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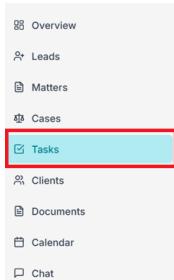
## **How do I create a task?**

To create and assign tasks related to cases, matters (or)clients for effective task tracking and management.

- User must be logged in to the OctoGenie Partner Portal
- User should have access to the Tasks module

### **Step 1: Navigate to Tasks**

1. Log in to your OctoGenie account.
2. From the left-side navigation menu, click on Tasks.
3. The Task Management page will open, showing the list of existing tasks



## Step 2: Click on “Add New Task”

1. On the top-right corner of the Task Management screen, click the “+ Add New Task” button.
2. This will open the Create Task form.



The screenshot shows the 'Task Management' section of a software application. At the top right is a blue button labeled '+ Add New Task'. Below it, there are filters: 'All Tasks 27' (underlined), 'Assigned to Me 9', 'Team Tasks 27', and 'Created by Me 9'. A search bar says 'View all tasks you have access to' with dropdowns for 'Entire Team' and 'Me'. To the right are buttons for 'All' (selected), 'Today', 'Yesterday', 'Last 7 days', and 'Custom date'. The main area is titled 'Create New Task' and contains fields for 'Task Name \*' (with placeholder 'Legal Research'), 'Status \*' (set to 'Pending'), 'Category \*' (set to 'Legal Research'), 'Priority \*' (set to 'Medium'), 'Due Date \*' (set to '19-01-2026'), 'Description' (an empty text area), 'Related Case \*' (a dropdown menu with 'Select a case'), 'Related Client \*' (a dropdown menu with 'Select a client'), and 'Notes' (a text area with placeholder 'Add any additional notes or comments').

### Step 3: Enter Task Details

Fill in the required task information:

- Task Title: Enter a clear and descriptive task name (e.g., *Prepare hearing brief*)
- Task Type / Category: Select the relevant category (e.g., *Case Analysis, Client Meeting, Court Filing*)
- Priority: Choose the priority level (*Low / Medium / High*)
- Due Date: Select the task deadline from the calendar
- Assign To: Select the team member responsible for the task
- Case (Optional): Link the task to a relevant case
- Client (Optional): Link the task to a client, if applicable
- Description: Add a brief explanation of the task (e.g., *Prepare comprehensive hearing brief for upcoming court date*)

### Step 4: Save the Task

1. Review all the entered details.
2. Click on Create Task

- The task will be successfully created.

## **Step 5: Verify Task Creation**

- The newly created task will appear in the Tasks list.
- You can view it under:
  - All Tasks
  - Assigned to Me
  - Team Tasks
  - Created by Me
- Task is created and visible in the Task Management dashboard
- Assigned user can track task status (Pending / Completed)
- Task is linked to relevant case or client (if selected)

## **How do I assign tasks to team members?**

To assign case-related tasks to specific team members for effective tracking and accountability.

- User must be logged in to the OctoGenie Partner Portal
- Team members must already be added to the organization
- Relevant Case / Client should exist

## **Step 1: Navigate to Tasks**

- Log in to OctoGenie
- From the left-hand menu, click on Tasks
- The Task Management screen will open showing all tasks

## **Step 2: Click on “Add New Task”**

- Click the “+ Add New Task” button at the top-right corner
- The Create Task form will appear

## **Step 3: Enter Task Details**

#### **Step 4: Assign Task to a Team Member**

1. Locate the Assign Task field
2. Click the dropdown
3. Select the team member's name from the list

The screenshot shows a user interface for creating a task. At the top, there are fields for 'Description' (empty), 'Related Case \*' (with a 'Select a case' button), 'Related Client \*' (with a 'Select a client' button), and 'Notes' (a text area with placeholder text). Below these is a section titled 'Assign Task' which contains a dropdown menu. This dropdown menu is highlighted with a red box. It includes a search bar labeled 'Search...' and a list of options: 'A. Select an employee', 'A. Self', and '3. sana monica (sana@gmail.com)'. The 'sana monica' option is the one currently selected.

#### **Step 5: Link Case / Client**

1. Select the Case from the Case dropdown (if applicable)
2. Select the Client linked to the task

#### **Step 6: Save the Task**

1. Review all entered details
2. Click on Create Task
3. The task is now assigned to the selected team member

#### **How do I set due dates?**

To define task deadlines so team members can prioritize and complete work on time.

- User must be logged in to the **OctoGenie Partner Portal**
- Access to **Tasks** module

- Task creation or edit permission

## Method 1: Set Due Date While Creating a New Task

### Step 1: Navigate to Tasks

1. Log in to OctoGenie
2. Click **Tasks** from the left-hand menu
3. The **Task Management** screen appears

### Step 2: Click “Add New Task”

1. Click the **+ Add New Task** button (top-right corner)
2. The **Create Task** form opens

### Step 3: Enter Task Details

### Step 4: Set the Due Date

1. Locate the **Due Date** field
2. Click on the **calendar icon**
3. Select the required **date** from the calendar

The screenshot shows a 'Create New Task' form with various fields. The 'Due Date' field is highlighted with a red box and contains the value '19-01-2026'. Other visible fields include 'Task Name' (empty), 'Status' (Pending), 'Category' (Legal Research), 'Priority' (Medium), and a large 'Description' text area.

### **Step 5: Save the Task**

1. Review all entered details
2. Click **Create Task**
3. The due date is now attached to the task

### **Method 2: Update Due Date for an Existing Task**

#### **Step 1: Open the Task**

1. Go to **Tasks**
2. Click **View Task** on the required task

#### **Step 2: Edit the Task**

1. Click the **Edit** button
2. Navigate to the **Due Date** field
3. Select a **new due date** from the calendar

#### **Step 3: Save Changes**

1. Click **Update / Save**
2. The updated due date is reflected immediately

### **How do I mark a task as completed?**

This will be updated once we get clarity on Edit option