



Edit Tasks 

in CA CloudDesk



Step 1: Log in to CA CloudDesk.

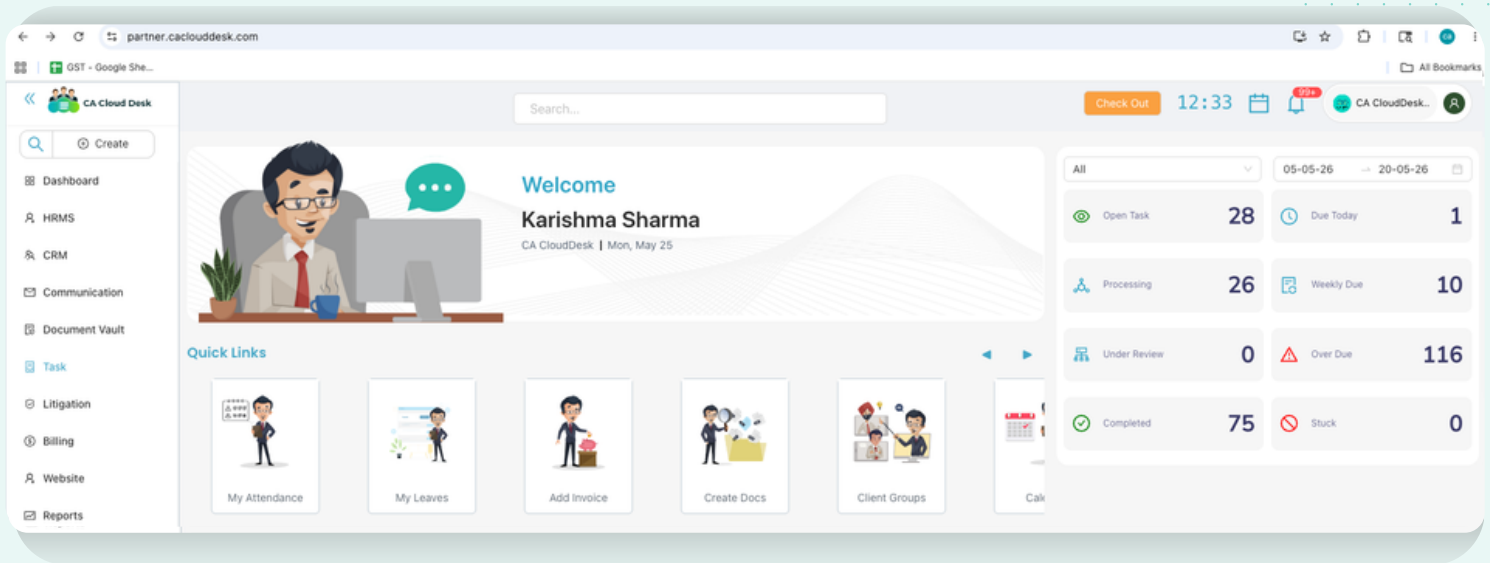
From the CA CloudDesk left navigation menu, select **Task** to begin the setup process.



Click on Tasks



Click the Settings icon



Step 2: Open the Task for Editing.

You can edit tasks using either of the following methods:

Method A: Bulk Edit Multiple Tasks.

1. Click View All from the Task Dashboard.
2. Select the tasks you want to edit using the checkboxes.
3. Click the Edit icon.
4. Enter the required password and click Confirm to proceed with editing.

Method B: Edit a Single Task.

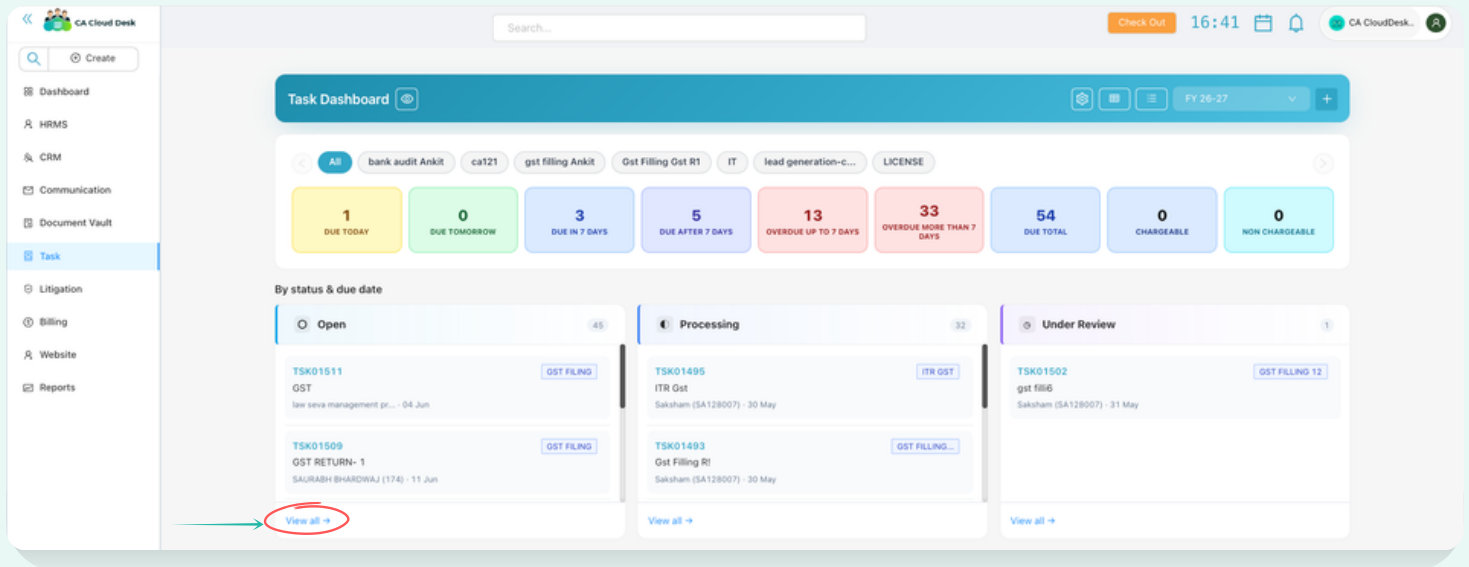
1. Open the Task Dashboard or Table View.
2. Click on the specific task you want to modify.
3. Click the Edit option to open the task in edit mode.



Method A: Bulk Edit Multiple Tasks.



- Click View All from the Task Dashboard.



Task Dashboard

Search...

Check Out 16:41

FY 26-27

1 DUE TODAY 0 DUE TOMORROW 3 DUE IN 7 DAYS 5 DUE AFTER 7 DAYS 13 OVERDUE UP TO 7 DAYS 33 OVERDUE MORE THAN 7 DAYS 54 DUE TOTAL 0 CHARGEABLE 0 NON CHARGEABLE

By status & due date

Open 45 Processing 32 Under Review 1

TSK01511 GST law seva management pr... - 04 Jun GST FILING

TSK01509 GST RETURN- 1 SAURABH BHARDWAJ (174) - 11 Jun GST FILING

View all →

TSK01495 ITR Gst Saksham (SA128007) - 30 May ITR GST

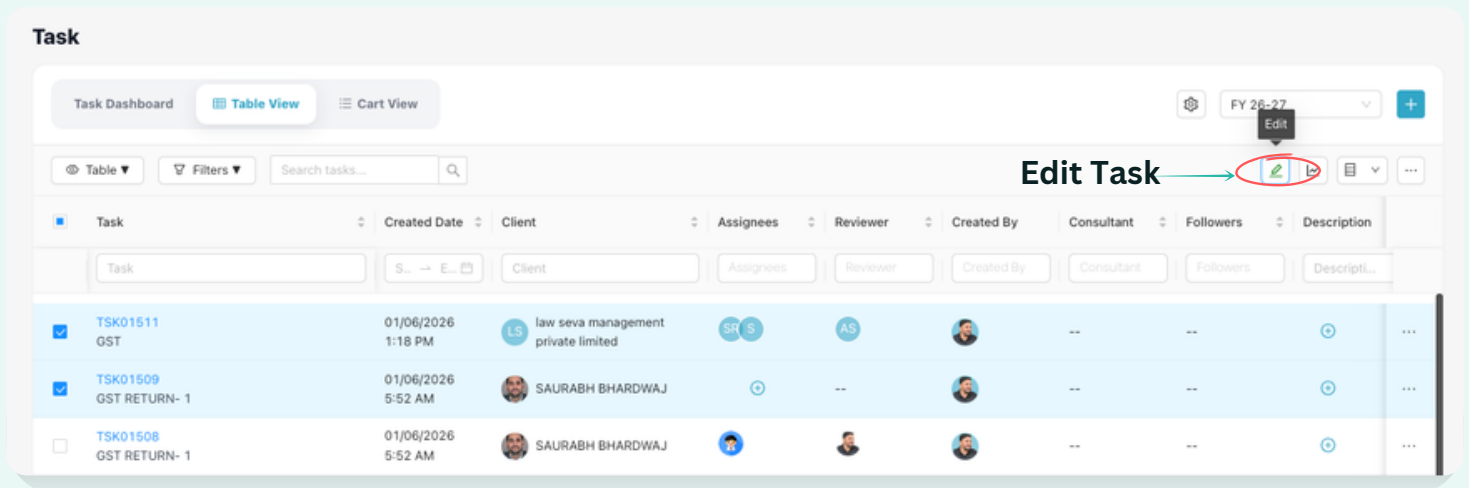
TSK01493 Gst Filing Rl Saksham (SA128007) - 30 May GST FILING...

View all →

TSK01502 gst fillig Saksham (SA128007) - 31 May GST FILING 12

View all →

- Select the tasks you want to edit using the checkboxes.
- Click the Edit icon.



Task

Task Dashboard Table View Cart View

FY 26-27 Edit

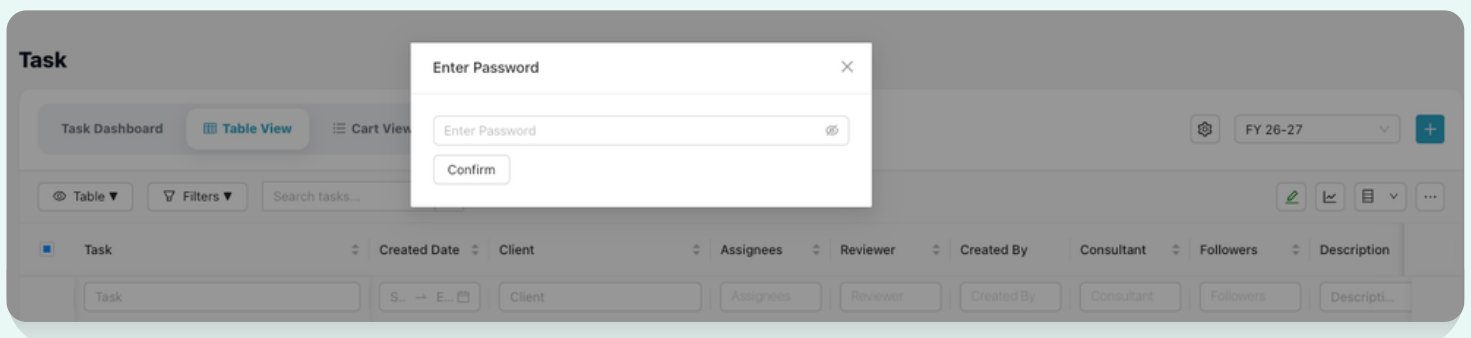
Table Filters Search tasks...

Task Created Date Client Assignees Reviewer Created By Consultant Followers Description

Task	Created Date	Client	Assignees	Reviewer	Created By	Consultant	Followers	Description
☒ TSK01511 GST	01/06/2026 1:18 PM	law seva management private limited	SR S	AS		--	--	
☒ TSK01509 GST RETURN- 1	01/06/2026 5:52 AM	SAURABH BHARDWAJ		--		--	--	
☐ TSK01508 GST RETURN- 1	01/06/2026 5:52 AM	SAURABH BHARDWAJ				--	--	

Edit Task

- Enter the required password and click Confirm to proceed with editing.



Task

Task Dashboard Table View Cart View

FY 26-27

Table Filters Search tasks...

Task Created Date Client Assignees Reviewer Created By Consultant Followers Description

Task	Created Date	Client	Assignees	Reviewer	Created By	Consultant	Followers	Description
Task	S... → E...	Client	Assignees	Reviewer	Created By	Consultant	Followers	Descripti...

Enter Password

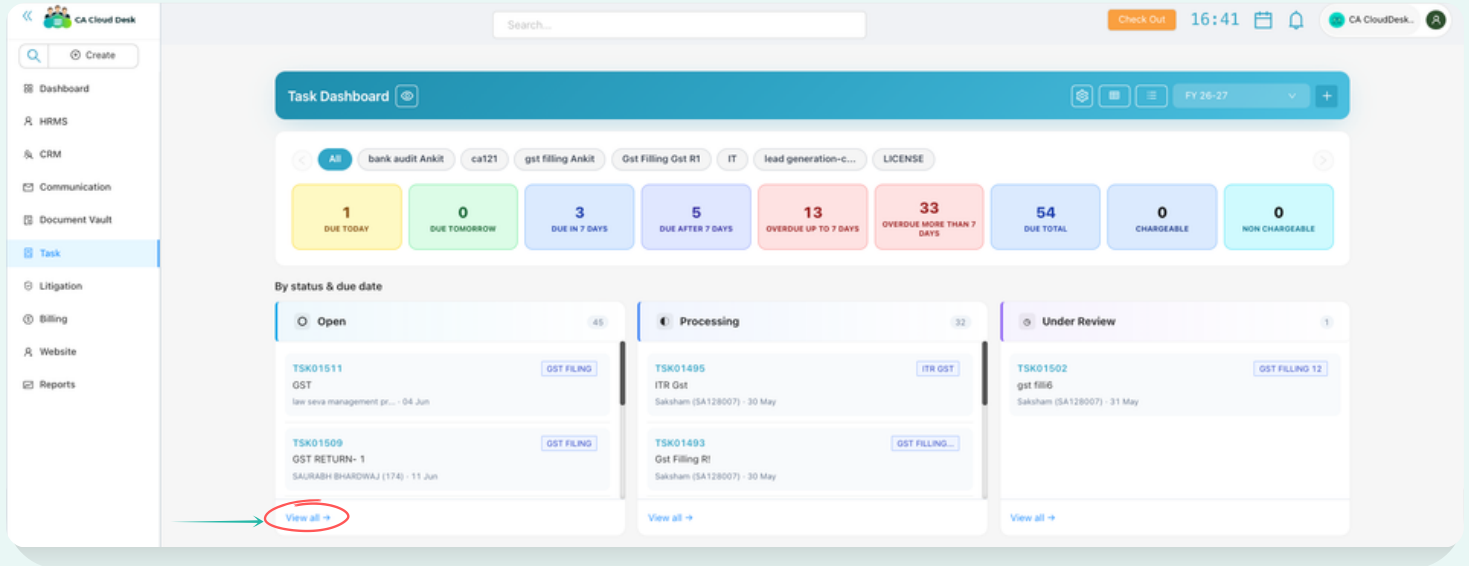
Enter Password

Confirm



Method B: Edit a Single Task.

- Open the Task Dashboard or Table View.



CA CloudDesk

Search...

Check Out 16:41

Task Dashboard

As bank audit Ankit ca121 gst filing Ankit Gst Filing Gst R1 IT lead generation-c... LICENSE

1 DUE TODAY 0 DUE TOMORROW 3 DUE IN 7 DAYS 5 DUE AFTER 7 DAYS 13 OVERDUE UP TO 7 DAYS 33 OVERDUE MORE THAN 7 DAYS 54 DUE TOTAL 0 CHARGEABLE 0 NON CHARGEABLE

By status & due date

Open 45 Processing 32 Under Review 1

TSK01511 GST law seva management pr... - 04 Jun GST FILING View all →

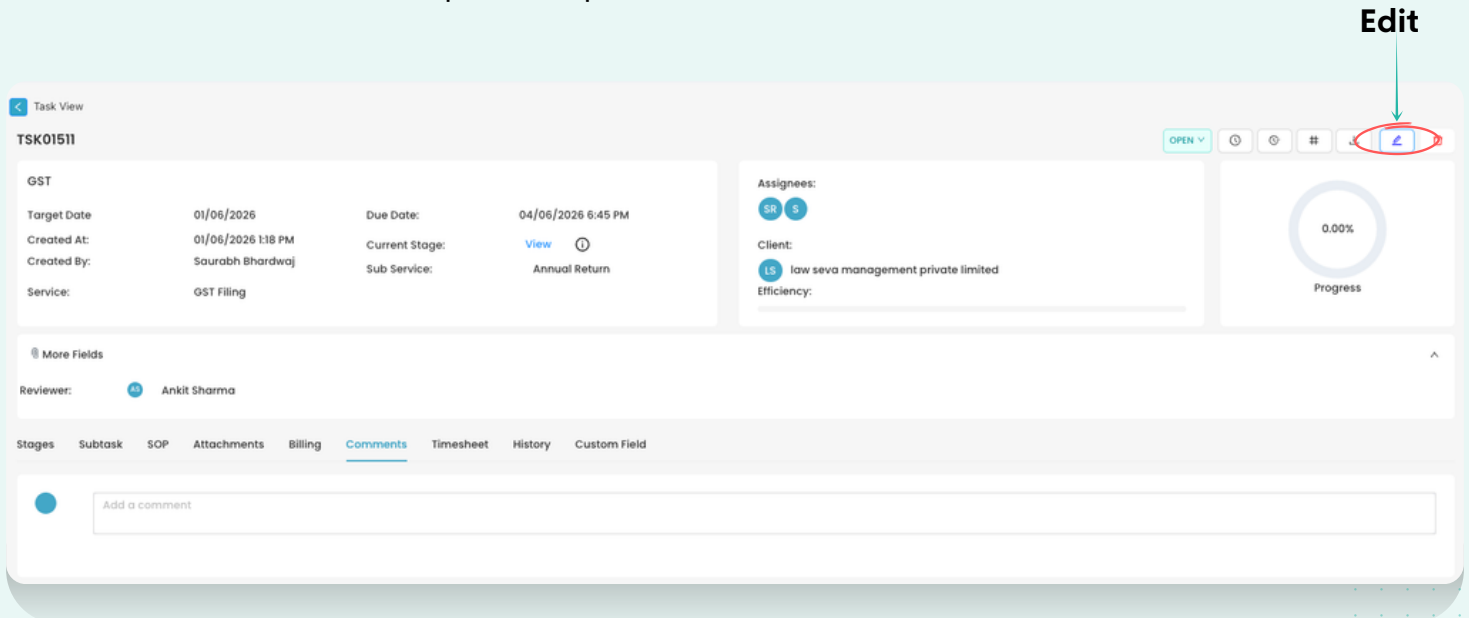
TSK01509 GST RETURN- 1 SAURABH BHARDWAJ (174) - 11 Jun GST FILING View all →

TSK01495 ITR Gst Saksham (SA128007) - 30 May ITR GST View all →

TSK01493 Gst Filing R! Saksham (SA128007) - 30 May GST FILING... View all →

TSK01502 gst fill6 Saksham (SA128007) - 31 May GST FILING 12 View all →

- Click the Edit option to open the task in edit mode.



Task View

TSK01511

OPEN

Target Date: 01/06/2026 Due Date: 04/06/2026 8:45 PM

Created At: 01/06/2026 1:18 PM Current Stage: View

Created By: Saurabh Bhardwaj Sub Service: Annual Return

Service: GST Filing

Assignees: SR S

Client: low seva management private limited

Efficiency: 0.00% Progress

More Fields

Reviewer: Ankit Sharma

Stages Subtask SOP Attachments Billing Comments Timesheet History Custom Field

Add a comment

Edit



- Click View All from the Task Dashboard.