



OPTIMIZE YOUR ACCOUNTING  
PRACTICE WITH AI POWERED  
CLOUD SOLUTION

[www.cadesk.ai](http://www.cadesk.ai)

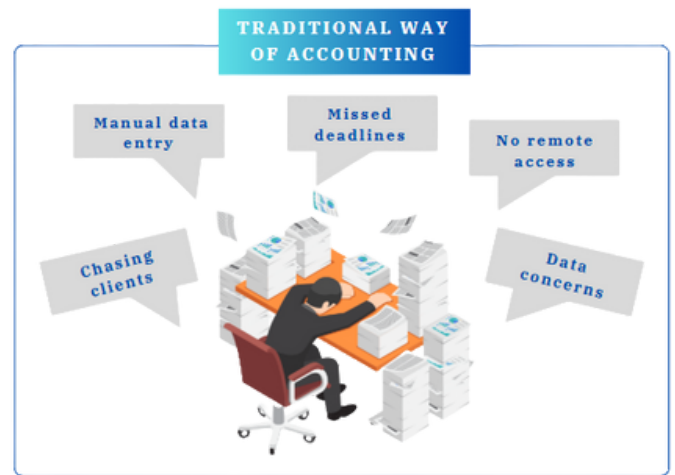


# Overview

Chartered Accountants are the financial backbone of India's economy, ensuring businesses stay compliant, audited, and trusted while also guiding entrepreneurs, MSMEs, and corporates toward sustainable growth. They play a pivotal role in strengthening transparency, driving tax collection, and enabling financial governance, directly contributing to the nation's development.

As practices expand and regulations evolve, CAs face several challenges that can slow operations and impact efficiency

- Scattered client documents across emails, drives, and WhatsApp
- Mounting compliance deadlines with high penalty risks
- Endless client follow-ups and communication delays
- Overloaded teams with poor task visibility and tracking
- Frequent urgent requests for certificates or audits disrupting workflow



## Introducing CAdesk

This is where CAdesk comes in a cloud-based ERP and practice management platform built exclusively for Chartered Accountants. CAdesk brings client data, files, compliance tasks, audits, service requests, and team collaboration into a single, easy-to-use dashboard.

With features like automated GST reconciliation, smart file organization, WhatsApp-based client communication, audit tracking, and role-based task management, it transforms how CAs work every day. By reducing manual effort and communication gaps, CAdesk not only boosts productivity but also ensures deadlines are never missed, giving CAs more time to focus on advisory and growth-oriented services for their clients.



# GST Reconciliation

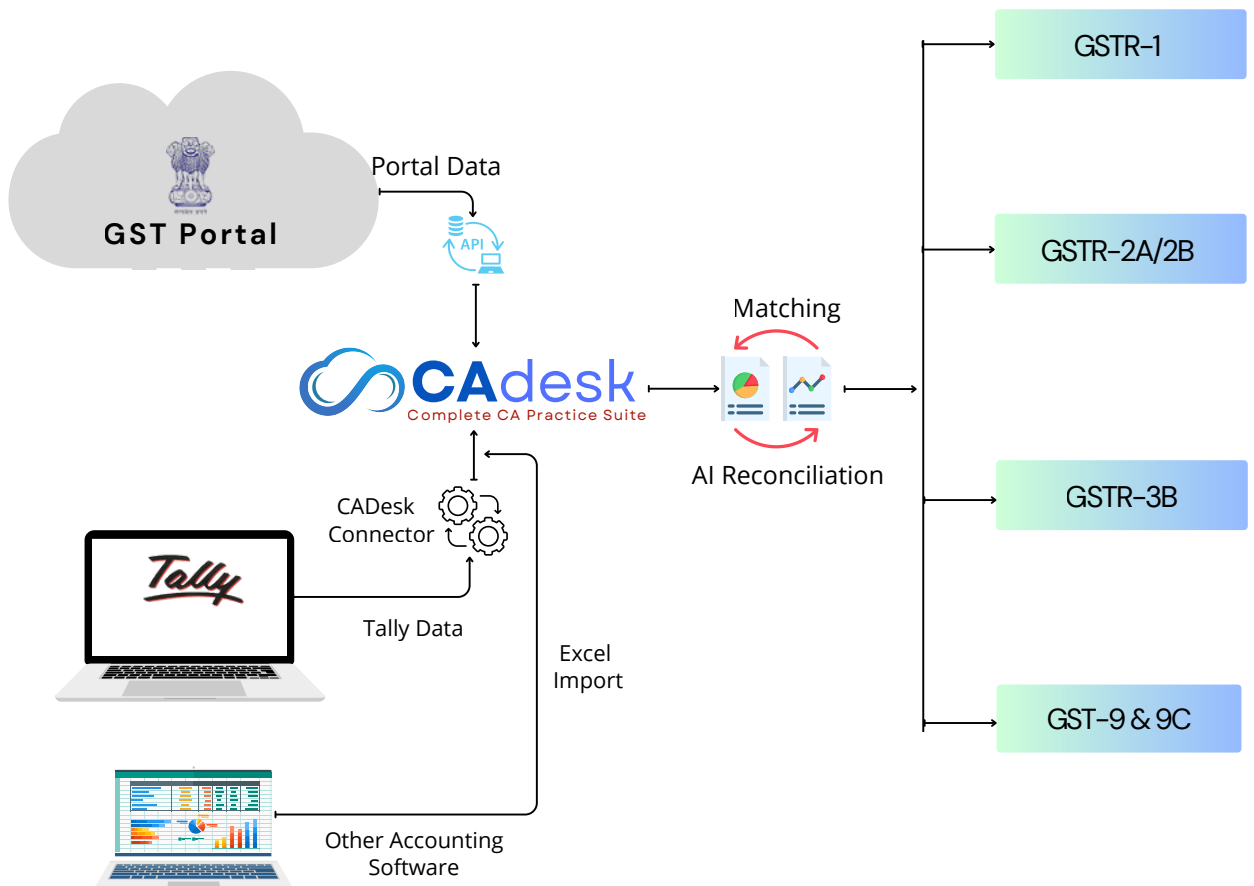
GST reconciliation has always been a complex, time-consuming task requiring advanced Excel skills. CAdesk simplifies the entire process by fetching data automatically and reconciling it with just one click.

## ✓ Fetch Data Automatically

- GSTR-1, GSTR-2A/2B, GSTR-3B, GSTR-9 & 9C fetched through API from the **GST Portal**.
- Sales & purchase data pulled from Tally via **CAdesk Connector** or you can import excel from any other accounting software.

## ✓ AI-Generated Reconciliation Report

- Instantly detects mismatches, missing invoices, and duplicates.
- Generates share-ready reports for corrections and compliance.



“One platform, one click,  
complete GST peace of mind.”

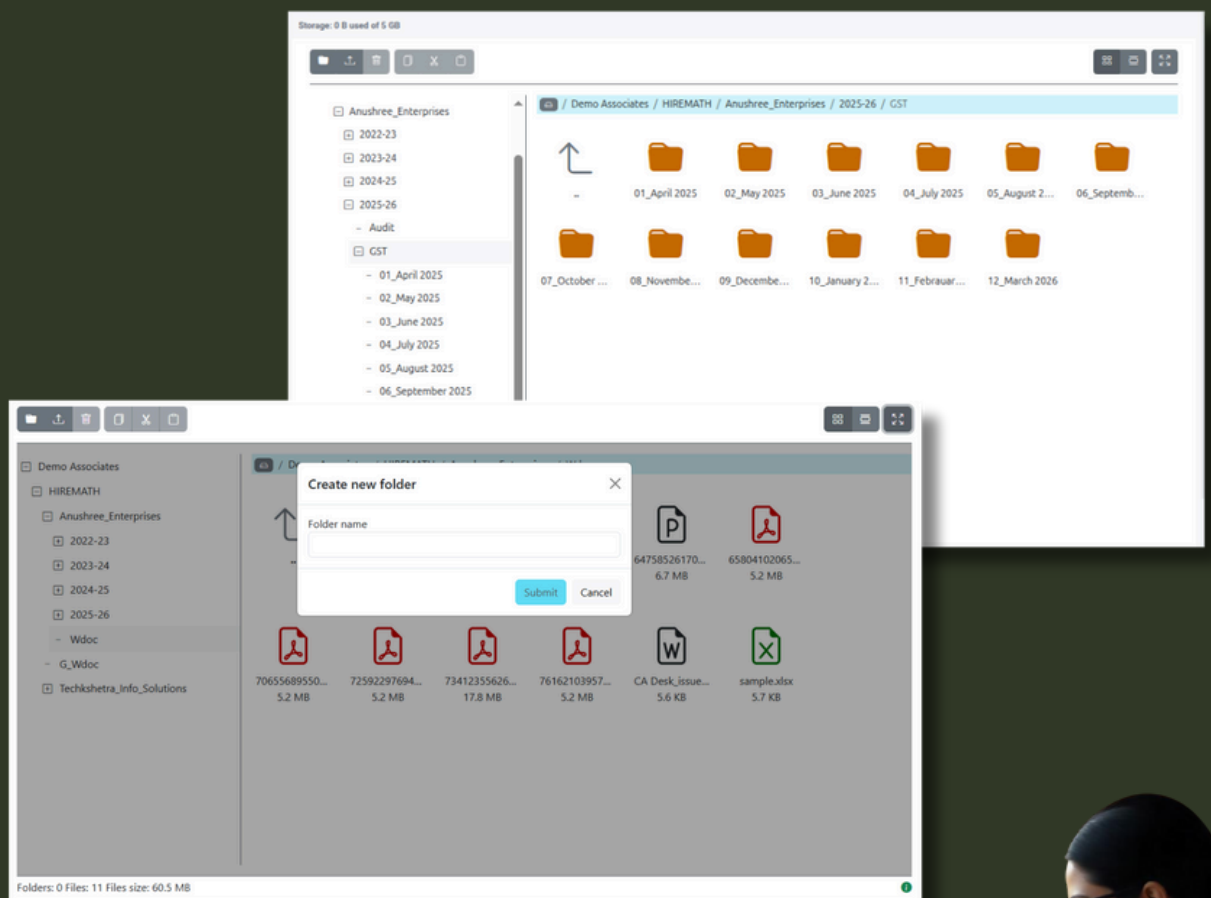


# File Organizer

From invoices, notices, Tally backups, return copies, GST & IT filings, to statutory records CAs often struggle with files scattered across emails, drives, and WhatsApp. This creates delays and stress, especially during audits or scrutiny.

CAdesk File Organizer solves this by providing a secure, centralized cloud space where:

- ✓ Files are **automatically arranged in a structured folder system** organized by client, financial year, compliance type, and group of companies.
- ✓ A familiar **Windows Explorer-style interface** makes file handling simple with options like upload, rename, copy, move, and delete.
- ✓ Since everything is stored in the **cloud**, files can be accessed securely anytime, anywhere enabling collaboration beyond office walls.



“Secure cloud storage for all your client files, organized and always accessible”





Clients prefer the ease of WhatsApp for their convenience, but for Chartered Accountants, managing financial documents through multiple staff phones can create security risks. Sensitive files become scattered and tracking them is cumbersome. CAdesk centralizes WhatsApp communication via a single business number, keeping all documents secure, organized, and instantly accessible from anywhere, at any time.

## ✓ Smooth Communication

Clients continue using WhatsApp, while CAs manage all messages and workflows securely from the CAdesk portal.

## ✓ Effortless File Sharing

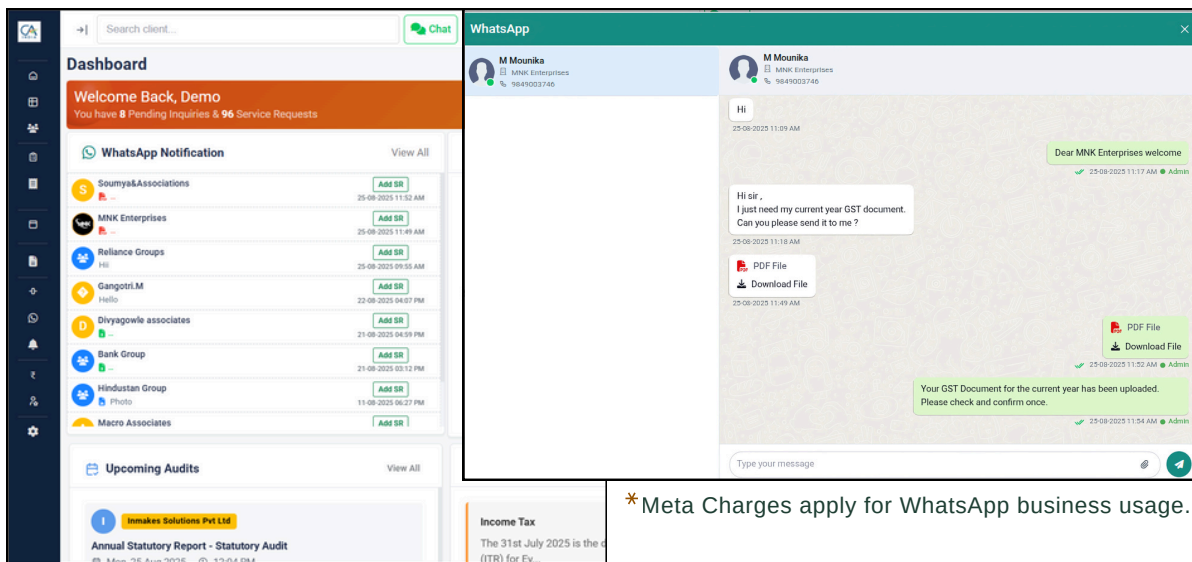
Client-sent documents are automatically stored in their dedicated “Wdoc” folder. CAs can also send invoices, reports, or other files directly.

## ✓ Instant Notifications & Reminders

Send timely alerts for dues, approvals, or required actions, ensuring clients stay informed and responsive.

## ✓ Role-Based Access

Employees can access only the chats and files assigned to them.



“Because Your Clients Live on WhatsApp Now Your ERP Does Too”

# Audit Management

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CAdesk enables Chartered Accountants to manage audits efficiently and remotely. With automated scheduling through Google Calendar sync, email, and WhatsApp notifications, it saves valuable time, travel, and resources. Every stage of the audit can be tracked in real time, as auditors raise queries and clients resolve them within the platform ensuring audits are timely, transparent, and fully compliant.

## ✓ Standardized Audit Checklists

CAs can create standard audit checklists as templates for junior and team auditors, ensuring consistency and accuracy across all audit types.

## ✓ Flexible & Remote Audit Scheduling

CAdesk supports physical audit scheduling and online audits with Google Meet integration, helping save travel, cut costs, and optimize resources especially for follow-ups and minor reviews

## ✓ Automated Tracking & Collaboration

Queries, reports, alerts, and updates are handled automatically, allowing clients and staff to collaborate seamlessly within the platform, making the entire audit process transparent and efficient.

The screenshot displays the CAdesk Audit Management interface. On the left, there's a sidebar with 'Audit Status' (All, Scheduled, Completed, Query Raised, Cancelled) and 'Upcoming Audit' (Bharatesh Associates - Income Tax Audit, Techkshetra Info Solutions - Finance Audit). The main area shows a calendar for August 2025 with a list of audits scheduled for various dates. A video call window is open, showing three participants: Bhoomika Salmath (Presenting), Mounika Madugu, and Meghana. The call window also displays a list of participants and a 'Share View' button. The bottom of the interface shows a '18:40 | ITR-1 Filing Report'.

“Simplify Audits. Serve Clients.  
Grow Revenue.”

# Task Management

CAdesk empowers Chartered Accountants to assign tasks, balance workloads, and track deadlines efficiently, whether employees are in-office or remote. Every task is visible by status, assignee, and timeline, helping teams work smarter, stay productive, and maintain accountability.

## ✓ Centralized Task Management

Assign, track, and monitor all tasks in a single platform for full visibility.

## ✓ Balanced Workload & Deadlines

Ensure fair distribution of tasks, set priorities, and improve efficiency and productivity.

## ✓ Automated Service Request Handling

Client Service requests are automatically converted into tasks.

## ✓ Auto Task Management

Tasks are automatically generated based on predefined reminder schedules for standard statutory compliance deadlines such as R1 filing, 3B filing, and TDS filing.

## ✓ Collaboration with Alerts & Notifications

Team members can update progress, share notes, Stay updated with reminders.

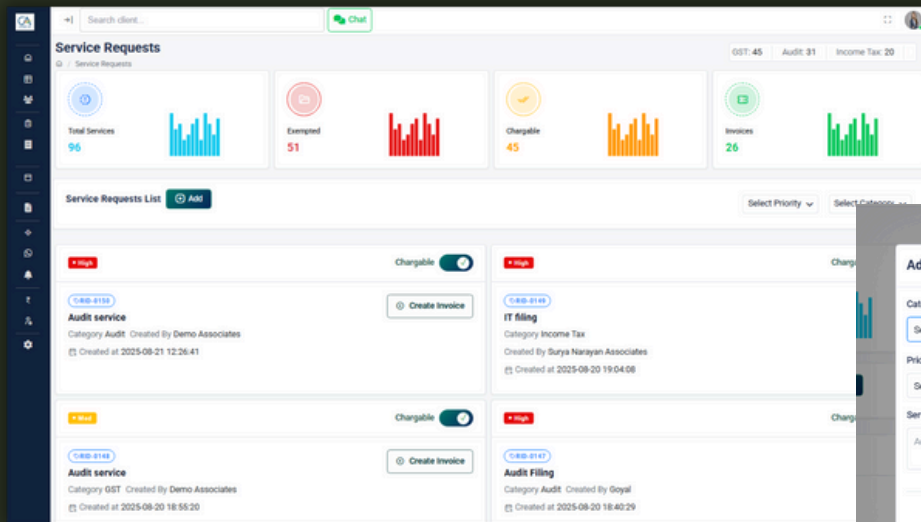
The screenshot displays the CAdesk Task Management interface. The main dashboard shows a grid of tasks categorized by status: New SR (47), Pending (57), In Progress (27), and Extended. Each task card includes a client name, task title, priority, and due date. An 'Add New Task' modal is open, showing fields for Category (GST), Assign To (User) (Kruthika (GST Manager)), Task Title (GST Compliance Service), Start Date & Time (25/08/2025 11:24 AM), Due Date & Time (26-08-2025 11:30 AM), Client (Mnk enterprises (CID0008)), and Priority (High). The modal also includes an 'Upload Attachment' section with a 'Choose File' button and a note about supported document types (Jpg, Jpeg, Png, Ppt, Doc) and a maximum size of 1 MB.

“Simplify Work. Boost Productivity. Stay Organized.”



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# Service Request



### Add Service Request

Category:

Client:

Priority:

Subject:

Service Description:

Upload Documents:

Choose File:

Supported Documents: jpg | png | pdf, Max: 2MB

Cancel

CAdesk seamlessly captures client requests from WhatsApp or the client portal, converts them into structured tasks, and organizes them on a centralized dashboard with categorization, real-time updates, audit trails, and options for assignment, chargeability, and instant invoicing.

“Smart Request Management. Instant Invoicing”

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# Instant Bills & Payments

**Invoices & Payments**

Search client... Chat

Invoices Summary:

- Total Invoice: ₹3095079.82
- Due: ₹1083631.76
- Total Overdue: ₹2011448.06

Invoices Table:

Invoice	Name	Description	Taxable Value	IGST(18%)	CGST(9%)	SGST(9%)	Total	Due Date
DEMO/061-2025-26	MNK Enterprises	Audit Service	₹25000.00	₹4500.00	₹0.00	₹0.00	₹29500.00	01/09/2025
DEMO/060-2025-26	Vinod Associates	GST Reconciliation for Current FY 2025-26	₹10000.00	₹1800.00	₹0.00	₹0.00	₹11800.00	01/09/2025
DEMO/059-2025-26	Beacon Associates	ITR-1 Filing Report	₹25000.00	₹4500.00	₹0.00	₹0.00	₹29500.00	01/09/2025
DEMO/058-2025-26	ASR Associates	ITR-1 Filing Report, Statutory Audit, Income Tax Return Filing	₹76501.00	₹13770.18	₹0.00	₹0.00	₹90271.18	01/09/2025

**DEMO ASSOCIATES**

24, 2nd Floor, GR Pristine, Kathriguppe Main Rd. above Apple Store, 3rd Phase, Banashankari 3rd Stage, Banashankari, Bengaluru, Karnataka 560085

Email: contact@techkshetrainfo.com Phone: 8095528899

GSTIN: 22ABCD1234F121

**Tax Invoice**

Original for Recipient

Bill To: GANGOTRIM N/A

Invoice No: DEMO-032-2025-26

Invoice Date: 20/08/2025

Reference: 65

State: Karnataka

State Code: 29

Email: gangotri.m@techkshetrainfo.com

Phone: 8073049440

GST N/A

PAN N/A

Sl.No	Description	SAC Code	Qty	Rate	Amount
1	Audit Service	998232	1	10,000.00	10,000.00

**Terms & Conditions:**

- Payment is due within 7 days from the date of invoice unless otherwise agreed in writing, delayed payments shall attract an interest of 1.5% per month from the due date.
- The services provided are as per the scope agreed upon and are governed by applicable professional standards.
- Any objections or discrepancies in the invoice must be reported within 7 days of receipt, this invoice is subject to the jurisdiction of Bangalore courts only.

**Taxable Amount: 10,000.00**

Add : CGST (9%) 900.00

Add : SGST (9%) 900.00

**Total Tax: 1,800.00**

**Total Amount After Tax: ₹ 11,800.00**

Amount in words: Eleven thousand Eight hundred only

Bank Details: Bank A/c No: 123456789012, IFSC Code: FNBK0001234, Branch Name: National Bank, Branch Banashankari

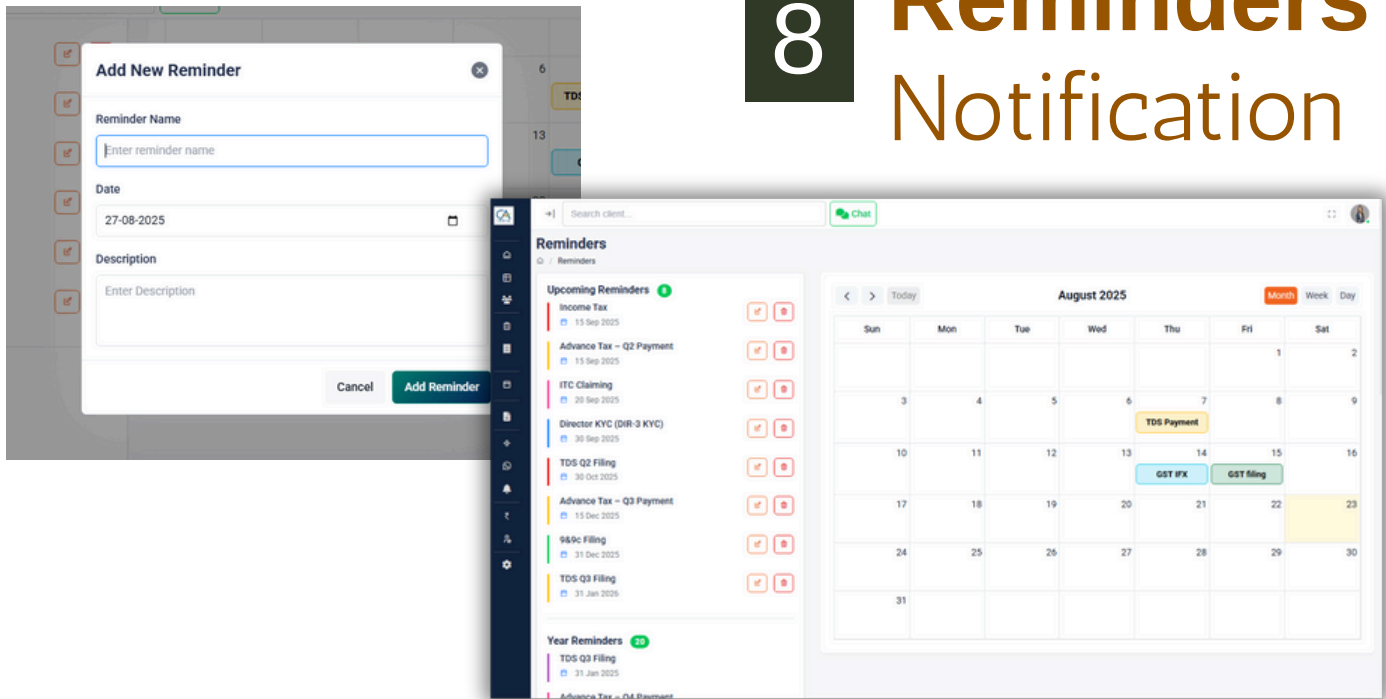
Authorized Signatory

CAdesk automates billing by instantly generating invoices after service completion and sending them to clients via WhatsApp and email. With built-in payment options like UPI, cards, and net banking, clients can pay directly from the invoice speeding up revenue settlements and reducing follow-ups. This streamlined process improves cash flow and lets firms focus on their core work.

“No Delays. No Doubts. Just Clean settlements”



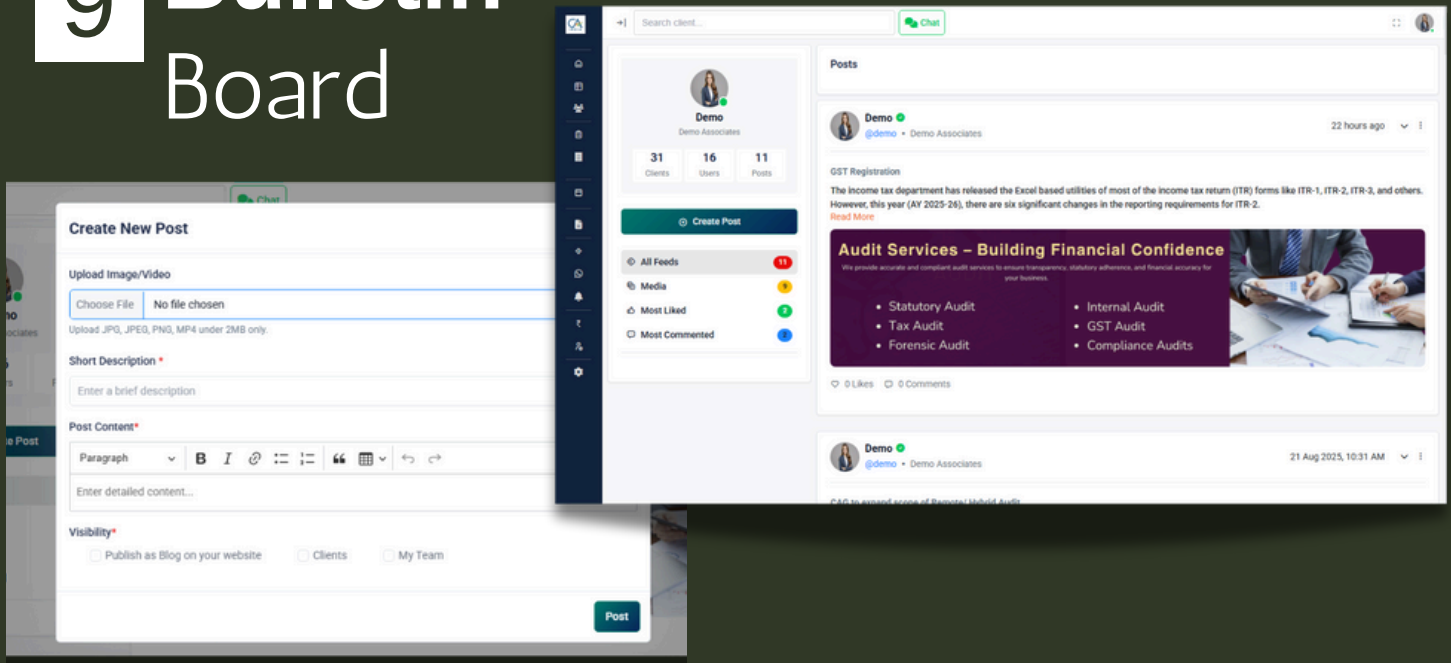
# 8 Reminders & Notification



All your clients receive instant reminders and notifications directly on their Emails & WhatsApp. Be it tax deadlines, pending tasks, or important updates everything reaches them on time, ensuring zero delays and smooth communication.

“Timely Reminders, Always on Time”

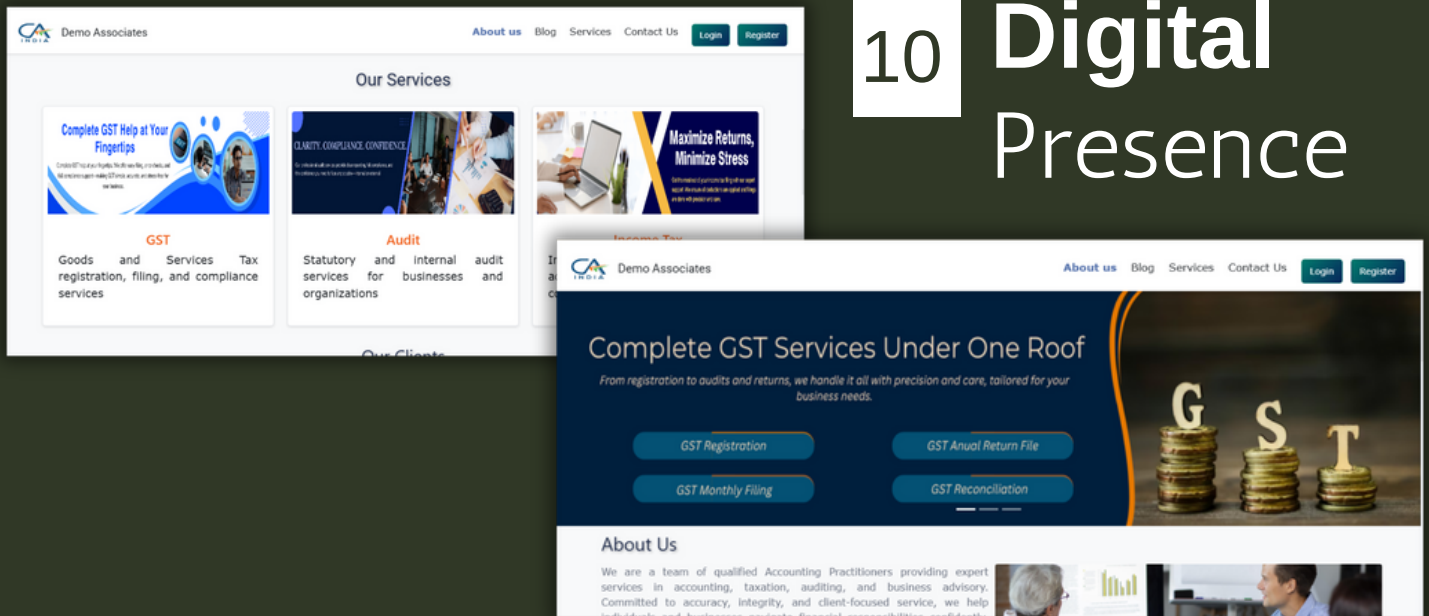
# 9 Bulletin Board



CAdesk Bulletin Board is a smart communication hub for CA firms, centralizing announcements, policy updates, client reminders, system notices, and government information on a single platform. It also enables CAs to publish blogs and create posts similar to social media updates.

“One Platform. All Your Important Updates”

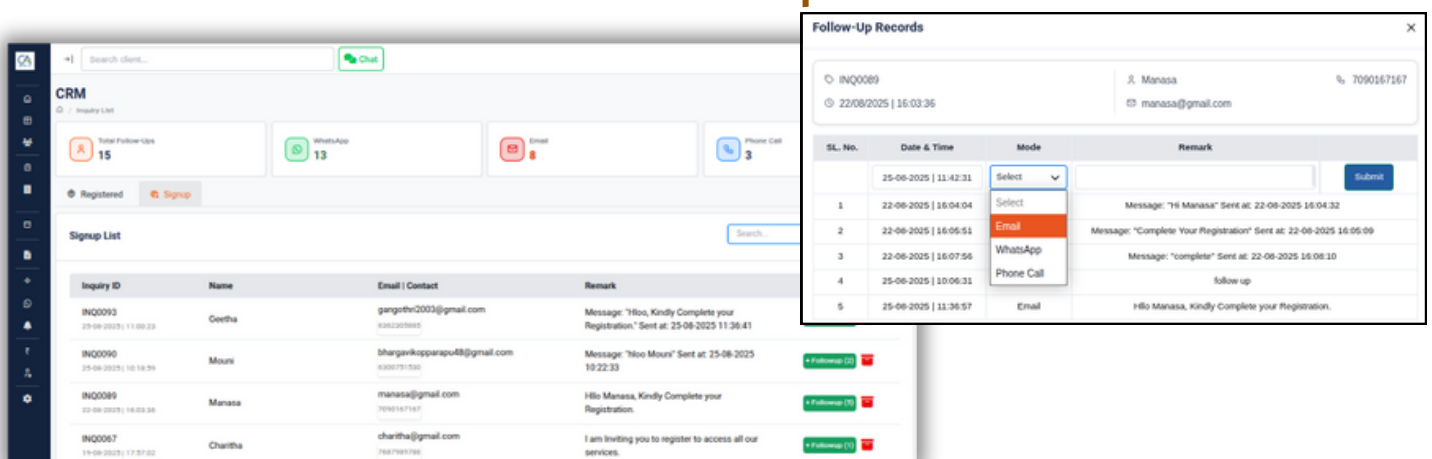
# 10 Digital Presence



CAdesk instantly builds your website, creating a professional digital presence to accelerate your firm's growth. Let clients discover your services, connect seamlessly, and get started anytime. Automated systems enhance client acquisition and support your expansion across India.

"Instant digital presence to drive growth and expand across India"

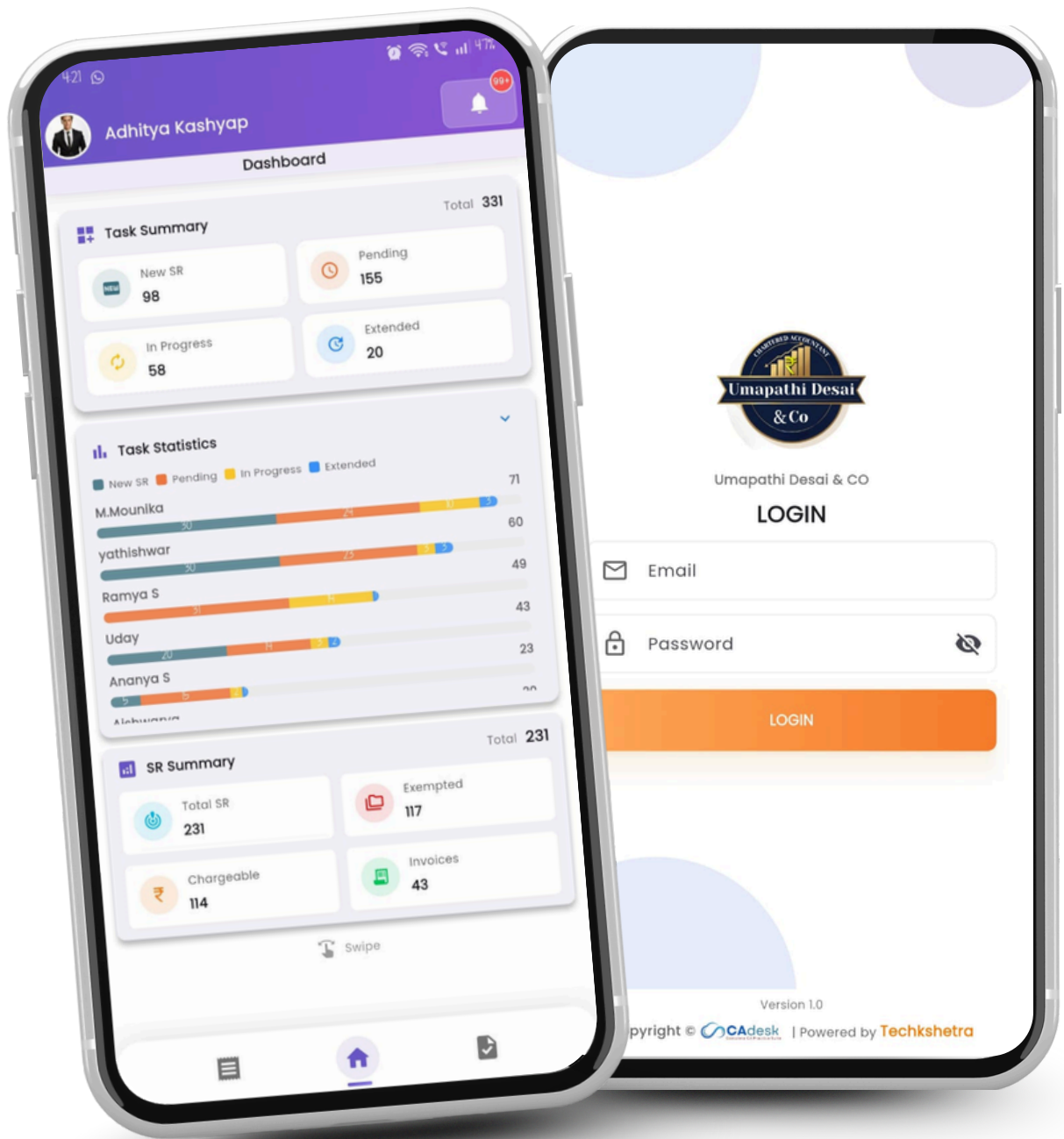
# 11 CRM Smart Follow-Up



Every visitor or inquiry is a chance to grow your business. Even if someone fills only part of a form or visits just once, our CRM ensures no lead slips away. With automated follow-ups through WhatsApp, email, or phone, it sends timely reminders, nurtures interest, and builds lasting customer connections.

"Never miss a lead follow up smart, convert faster."

# MOBILE APPLICATION



CAs need to stay organized and responsive while managing multiple clients. The CADesk Mobile Application empowers Chartered Accountants to efficiently handle tasks, service requests, and audits directly from their mobile devices anytime, anywhere.

- ✓ Manage tasks, service requests on the go
- ✓ Real-time updates synced with the web platform
- ✓ Receive instant alerts & reminders
- ✓ User-friendly mobile interface for faster workflow

Available on Android devices Download & access anywhere

# Our Security Aspects



## AWS SECURED SERVER

With AWS secured hosting and exclusive databases for every CA, CAdesk guarantees that your firm's and clients' data remain safe, private, and fully protected.



## SSL CERTIFICATE

Secure HTTPS connections are enabled with SSL certificates, ensuring encrypted and safe data transmission.



## DISASTER RECOVERY & HIGH AVAILABILITY

CAdesk maintains disaster recovery protocols and redundant infrastructure to guarantee uptime and business continuity.



## TWO-FACTOR AUTHENTICATION

Two-Factor Authentication ensures enhanced login protection using OTP and authenticator apps.



## AUTOMATED BACKUPS

Your data is securely backed up daily for maximum protection



## DATA RESIDENCY & OWNERSHIP

Each CA firm retains complete ownership of its data, stored securely in dedicated databases.



# What Our Client Says

*"I've been using CAdesk for a while now, and it has completely changed the way I work as a CA. Earlier, GST reconciliation on Excel used to take hours, but with CAdesk the automatic matching makes it quick and simple. The inbuilt WhatsApp feature has made client communication much easier for our entire team, and storing files and documents is now hassle-free. I also find the online and offline audit features very useful, and managing audit reports, invoices, and payment collection has become effortless. My team especially likes the task management feature, which helps us stay consistent and organized."*

*"I would strongly recommend every CA to use CAdesk and experience the benefits it brings."*



**CA Umapathi Desai**

Umapathi Desai & Co - Bengaluru

## About Us



Techkshetra Info Solutions Pvt. Ltd., founded in 2016 and based in Bengaluru, is a leading tech company providing innovative IT solutions to government bodies, corporates, and global clients. Certified with ISO 9001:2015 and CMMI Level 5, the company delivers high-quality services across sectors like education, security, renewable energy, and infrastructure. Embracing Industry 4.0, Techkshetra leverages AI, IoT, automation, and data analytics to drive digital transformation and smart manufacturing.



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