

Keep track of your tasks

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Tasks are the small things that have to happen for a matter to move: send the draft, chase the lender, book the call. Each one has someone it's for and, if you like, a day it's due.

1 Open your tasks

Go to **Tasks**

You'll see your open tasks grouped by **Overdue**, **Today**, **This week**, **Later** and **No date**.

Switch to **Everyone** to see the whole team's list, or to **Done** to see what's been ticked off.

2 Add a task

Press **New task** and fill in:

- **Task**, what needs doing
- **For**, the person who'll do it
- **Due**, if it has a date
- **Matter**, if it belongs to one

3 Save it

Press **Add task**. If it's for someone else, they hear about it in **Updates**.

4 Add one from a matter

On a matter, press **Add** beside **Tasks**. The task is filed on that matter for you, and shows on the matter as well as on your list.

5 Tick it off

Press the tick at the start of the row when it's done. Press it again to open the task again if you were too quick.

6 Change or remove a task

Press a task to open it. Change what you need and press **Save**, or press **Remove** if it's no longer needed.

If something goes wrong

There's no **Add** beside **Tasks** on a matter.

Closed matters don't take new tasks, and you need to be able to change the matter. Add the task from **Tasks** instead, or ask your Desk admin.