>	
Permanent Address*		
<input type="text" value="Permanent Address"/>		
State*	City*	PIN NO.*
<input type="text" value="State"/>	<input type="text" value="City"/>	<input type="text" value="PIN NO."/>
Signature	Logo	
<input type="button" value="Click to Upload"/>	<input type="button" value="Click to Upload"/>	
Default Invoice*		
<input type="radio"/> INVOICE 1 <input checked="" type="radio"/> INVOICE 2 <input type="radio"/> INVOICE 3 <input type="radio"/> INVOICE 4		
Ledger Format*		
<input checked="" type="radio"/> LEDGER 1 <input type="radio"/> LEDGER 2		
Default Payslip*		<input type="checkbox"/> Invoice Raised By
<input type="radio"/> Payslip 1 <input checked="" type="radio"/> Payslip 2		
Invoice Settings		
<input type="button" value="+ Add field"/>		
Proforma Invoice Settings		
<input type="button" value="+ Add field"/>		
Allow Outside Radius :	Allow Face Recognition :	
<input checked="" type="checkbox"/> Allow Outside Radius	<input checked="" type="checkbox"/> Allow Face Recognition	



Locations :

Office Name *	Latitude *	Longitude *	Radius *
Enter Office Name	0	0	0

+ Add field

Employee Expectation : Timesheet Lock Period :

	In Days
--	---------

Auto Timesheet Approval

Yes No

Make this branch as default branch

Save & Next



STEP 6: Save and Next

After filling the Basic Details (and optionally setting default branch), click Save and Next to move to Billing. Then complete Payment, Social Media, and Support as required to finish adding the branch.