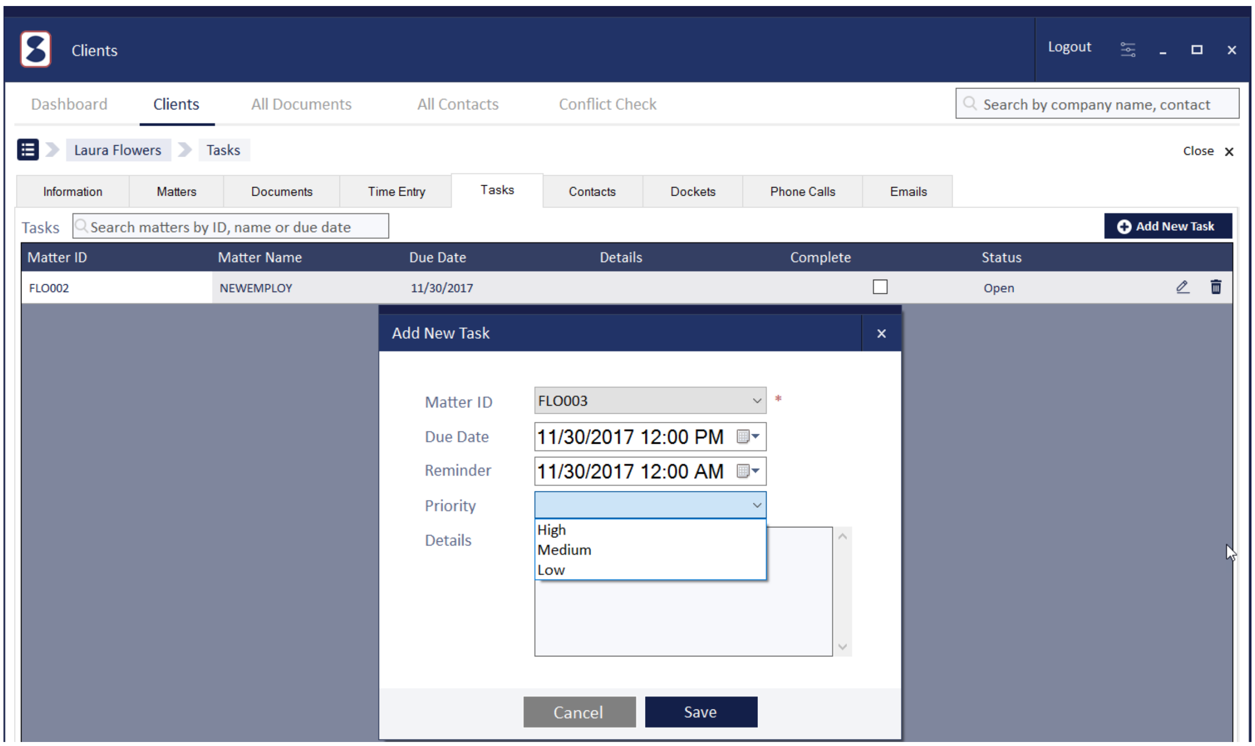
Creating a task

From the Clients tab, click the “Edit” button for a specific client and go to the “Task” tab. You can add new tasks by clicking on the “Add New Task” button. If a task has a higher or lower priority, select the level here. When you go back to the dashboard calendar, your priority will be identified by color. Blue = low, Green = Medium, Red = High.



Editing an existing task

You can edit an existing task by clicking the “Edit” button.

Deleting an existing task:

You can delete an existing task by clicking the “Delete” button.

Searching an existing task:

You can search for an existing entry by entering search keywords such as: “matter ID, matter name, due date, etc” into the search field.