



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+



Access Anytime Anywhere
24/7



DASHBOARD

Real-Time Control, One View

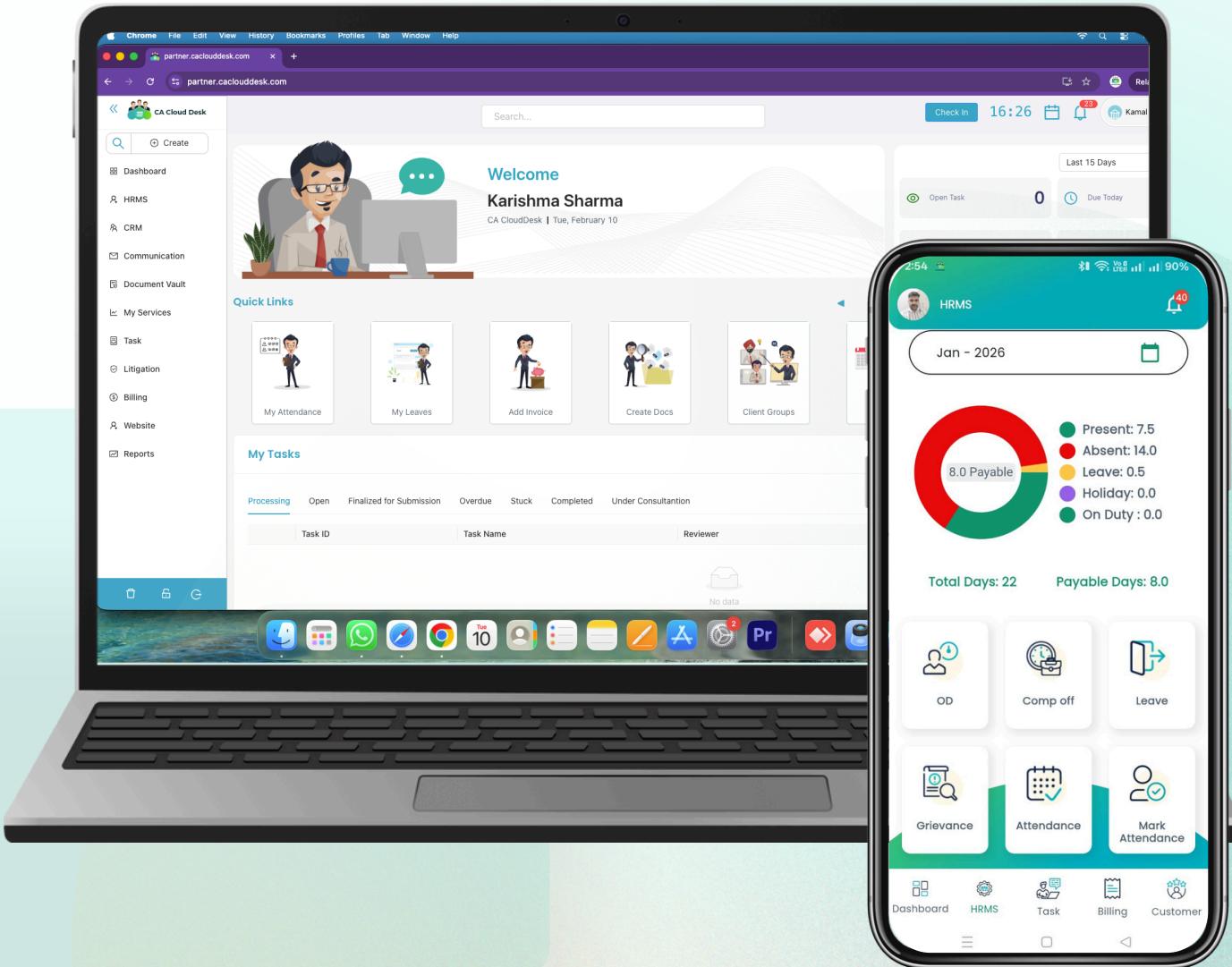
The Smart Dashboard gives users instant visibility into key metrics, tasks, and performance indicators.

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



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.

DOCUMENT VAULT



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

TASK MANAGEMENT



CRM & CLIENT DESK



BILLING



7 POWERFUL MODULES

That Run Your Entire CA Practice



LITIGATION



HRMS & PAYROLL



DOCUMENT VAULT



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%

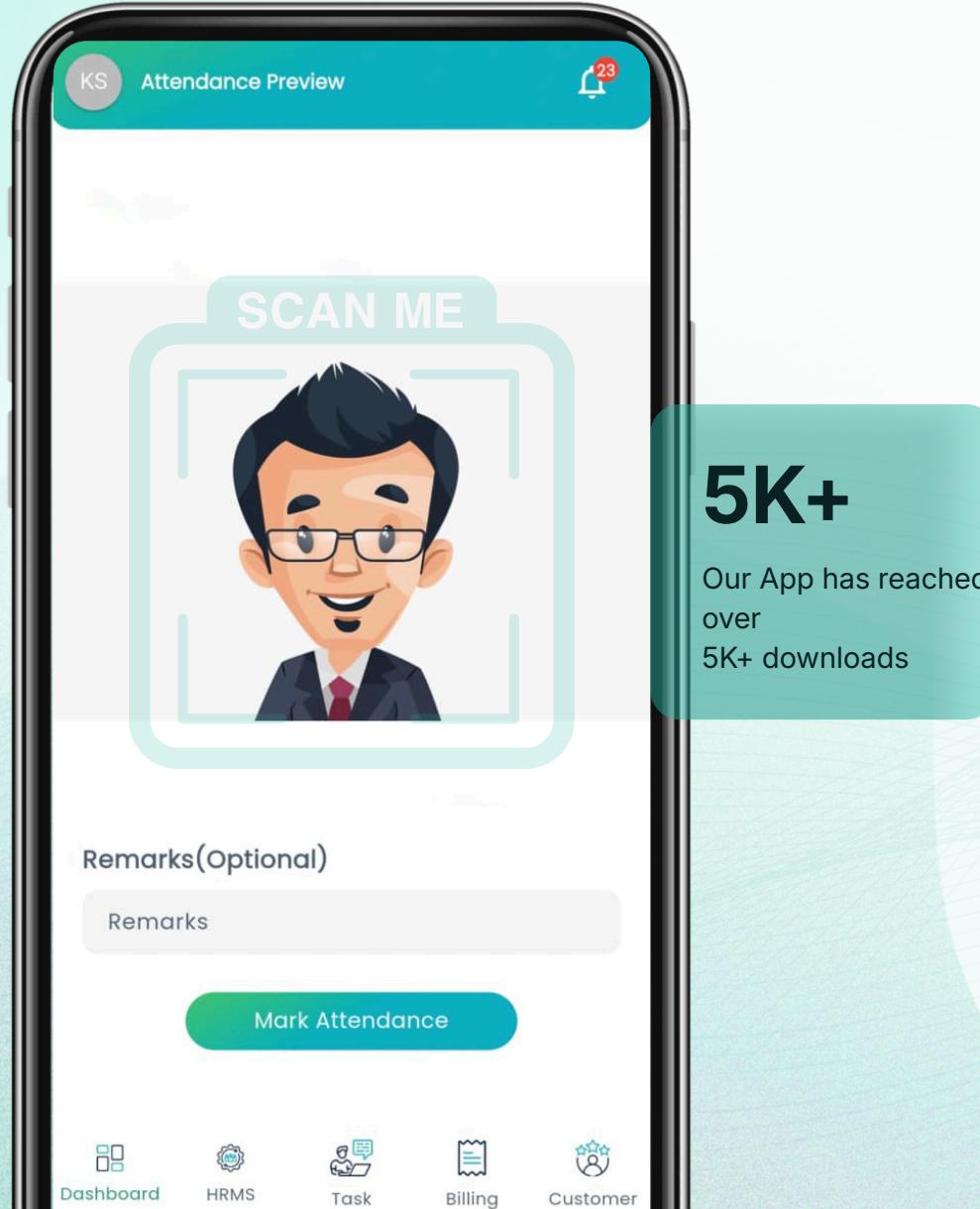
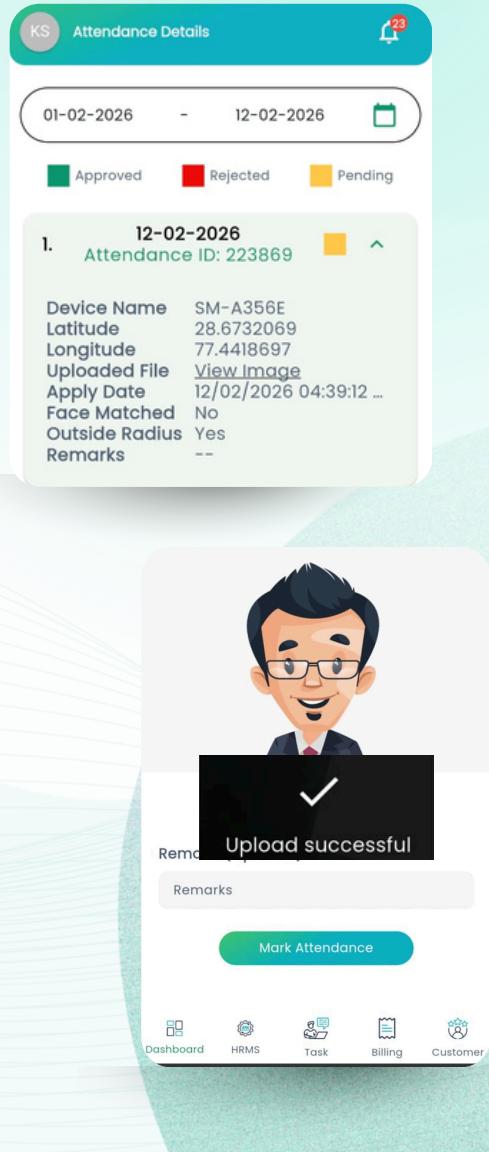
Cost Optimization

Streamlined workflows reduce overhead and improve resources.



Scalable Growth

Built to support teams as they grow without performance issues.



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.



CA Cloud Desk

- Dashboard
- HRMS
- CRM
- Communication
- Document Vault
- My Services
- Task**
- Litigation
- Billing
- Website
- Reports

Tasks

Task Name	TASK ID	Cust Photo	Firm /Co Name	Assignee	Reviewer	Description	Status	Period	Priority	Invoice Status	Service
Task 4200	TSK01120	--	--		DA		PROCESSING	Jan/2026 - Dec/2026	High	Not Allowed	Annual Tax audit
AUDIT	TSK01132	--	--		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.



The screenshot displays the CA Cloud Desk HRMS & Payroll system interface. The left sidebar includes links for CA Cloud Desk, Create, Dashboard, HRMS (selected), Customer, Communication, Document Vault, My Services, Task, Community, Billing, Reports, and Website. The main area is divided into two sections: Payroll (top) and HRMS (bottom). The Payroll section contains icons for SALARY SLIPS, FORM 12 B, and FORM 12BB. The HRMS section contains icons for VIEW EMPLOYEE, EMPLOYEE HIERARCHY, MY LEAVE, MY ATTENDANCE, MY EXPENSE, MANAGER APPROVAL, MANAGER REPORTS, and RAISE GRIEVANCES.

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.



Dashboard Invoice Proforma Invoice Receipt View Ledger Credit Notes Debit Notes Opening Balance Reported Transactions

Estimated Earnings FY 25-26 01/04/2025 → 31/03/2026

₹13,18,420 Dr + ₹4,04,632 Dr - ₹28,130 Cr = ₹16,94,922 Dr

Opening Balance Total Billing Total Collection Debit & Credit Note Outstanding - Before Advance Receipts

Billing Summary

Invoice Payment

Billing

Customer	Amount	(Amt + Dr note - Cr note)
DELHI	3,44,148.00 Dr	(Amt + Dr note - Cr note)
XYZ & CO. - Ghaziabad	54,584.00 Dr	(Amt + Dr note - Cr note)
CA CloudDesk	5,900.00 Dr	(Amt + Dr note - Cr note)

Receiving

Customer	Amount
XYZ & CO. - Ghaziabad	28,130.00 Cr

Summary of Income (In Inr)

Category	Amount
Opening Balance	₹ 13,18,420 Dr
Opening Fees of Bills in Existence	₹ 13,18,420 Dr
Opening Fees of Bills not in Existence	₹ 0
Add: Billing / Debit note during the year	
Invoice / Debit note	₹ 4,04,632 Dr
Invoice	₹ 4,04,632 Dr

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.



The screenshot shows the CA Cloud Desk interface with the 'Document Vault' module selected in the sidebar. The main area displays eight modules:

- CUSTOMER DOCUMENTS
- CREATE DOCUMENTS
- INWARD & OUTWARD DOCUMENTS
- DSC TRACKER
- UDIN REPOSITORY
- PEER REVIEW
- FIXED ASSET REGISTER
- I5CA
- I5CB

The sidebar also includes links for Dashboard, HRMS, CRM, Communication, My Services, Task, Litigation, Billing, Website, and Reports. The bottom navigation bar includes Support, Community, Policy, Lead Management, Training & Demo, Tools, Refer & Earn, and a copyright notice for Law Seva Management Pvt. Ltd. Version: 4.1.26.

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.



Document Vault

Create document View Created document Custom Document Creation

Search Template:

Customer:

Category*:

Sub Category*:

Document Type*:

Document Name:

Save

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	Aut sig
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	
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	
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	

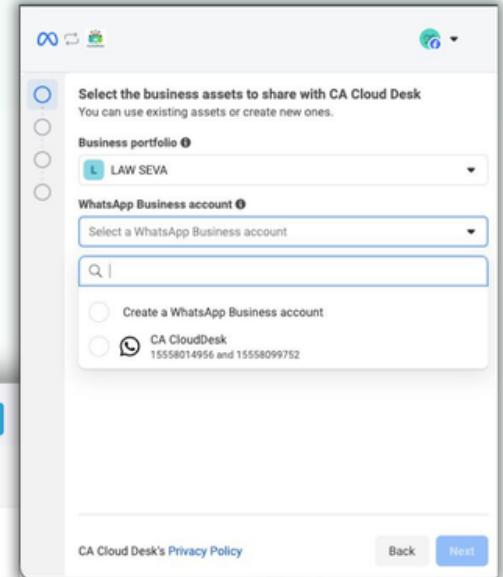
Task					Enable for	
Completed	Processing	Open	Total Created			
255	1	2	258	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
9	0	0	10	<input type="radio"/> Self <input checked="" type="radio"/> Cust	<input checked="" type="radio"/> Self <input type="radio"/> Cust	
29	0	1	30	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
365	1	13	380	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
3	0	0	3	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
9	0	0	9	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
4	4	1	9	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust	
View	365	1	13	380	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	3	0	0	3	<input type="radio"/> Self <input checked="" type="radio"/> Cust	<input checked="" type="radio"/> Self <input type="radio"/> Cust
View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	9	0	0	9	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	4	4	1	9	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
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View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	0	0	0	0	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> Cust
View	2	0	0	2	<input checked="" type="radio"/> Self <input type="radio"/> Cust	<input type="radio"/> Self <input checked="" type="radio"/> 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.



A screenshot of the CA CloudDesk software interface. On the left is a sidebar with icons for Dashboard, HRMS, Customer, Communication, Document Vault, My Services, Task, Billing, Reports, and Website. The main area shows a "Settings" screen with tabs for "Link Whatsapp" and "Template". Under "Link Whatsapp", there's a section titled "View Whatsapp Numbers" with fields for Business Name (empty), Display Phone (empty), Created At (Invalid Date), and Status (Inactive). To the right, there's a "Integrate Your Whatsapp" section with a "Next" button. A modal window is open in the top right corner, titled "Select the business assets to share with CA Cloud Desk". It shows a "Business portfolio" dropdown set to "LAW SEVA", a "WhatsApp Business account" dropdown with "Select a WhatsApp Business account", and two radio button options: "Create a WhatsApp Business account" and "CA CloudDesk 15558014956 and 15558099752". There are also links for "CA Cloud Desk's Privacy Policy", "Back", and "Next".



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.

A screenshot of the 'Send Email' interface in CA Cloud Desk. It includes fields for 'SMTP', 'Template', 'Customer', 'Additional Email', 'CC Email', and 'Subject'. Below these are rich text and font selection tools. On the right, there are sections for 'Content' (with a preview area showing 'Normal' text), 'Add Attachment', and 'Send' and 'Reset' buttons.

A screenshot of the 'Communications' dashboard in CA Cloud Desk. It features three main icons: 'E MAIL' (with a person holding an envelope), 'SMS' (with a person holding a phone), and 'NOTIFICATION' (with a bell icon). Below the icons is a footer with links to 'Support', 'Policy', 'Lead Management', 'Training & Demo', 'Tools', and copyright information: 'Copyright © 2020 Law Seva Management Pvt. Ltd. All Rights reserved. Version: 3.3.1'.

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.



The screenshot shows the CA CloudDesk software interface. At the top, there is a navigation bar with tabs: Profile, HRMS, Payroll, Import Utility, Notification, Accounts, Services, and Settings. The Settings tab is highlighted. Below the navigation bar, there are four cards: 'SMTP CONFIGURATION' (with a person icon), 'CUSTOM FIELD Customer Form' (with a person and gear icon), 'CUSTOMER POLICY' (with a person icon), and 'WHATSAPP' (with a person and WhatsApp icon). In the bottom right corner, a detailed view of the 'SMTP Configuration' screen is shown. This screen has a back arrow, a title 'SMTP Configuration', and a 'View SMTP' link. It contains several input fields with validation asterisks: 'Email*', 'Password*', 'Host*', 'Port*', and a 'Default:' checkbox. There is also a 'Save' button at the bottom.

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.



The screenshot shows the CA Cloud Desk software interface. The left sidebar has a navigation menu with items like Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task, Litigation (which is selected and highlighted in blue), Billing, Website, and Reports. The main content area is titled 'Litigation' and contains two cards: 'CASES & APPEALS' (with an icon of a person holding a briefcase) and 'GST' (with an icon of a person at a desk). At the bottom of the main area, there are links for Support, Community, Policy, Lead Management, Training & Demo, Tools, and Refer & Earn. A copyright notice at the bottom states: Copyright © 2020 Law Seva Management Pvt. Ltd . All Rights reserved. Version: 4.1.26. The top right corner shows a user profile for 'Kamal Assoc.' with a check-in button, the time '12:14', and a notification badge with the number '23'.

Website

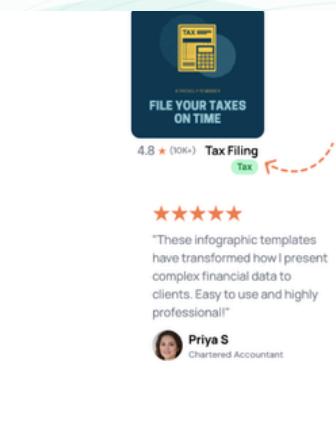
Track and manage complete case information, including client details, court hearings, important deadlines, case status updates in one centralized system- ensuring accuracy, compliance, and timely action.



A screenshot of the CA Cloud Desk software interface. The left sidebar shows a navigation menu with items like Dashboard, HRMS, CRM, Communication, Document Vault, My Services, Task, Litigation, Billing, Website (which is highlighted in blue), and Reports. The main content area is titled 'Website' and contains five cards: 'COMPANY DETAILS' (with a person icon), 'MAIN DASHBOARD' (with a person at a desk icon), 'MY SERVICES' (with a person in a circle icon), 'ABOUT US' (with two people shaking hands icon), and 'GALLERY' (with a person in front of a screen icon). At the bottom, there are links for Support, Community, Policy, Lead Management, Training & Demo, Tools, Refer & Earn, and copyright information: 'Copyright © 2020 Law Seva Management Pvt. Ltd. All Rights reserved. Version: 4.1.26'. The top right corner shows 'Check In', the time '12:28', a notification badge with '23', and user info for 'Kamal Assoc.'. A small 'Active' status indicator is also present.

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 .



Discover Diverse Infographic Templates

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

The page displays a grid of five diverse infographic templates. From left to right: 1. "Tax Tips" - A template for tax professionals featuring a lightbulb icon and the text "Invest up to 12.5 lakh in tax-saving instruments to reduce taxable income." 2. "FINANCIAL MANAGEMENT FOR SMALL BUSINESSES Simplified Accounting Solutions" - A template for marketing financial management, showing a bar chart on a laptop screen. 3. "WE'RE HIRING MANAGER" - A template for job recruitment, showing three colorful chairs. 4. "Did You Know?" - A template for data security and compliance, featuring a lightbulb icon and the text "Engaging a CA for your business can significantly reduce the chances of receiving notices from tax authorities, thanks to their meticulous compliance strategies." 5. "Happy Onam Festival" - A template for festive occasions, featuring a person in traditional Indian attire holding a fan under a tree.

Engage Clients with Infographics

Use our expertly crafted infographic templates to boost client engagement and retention. Perfect for accountants and tax professionals, our templates turn complex information into engaging visuals.

[Get Started](#) [Learn More](#)

A detailed infographic template titled "5 Steps to File an ITR". It consists of five green steps with icons: 1. Open ITR Filing Portal, 2. Enter Personal Details, 3. Add Income Sources, 4. Calculate Tax, 5. Submit & Pay. Below the steps, it says "4.8 ★ (10K+) ITR Filing Accounting". A red dashed arrow points from the main heading "Engage Clients with Infographics" down to this template.

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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One Platform. Endless Possibilities