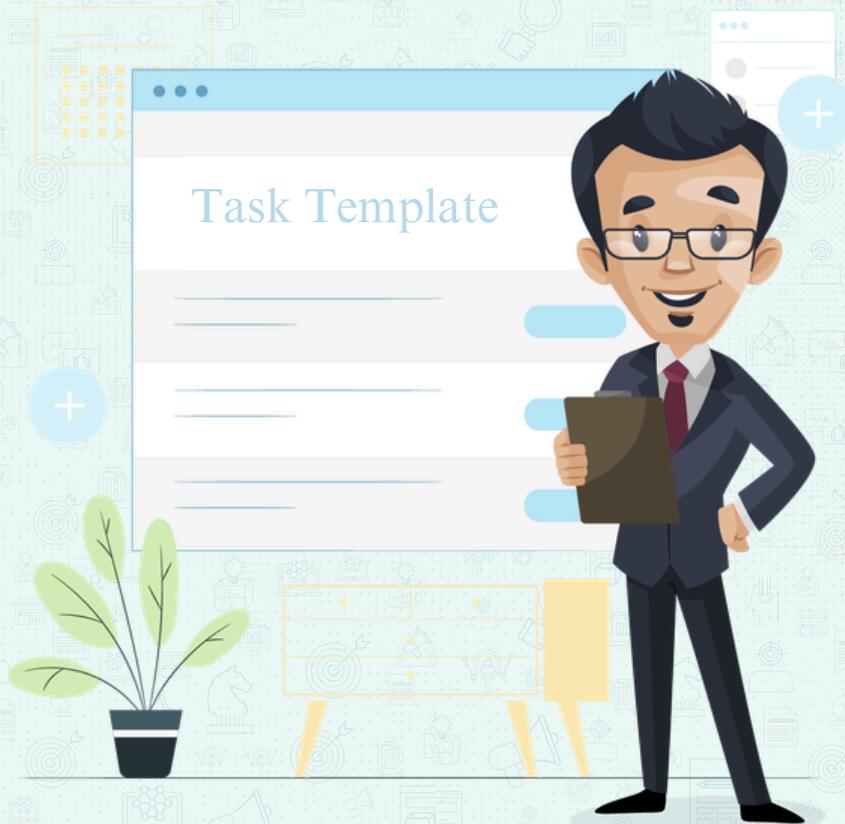




Task Template

CA CloudDesk

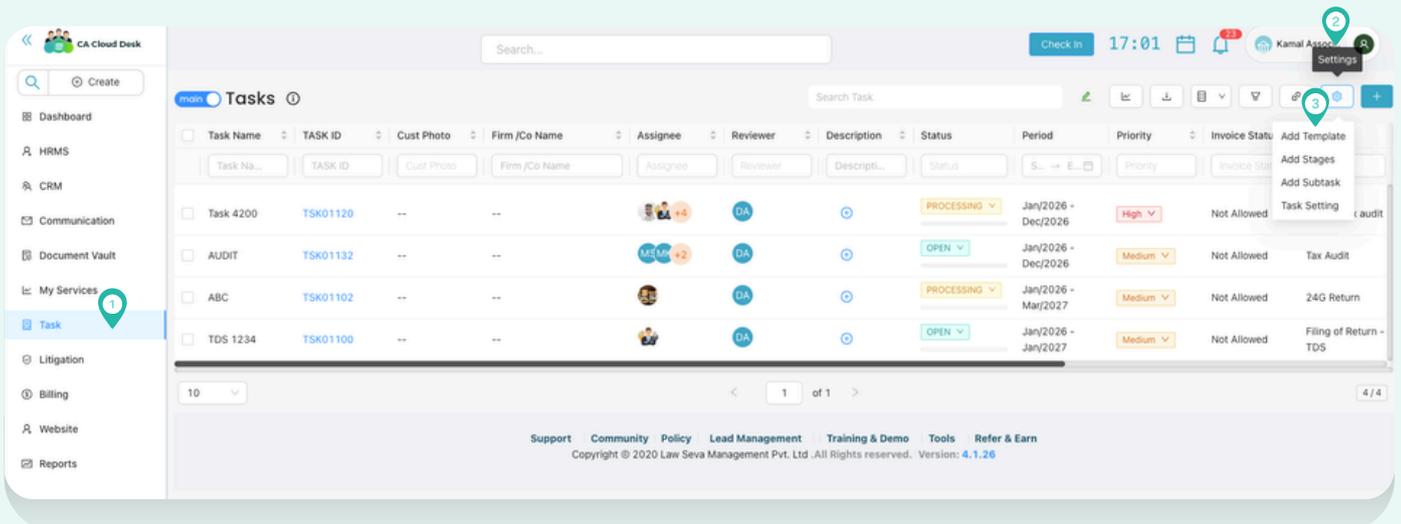


Step 1: Open CA CloudDesk Dashboard

Go to Task → Click on the  (Setting) icon → Add Template



- 1 Click on Task.
- 2 Click on Setting
- 3 Click on Add Template



The screenshot shows the CA CloudDesk interface. On the left sidebar, the 'Task' menu item is highlighted with a red circle labeled '1'. In the top right corner, the 'Settings' icon is highlighted with a red circle labeled '2'. A dropdown menu is open over the 'Add Template' button, with the 'Add Template' option highlighted by a red circle labeled '3'. The main content area displays a table of tasks with columns for Task Name, TASK ID, Cust Photo, Firm /Co Name, Assignee, Reviewer, Description, Status, Period, Priority, and Invoice Status.

| Task Name | TASK ID | Cust Photo | Firm /Co Name | Assignee | Reviewer | Description | Status | Period | Priority | Invoice Status |
|-----------|----------|------------|---------------|--|---|-------------|------------|---------------------|----------|----------------|
| Task 4200 | TSK01120 | -- | -- |  +4 |  | | PROCESSING | Jan/2026 - Dec/2026 | High | Not Allowed |
| AUDIT | TSK01132 | -- | -- |  +2 |  | | OPEN | Jan/2026 - Dec/2026 | Medium | Not Allowed |
| ABC | TSK01102 | -- | -- |  |  | | PROCESSING | Jan/2026 - Mar/2027 | Medium | Not Allowed |
| TDS 1234 | TSK01100 | -- | -- |  |  | | OPEN | Jan/2026 - Jan/2027 | Medium | Not Allowed |

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Step 2: Create Task Template & Set Price

Fill in the required fields:

- Task Name
- ECT(Days)
- ECT (Hours)
- Priority
- More fields
- Select Stages
- SOP
- Billable
- Subtask
- Assign
- Service
- Sub Service Name



Create Task Template & Set Price ⓘ ⓘ View & Edit Template ⚙

| | |
|-------------|------------------|
| Task Name | Assignee |
| ECT(days) | ECT(hours) |
| Service | Sub Service Name |
| No Priority | |

More Fields

Select Stages of Service

SOP

Billable ⓘ

Subtask

Cancel Submit

Step 2: View & Edit Template

Use the filters to see which templates are linked to specific people:

- Consultant
- Assignee
- Followers

On the View & Edit Template screen, the Settings (gear) icon lets you:

Add Stages - Add or manage stages of service for templates.

Add Subtask -Add or manage subtasks to divide a task template into smaller st

Create Task Template & Set Price ⓘ + [View & Edit Template](#) ⚙️

Filters: Consultant Assignee Followers

Add Stages
Add Subtask

| S. No. | Task | Assignee | Consultant | Followers | Price | Hsn | Govt Hsn | Govt Fees | ECT(Days hours) | SOP | Take Actions |
|--------|-------|----------|------------|-----------|----------|-----|----------|-----------|-----------------|-----|--------------------------------------|
| 1 | Fssai | E1 | -- | -- | 5,000.00 | NA | NA | 0 | 5 -- | -- | 🔗 🗑️ |

