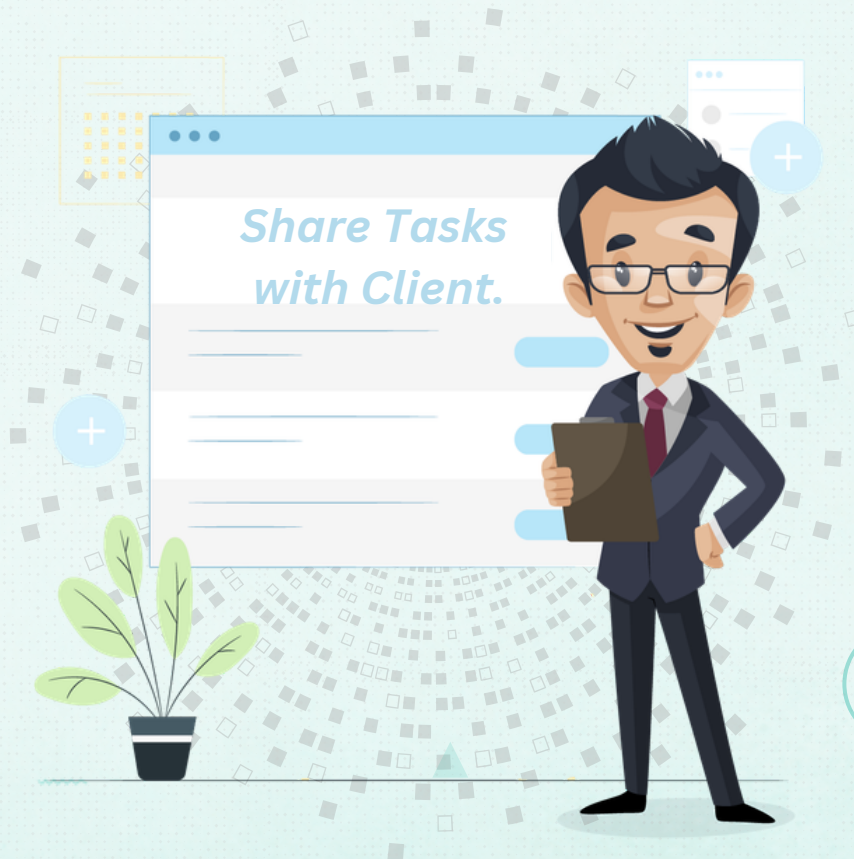




Share Tasks With Clients

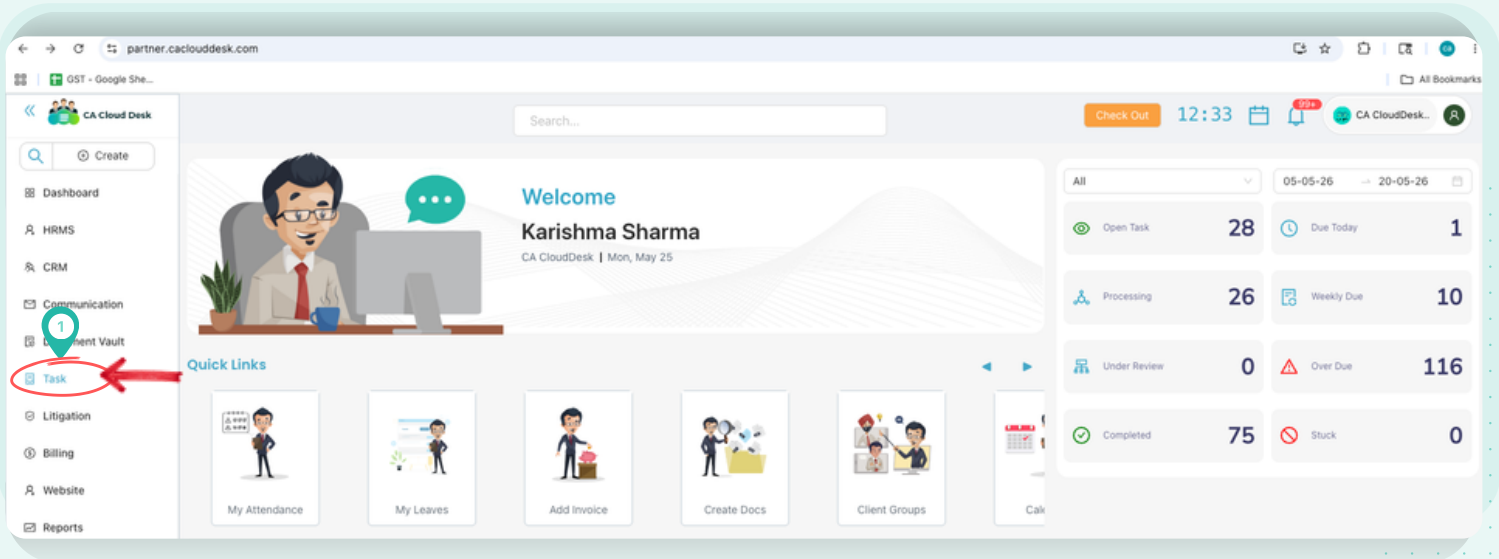
CA CloudDesk





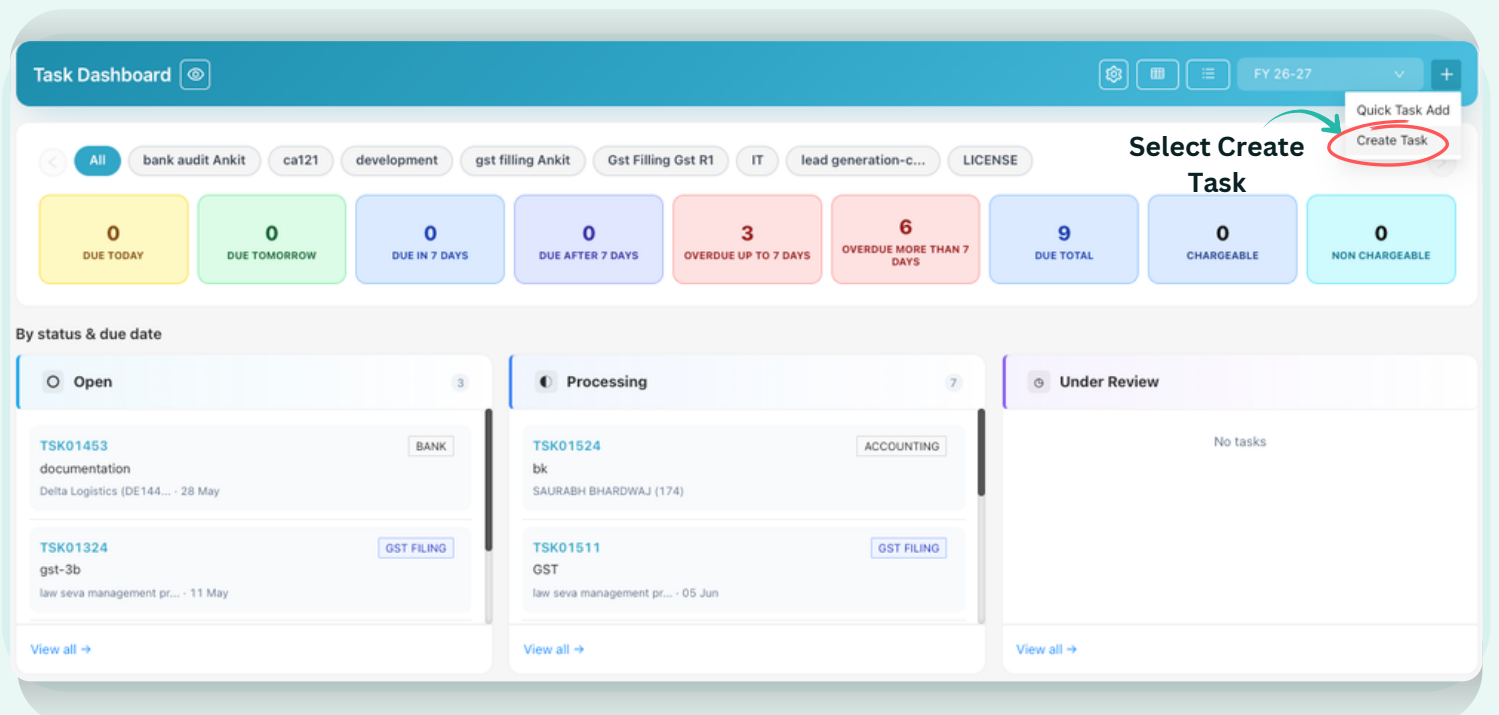
1 Step 1: Log in to CA CloudDesk.

From the CA CloudDesk left navigation menu, select **Task**.



2 Step 2: Create Task.

From the Task Dashboard, click on **Plus Icon** to create a new task.



3

Step 3: Share/Update Task with Client.

While creating or adding a task, tick the option **Share/Update with Client** to share the task with the client.



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
Ankit Sharma (AK0010)

Approval required from reviewer

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

Consultant
-- Select --

Clients
Select from group
Select client(s)

Followers
Select followers

Priority
Select Team

Share with client
☒ Share / Update with Client

Branch, when this task occurs & workflow

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
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

COMPLETED

