



OPTIMIZE YOUR ACCOUNTING
PRACTICE WITH AI POWERED
CLOUD SOLUTION

www.cadesk.ai

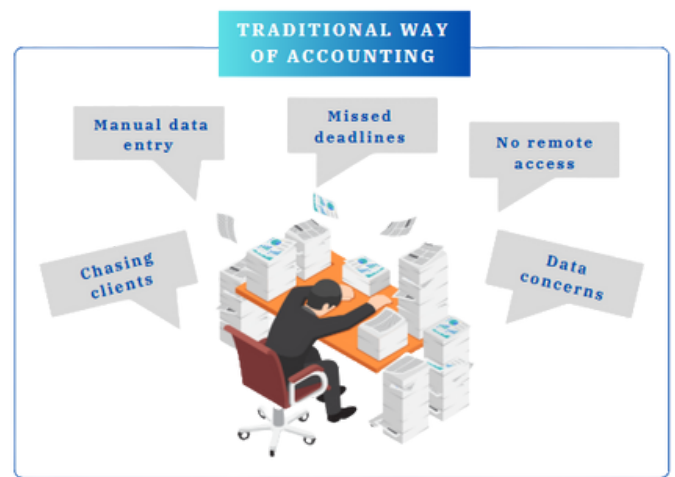


Overview

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

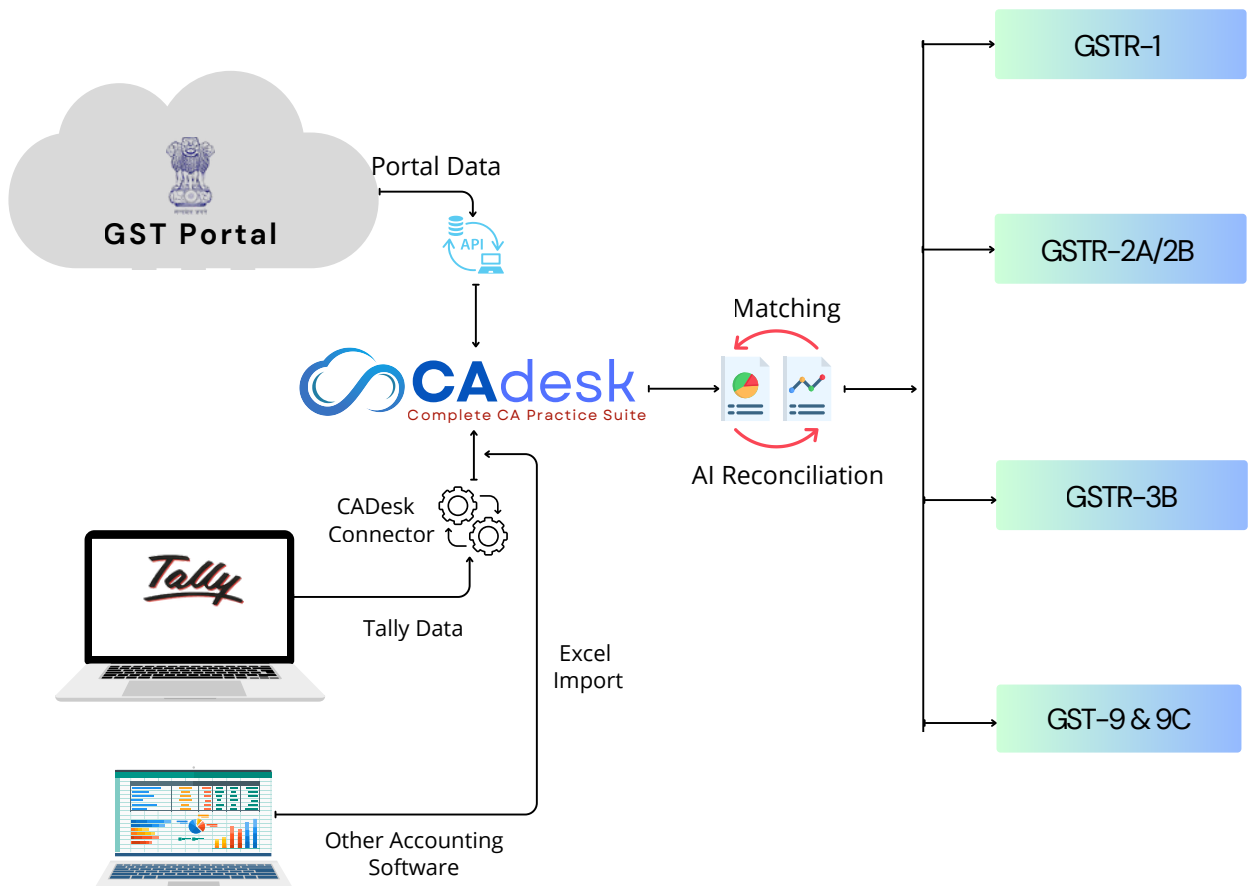
GST reconciliation has always been a complex, time-consuming task requiring advanced Excel skills. CAdesk simplifies the entire process by fetching data automatically and reconciling it with just one click.

✔ 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.”



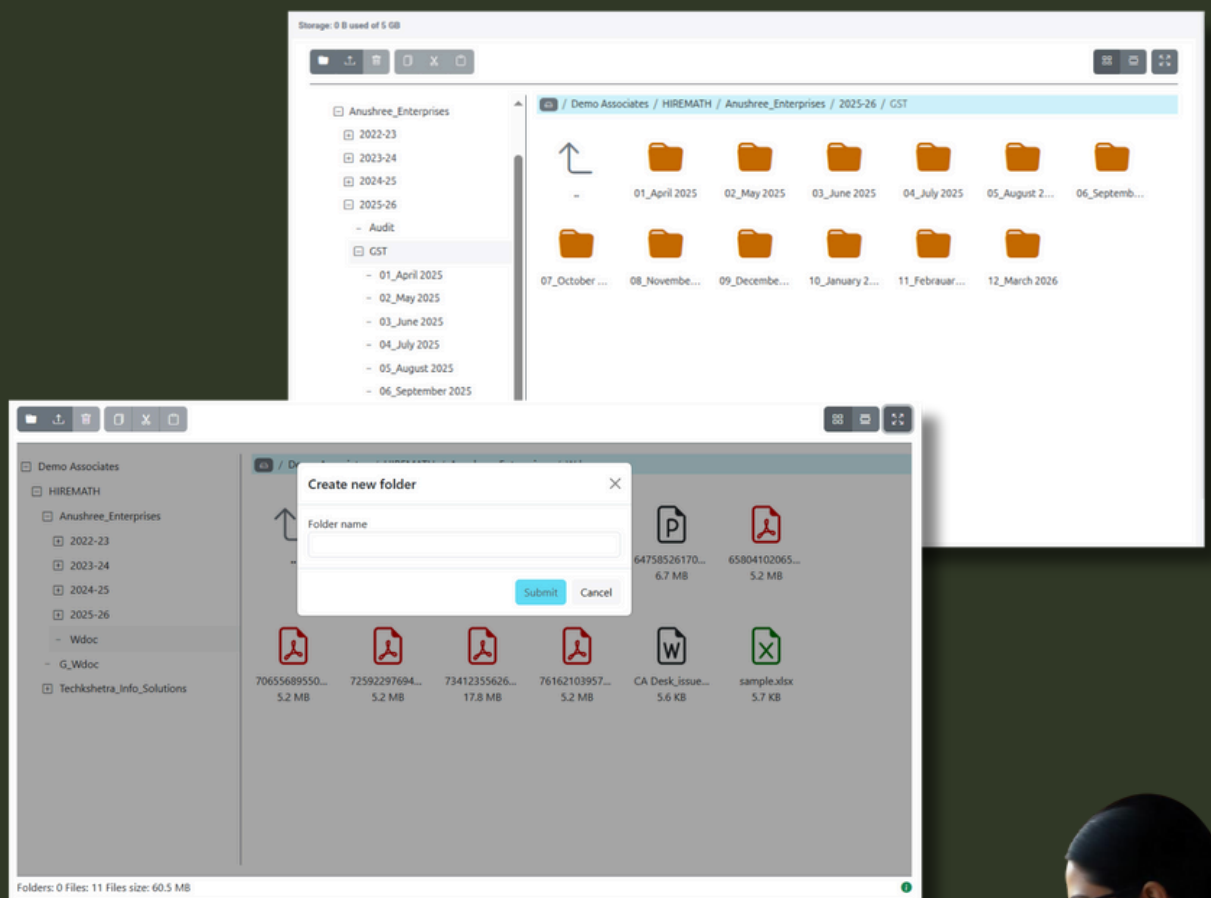
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File Organizer

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”



WhatsApp Connect

3

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

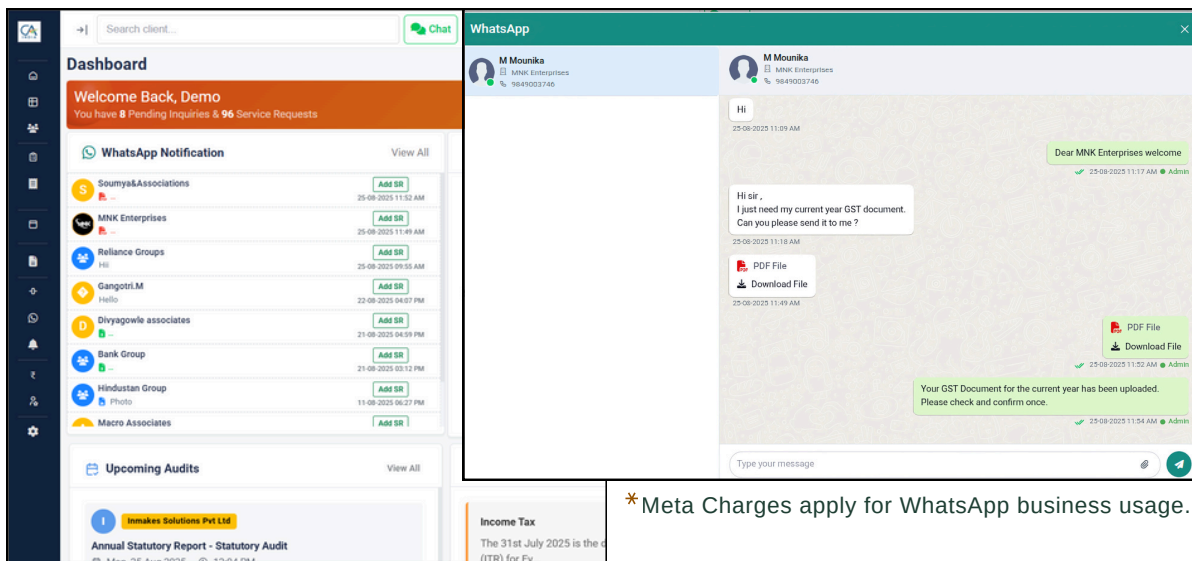
Client-sent documents are automatically stored in their dedicated “Wdoc” folder. CAs can also send invoices, reports, or other files directly.

✓ 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.



The image shows a split-screen view. On the left is the CAdesk dashboard, which includes a search bar, a 'Chat' button, and a 'Dashboard' section with a 'Welcome Back, Demo' message and '96 Service Requests'. Below this is a 'WhatsApp Notification' section listing various clients like 'Sourmya&Associations', 'MNK Enterprises', 'Reliance Groups', etc., each with an 'Add SR' button. At the bottom, there are sections for 'Upcoming Audits' and 'Income Tax'. On the right is a WhatsApp chat window for 'M Mounika' (MNK Enterprises). The chat shows a conversation where the client asks for their current year GST document, and the CA responds with a PDF file and a confirmation message: 'Your GST Document for the current year has been uploaded. Please check and confirm once.'

* Meta Charges apply for WhatsApp business usage.



“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, Techshetra Info Solutions - Finance Audit). The main area shows a calendar for August 2025 with audit events for various clients like Siddharth Enterprises and Anushree Enterprises. A video call window is overlaid on the bottom right, showing a meeting with participants Bhoomika Salmath, Mounika Madugu, and Meghana. The call is displaying a financial statement with a table of Particulars and a Grand Total of 2,38,029.82.

Particulars	Debit	Credit	Closing Balance
April		2,38,029.82	2,38,029.82 Dr
May			2,38,029.82 Dr
June			2,38,029.82 Dr
July			2,38,029.82 Dr
August			2,38,029.82 Dr
Grand Total		2,38,029.82	2,38,029.82 Dr



“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.

✓ Collaboration with Alerts & Notifications

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

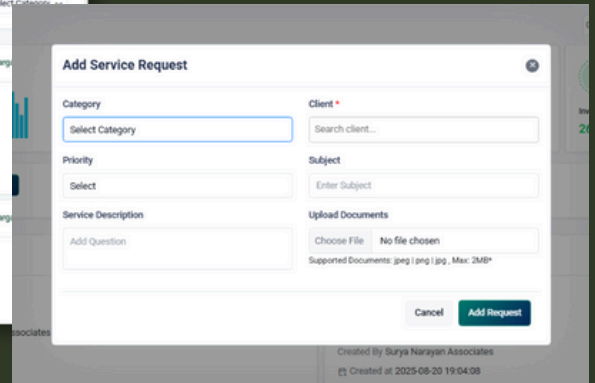
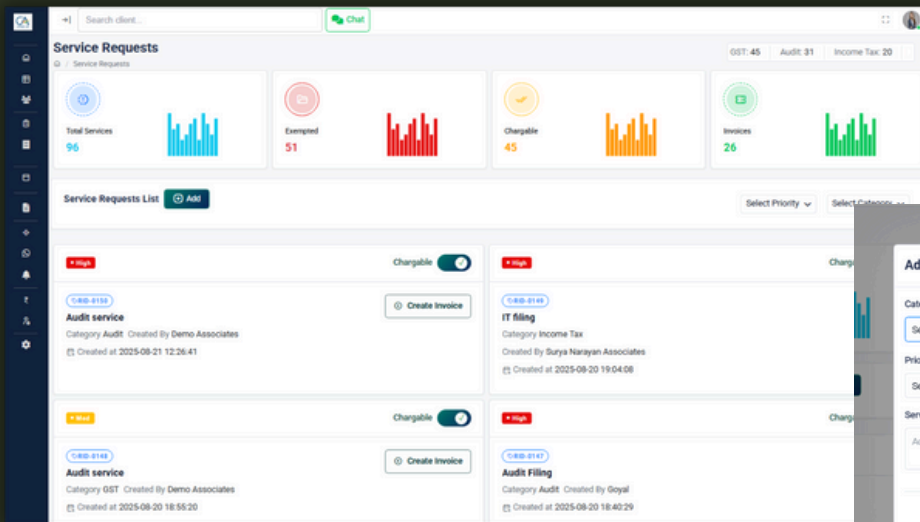
The screenshot displays the CAdesk Task Management interface. The main dashboard shows a grid of task cards categorized by status: New SR (47), Pending (57), In Progress (27), Extended (10), and Completed (11). Each card includes a client name, task title, priority, and assignee. An 'Add New Task' modal is open, showing fields for Category (GST), 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 supported document types (Jpg, Jpeg, Png, Ppt, Doc).

“Simplify Work. Boost Productivity. Stay Organized.”



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Service Request

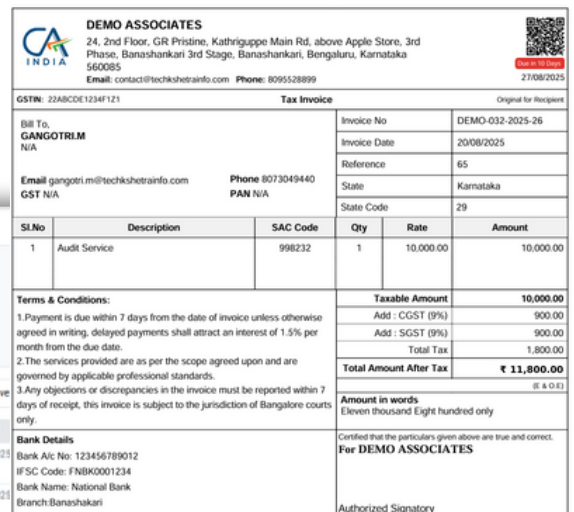
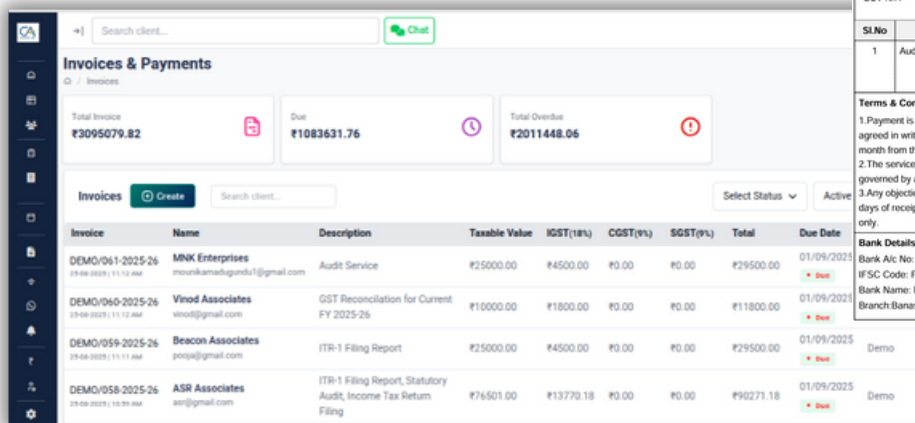


CAdesk seamlessly captures client requests from WhatsApp or the client portal, converts them into structured tasks, and organizes them on a centralized dashboard with categorization, real-time updates, audit trails, and options for assignment, chargeability, and instant invoicing.

“Smart Request Management. Instant Invoicing”

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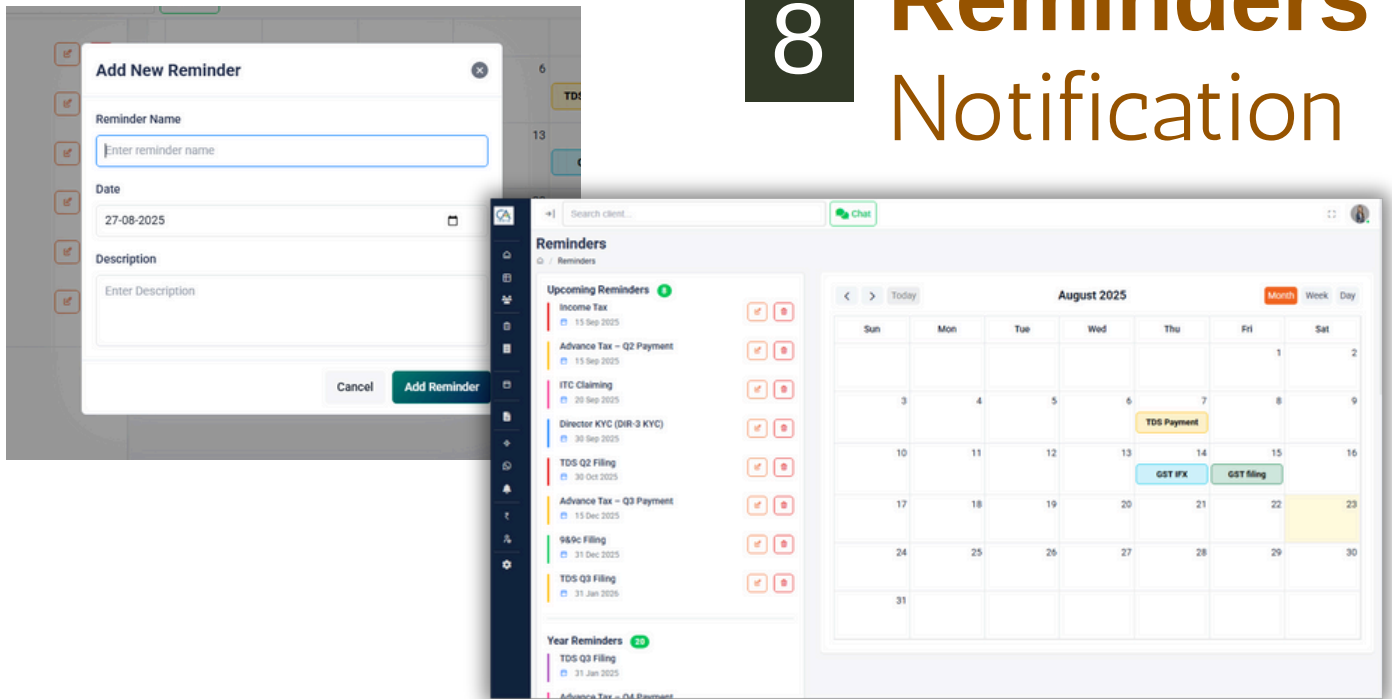
Instant Bills & Payments



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”

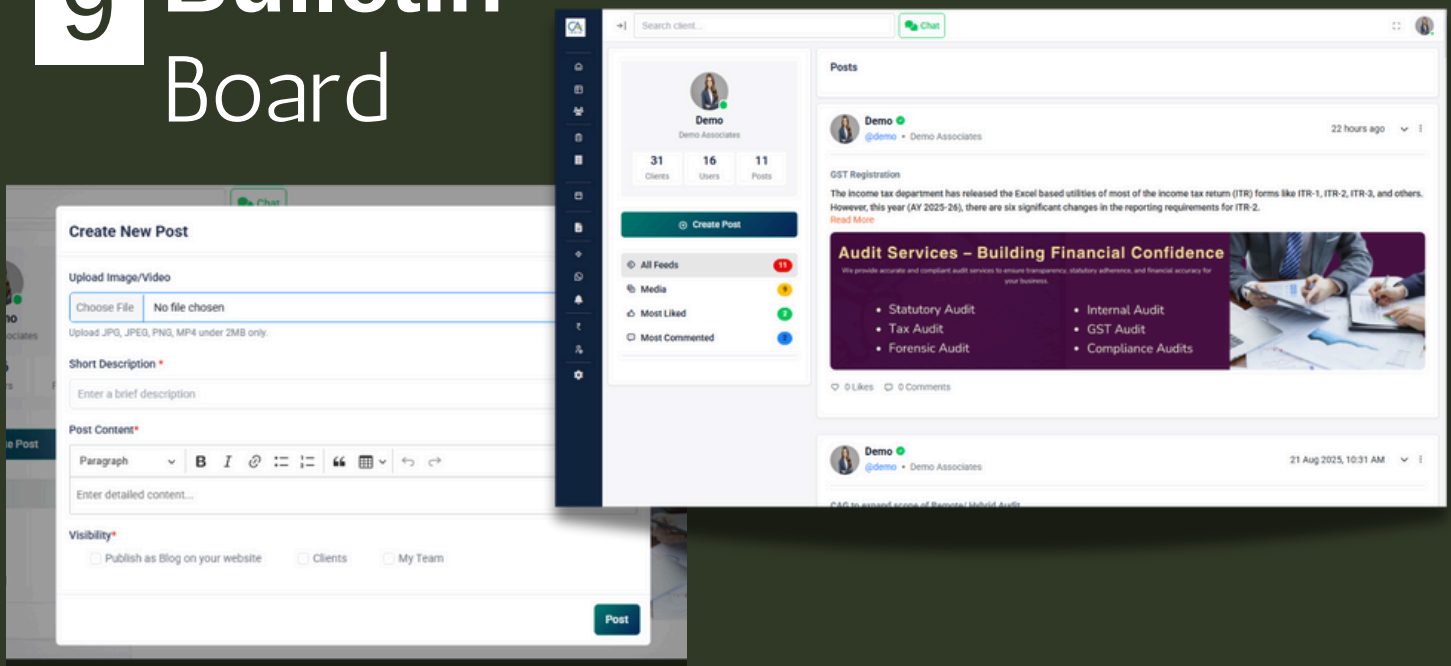
8 Reminders & Notification



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”

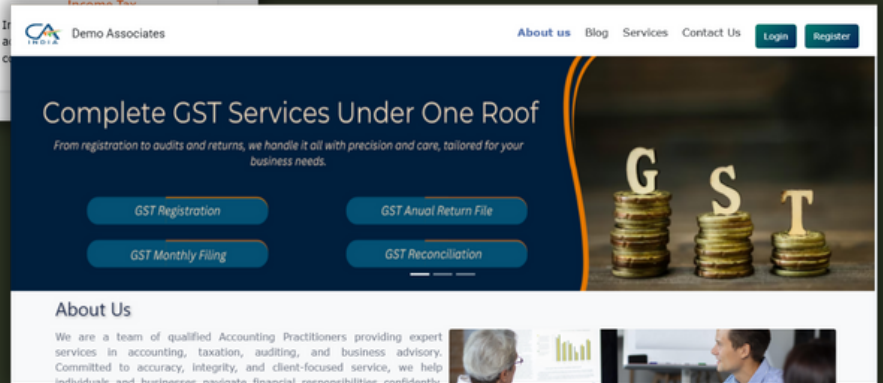
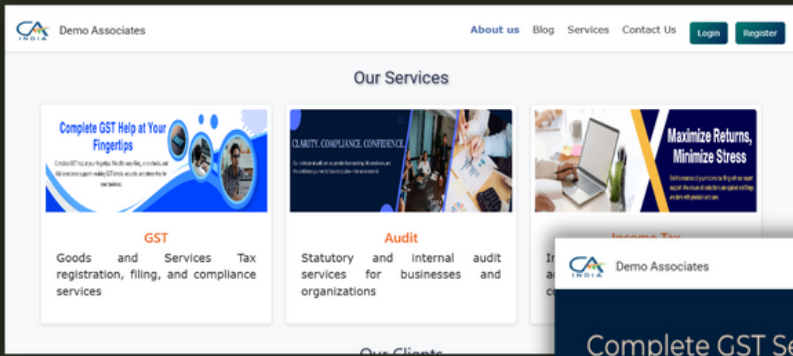
9 Bulletin Board



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”

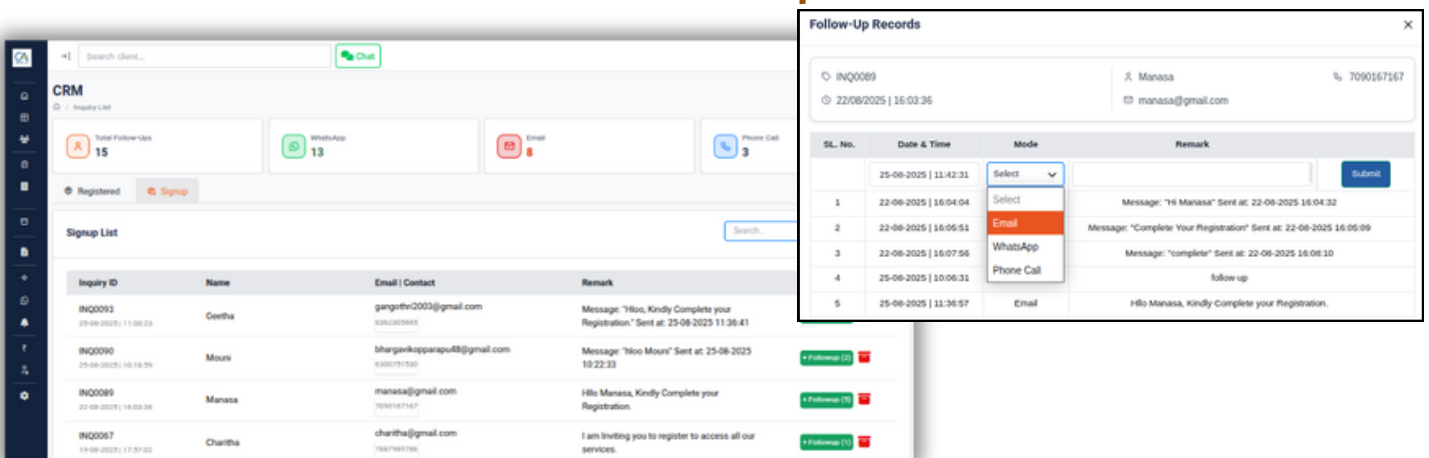
10 Digital Presence



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."

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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