Draftstack
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FREE PREVIEW

CA Client & Due-Date Tracker

For CA firms, tax consultants and accountants: a client master with GST, TDS, PF and audit flags, every filing with due date, staff and status, overdue and due-soon alerts, late-filing count, work per staff member, and fees billed and received.

What the full file has

Clients: Client master.

Tasks: Every filing or job.

Billing: Bills raised and money received.

Due Dates: Common monthly and yearly due dates (verify on the portals; extensions are common).

Work Board: Overdue, due soon and work per staff member.

Free 3-page preview: the next pages show the sample file exactly as it looks in Excel and Google Sheets.

FREE SAMPLE · DRAFTSTACK.IN

Get the full CA Client & Due-Date Tracker

Blank file for your own data plus the sample file. Works in Excel, Google Sheets and WPS Office.

Buy the full product

FREE SAMPLE ONLY · This is not the real product.
Buy the full product to use it: draftstack.in/product/ca-tax-consultant-client-due-date-tracker

Clients

Client master.


CA Tax Consultant Client Due Date Tracker.xlsx

fx Clients

Clients

Code	Client	Type	PAN	GST filing	TDS	PF / ESI	Audit	Staff	Monthly retainer	Open tasks	Fee balance
CL-01	Mehta Traders	Proprietor	AAAPM123...	Monthly	Yes	Yes	No	Nidhi	₹2,500	1	₹2,500
CL-02	Sunrise Foods Pvt Ltd	Company	AAECS5678L	Monthly	Yes	Yes	Yes	Rohit	₹12,000	1	₹0
CL-03	Dr. Kavita Nair	Individual	ABCPN9012...	None	No	No	No	Nidhi	₹0	0	₹3,000
CL-04	Sai Builders LLP	LLP	AAKFS3456N	Quarterly (QRMP)	Yes	Yes	No	Rohit	₹6,000	1	₹6,000

Start Here | Clients | Tasks | Billing | Due Dates | Work Board | Lists

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Work Board

Overdue, due soon and work per staff member.



CA Tax Consultant Client Due Date Tracker.xlsx

fx Work Board

Work Board

Overdue	Due in 7 days	Filed late (all time)	Fees outstanding
1	0	0	₹11,500

Open tasks by staff

Staff	Open	Overdue	Due soon
Nidhi	1	0	0
Rohit	2	1	0
Self	0	0	0

Open tasks by area

Area	Open
GST	1
TDS	0
Income tax	1
ROC	1
Audit	0
Payroll / PF-ESI	0
Other	0

Overdue and due soon

#	Task	Client	Due	Staff
1	ROC: AOC-4	Sunrise Food...	29-Oct-2026	Rohit
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

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