



# Add Recurring Tasks



## in CA CloudDesk



## Step 1: Log in to CA CloudDesk.

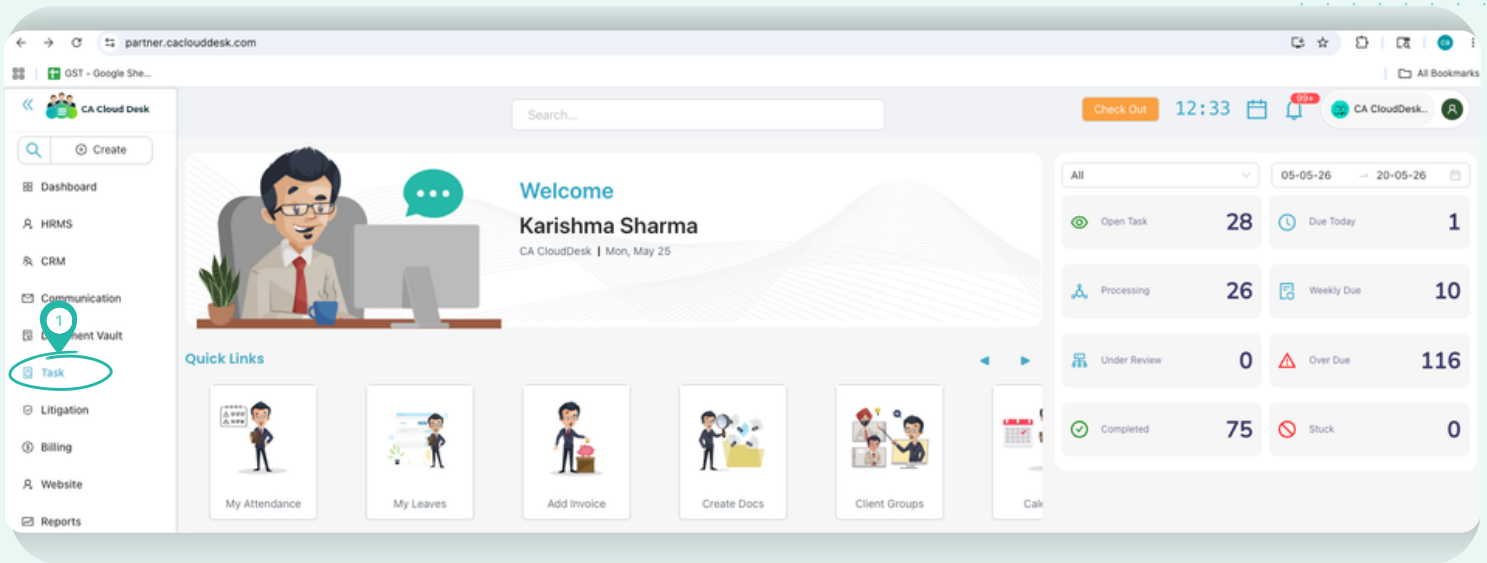
From the CA CloudDesk left navigation menu, select **Task** to begin the setup process.



Click on Tasks

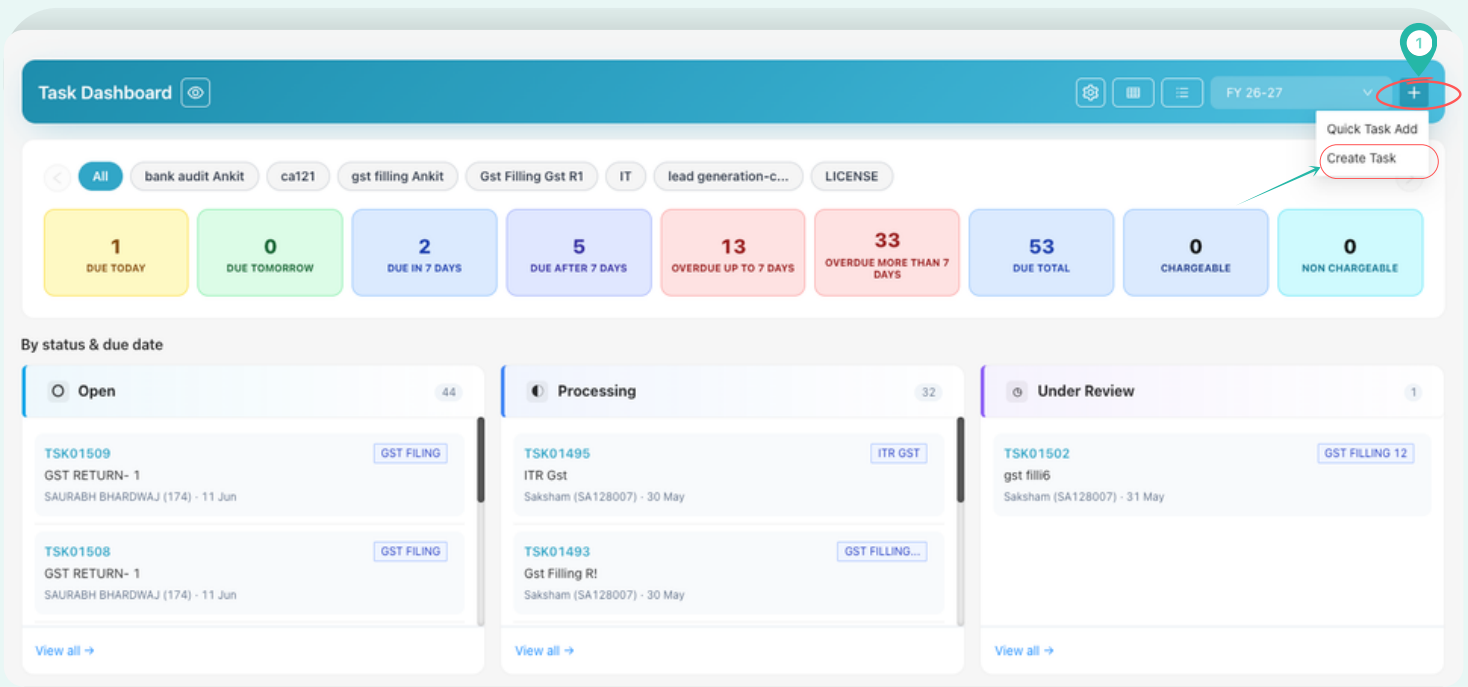


Click the Settings icon



## Step 2: Click on + Icon or Create Task.

Click the + (Plus) icon and select Create Task, or click the Create Task button from the Task module.



## Step 3: Enter Basic Task Information.

Select the Service and Sub-Service, enter the Task Title, assign the responsible team members, select the client, and configure the required task details.



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)

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.

## Step 4: Configure Recurring Settings.

Under When this Task Occurs, select the desired recurrence frequency such as **Daily**, **Weekly**, **Monthly**, **Quarterly**, **Half-Yearly**, or **Yearly**.

Define the recurrence schedule by specifying:

- **Start Date**
- **End Date (if applicable)**
- **Repeat Frequency**
- **Specific recurrence conditions based on the selected schedule**



Branch, when this task occurs & workflow Custom fields

Branch\*  
Bluemon Wealth Management

When this Task occurs  
Onetime

Onetime  
YEARLY  
HALF YEARLY  
QUARTERLY  
MONTHLY  
15 DAYS  
WEEKLY

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  
Select Stage

Assignee  
Select Assignee

## Step 5: Configure Workflow and Status.

Select the required **Stages**, **Status**, **Priority**, and assign the appropriate **Assignee**, **Reviewer**, and **Consultant** for the recurring task.



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

## Step 6: Save the Recurring Task.

Review all entered details and click Create Task.

**Result:** The system will automatically generate tasks based on the defined **recurrence schedule, ensuring timely task creation** without manual intervention.



COMPLETED

