



Task Setup in CA CloudDesk

Add Tasks

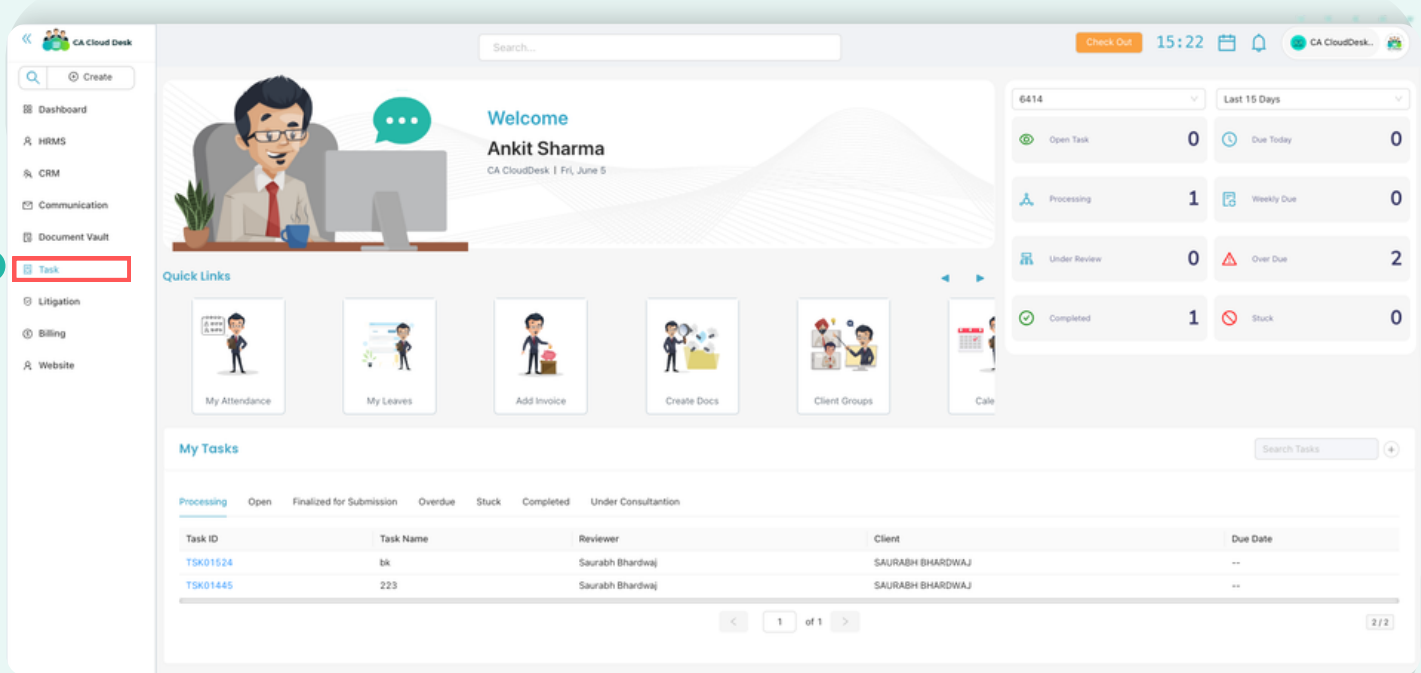


Step 1: Log in to CA CloudDesk.

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



1 Click on Tasks

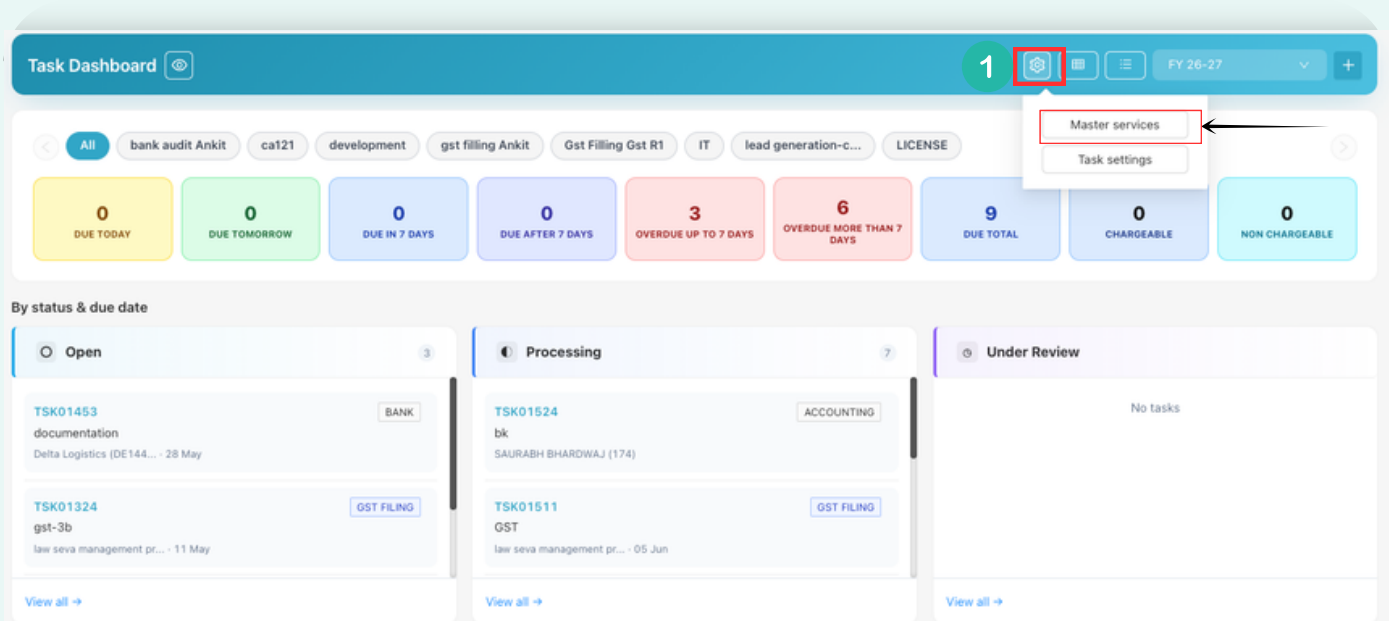


The screenshot shows the CA CloudDesk dashboard. On the left, the 'Task' menu item is highlighted with a red box and a green circle with the number '1'. The dashboard header includes a search bar, a 'Check Out' button, the time '15:22', and a notification bell. The main content area displays a 'Welcome' message to Ankit Sharma, a 'Quick Links' section with icons for 'My Attendance', 'My Leaves', 'Add Invoice', 'Create Docs', 'Client Groups', and 'Cafe', and a 'My Tasks' section with a table of tasks.

Task ID	Task Name	Reviewer	Client	Due Date
TSK01524	bk	Saurabh Bhardwaj	SAURABH BHARDWAJ	--
TSK01445	223	Saurabh Bhardwaj	SAURABH BHARDWAJ	--

Step 2: Open Settings

Click the Settings icon, then select Master Services from the menu.



The screenshot shows the 'Task Dashboard' in CA CloudDesk. The 'Settings' icon (a gear) is highlighted with a red box and a green circle with the number '1'. A dropdown menu is open, showing 'Master services' and 'Task settings', with 'Master services' selected. The dashboard includes a 'Task Dashboard' header, a filter bar with various task categories, a summary section with colored boxes for task counts (e.g., '0 DUE TODAY', '3 OVERDUE UP TO 7 DAYS'), and a 'By status & due date' section with tabs for 'Open', 'Processing', and 'Under Review'.

Step 3: Select or Add a Master Service

Select an existing Master Service from the list to assign it, or click Add Master Service to Select create a new one.



Service Master

Search service name All or hidden services ▼

MY BOARDS (109)

10BDD	12A/80G Registration	24G Return	ACCOUNT FEES	Accounting
Account Review	Accounts	AD Code	Agreement - Consulta...	Agreement - Franchis...
Agreement - Sharehol...	Agreement - Vendor A...	Annual Tax audit	APEDA License	Audit
AUDIT	AUDIT-22	Audit Work	Bank	bank audit Ankit
Book Keeping	BOOK KEEPING	Business Loan	Buyback of shares/se...	ca121



Add Master Service

Service Master

Search service name All or hidden services ▼

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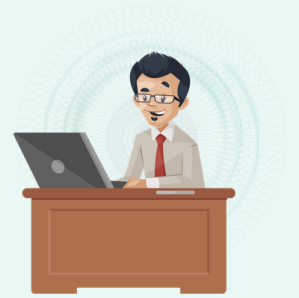
Suggested board templates

AUDIT	BOOK KEEPING	ESI PF REGISTRATION & FILLING	FOOD LICENSE - FSSAI
GST Filing	GST License	IMPORT & EXPORT CODE - IEC	Incorporation of Pvt Ltd Co./ proprietors...
ITR	LABOUR LICENSE	ROC/MCA	TDS FILLING

Create service from scratch

Step 4: Add Sub-Service

Click Add Sub-Service (+) to create a new sub-service entry. Fill in the required details such as name, priority, and TAT.



[← Back to list](#)

10BD – Sub-services

MY BOARDS (1)

12

...

+ Add sub-service

Sub-service ID	Name	Priority	TAT	Share with client
8312H	12	Medium	---	No

Step 5: Save the Service Configuration

After entering all Parent Service and Sub-Service details, including workflow stages, task statuses, billing settings, assignees, notification preferences, and recurring options, click Save Changes at the bottom of the page.

Result: The Master Service and its Sub-Services will be successfully created and available for task creation, workflow management, billing, and tracking within CA CloudDesk.



Add Service Master

Parent Service

[Save](#)

Service ID: 2 digit alphanumeric. Subservices will inherit first 2 characters (non-changeable).

Service ID *

Service name *

Logo

[Click to Upload](#)

Star service

☐ Show in dashboard filters

Service colour *

Choose a colour for this service (required).



Subservices

One parent service can have multiple subservices. You can add Services one by one.

Subservice 1

Subservice ID (first 2 from service + 3 alphanumeric)

Name *

Logo (optional)

[Click to Upload](#)

TAT - No. of days & hours

 &

Task name

Priority

Share with client

☐

Enter any or both (e.g. 2 days & 5 hrs)

☐ Is service linked with GST

Invoice type

☐ Proforma invoice ☒ Invoice ☐ N/A

Price, Discount & HSN (multi-item bills)

+ Add

Assignee

Reviewer

Consultant

Followers

Add own Stages

[Add stage](#)

D1 D2 D3 D4 D5 DA DB DC A B C D Notice Received Information Call Reply Prepare Submission Made Collection of Data
Collection of Documents X Z Civil Check Collection of Paper Selection of Bank Submit of Document Sencention Document Arrangement Accounting
Book Keeping Balancesheet Finalization ITR CA NILESH

☐ Follow Sequentially

+ Add stage

Task status (for this sub-service)

Choose which status options appear in the task dropdown when creating tasks for this sub-service. The initial status will be open and add your own statuses for this sub-service.

Default statuses

These are the default statuses selected for this sub-service. They will appear in the task dropdown by default.

OPEN PROCESSING COMPLETED FINALISED FOR SUBMISSION STUCK UNDER REVIEW OVER DUE

Add own status

Add custom statuses for this sub-service. These will appear in the task dropdown along with the predefined statuses you included above.

[Add status](#)

CANCELED

Pending & Stuck reasons (for this sub-service)

Configure which reasons appear in the dropdown when a task is set to Pending or Stuck. Options come from Task Settings; add your own if not listed.

Pending - reasons

Payment pending
PENDING FROM DEPARTMENT
document not recieved

[Add](#)

Stuck - reasons

client
department
cl
incomplete information
ewdwe

[Add](#)

Billing linked to status

When a task for this sub-service moves to the selected status, the system will automatically create an invoice.

Auto-create invoice when status is

> Description & Documents

> Notification setting

> Set Recurring

+ Add another subservice

[Save changes](#)[Cancel](#)

COMPLETED

