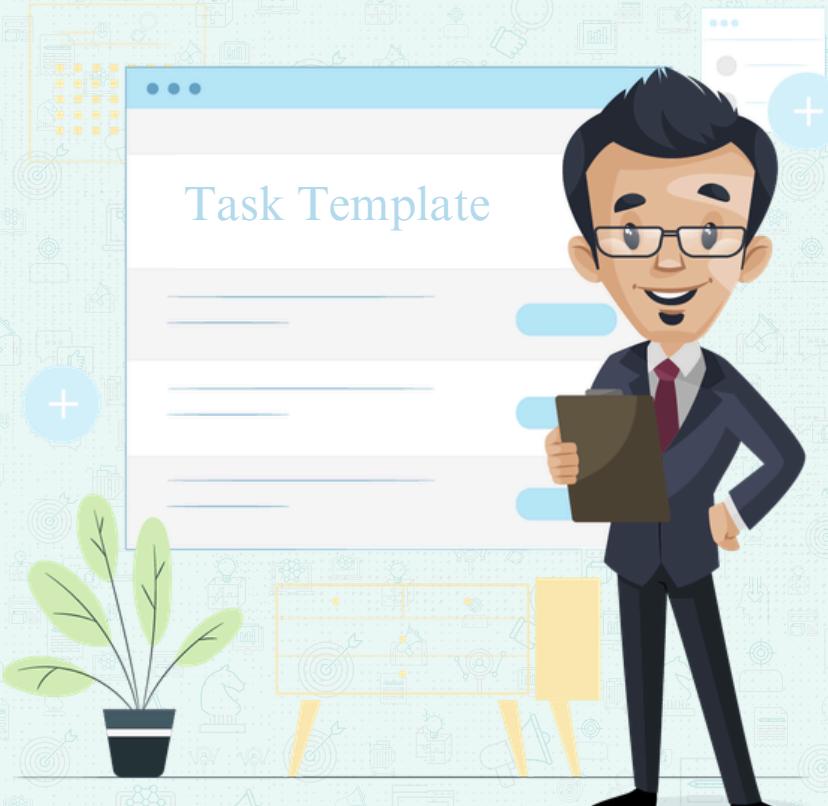




CA CloudDesk

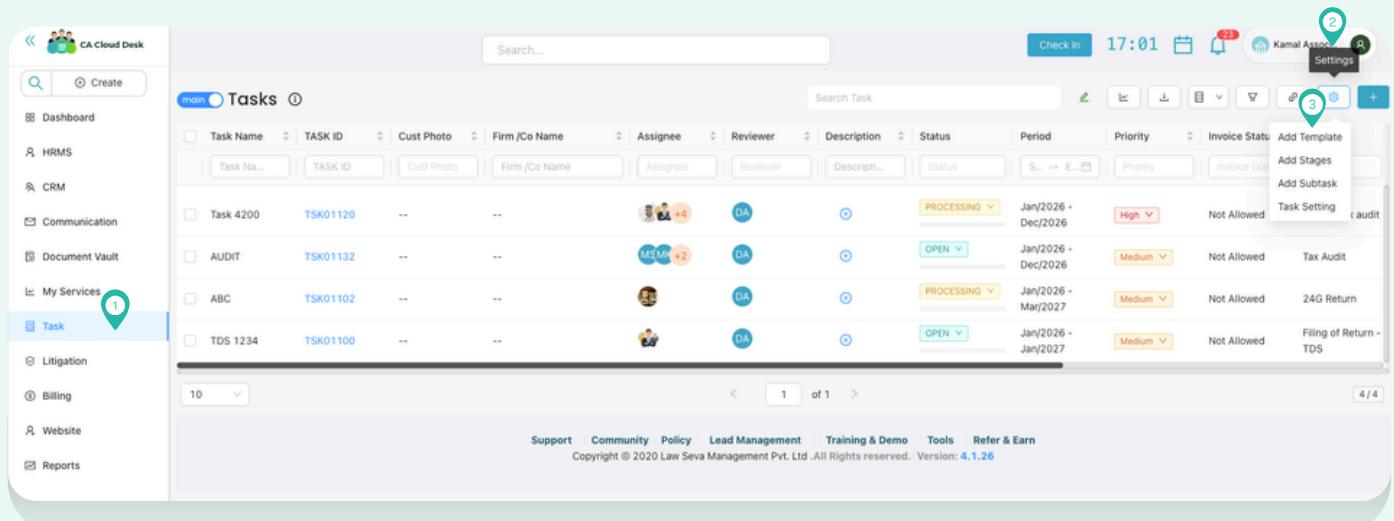
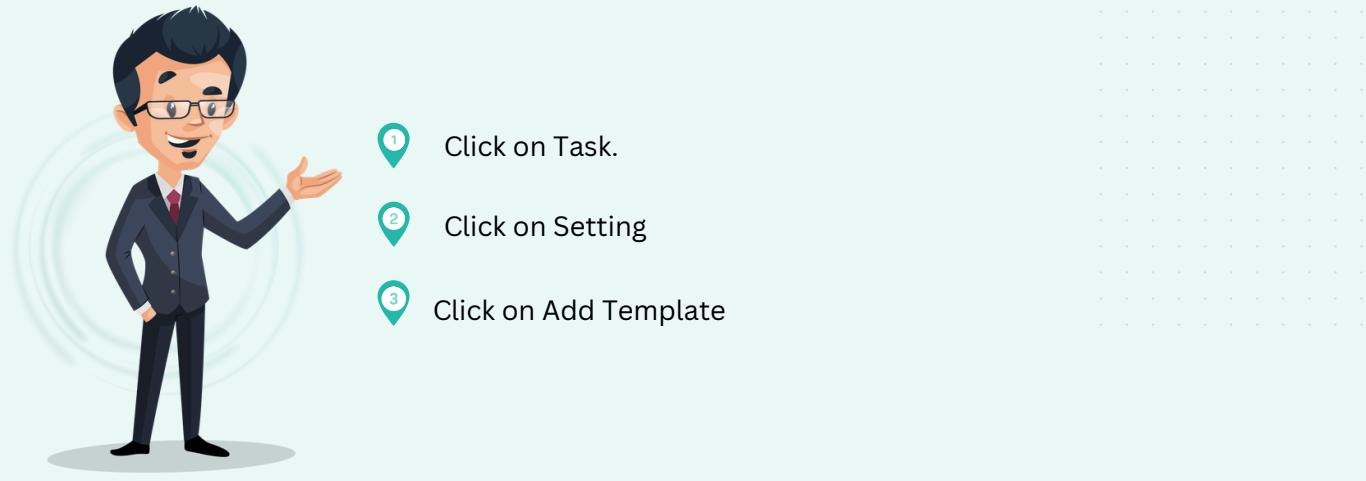
Task Template

CA CloudDesk



Step 1: Open CA CloudDesk Dashboard

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



Task Name	TASK ID	Cust Photo	Firm /Co Name	Assignee	Reviewer	Description	Status	Period	Priority	Invoice Statu	Action
Task 4200	TSK01120	--	--				PROCESSING	Jan/2026 - Dec/2026	High	Not Allowed	Add Stages
AUDIT	TSK01132	--	--				OPEN	Jan/2026 - Dec/2026	Medium	Not Allowed	Add Subtask
ABC	TSK01102	--	--				PROCESSING	Jan/2026 - Mar/2027	Medium	Not Allowed	Task Setting
TDS 1234	TSK01100	--	--				OPEN	Jan/2026 - Jan/2027	Medium	Not Allowed	Filing of Return - TDS

Step 2: Create Task Template & Set Price

Fill in the required fields:

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



Create Task Template & Set Price ① ② View & Edit Template ⚙️

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

⊕ More Fields

⊕ Select Stages of Service

⊕ SOP

⊕ Billable ③

⊕ Subtask

Cancel Submit

Step 2: View & Edit Template

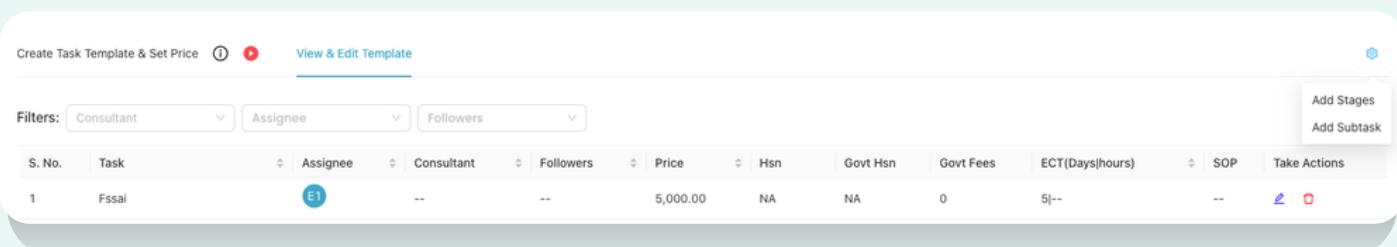
Use the filters to see which templates are linked to specific people:

- 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



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 --	--	 

COMPLETED

