



[Knowledgebase](#) > [How to guides](#) > [Tasks](#) > [How to Configure and Use the Task Counter](#)

How to Configure and Use the Task Counter

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How to Configure and Use the Task Counter

Link to Video Guide: <https://youtu.be/XiKNcoLGCGE?si=AcXo57CBx7gxcXiG>

Overview

The Task Counter is a sidebar feature in Yao that displays a count of tasks assigned to you. This guide will walk you through configuring the counter to show only the priorities that matter to you, and then using the Tasks section to view and manage all your tasks.

What You Will Learn

- How to access the Task Counter Configuration
- How to select task priorities to display in the counter
- How to save your configuration
- How to use the Tasks section effectively

Part 1: Configuring the Task Counter

Accessing the Configuration

To configure the Task Counter, follow these steps:

1. From the left sidebar menu, click on **Configuration**
2. In the Configuration section, click on the **General** tab
3. You will see a section titled **Sidebar Counter**

Task Counter Configuration

Select which task priorities should be counted in the sidebar menu. Only tasks assigned to you with the selected priorities will be displayed in the counter.

No filters selected: The counter will not show any tasks (counter will be 0).

Task Priorities

- Urgent**
Tasks marked as urgent priority
- Critical Date**
Tasks with critical deadlines
- Standard**
Regular priority tasks
- Low**
Low priority tasks

Save Changes

You have unsaved changes

Understanding Task Priorities

Yao provides four priority levels. Select the ones to display in your counter:

Selecting Your Priorities

To select which priorities appear in your counter:

1. In the **Task Priorities** section, locate the checkboxes for each priority level
2. Click the checkbox next to each priority level you want to include
3. The counter will only show tasks matching your selected priorities

Saving Your Configuration

1. Once you have selected your priorities, locate the **Save Changes** button
2. Click **Save Changes** to apply your configuration
3. You will see a notification confirming the changes have been saved

Part 2: Using the Tasks Section

Accessing Tasks

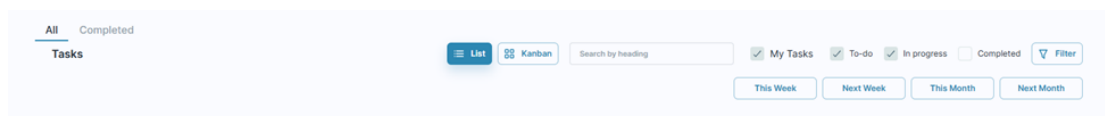
To view all your tasks:

1. Click on **Tasks** in the left sidebar menu
2. The **Tasks** page displays all tasks assigned to you

Understanding the Task Columns

The Tasks view displays the following information for each task:

- **Client:** The client associated with the task
- **Matter:** The matter or case the task relates to
- **Status:** Current status (In Progress, To-Do, etc.)
- **Priority:** Priority level of the task
- **Due:** The task due date
- **Task Heading:** Brief description of the task
- **Time:** Time allocated or spent on the task
- **Author:** Person who created or assigned the task



Filtering Your Tasks

View Tabs

- **All:** Shows all your tasks
- **Completed:** Shows only completed tasks

View Formats

- **List:** Traditional table view
- **Kanban:** Card-based view organised by status

Status Filters

- **My Tasks:** Tasks assigned to you
- **To-do:** Tasks not yet started
- **In progress:** Tasks currently being worked on

- **Completed:** Finished tasks

Time Filters

View tasks by time period:

- This Week
- Next Week
- This Month
- Next Month

Searching for Tasks

1. Click the search field labelled "**Search by heading**"
2. Type the task name or keywords
3. The task list filters to show matching tasks

Best Practices

- Configure priorities that match your workflow to keep your counter relevant
- Check your Task Counter regularly throughout the day
- Update task statuses as you work to maintain accurate tracking
- Use filters to focus on what matters most
- Search for specific tasks to save time finding them