

How to Use and Navigate the Task List

Max Mazo - 2026-02-19 - [Comments \(0\)](#) - [Tasks](#)

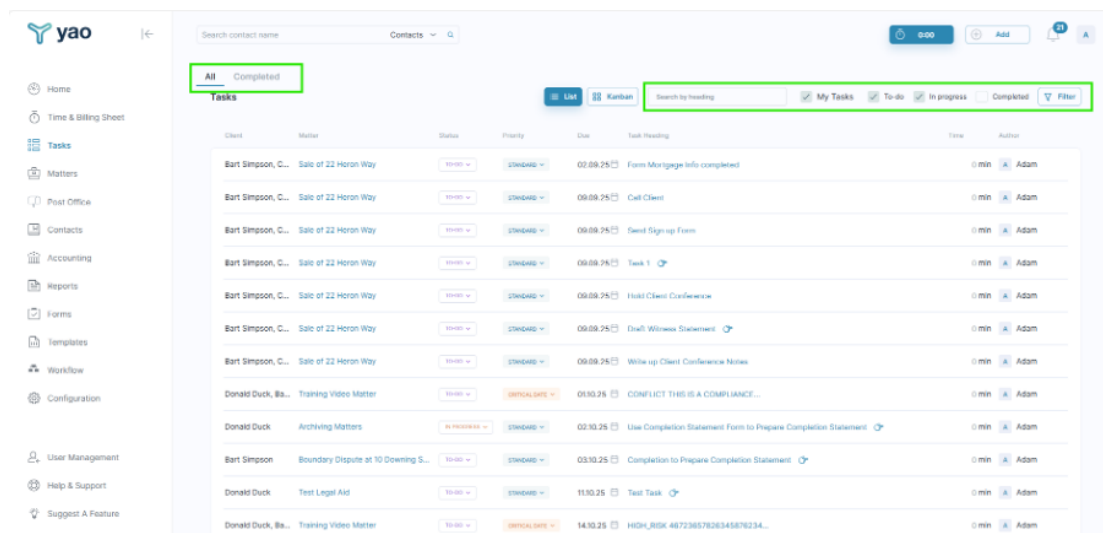
How to Use and Navigate the Task List

The Task List is your centralised view for managing all outstanding work and monitoring the progress of tasks, which are assigned to you or your team. This module provides flexible viewing options and essential filtering capabilities to ensure you can efficiently manage your workload.

Accessing the Task List and Viewing Completed Tasks

You can easily access the Task List from the main navigation menu, which then allows you to switch between viewing all of your tasks to do and completed tasks.

1. Navigate to the Tasks option in the left-hand navigation menu.
 1. The Task List will open, displaying the default All tasks view, which includes tasks with a status of 'To Do', 'In Progress' and 'Completed', you can filter by these or search by the heading of a task to filter by.
2. To view only tasks which have been finalised, click the Completed tab located above the task list.
 1. The Task List will immediately filter to show only tasks with the status of 'Completed'.



Searching and Filtering the Task List

The Task List provides a search bar and quick-filter buttons to help you rapidly locate specific tasks or groups of tasks.

1. To search for a task using keywords, click into the search field (found above the task list on the right side).

2. Type the relevant keyword, such as the task name or client name.

1. The list dynamically filters to display only those tasks which match your search term.

3. To quickly narrow the list by status or assignee, use the quick-filter buttons. Click one of the following buttons, which are located near the search bar:

- **My Tasks:** Filters the list to show only tasks which are currently assigned to you.
- **To-do:** Filters the list to show only tasks which have a status of **To Do**.
- **In-Progress:** Filters the list to show only tasks which have a status of **In Progress**.
- **Completed:** Filters the list to show only tasks which have a status of **Completed**.
- **Filter option:** Allows you to select various filters to apply to the Task list, which includes Priority, Status, Date Due, Category, who the task is assigned to and the Author

×

Filter tasks

Priority

Choose priority

Status of the task

To Do + In Progress + Choos...

Due Date

23/10/2025

Category

Choose category

Estimate Time (minutes)

Minutes

Assigned to

Jo Yao

Author

Author

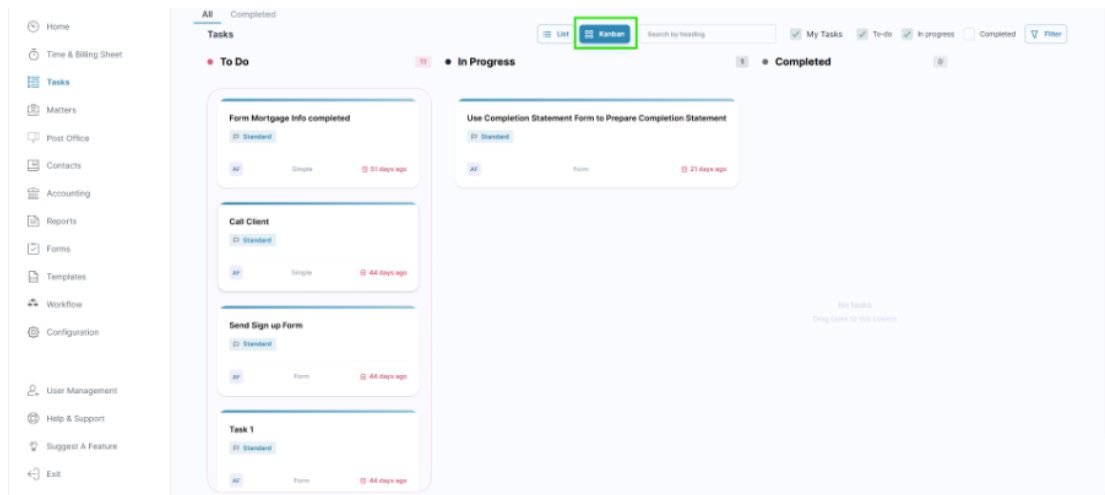
Cancel Apply

Switching Views (List vs. Kanban)

You can view your tasks in one of two formats: the default List view or the Kanban view, which is a visual card-based board organised by status.

1. To switch to the visual card format, click the Kanban button in the centre of the toolbar.

1. The Task List changes to a board divided into columns for To Do, In Progress, and Completed tasks.



1. To update a task's status in the Kanban view, click and hold the task card, then drag it to the desired column (To Do, In Progress, or Completed).

1. The task status is updated and a confirmation message will appear briefly in the lower-right corner.

2. To return to the traditional table view, click the List button.

Completing Tasks and Sending Associated Emails

You can mark any outstanding task as complete directly from the Task List by updating its status. For tasks which involve sending an email, there is an additional step to ensure the email is correctly generated and sent.

1. To view only tasks which have been finalised, click the **Completed** button above the task list.


2. To mark a task as complete, locate the task in the list and click the **dropdown icon** located under the **Status** column for that task.

3. Select the Completed option from the dropdown menu to update the status.

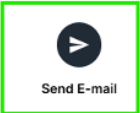
1. A confirmation message will appear briefly in the upper-right corner.


4. **For Email Tasks:** If the task is an email, click the **hyperlinked task heading** to open the full task window.

5. Within the task window, you will have the option to amend the task status, and there will be an additional **Send Email** option.


Email task  ✕

Sale of 22 Heron Way • #236


Send E-mail

PRIORITY	STATUS	CATEGORY
STANDARD	To-do	Email
DUE DATE	ESTIMATE TIME	ASSIGNED TO
31/Oct/2025 	0 min	Adam Field

Notes

No notes added yet. Click the edit icon to add notes. 

Notifications


Send notification when task is completed

When enabled, completing this task will create a notification for the matter

Comments

Add a comment...

Add Comment


No comments yet
Add the first comment above to start the conversation

1. Click the Send Email option.

1. The system will launch a new email window, automatically pulling through the associated email content.

2. From here, you can amend the email content and recipients, and attach correspondence from the matter before finally sending the email.

✕

Email Correspondence

To

Add cc emails

Add bcc emails

Subject

Message USE TEMPLATE

B *I* U ~~S~~ | A² ▾ A ▾ A ▾ A! ▾ | ≡ ≡ ≡ ≡ | :: ▾ !: ▾ ≡ ≡

Dear Client|

Re: Sale of 22 Heron Way

Thank you for your enquiry. We would be very pleased to work with you on this matter.

We are pleased to attach our fee estimate for your consideration.

Should you have any queries, please contact me using the details below.

Upload from correspondences +

Cancel
Send

Sorting and Editing Tasks in List View

The **List** view allows you to sort tasks by column headers and edit individual tasks directly.

1. To sort the tasks in ascending or descending order, click on any of the column headers, such as Client, Matter, Priority, or Task Heading. Clicking the header again will reverse the sort order.
2. To edit a specific task, hover your cursor over the ellipses (menu) at the end of the task row and select the Edit option.
3. Once you click Edit. The Edit task dialogue box opens on the right side of the screen.
4. Make the necessary changes, such as updating the Status field or adjusting the description.
5. Click the Update button at the bottom of the dialogue box to save your changes. The task is updated and a confirmation message will appear briefly in the top right corner.