



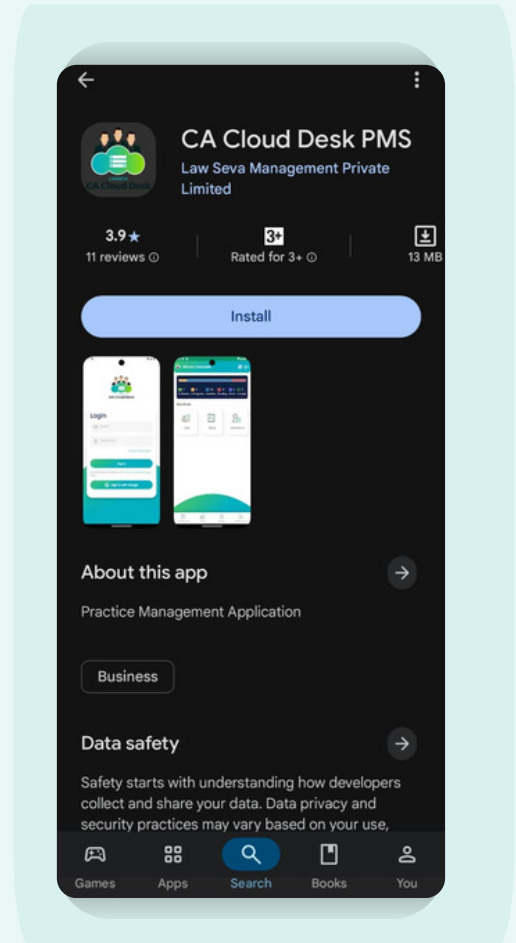
Task On Mobile App

CA CloudDesk



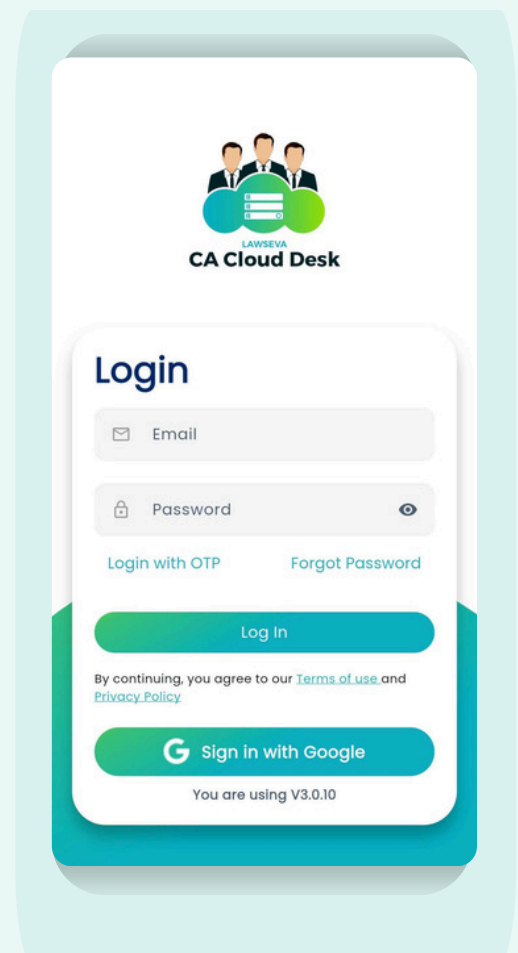
1 Step 1: Download the Mobile Application.

- Open the Google Play Store on your mobile device.
- Search for **CA Cloud Desk**.
- Download and install the application.



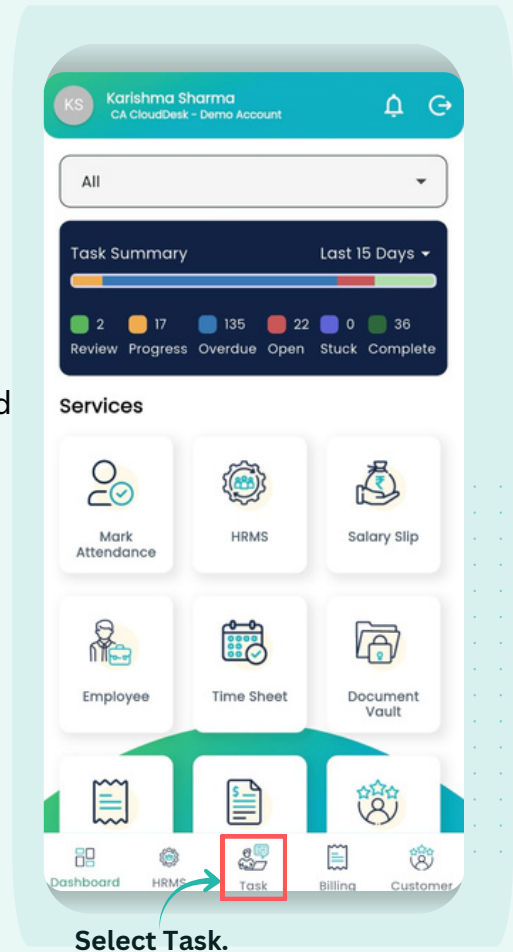
2 Step 2: Login to the Application

- Open the CA Cloud Desk mobile app.
- Enter your **User ID** and **Password**.
- Tap Login to access your account.



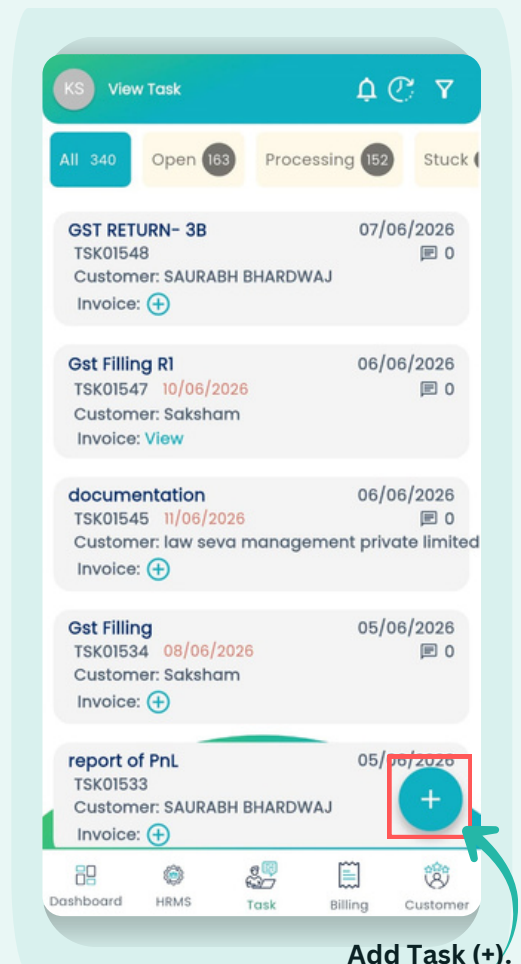
3 Step 3: Navigate to the Task Module.

- After logging in, you will be redirected to the Dashboard.
- Tap on the Task icon from the bottom navigation menu.
- The View Task screen will open, displaying all assigned tasks.



4 Step 4: Create a New Task.

- On the View Task screen, tap the (+) Add Task button located at the bottom-right corner.
- The Create Task form will open.



5 Step 5: Enter Task Details

Fill in the required information:

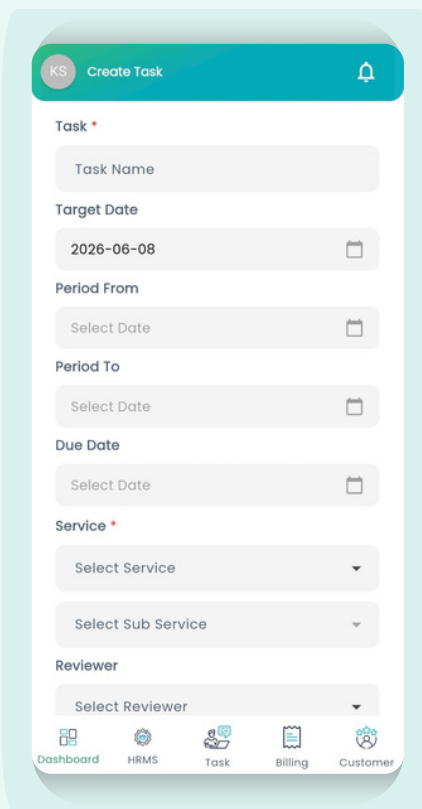
- Task Name
- Target Date
- Period From
- Period to
- Due Date - Select Date
- Service a.)Select Service
b.)Select Subservice
- Reviewer- Select Reviewer
- Priority
- Status (Open, Processing, Completed, Finished for Submission, Stuck, Under Review, Over Due, etc.)
- Pending Reasons (if applicable)
- Stuck Reasons (if applicable)
- Assigned Employee
- Client (Mandatory)

Additional Options

- Approval Required from Reviewer – Enable if reviewer approval is required before task completion.
- Share with Customer – Enable if the task needs to be visible to the customer.

Optional Sections

- You can also configure the following sections as needed:
- More Fields – Add any additional task-related information.
- Stages of Service – Define the workflow stages for the task.
- SOP – Attach or reference the Standard Operating Procedure.
- Billable – Configure billing details for the task.
- Attachments – Upload supporting documents or files related to the task.



KS Create Task

Task *

Task Name

Target Date

2026-06-08

Period From

Select Date

Period To

Select Date

Due Date

Select Date

Service *

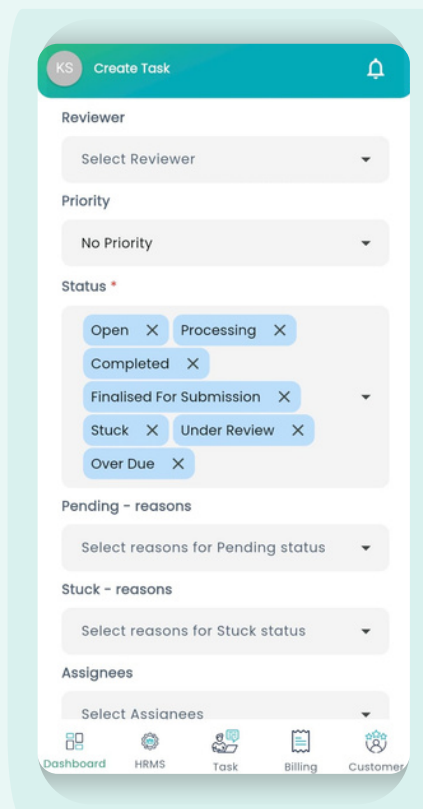
Select Service

Select Sub Service

Reviewer

Select Reviewer

Dashboard HRMS Task Billing Customer



KS Create Task

Reviewer

Select Reviewer

Priority

No Priority

Status *

Open X Processing X

Completed X

Finalised For Submission X

Stuck X Under Review X

Over Due X

Pending - reasons

Select reasons for Pending status

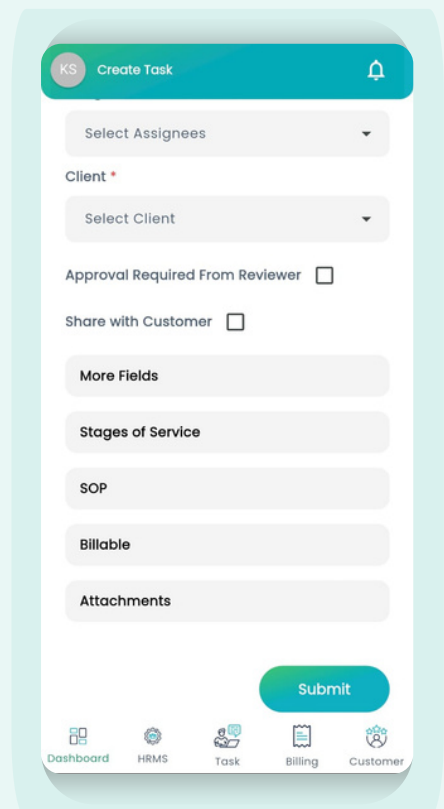
Stuck - reasons

Select reasons for Stuck status

Assignees

Select Assignees

Dashboard HRMS Task Billing Customer



KS Create Task

Select Assignees

Client *

Select Client

Approval Required From Reviewer ☐

Share with Customer ☐

More Fields

Stages of Service

SOP

Billable

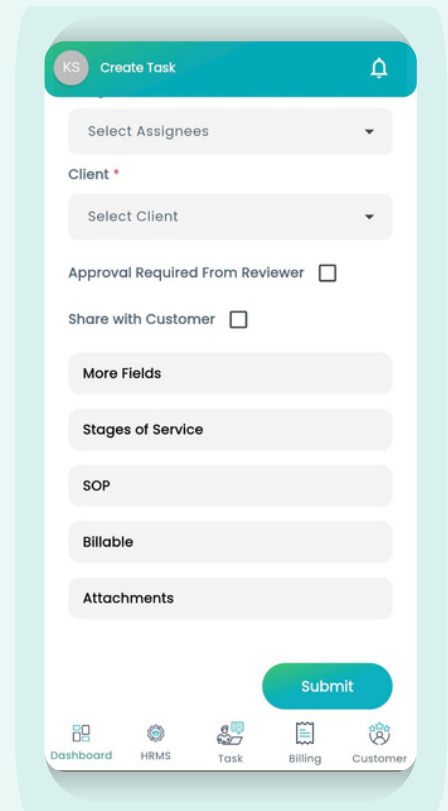
Attachments

Submit

Dashboard HRMS Task Billing Customer

6 Step 6: Submit the Task

- After entering all required details, tap the **Submit** button to create the task successfully. The task will then be available in the **Task Module** for tracking and management.



The screenshot shows the 'Create Task' form in the CA CloudDesk app. The form has a teal header with 'KS Create Task' and a bell icon. Below the header, there are several input fields and checkboxes: 'Select Assignees' (dropdown), 'Client *' (dropdown), 'Approval Required From Reviewer' (checkbox), and 'Share with Customer' (checkbox). There are also five expandable sections: 'More Fields', 'Stages of Service', 'SOP', 'Billable', and 'Attachments'. A large teal 'Submit' button is at the bottom right. At the very bottom, there is a navigation bar with icons for 'Dashboard', 'HRMS', 'Task', 'Billing', and 'Customer'.

