

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.

The screenshot displays the 'Clients' application interface. At the top, there is a navigation bar with 'Clients' and 'Logout' options. Below this is a breadcrumb trail: 'Dashboard > Clients > Laura Flowers > Tasks'. A search bar is present with the text 'Search by company name, contact'. The main content area shows a table of tasks with columns: Matter ID, Matter Name, Due Date, Details, Complete, and Status. The table contains one row with Matter ID 'FLO002', Matter Name 'NEWEMPLOY', Due Date '11/30/2017', and Status 'Open'. An 'Add New Task' dialog box is open in the foreground, allowing the user to create a new task. The dialog box has the following fields: Matter ID (dropdown menu with 'FLO003' selected), Due Date (calendar icon and '11/30/2017 12:00 PM'), Reminder (calendar icon and '11/30/2017 12:00 AM'), Priority (dropdown menu with 'High', 'Medium', and 'Low' options), and a 'Details' section. At the bottom of the dialog box are 'Cancel' and 'Save' buttons.

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.