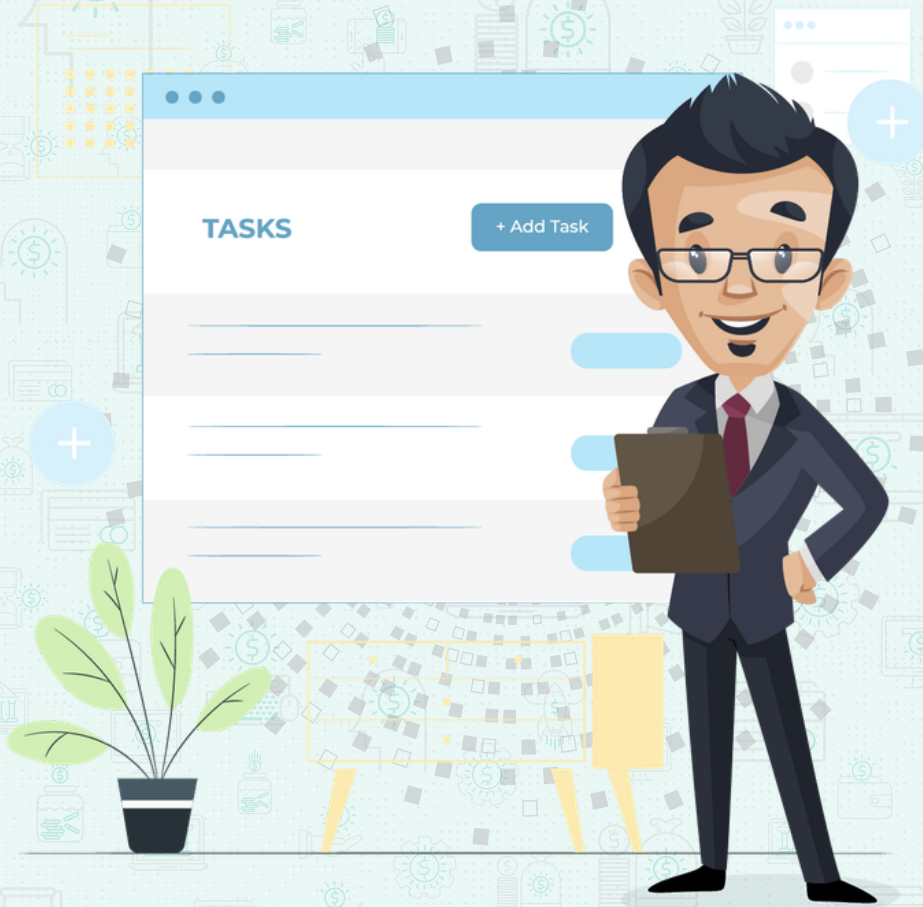




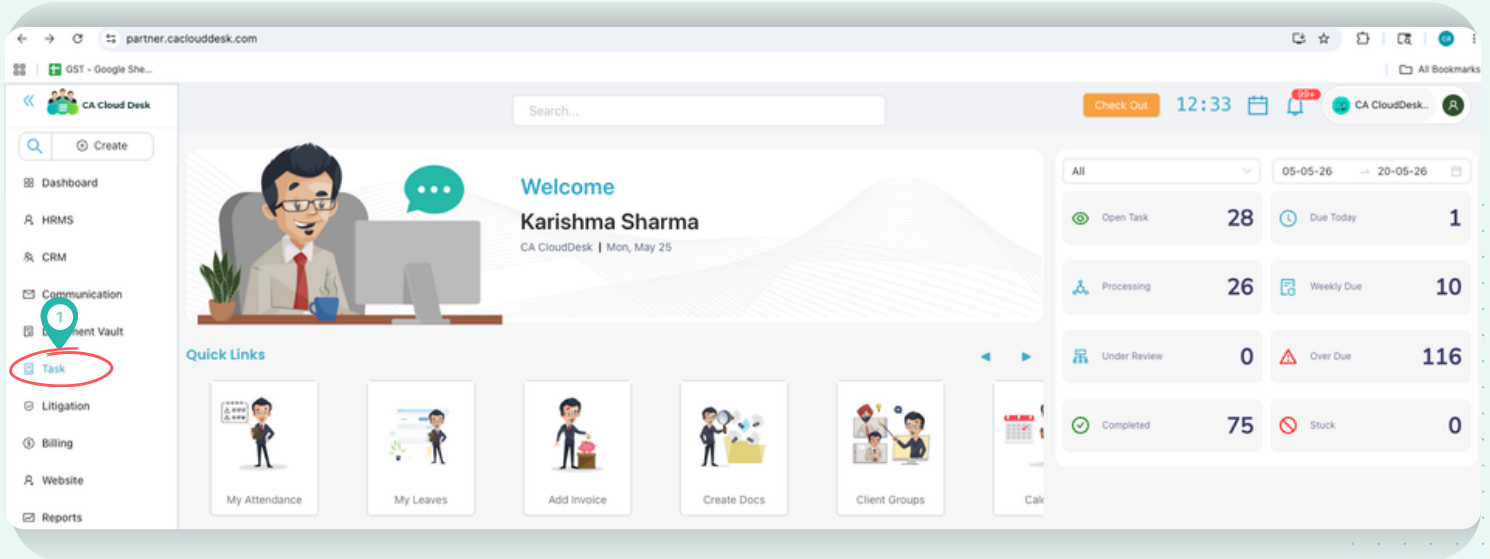
Task Dashboard

CA CloudDesk



Step 1: Log in to CA CloudDesk.

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

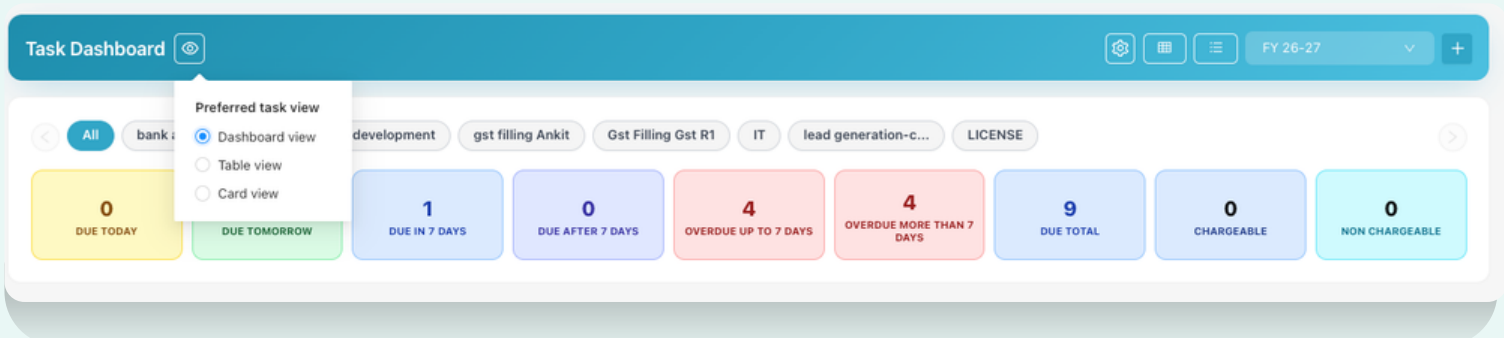


Step 2: Open Task Dashboard.

Click the View Settings (Eye Icon) available beside the Task Dashboard heading.

From the Preferred Task View menu, select your preferred display format:

- **Dashboard View** – Displays tasks grouped by status with summary widgets.
- **Table View** – Displays tasks in a tabular format for detailed filtering and bulk actions.
- **Card View** – Displays tasks as individual cards for quick visual tracking.



A .Dashboard View.

The Dashboard View provides a quick overview of task performance, due dates, workload, and task status.

How to Use Dashboard View

Step 1: Open Dashboard View.

1. Navigate to Task > Dashboard.
2. The dashboard opens by default in Dashboard View.

Step 2: Filter Tasks.

1. Select a service tab such as GST Filing, Audit, ITR, or any available service.
2. Use the Financial Year selector to switch between periods.
3. Apply available filters if required.

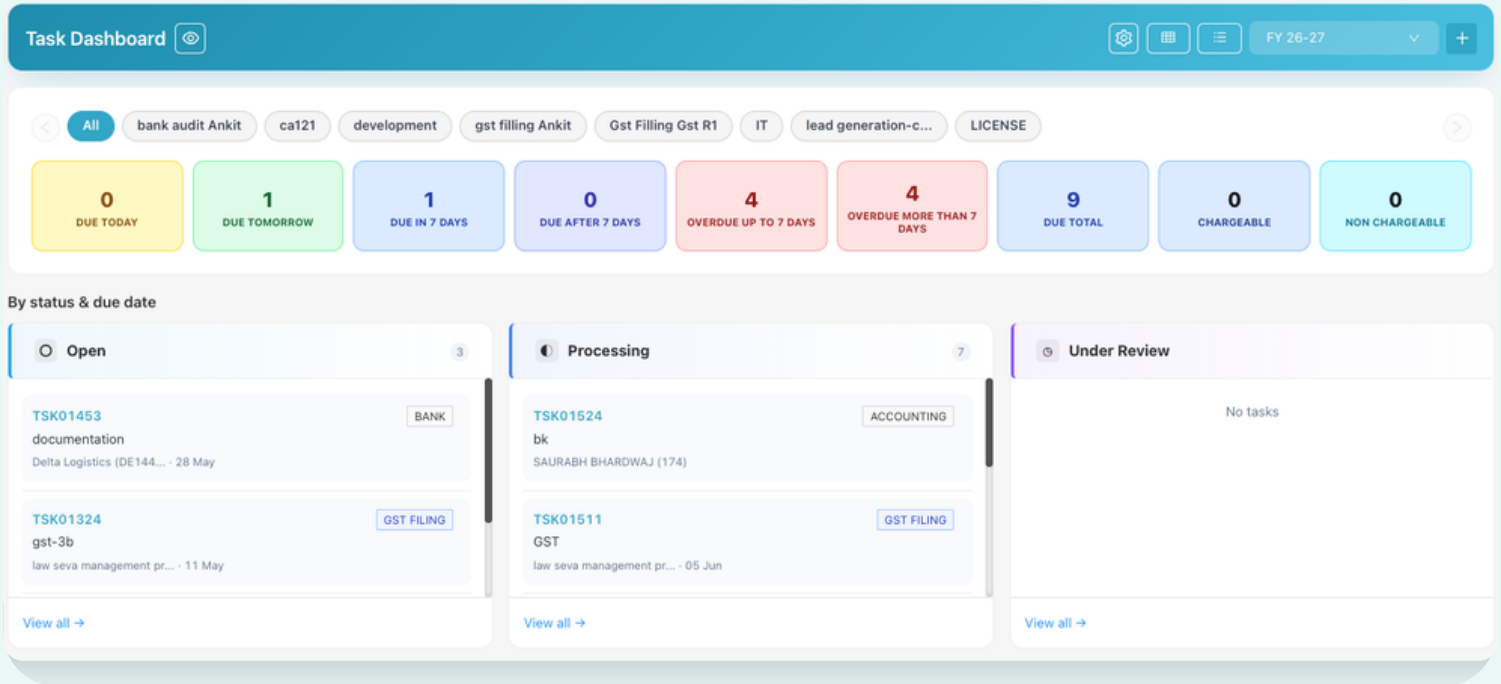
Step 3: Review Due Date Summary.

The dashboard displays task counts based on due dates:

- Due Today
- Due Tomorrow
- Due in 7 Days
- Due After 7 Days
- Overdue Up to 7 Days
- Overdue More Than 7 Days
- Due Total
- Chargeable Tasks
- Non-Chargeable Tasks



A.) Dashboard View



B.) Table View

Task										
Task Dashboard Table View Cart View										
Table Filters Search tasks...										
Task	Created Date	Client	Assignees	Reviewer	Created By	Consultant	Invoice Status	Followers		
Task	S... → E...	Client	Assignees	Reviewer	Created By	Consultant	Invoice Stat...	Followers		
☐ TSK01524 bk	02/06/2026 4:30 PM	SAURABH BHARDWAJ				--		--	...	
☐ TSK01511 GST	01/06/2026 1:18 PM	law seva management private limited				--		--	...	
☐ TSK01495 ITR Gst	28/05/2026 1:18 PM	--					Not Allowed	--	...	
☐ TSK01453 documentation	22/05/2026 7:52 AM	Delta Logistics							...	
☐ TSK01466 gst	23/05/2026 2:16 PM	law seva management private limited							...	
☐ TSK01471 2023 -2024	25/05/2026 5:40 AM	--					Not Allowed	--	...	
☐ TSK01445 223	20/05/2026 5:06 PM	SAURABH BHARDWAJ				--		--	...	
☐ TSK01175 collect data	09/04/2026 9:17 PM	law seva management private limited						--	...	
☐ TSK01189 gst filling	13/04/2026 9:07 PM	law seva management private limited					View	--	...	

B.) Card View

Task

Task Dashboard

Table View

Cart View

ALL MY TASKS

REVIEW

CONSULTANT

OVERDUE

INV PENDING

MY SERVICES (14)

10BDD

1

Accounting

A

Accounts

A

Annual Tax audit

AT

AUDIT-22

A

Bank

B

bank audit Ankit

BA

DSC – Digital Sig...

D-

Filing of Return ...

FO

GST Filing

GF

gst filling Ankit

GF

Gst Filling Gst R1

GF

ITR GST

IG

Litigation Training

LT

