CA CloudDesk®

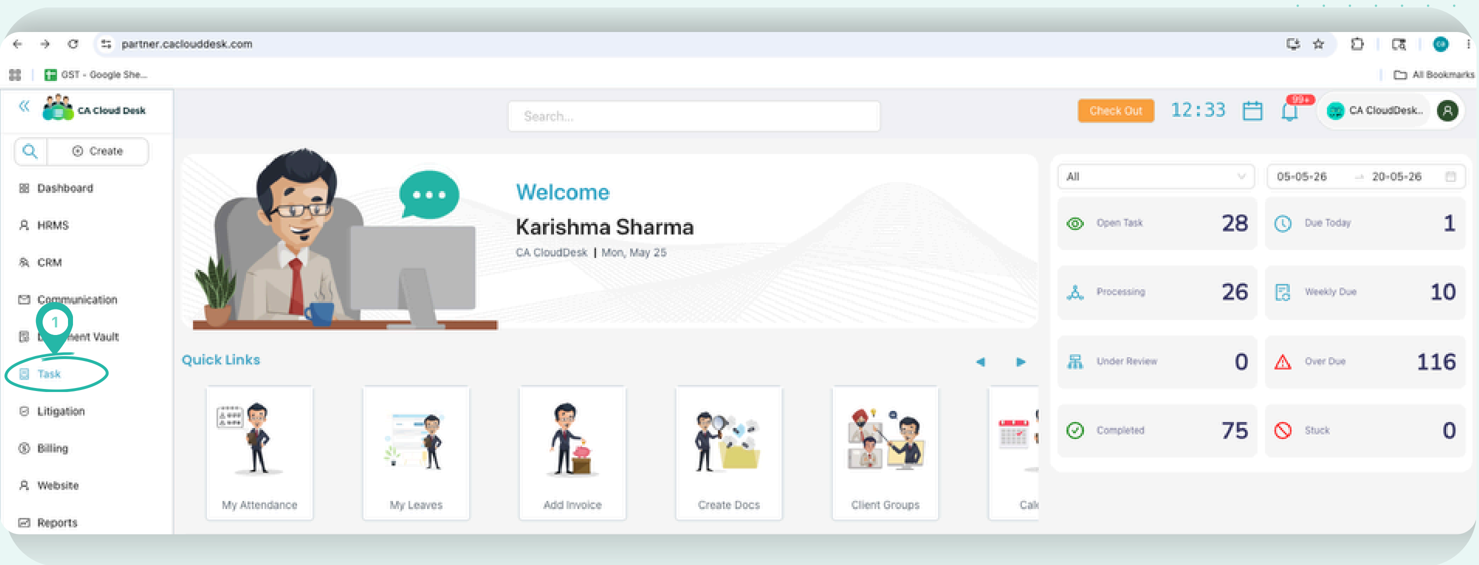
Add Tasks in

CA CloudDesk

Step 1: Log in to CA CloudDesk.

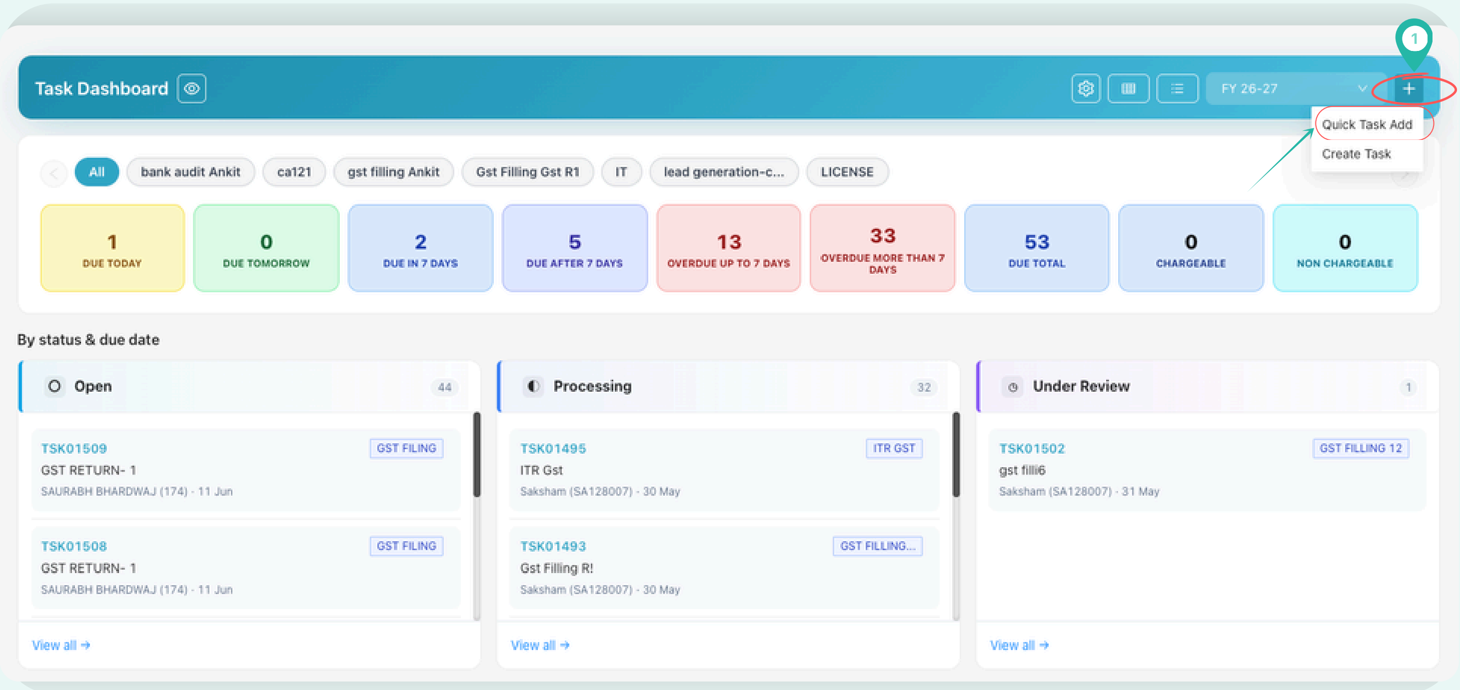
From the CA CloudDesk left navigation menu, select Task to begin the setup process.

1. Click on Tasks
2. Click the Settings icon



Step 2: Click on + Icon or Create Task.

To create a new task, click the + (Plus) icon available in the top navigation bar for quick task creation, or click the Create Task button from the Task module.



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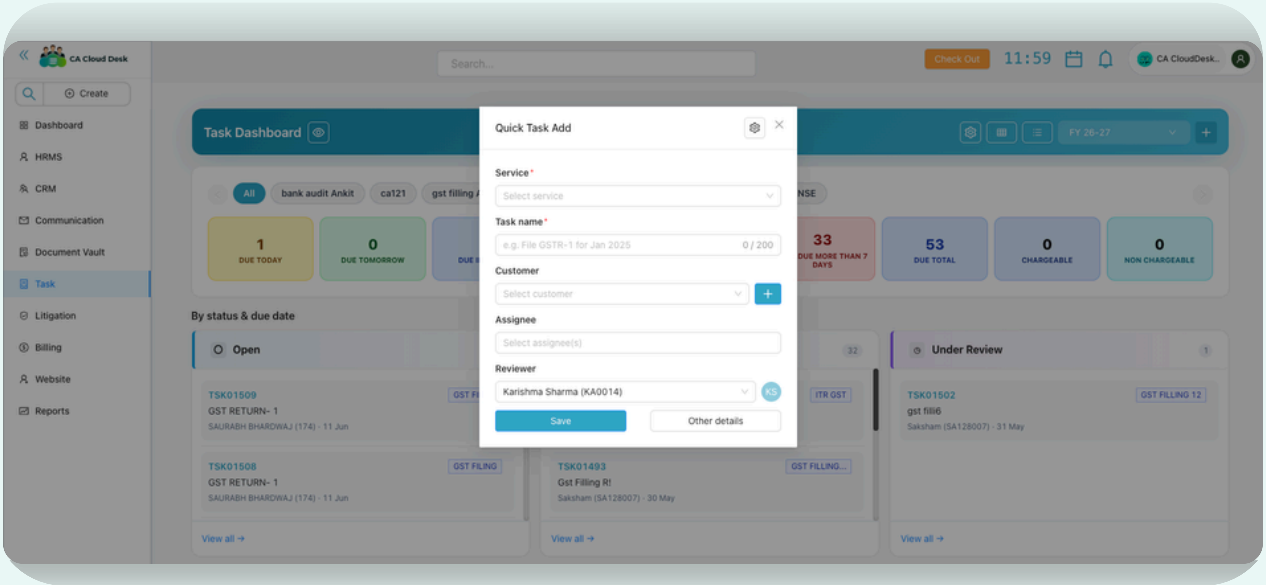
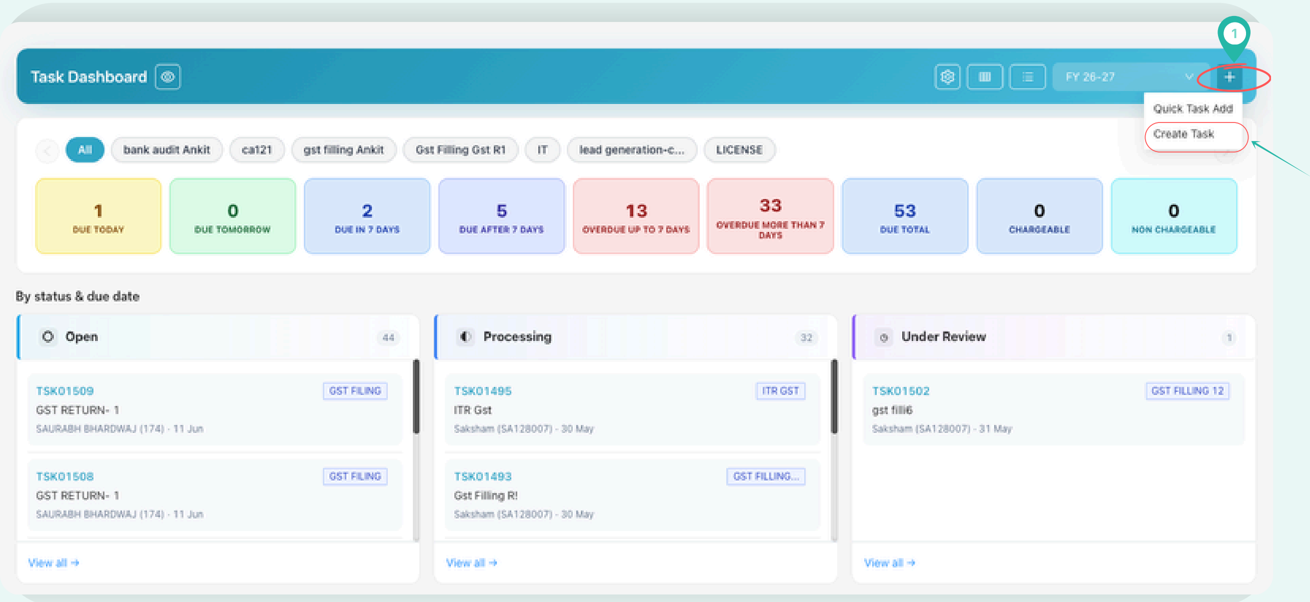
Step 3: A.) Add a Quick Task

In the Quick Task Add window, fill in the required details:

- **Service:** Select the service for which the task is being created.
- **Task Name:** Enter a clear and descriptive task name.
- **Customer:** Select the customer from the dropdown list. You can also click the + icon to quickly add a new customer if it is not already available.
- **Assignee:** Choose the team member responsible for completing the task.
- **Reviewer:** Select the reviewer who will verify and approve the task.



Step 4: B.) Click on Create Task.



Step 5: Enter Task Details and Create the Task.

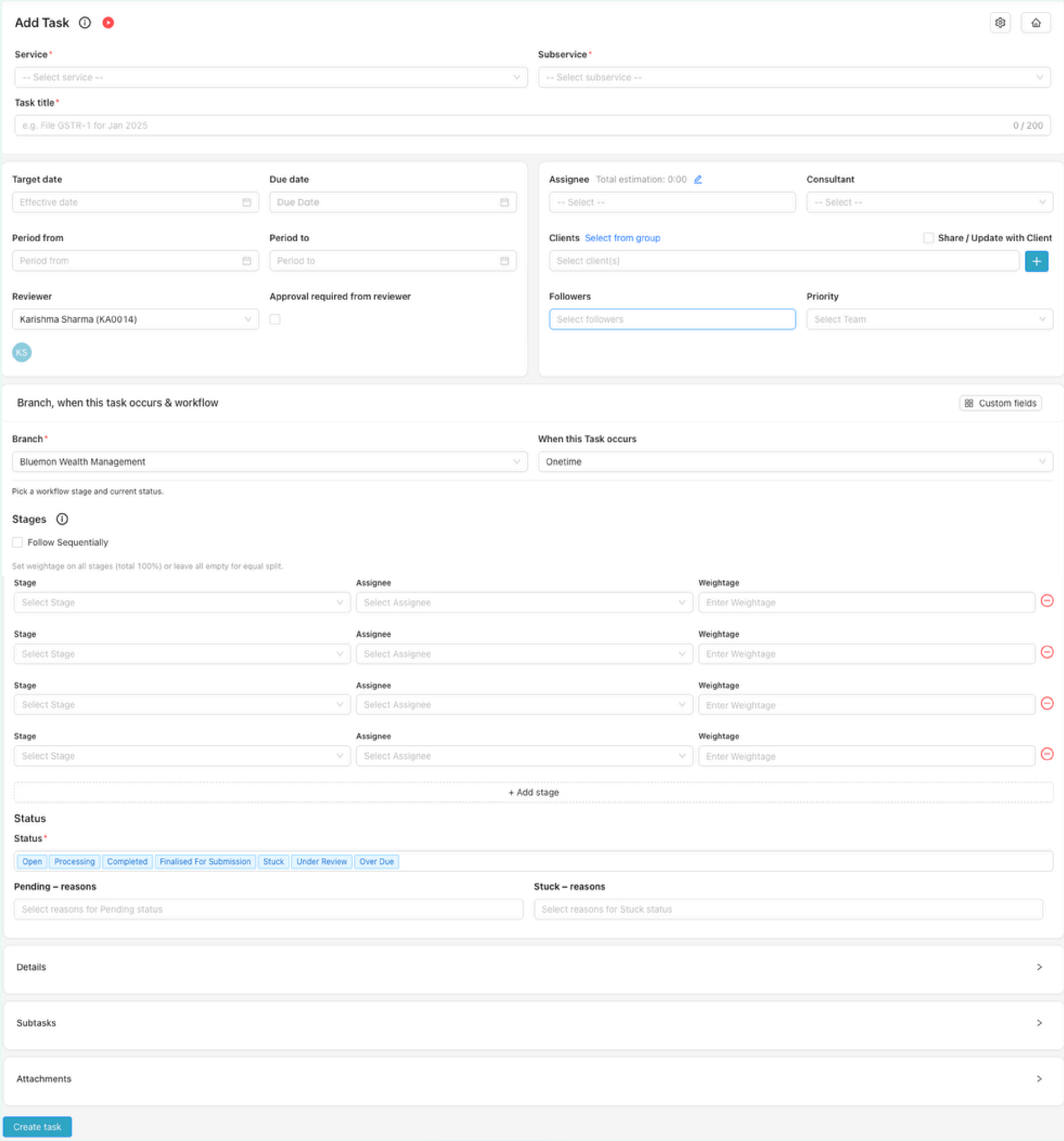
Fill in all the required task information, including:

- **Service and Sub-Service**
- **Task Title**
- **Target Date and Due Date**
- **Period From and Period To (if applicable)**
- **Assignee, Reviewer, and Consultant**
- **Client(s) and Followers**
- **Priority Level**
- **Branch and Task Occurrence (One-time or Recurring)**

Configure the workflow by selecting the required Stages, Task Status, and applicable Pending/Stuck Reasons. You can also add additional information through the **Details, Subtasks, and Attachments sections** if needed.

Once all details have been entered and verified, click Create Task to save and assign the task.

Result: The task will be successfully created and assigned to the selected team members, enabling progress tracking, workflow management, and status updates within CA CloudDesk.



Add Task

Service*
-- Select service --

Subservice*
-- Select subservice --

Task title*
e.g. File GSTR-1 for Jan 2025 0 / 200

Target date
Effective date

Due date
Due Date

Period from
Period from

Period to
Period to

Reviewer
Karishma Sharma (KA0014)
KS

Approval required from reviewer

Assignee Total estimation: 0:00
-- Select --

Consultant
-- Select --

Clients Select from group
Share / Update with Client
Select client(s)
+

Followers
Select followers

Priority
Select Team

Branch, when this task occurs & workflow
Custom fields

Branch*
Bluemon Wealth Management

When this Task occurs
Onetime

Pick a workflow stage and current status.

Stages

Follow Sequentially

Set weightage on all stages (total 100%) or leave all empty for equal split.

Stage	Assignee	Weightage
Select Stage	Select Assignee	Enter Weightage
Select Stage	Select Assignee	Enter Weightage
Select Stage	Select Assignee	Enter Weightage
Select Stage	Select Assignee	Enter Weightage

+ Add stage

Status

Status*
Open | Processing | Completed | Finalised For Submission | Stuck | Under Review | Over Due

Pending – reasons
Select reasons for Pending status

Stuck – reasons
Select reasons for Stuck status

Details

Subtasks

Attachments

Create task