



Custom Field in Task

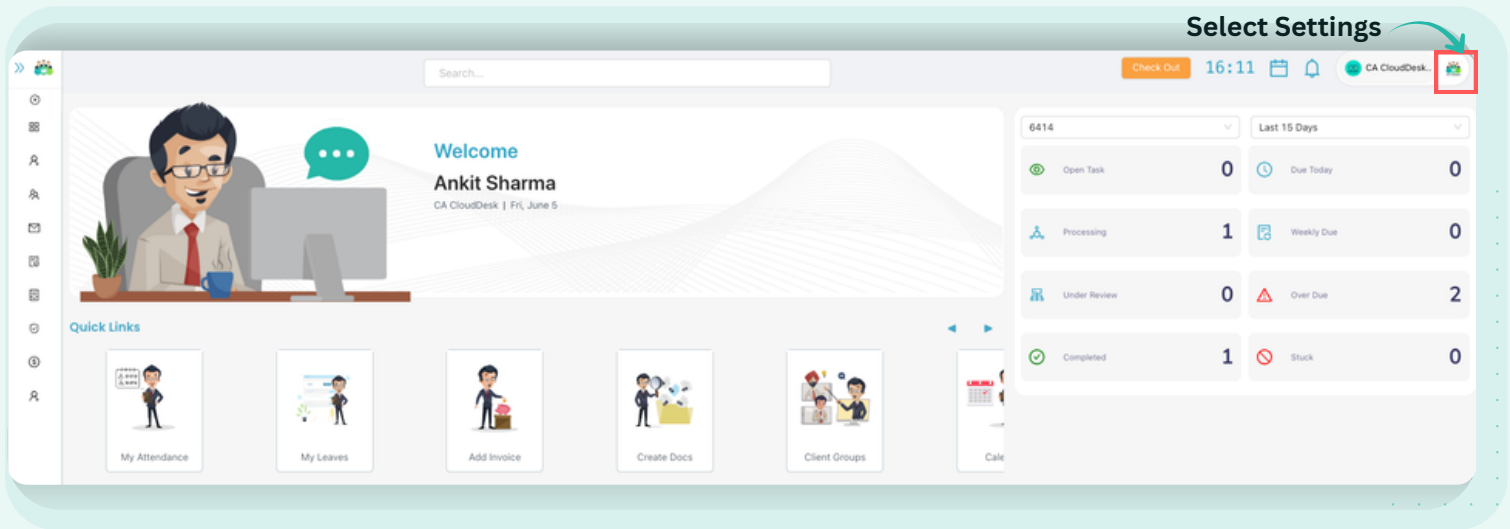
CA CloudDesk





1 Step 1: Log in to CA CloudDesk.

From the CA CloudDesk Dashboard , Select **Settings**.



Select Settings

Check Out 16:11 CA CloudDesk

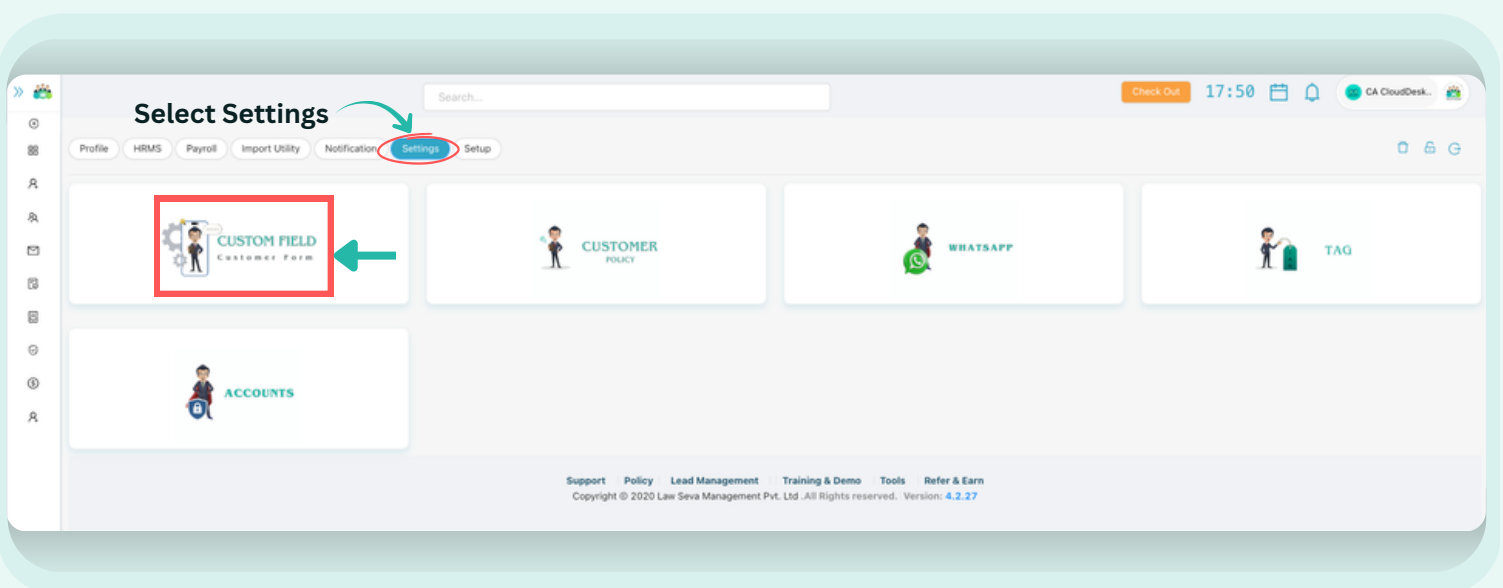
6414	Last 15 Days
Open Task	0
Processing	1
Under Review	0
Completed	1
Due Today	0
Weekly Due	0
Over Due	2
Stuck	0

Quick Links

- My Attendance
- My Leaves
- Add Invoice
- Create Docs
- Client Groups
- Calendar

2 Step 2: Select Settings .

From the Task Dashboard, click on **Settings** & Then Select **Custom Field**.

Select Settings

Profile HRMS Payroll Import Utility Notification **Settings** Setup

CUSTOM FIELD
Customer Form

CUSTOMER POLICY

WHATSAPP

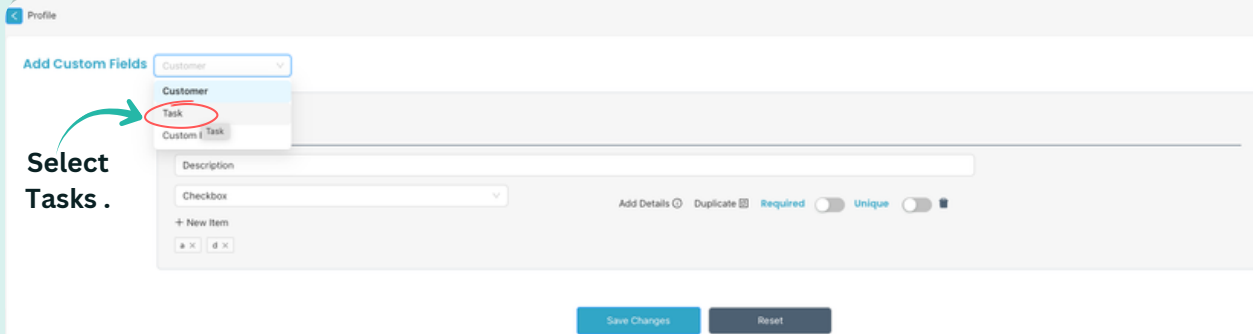
TAG

ACCOUNTS

Support Policy Lead Management Training & Demo Tools Refer & Earn
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3 Step 3: Add Custom Field.

Select **Task** Option From Custom Fields.



Profile

Add Custom Fields

Customer

Customer

Task

Custom Task

Description

Checkbox

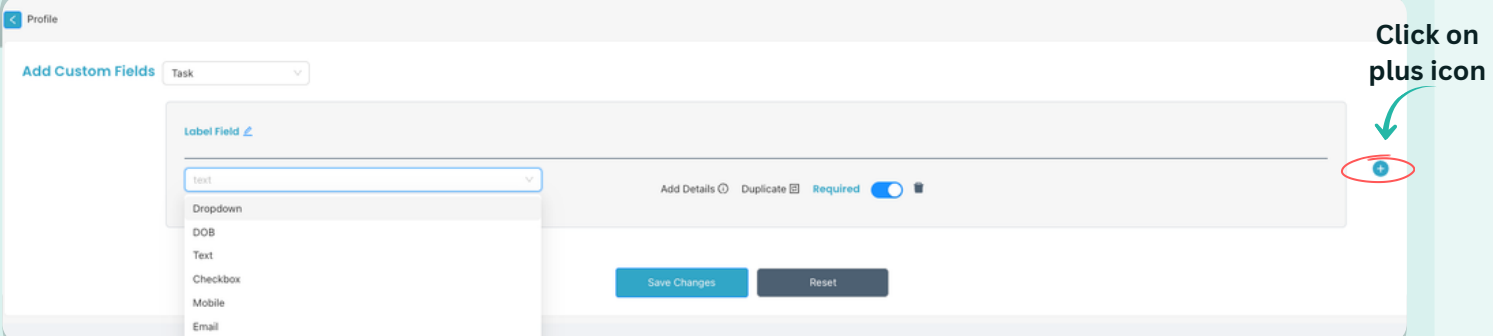
+ New Item

Add Details Duplicate Required Unique

Save Changes Reset

4 Step 4: Add Custom Field.

Dropdown/Checkbox fields must have at least one option.



Profile

Add Custom Fields

Task

Label Field

text

Dropdown

DOB

Text

Checkbox

Mobile

Email

Add Details Duplicate Required

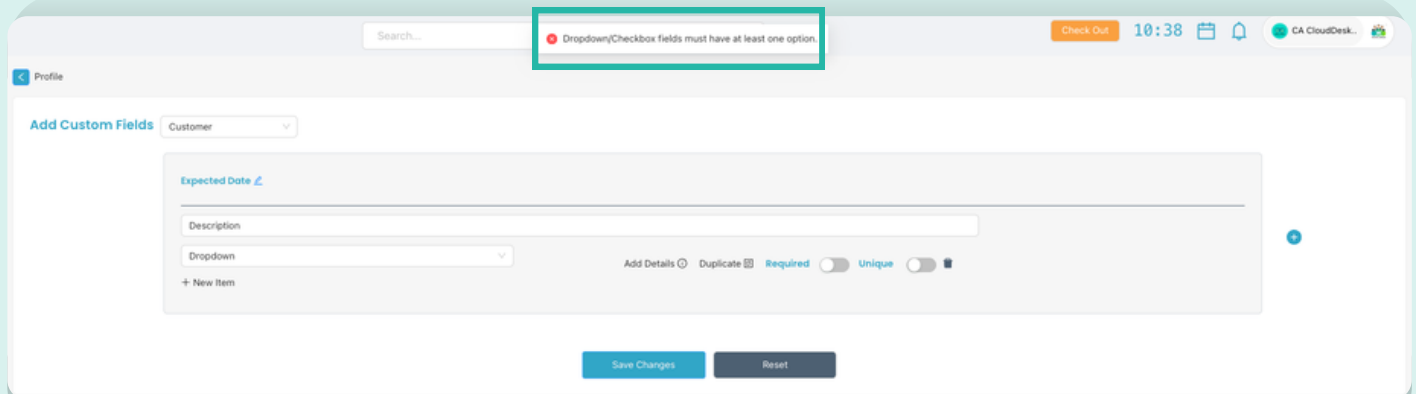
Save Changes Reset

Click on plus icon



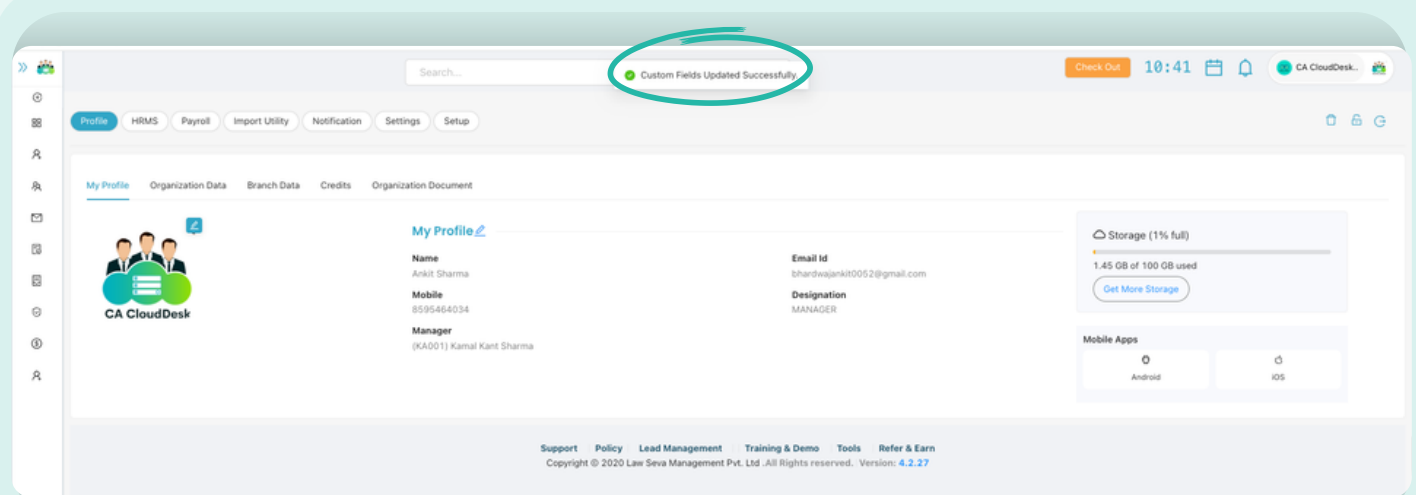
5 Step 5: Add Custom Field.

Dropdown/Checkbox fields must have at least **one** option.



6 Step 6: Click Save to Add Custom Field.

Once the custom field is saved, the **"Custom Field Updated Successfully"** pop-up will be shown.



COMPLETED

