



# Bulk Actions in Tasks

## CA CloudDesk

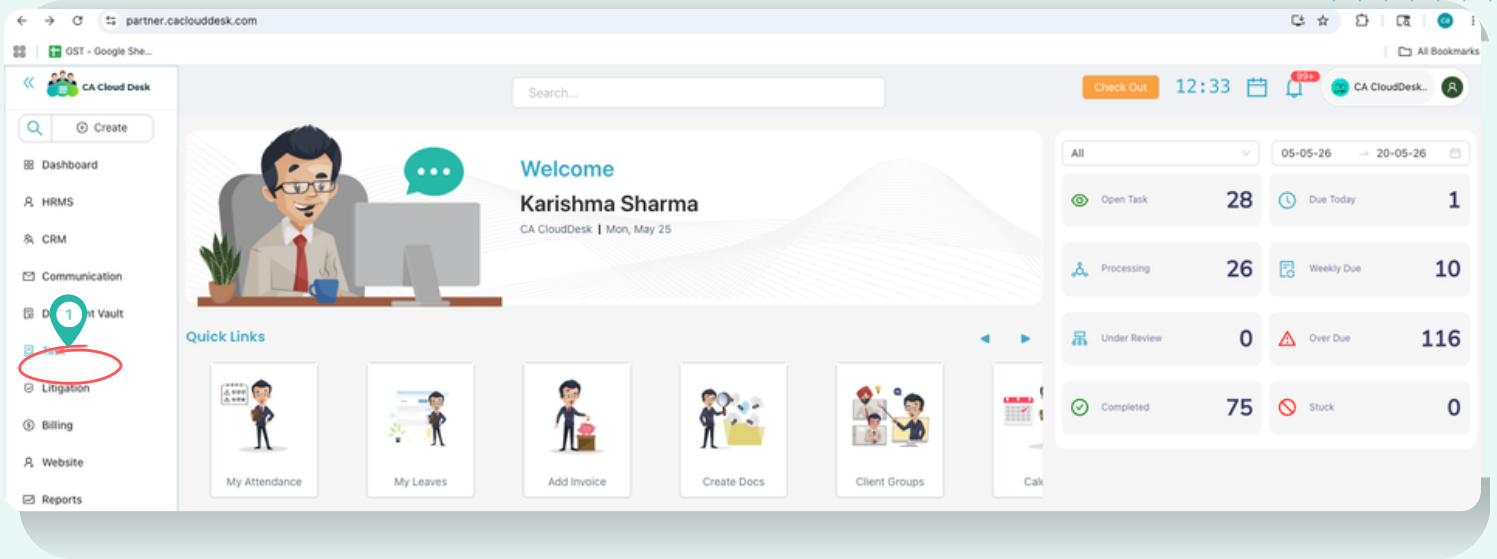


## Step 1: Log in to CA CloudDesk.

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

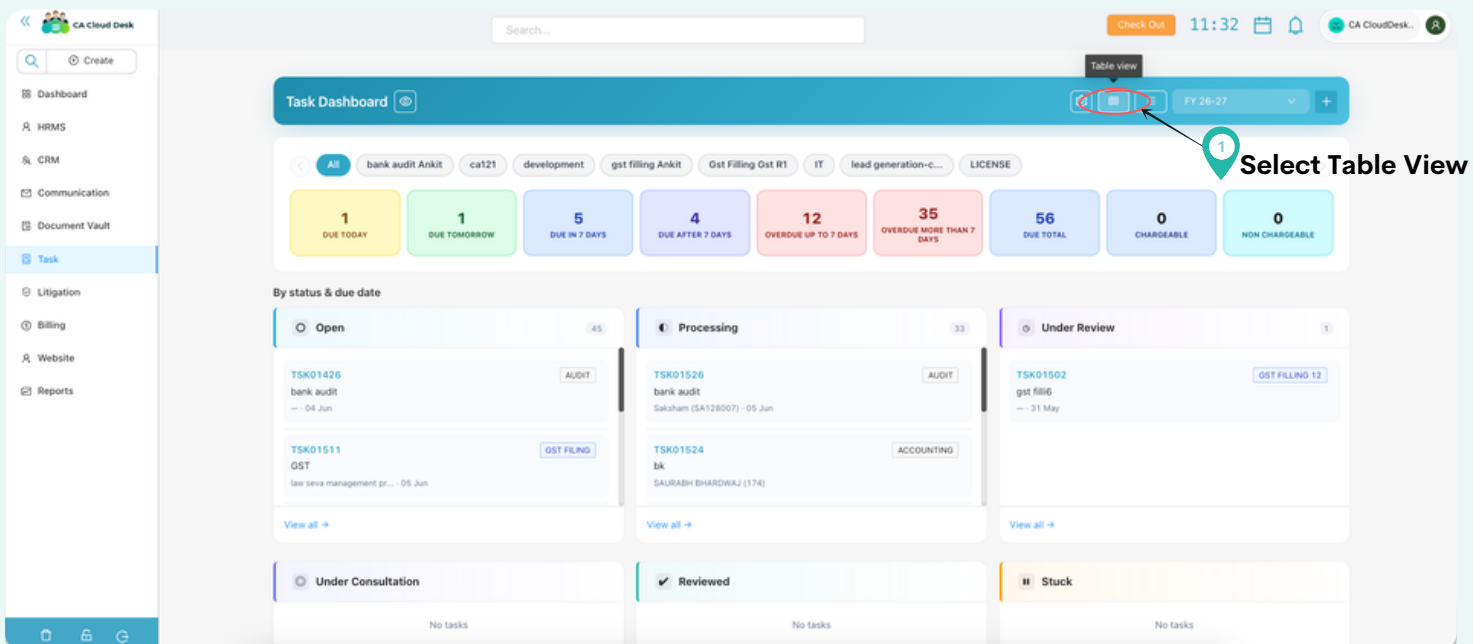


Click on Tasks



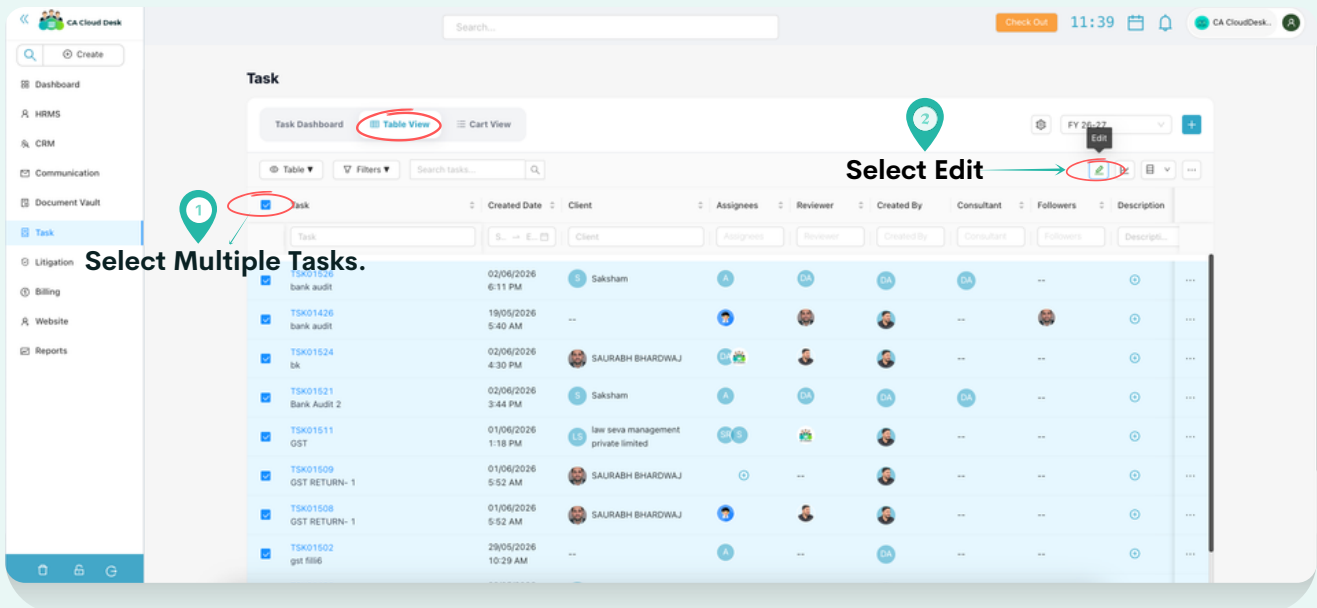
## Step 2: Click on Table View.

Select the **Table View** Option from the following options.



## Step 3: Select Tasks .

You can edit Tasks in Bulk using the Edit Option.

**Task**

Task Dashboard **Table View** Cart View

Table Filters Search tasks...

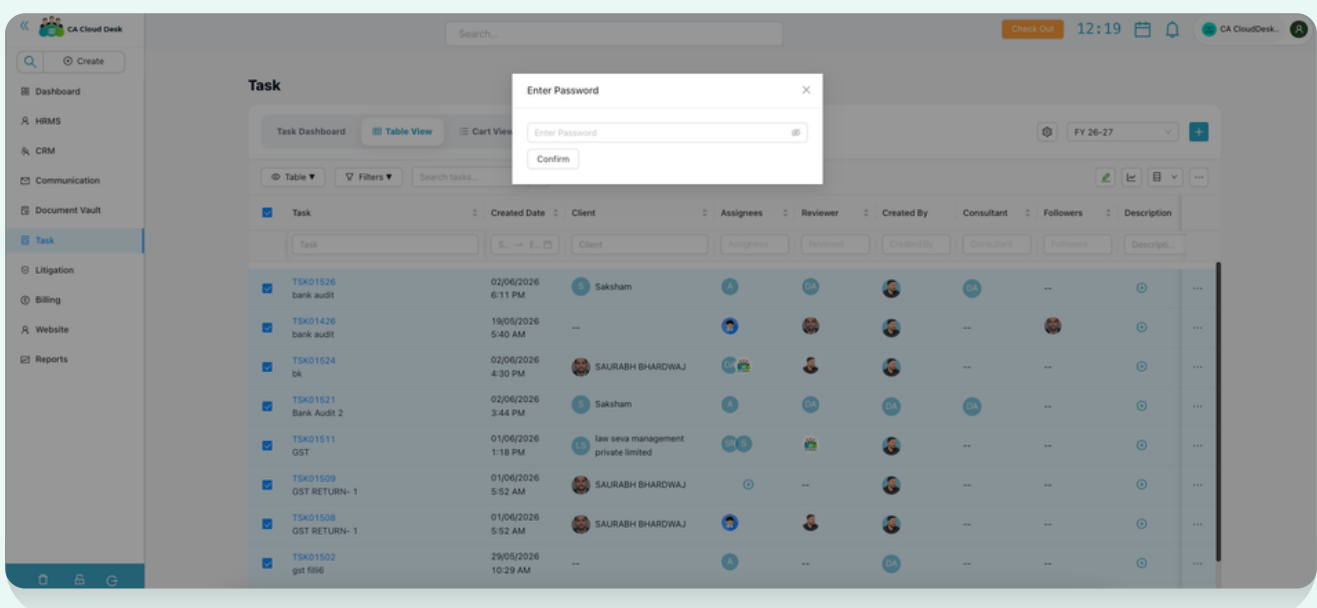
**Select Multiple Tasks.**

**Select Edit**

| Task                   | Created Date        | Client                              | Assignees | Reviewer | Created By | Consultant | Followers | Description |
|------------------------|---------------------|-------------------------------------|-----------|----------|------------|------------|-----------|-------------|
| TSK01526 bank audit    | 02/06/2026 6:11 PM  | Saksham                             | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01426 bank audit    | 19/05/2026 5:40 AM  | ---                                 | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01524 bk            | 02/06/2026 4:30 PM  | SAURABH BHARDWAJ                    | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01521 Bank Audit 2  | 02/06/2026 3:44 PM  | Saksham                             | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01511 GST           | 01/06/2026 1:18 PM  | law seva management private limited | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01509 GST RETURN- 1 | 01/06/2026 5:52 AM  | SAURABH BHARDWAJ                    | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01508 GST RETURN- 1 | 01/06/2026 5:52 AM  | SAURABH BHARDWAJ                    | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01502 gst fill6     | 29/05/2026 10:29 AM | ---                                 | A         | DA       | DA         | DA         | ...       | ...         |

## Step 4: Enter Your Password.

Enter Your Password of CA CloudDesk Partnerdesk.

**Task**

Task Dashboard **Table View** Cart View

Table Filters Search tasks...

**Enter Password**

Enter Password

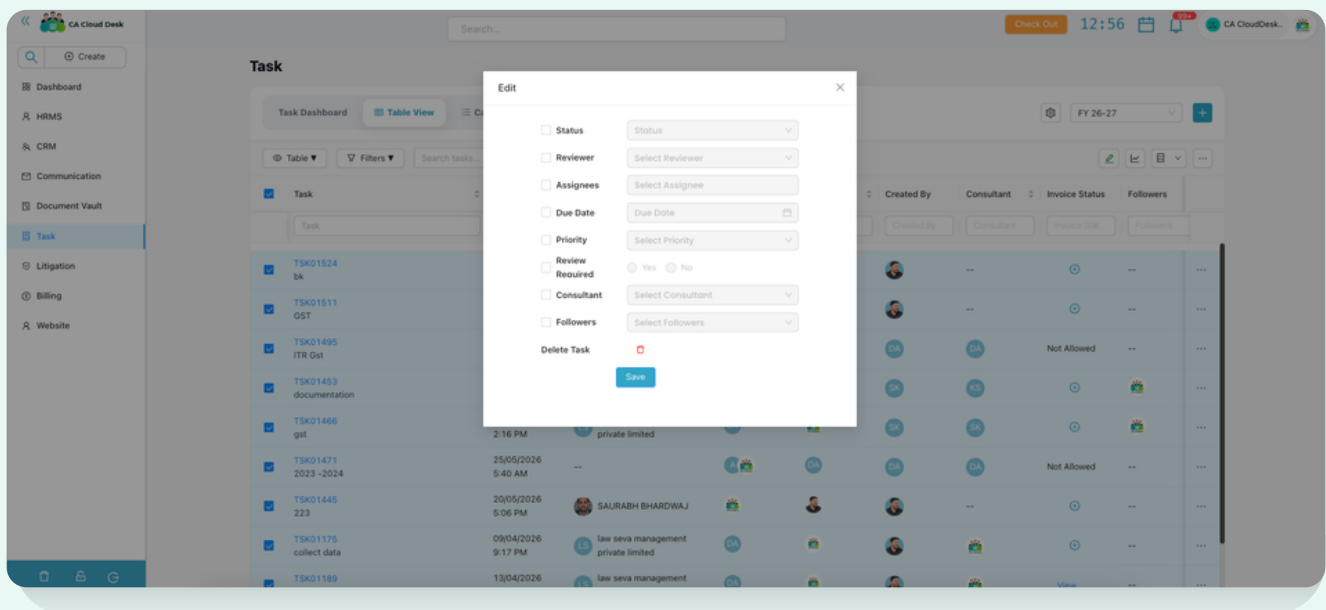
Confirm

| Task                   | Created Date        | Client                              | Assignees | Reviewer | Created By | Consultant | Followers | Description |
|------------------------|---------------------|-------------------------------------|-----------|----------|------------|------------|-----------|-------------|
| TSK01526 bank audit    | 02/06/2026 6:11 PM  | Saksham                             | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01426 bank audit    | 19/05/2026 5:40 AM  | ---                                 | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01524 bk            | 02/06/2026 4:30 PM  | SAURABH BHARDWAJ                    | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01521 Bank Audit 2  | 02/06/2026 3:44 PM  | Saksham                             | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01511 GST           | 01/06/2026 1:18 PM  | law seva management private limited | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01509 GST RETURN- 1 | 01/06/2026 5:52 AM  | SAURABH BHARDWAJ                    | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01508 GST RETURN- 1 | 01/06/2026 5:52 AM  | SAURABH BHARDWAJ                    | A         | DA       | DA         | DA         | ...       | ...         |
| TSK01502 gst fill6     | 29/05/2026 10:29 AM | ---                                 | A         | DA       | DA         | DA         | ...       | ...         |



## Step 5: Perform Bulk Task Updates

To update multiple tasks at once, select the required tasks using the checkboxes and click the Edit icon. In the Edit window, choose the fields you want to modify (**such as Status, Reviewer, Assignee, Due Date, Priority, Consultant, or Followers**), enter the updated values, and click Save.



**Result:** The selected changes will be applied to all chosen tasks simultaneously, reducing manual effort and ensuring consistency across tasks.

