



Task Billing

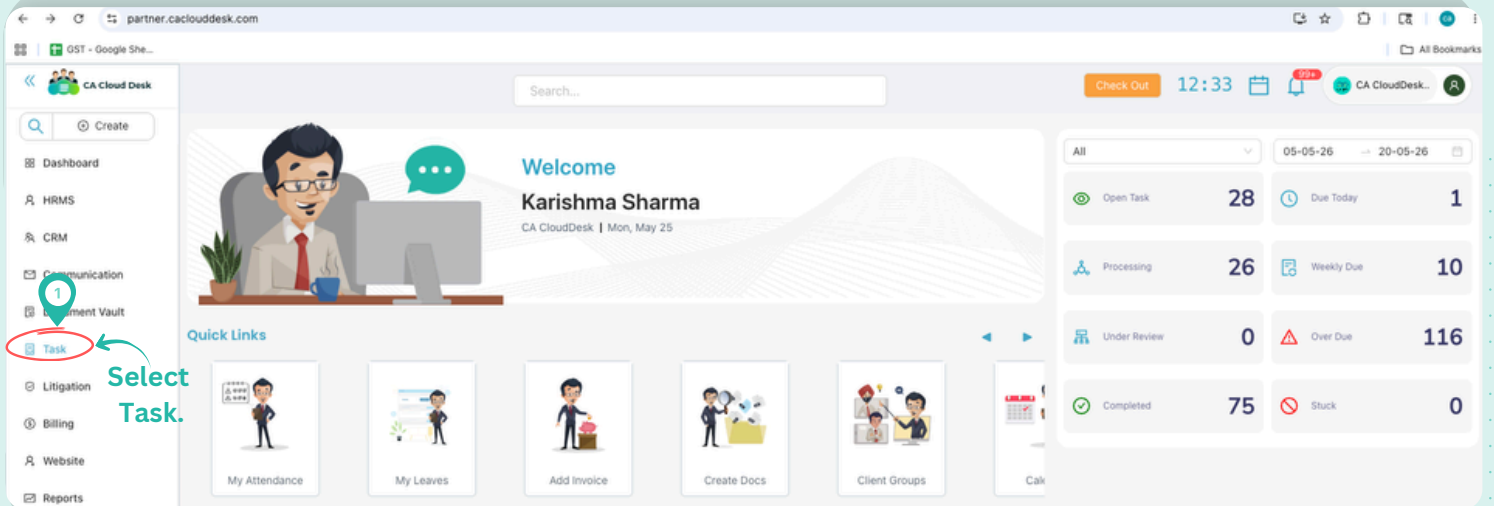
CA CloudDesk 



A.) Billing while Creating Task.

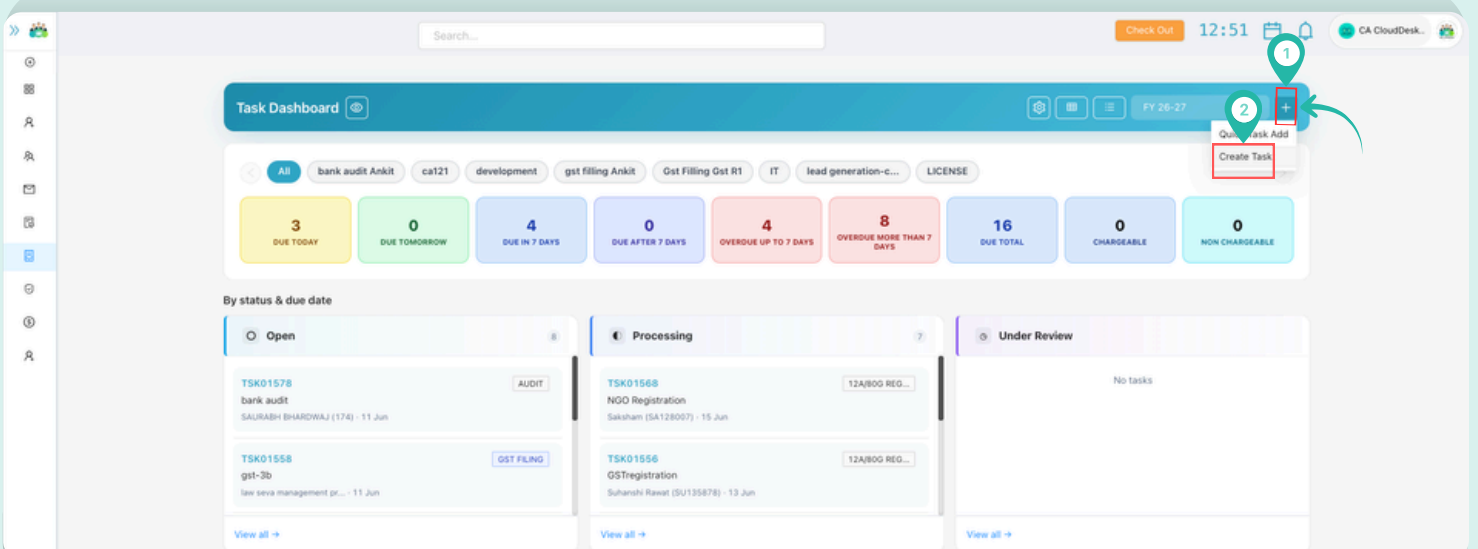
1 Step 1: Log in to CA CloudDesk.

From the CA CloudDesk Dashboard, Select **Task** Module.



2 Step 2: Create New Task.

Click on **Plus Icon (+)** and then select **Create Task**.



3 Step 3: Add Task with Billing.

While creating a task, you can also do **Billing** directly from the task creation form. Fill in the billing details as needed.



Add Task

Service*

AUDIT

Subservice*

22

Task title*

e.g. File GSTR-1 for Jan 2025

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

CA Rakesh Sharma (CA4353) +2

Consultant

-- Select --

Clients

Select from group

SAURABH BHARDWAJ (174)

SAURABH BHARDWAJ

Followers

Select followers

Priority

High

Branch, when this task occurs & workflow

Custom fields

Branch*

Bluemoon Wealth Management

When this Task occurs

Overtime

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
D3	Ankit Sharma (AK0010)	Enter Weightage
D1	Ankit Sharma (AK0010)	Enter Weightage

+ Add stage

Status

Open

Processing

Completed

Finalized For Submission

Stuck

Under Review

Over Due

Pending – reasons

Select reasons for Pending status

Stuck – reasons

Select reasons for Stuck status

Billing

Invoice

Proforma invoice

N/A

Invoice Initial*

2026

Price, Discount & HSN (multi-item bills)

Price

Discount %

Our HSN

+ Add

Subtasks

Attachments

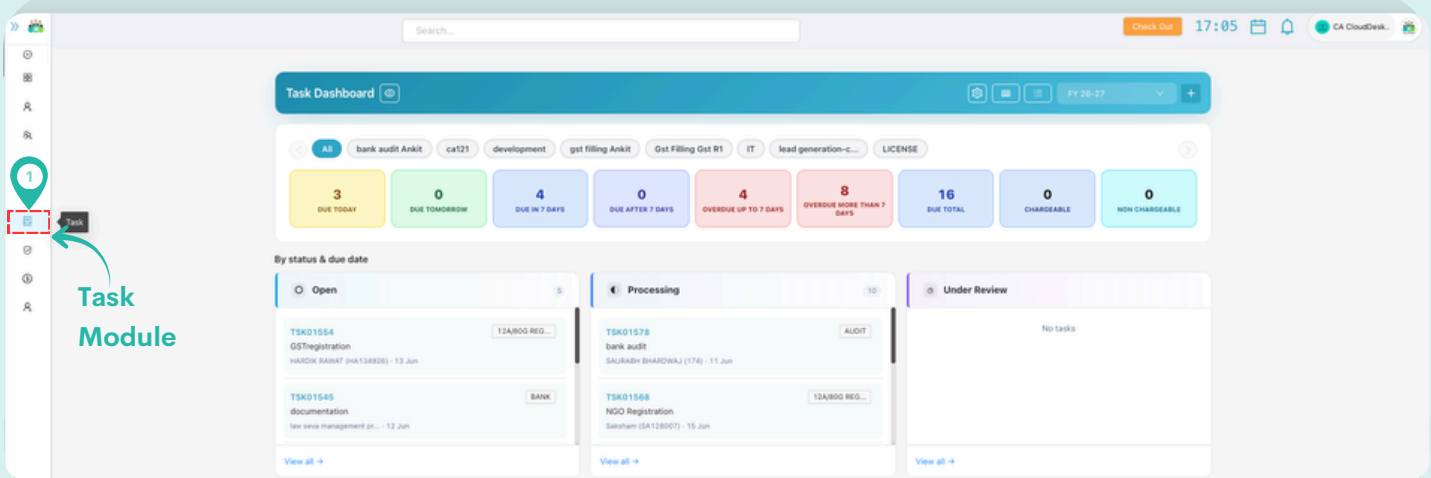
Create task

B.) Billing After Creating Task.



1 Step 1: Select Task Module.

Select **Task** Module from the CA CloudDesk Dashboard then Select Any Particular Task .



Task Dashboard

Search...

Check Out 17:05 CA CloudDesk

Task Dashboard

3 DUE TODAY 0 DUE TOMORROW 4 DUE IN 7 DAYS 0 DUE AFTER 7 DAYS 4 OVERDUE UP TO 7 DAYS 8 OVERDUE MORE THAN 7 DAYS 16 DUE TOTAL 0 CHARGEABLE 0 NON CHARGEABLE

By status & due date

Open Processing Under Review

TSK01554 GSTRegistration HARDIK RAIKAT (HA134920) - 13 Jun 12A/ROG REG...

TSK01545 documentation tax seva management pr... - 12 Jun BANK

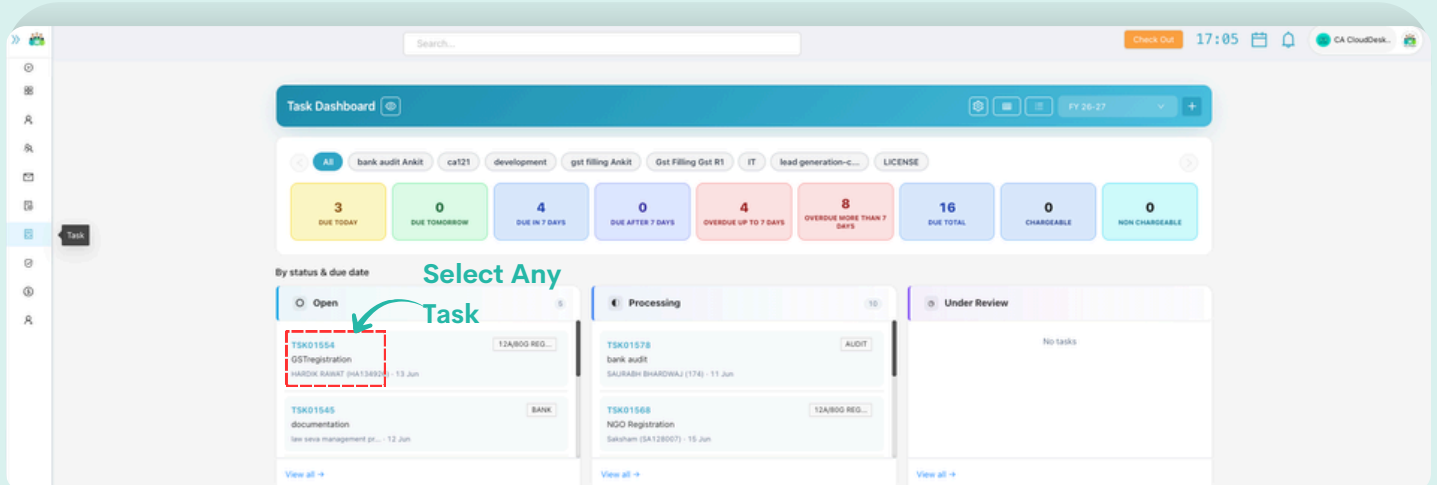
View all →

TSK01578 bank audit SAURABH (BHARDWAJ) (174) - 11 Jun AUDIT

TSK01568 NGO Registration Saksham (SA128007) - 15 Jun 12A/ROG REG...

View all →

View all →



Task Dashboard

Search...

Check Out 17:05 CA CloudDesk

Task Dashboard

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View all →

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TSK01568 NGO Registration Saksham (SA128007) - 15 Jun 12A/ROG REG...

View all →

View all →

Select Any Task

1 Step 2: Select Billing.

Select **Billing** Option from the Particular Opened Task.



Task View
TSK01554

GSTRegistration

Target Date: 04/06/2026
Created At: 08/06/2026 5:03 PM
Created By: Ankit Sharma
Service: 12A/800 Registration

Due Date: 13/06/2026 5:02 PM
Priority: No Priority
Sub Service: 12A/800 Registration

Assignees:
Client: HARDIK RAIWAT
Efficiency: 0.00%

Reviewer: Ankit Sharma
Consultant: Raghav Mishra

Stages: Subtask SOP Attachments **Billing** Comments Timesheet History Custom Field

Invoice Preforma Expense UDIN

S. No.	Invoice Number	Date	Exp. Pay Date	Amount	Discount Amount	Status	Actions
No data							



Invoice

Branch*: Bluemon Wealth Management

Invoice Date: 16/06/2026

Task: documentation

Team: Select Team

Exp. Pay Date: 01/07/2026

Line items*:

Price	Task HSN	Discount
Description		
+ Add line		

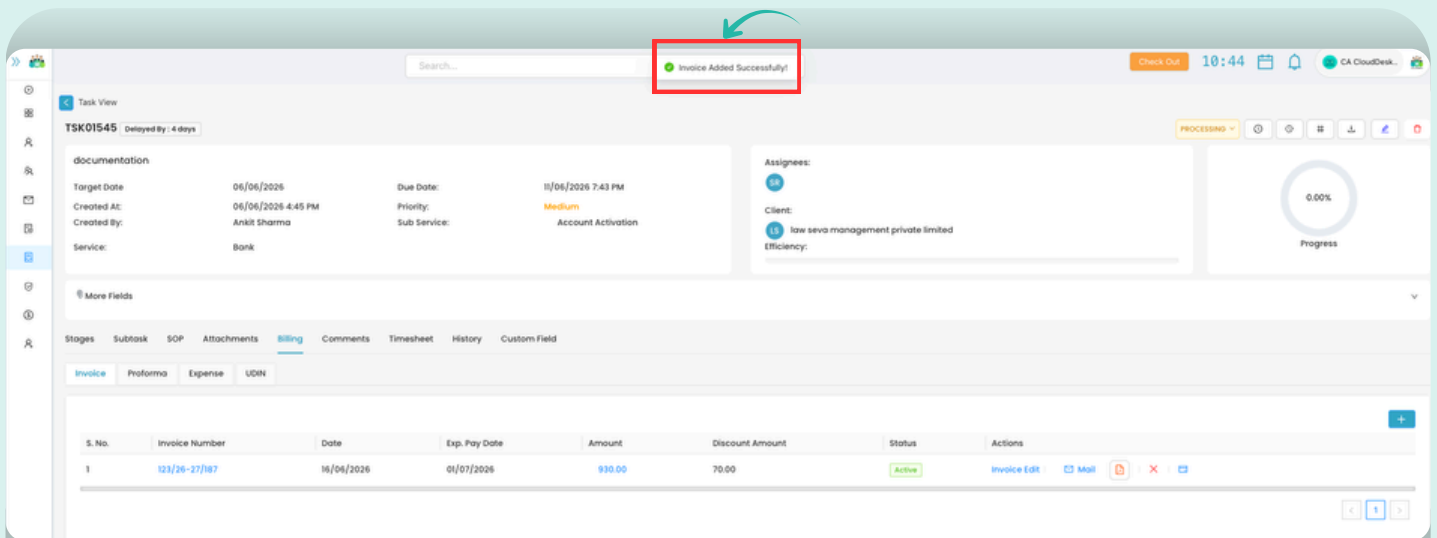
Invoice Initial*: Select Invoice Initial

Add Invoice



1 Step 3: Fill in Invoice Details.

Fill in the following details of **Invoice** to do billing after task, After the billing is done the pop up will come **"Invoice Added Successfully!"**.



Task View

TSK01545 Delayed By: 4 days

documentation

Target Date: 06/06/2026 Due Date: 11/06/2026 7:43 PM

Created At: 06/06/2026 4:45 PM Priority: Medium

Created By: Ankit Sharma Sub Service: Account Activation

Service: Bank

Assignees:

Client: law seva management private limited

Efficiency:

Progress: 0.00%

More Fields

Stages Subtask SOP Attachments **Billing** Comments Timesheet History Custom Field

Invoice Proforma Expense UDN

S. No.	Invoice Number	Date	Exp. Pay Date	Amount	Discount Amount	Status	Actions
1	123/26-27/187	16/06/2026	01/07/2026	930.00	70.00	Active	Invoice Edit Mail Print X Close

COMPLETED

