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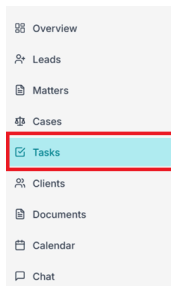
How do I create a task?

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

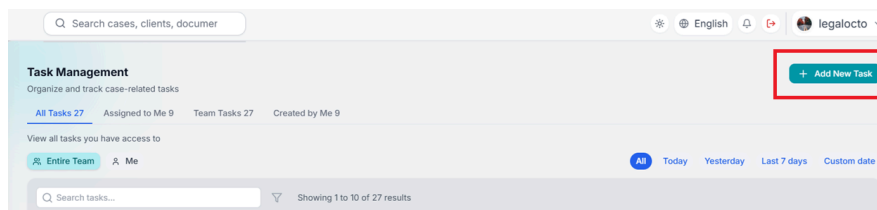
Step 1: Navigate to Tasks

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.



Task Management

Organize and track case-related tasks

+ Add New Task

All Tasks 27

Assigned to Me 9

Team Tasks 27

Created by Me 9

View all tasks you have access to

Entire Team

Me

All

Today

Yesterday

Last 7 days

Custom date range

Create New Task

Task Name *

Status *

Pending

Category *

Legal Research

Priority *

Medium

Due Date *

19-01-2026

Description

Related Case *

Select a case

Related Client *

Select a client

Notes

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

3. 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

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

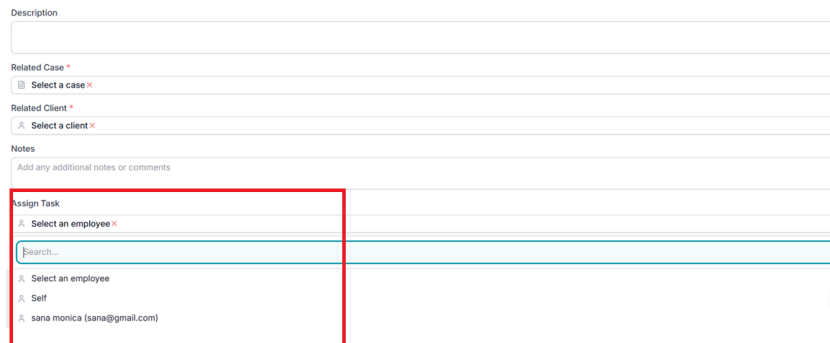
Step 2: Click on “Add New Task”

1. Click the “+ Add New Task” button at the top-right corner
2. 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 form with several fields: 'Description', 'Related Case' (with a dropdown icon and 'Select a case' text), 'Related Client' (with a dropdown icon and 'Select a client' text), and 'Notes' (with a placeholder 'Add any additional notes or comments'). Below these is the 'Assign Task' section, which is highlighted with a red box. It contains a dropdown menu with a search bar and a list of team members: 'Self' and 'sana monica (sana@gmail.com)'.

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 the 'Create New Task' form. The 'Due Date' field is highlighted with a red rectangular box. The field contains the date '19-01-2026' and a small calendar icon to its right. Other fields visible include 'Task Name', 'Status' (set to 'Pending'), 'Category' (set to 'Legal Research'), and 'Priority' (set to 'Medium'). A 'Description' field is at the bottom.

Task Name *	Status *
<input type="text"/>	Pending
Category *	Priority *
Legal Research	Medium
Due Date *	
19-01-2026	
Description	

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