



ClientDesk

● CONNECTED PRACTICE SOFTWARE

ClientDesk Product Guide

The client record your entire practice can rely on.

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One command centre for clients, tasks, deadlines, documents, communication, employees, billing and recovery.



THE LEDZERLY OUTCOME

**Replace scattered
spreadsheets and
follow-ups with one
visible operating
rhythm for the entire**

Designed around ownership, evidence and review.

ClientDesk, end to end.

A single flow turns every hand-off into visible work with an owner, status and next action.



Context

Create once, reuse everywhere.

Ownership

Make responsibility obvious.

Evidence

Keep proof with the work.

Review

Escalate what needs judgement.

Every important detail has a home.

Replace scattered spreadsheets and follow-ups with one visible operating rhythm for the entire firm.

01

Client Management

Client, group, entity, contacts, registrations and services in one record.



02

Task & Retainer Management

Recurring work, owners, due dates, status and verification.



03

Compliance Calendar

GST, TDS, ITR, audit and corporate deadlines across clients.



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04

Document Management

Return documents, acknowledgements, evidence and physical tracking.



05

DSC Management

Certificate holders, expiry dates and renewal action.



06

Billing & Recovery

Invoices, receipts, outstanding dues and payment reminders.



Every important detail has a home.

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07

Automated Communication

Scheduled email, WhatsApp and SMS reminders and requests.



08

Employee Management

Roles, assignments, workload, performance and accountability.



09

Import & Export

Bring in operational data and export management reports.



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10

Client Portal

Upload documents, view status, download outputs and check balances.



11

Multi-billing Entities

Operate multiple billing entities while retaining one client view.



12

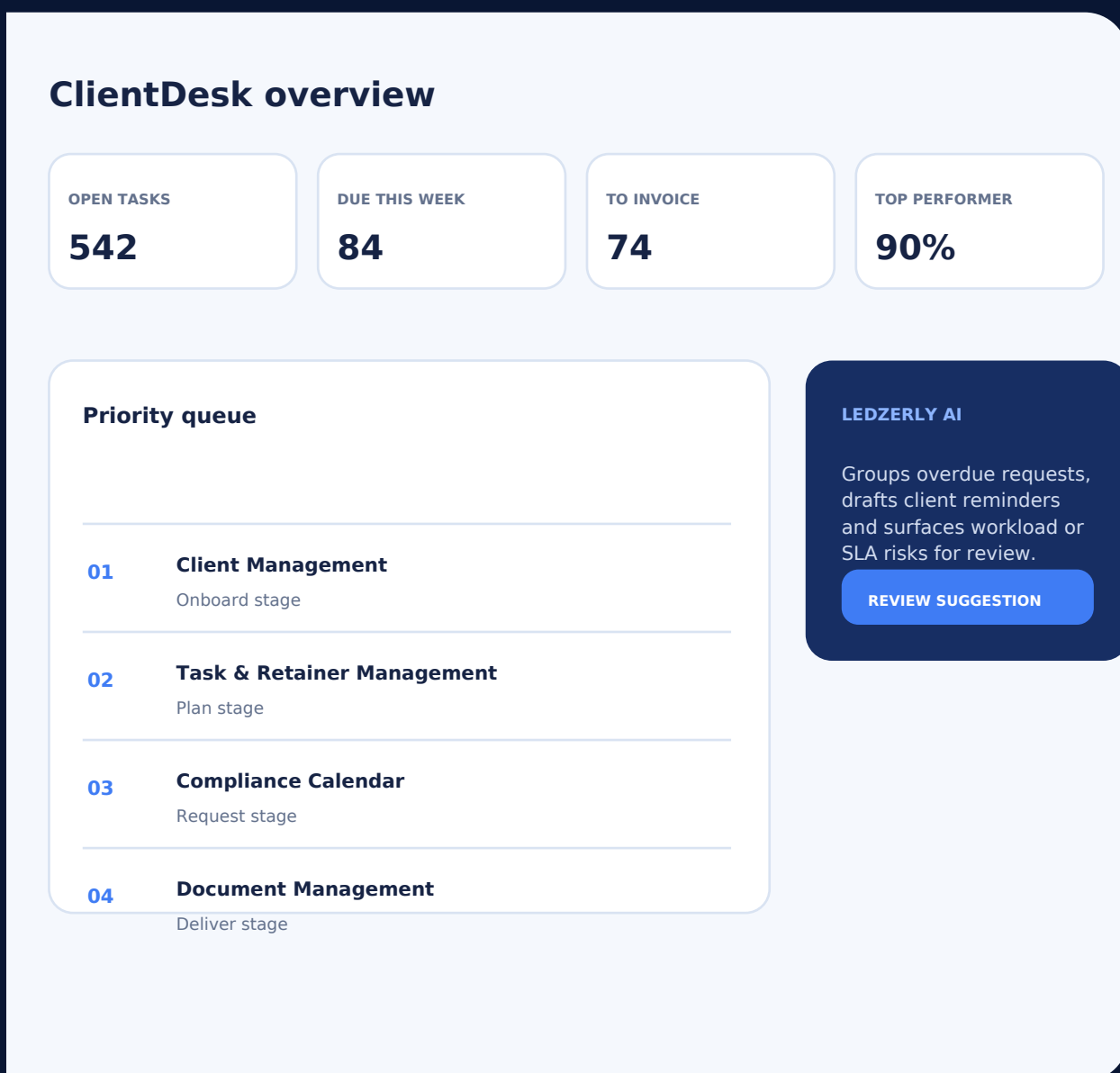
Practice Reports

Overdue work, productivity, billing, recovery and service visibility.



See the work before it becomes a problem.

Representative interface concept - built to show how the product organises priorities, status and review.



Automation with professional judgement.

Ledzerly AI prepares, explains and prioritises. Your team retains approval and accountability.

1

Role-aware

Access follows the client, entity and role.

2

Maker-checker

Preparation and approval remain separate.

3

Evidence-linked

Documents stay connected to the outcome.

4

Activity history

Every action has a traceable record.

5

Human-reviewed AI

AI drafts; professionals decide.

6

Cloud workspace

One source of truth across locations.

Start focused. Expand with confidence.

Clear entry points for businesses and CA practices, with customisation available when your operating model demands it.

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See your actual practice in motion.

A focused walkthrough around your clients, deadlines, team roles, documents and review controls.

YOUR 30-MINUTE SESSION

Choose one product or connect the full suite. We will map your current process to a practical starting scope.

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